



*Adding will drafting
to your practice?
Start here!*



Basics of Will Planning & Drafting

with Jasmine Sweatman

Thursday, June 17, 2021

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

This program is designed for general practitioners, new lawyers, and support staff who have little or no experience in will planning and drafting.

ABOUT THE PROGRAM

Many lawyers are asked to draft wills for existing clients - or friends or relatives - whether or not their practices include estate planning. So, you follow your old Bar Admission materials and add a few online updates you've found, and all is well, right? Wrong! Drafting a will requires a general understanding of the technical and human aspects of will drafting, as well as specialized knowledge from other legal fields, including estate and income tax law. This new short course with experienced estates lawyer Jasmine Sweatman is designed for lawyers new to will drafting or who have limited experience in this area. In just 90 minutes, Jasmine will walk you through four key stages of will planning and drafting:

- Information gathering and the initial client interview
- The planning process
- The drafting process
- Execution of documents and follow-up issues

You'll learn the situations where it is appropriate to use a 'simple' will, how to be alert to issues of capacity and abuse, and risks of will drafting and how to protect yourself. Don't draft another will without attending this course!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Requirements of a Valid Will

Situations When a Will is Not "Simple"

Using Will Drafting Software and/or Forms

Preliminary Matters

- Initial Meeting and Taking Instructions
- Confirming Capacity and the Absence of Undue Influence
- Choosing Executors and Attorneys

The Retainer Letter

Drafting the Will

- Initial Matters
- Disposition of the Estate
- Administration of the Estate
- Closing Items

Reporting to the Client

Practice Pointers

Program Wrap-up and Evaluation

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PRAISE FOR PAST ESTATES PROGRAMS

- “Very practical presentation that dealt with matters that arise constantly in my practice.”
- “Good practical info. I do a lot of this work and found it very useful.”
- “Excellent coverage of the topic. Right on point.”
- “Enjoyed the practical approach. One of the best CPD programs I have ever experienced.”
- “A dream presenter. Knowledgeable but very down to earth. Answers questions we deal with every day.”
- “Excellent - like a conversation with a colleague.”



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

BC: This program has been approved for 1.5 CPD hours, including 0.5 hours of professional responsibility and ethics, client care and relations, and/or practice management.

SK: CPD application is pending.

NB: 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.

MEET YOUR PRESENTER



Jasmine Sweatman is the founder of Sweatman Law, an Oakville, ON firm providing legal services in the areas of wills, trusts and estates law. A Certified Specialist in Estates and Trusts Law by the Law Society of Ontario, she has

been recognized by Lexpert® as a leading practitioner in Estates and Trusts and Charities, and has been listed in The Best Lawyers in Canada for Estates and Trusts since 2009. She is past Chair of the Estate Planning Council of Halton, past Chair of the Ontario Bar Association Trusts & Estates Executive; and a member of the Executive of the CBA Elder Law Section. Jasmine has authored *Powers of Attorney and Capacity: Practice and Procedure* (Carswell, 2014) and, along with contributors, *Bequest Management for Charities in Canada* (LexisNexis: 2nd edition 2017). In addition, she is the editor of the *O'Brien's* chapter on Powers of Attorney and a contributor to the Powers of Attorney chapter in *Key Developments in Estates and Trusts Law in Ontario* (Canada Law Book).

✓ **Yes, I want to attend Basics of Will Planning & Drafting, with Jasmine Sweatman**
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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 May 28, 2021: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After May 28, 2021: \$165.00 + \$21.45 (13%) HST* = \$186.45

*With ON HST. Please adjust tax for attendee's province as follows: 5% in AB, BC, MB, NWT, NU, SK, YK. 13% in ON. 15% in NS, NB, PEI & NL.

Register online: <http://seminarpartners.ca/register-for-courses/>

Register by mail, fax or phone: Return this form with payment to Jennifer Snoyer, Finance and Communications Coordinator, Seminar Partners, 2300 Yonge Street, Suite 1600, Toronto, ON M4P 1E4 Tel. 1.866.606.4212 or 647.352.8633 Fax 416.549.1619. Email: jennifer@seminarpartners.ca. Registration fee is refundable less \$50 admin fee if written cancellation received 10 working days before the program. No refunds will be made after the cancellation date. Program content, speakers and location may change without notice. See our website for all policies. In the event of program cancellation, our liability is limited to refund of registration fees. GST/HST #848208492

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