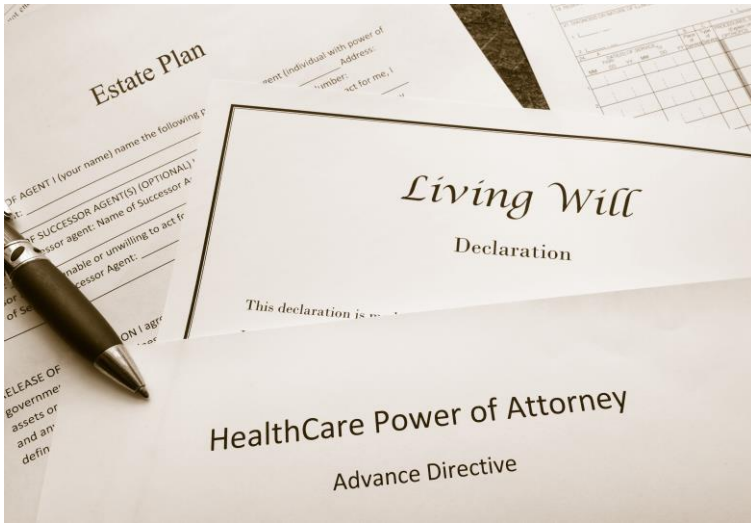




Avoid pitfalls that lead to mistakes for estates practitioners!



Avoiding Negligence Claims in an Estates Practice

with Gillian Fournie & Joanna Lindenberg

Wednesday, April 17, 2019

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)

**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

This seminar will benefit all lawyers who practice in the areas of wills, trusts, estates, and elder law.

ABOUT THE PROGRAM

Malpractice claims against wills and estates practitioners have steadily increased over the last decade, with inadequate fact investigation and lawyer/client communication failures being the top reasons complaints are made. Lawyers who draft estate planning documents are under more scrutiny than ever as the largest wealth transfer from one generation to the next begins. Mistakes can be found at every turn, from failure to have a working knowledge of tax, real estate, and family law, or misunderstanding a client's unique, and often complex, family dynamics and asset ownership.

Lawyers new to estates law and non-specialists who dabble in wills, trusts, and estates in addition to their regular practice must be particularly diligent to meet the standard of care. Among other things, drafting lawyers owe a duty of care not only to their clients, but third parties as well. Fortunately, most of the errors and omissions that give rise to negligence claims can be easily avoided.

This highly practical program, featuring Toronto estates lawyers Gillian Fournie and Joanna Lindenberg, will provide an overview of the current law of solicitor's negligence, common causes of estate malpractice claims, and best practices. The use of fact scenarios, audience polling, and live Q & A will create a dynamic, interactive learning experience. This is an excellent opportunity for all lawyers working in this area to understand the widening scope of their duty to clients and others, the increasing causes of negligence claims, and how to avoid them.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks

Current Law of Solicitor's Negligence

To Whom Does the Solicitor Owe a Duty of Care?

What is the Standard of Care?

Common Errors & How to Avoid Them

Risk Management Tips & Best Practices

Program Wrap-up and Evaluation

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MEET YOUR PRESENTERS



Gillian Fournie is a partner at de Vries Litigation LLP in Toronto, ON. Her practice focuses on disputes relating to estates, capacity, and guardianship. Gillian has extensive experience acting for and against estate trustees and attorneys for property/care to resolve power of attorney disputes, passings of accounts, and will challenges. Gillian regularly acts as agent lawyer for the Office of the Children's Lawyer as well as for the estates departments of major Canadian financial institutions. In addition to her estates practice, clients seek Gillian's expertise when dealing with civil litigation matters that touch on estate issues. Gillian is a regular writer on estates related topics, including for the All About Estates blog, and presentations for the Law Society of Ontario and Ontario Bar Association. Gillian is on the Executive of the OBA's Trusts and Estates Law Section.



Joanna Lindenberg is an estates, trusts, and capacity litigator with de Vries Litigation LLP (Toronto, ON). Joanna's practice currently focuses on will challenges, dependant's support, and power of attorney disputes. She has appeared before the Ontario Superior Court and Ontario Court of Appeal, and is a frequent contributor to the popular estate blog, All About Estates on the topics of estate planning and administration, and solicitor's negligence. Joanna has a BA from McGill University, an LLB from the Shulich School of Law at Dalhousie University, and an LLM from the UCLA. She is a member of the Ontario Bar Association and The Advocates' Society.



BC: This program has been approved for 1.5 CPD hours of professional responsibility & ethics, client care and relations, and/or practice management.

ON: This program has been approved for 1.5 Professionalism hours.

NB & SK: CPD application is pending.

Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

Seminar Partners is an Accredited Provider of Professionalism Content by the Law Society of Ontario and a pre-approved CPD Provider of the Law Society of British Columbia.

✓ Yes, I want to attend **Avoiding Negligence Claims in an Estates Practice** **Wednesday, April 17, 2019 • Live webinar (slides and audio) with chat and 60 day replay***

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* Materials will be distributed electronically in advance. Live webinars feature real-time audio 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 **March 22, 2019: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00**
- After March 22, 2019: \$165.00 + \$21.45 (13%) HST* = \$186.45

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