Tips & traps planning for multi-jurisdictional assets in Canada & abroad!

Avoiding Cross-Border Estate Pitfalls

with Rose Shawlee & Maria Starko

Thursday, March 12, 2026

Live webinar with chat

includes 60 day replay*

9:00 am – 10:30 am (Pacific)
10:00 am – 11:30 am (Mountain)
11:00 am – 12:30 pm (Central)
12:00 pm – 1:30 pm (Eastern)
1:00 pm – 2:30 pm (Atlantic)
1:30 pm – 3:00 pm (Newfoundland)

**This program features real-time video of the presenter with synchronized presentation slides, and a chat feature that allows for live Q & A. SK attendees please verify whether you align with Central (MB) or Mountain (AB) time based on season and location.*

WHO SHOULD ATTEND

This program will be of interest to lawyers who assist clients with wills, powers of attorney, and other estates matters but are not estates or tax specialists.

ABOUT THE PROGRAM

Many clients today have property, bank accounts and other assets in more than one province or country. These cross-border holdings can create hidden risks when drafting wills, powers of attorney, and other estate planning documents. This practical 90-minute webinar with experienced estates practitioner Rose Shawlee and associate Maria Starko will help you spot and manage multi-jurisdictional issues before they become problems. Drawing on real-world examples, Rose and Maria will address red flags to watch for, questions to ask during intake, and drafting and risk management strategies to help you avoid invalid documents, disputes, and professional liability. You'll learn how to:

- Identify red flags in client instructions
- Assess key jurisdictional pitfalls
- Avoid structuring and drafting mistakes that lead to foiled plans and disputes
- Plan for estates with property and people in multiple provinces or countries

Multi-jurisdictional issues are now a routine part of estate planning. Don't miss this chance to boost your client counseling and drafting skills and better protect your clients and your practice from cross-border estate pitfalls!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks

Why Multi-jurisdictional Issues Matter

Key Jurisdictional Pitfalls

- Differences in provincial rules
- Residency of control people
- Property located in multiple provinces
- Select international planning traps for global wills

Practical Drafting Tips

- Intake questions to uncover cross-jurisdiction risks
- Structural and drafting strategies to reduce complexity

Key Take-aways for Risk Mitigation

Program Wrap-up and Evaluation

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MEET YOUR PRESENTERS

Rose Shawlee is a member of the Wills & Estates and Individual Tax Planning Groups at Boughton Law in Vancouver, B.C. She brings over 15 years' experience to her practice, which is primarily focused on assisting families and businesses with their planning, succession and reorganization, estate, and business needs. She strives to make life's inevitabilities, death and taxes, less daunting a topic for clients while being alert to the complications these raise from a legal, family, tax, probate fee, and cost perspective. Rose is a regular speaker and writer on estate planning, corporate freezes, and trusts, including for BC CLE and the Pacific Business & Law Institute. Rose is Past Co-Chair of the Canadian Bar Association Elder Law Section, BC Branch and a Member of Canadian Bar Association, the Estate Planning Council of Vancouver, and the Estate Planning Council of Canada. She has been included in Best Lawyers in Canada for Trusts and Estates since 2022.

Maria Starko is an associate in Boughton Law's Wills & Estates and Individual Tax Planning Groups. She graduated from the University of Calgary Faculty of Law, where she received several awards, including the STEP Law Prize in Estate Planning and Trusts. Maria has experience in estate planning, corporate transactions, and estate administration. She has also co-authored several legal publications on trust and estate matters.

LAW SOCIETY OF ONTARIO accredited **ON:** *This program contains 1.0 Substantive hour and 0.5 Professionalism hours.*
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√ Yes, I want to attend Avoiding Cross-Border Estate Pitfalls, *with Rose Shawlee & Maria Starko*

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* Materials will be distributed electronically in advance. Live webinars feature real-time video of the presenter with synchronized presentation slides, and a chat feature that allows for live questions and verbal responses by the presenter. The recording of the webinar is available for 60 days.

REGISTRATION FEE:

□ **On or before February 20, 2026: $150.00 + $19.50 (13%) HST* = $169.50** ***- Save $25.00 + tax!***

□ After February 20, 2026: $175.00 + $22.75 (13%) HST* = $197.75

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