



*Can you spot the warning signs of future conflict?*



# Avoiding & Managing Sibling Conflicts in Estate Matters

*with Charles Ticker*

**Thursday, June 11, 2020**

**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 audio 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

Every lawyer whose practice includes estate planning and administration, and estate litigation, should attend this program.

## ABOUT THE PROGRAM

The death of a parent – in particular the last parent – is a difficult time that can reopen old wounds and exacerbate long-standing rivalries between siblings. Despite a parent's best intentions, feelings of unfairness, poor communication, and ambiguities in estate documents can lead to costly, emotional, and very public litigation. Fortunately, many of these disputes can be anticipated and even avoided. In this entertaining presentation, veteran estate mediator and litigator Charles Ticker offers fresh insights on how and why these disputes happen, and shares straight-forward planning, drafting and estate administration advice to avoid conflicts, and manage them when they arise. Drawing on a blend of psychological research and real-life cases from his own practice, as well as noted celebrity estates, Charles shares common scenarios all estate practitioners will recognize, and best practices to try and avoid future will challenges and applications to remove an Executor or Trustee. Along the way he discusses which cases are better suited to litigation or settlement, the trade-offs and benefits of mediation, and tips for managing client expectations. Don't miss this opportunity to improve your ability to help clients navigate this strife-filled area of the law!

## SCHEDULE (Eastern)

**12:00 pm - 1:30 pm**

**Welcome and Introduction**

**Sibling Rivalry – The Source of Estate Disputes**

**Unequal Division of the Estate: “Not fair!” Scenarios**

**Equal Division of the Estate: “Not always fair!”**

**Scenarios**

**Unfairness in Estate Administration: Common**

**Scenarios**

**Practical Planning & Drafting Strategies to Avoid**

**Disputes**

- Communicate the Estate Plan
- Explain Unequal Distributions
- Explain Executor/Trustee Selection
- Avoid Warring Co-Trustees
- Include an Executor Tie Breaking Mechanism
- Specify Gifts and Loans
- Rule Out Incapacity and Undue Influence Claims

**Settle or Sue?**

**Mediation – Trade-offs, Benefits & FAQ**

**Concluding Remarks**

**Program Wrap-up and Evaluation**

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## PRAISE FOR PAST ESTATE PROGRAMS

- “Fantastic job breaking difficult information down into digestible chunks that are very easy to absorb.”
- “Excellent insights with a no-nonsense approach.”
- “Information provided was superb and helped to answer a lot of questions that I have!”
- “Enjoyed the session. Strong presenter, covering complex topic in a clear, concise manner.”
- “A fantastic CLE. Thoughtful and thought provoking. It will definitely help me advise clients.”



**ON:** This program contains 1.0 Substantive hour and 0.5 Professionalism hours.

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## MEET YOUR PRESENTER



**Charles B. Ticker** is a Toronto based mediator and estate litigator with over 40 years of experience. He restricts his practice to estate litigation, estate administration and mediation of estate disputes. Charles has appeared as counsel at all levels of Court in Ontario, including the Court of Appeal. He is a member of the Canadian and Ontario Bar Association (Trusts and Estates and ADR sections), and the Society of Trust and Estate Practitioners. An active writer and presenter, Charles has chaired and spoken at several legal conferences on estate issues and mediation. In addition, he publishes a blog “The Sibling Fight” which deals with sibling disputes in estate matters. He recently produced a CD set entitled “How to Make the Most of Your Mediation” and in June 2019 published the book, *Bobby Gets Bubkes: Navigating the Sibling Estate Fight*. He has a B.Sc. (Hons) from McGill University and an LLB from Osgoode Hall Law School. Charles is a past recipient of the Queen Elizabeth II Diamond Jubilee Medal.

### ✓ Yes, I want to attend **Avoiding & Managing Sibling Conflicts in Estate Matters**

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