



*Get real-world tips
to practice
defensively!*



Best Practices for Surviving Deathbed Wills

with Justin de Vries

Thursday, June 6, 2024

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 new and experienced wills and estates practitioners.

ABOUT THE PROGRAM

Most estate planning lawyers will eventually work with a client who is at the end of their life. For clients who have put off preparing or updating their estate plan, a last-minute call raises unique client counseling, drafting and ethical issues. This program with noted estates lawyer Justin de Vries will provide practical guidance for estate planning lawyers who are faced with a deathbed will scenario. Part one will cover near-death decisions and common wealth transfer scenarios like *inter vivos* gifts, real property transfers, and changing beneficial designations, as well as standards of capacity and types of undue influence involved in assessing a client's unique circumstances. Part two will address best practices to observe in a deathbed will scenario, including questions to ask on the initial inquiry, being clear about the conditions of retainer, and further specific practice tips once a retainer is accepted, including taking instructions, addressing suspicious circumstances, executing the will, and documenting the file. By the end of the program you will better understand:

- the different tests and shifting standards involved in deathbed wills
- how to act quickly and effectively to meet the requisite standard of care
- when to walk away from a deathbed will retainer

While advanced will planning is always preferable, deathbed wills cannot always be avoided. Don't miss this opportunity to get practical suggestions to help navigate this thorny situation and improve your chances of "surviving" a deathbed retainer.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks

Near Death Decisions

Deathbed Wills

- **The Retainer**
- **Acting Quickly & Effectively**
- **Documenting the File**

Program Wrap-up and Evaluation

PRAISE FOR PAST PROGRAMS

"A perfect balance... relevant case law and statute, but in the context of a real, everyday law practice."

"Good practical info. I do a lot of this work and found it very useful."

"Great presenter. Knowledgeable but very down to earth. Answers questions we deal with every day."

"Liked getting the slides and sample letters. Always nice to have examples from good lawyers."

"I've been doing wills work for 5 years and found everything useful. Would definitely recommend."



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

BC: This program has been approved for 1.5 CPD hours, including 1.0 hours of professional responsibility and ethics, client care & relations, and/or practice management.

SK: This program qualifies for 1.5 CPD hours (1.0 of which qualify as ethics hours) under the Law Society of SK CPD Policy. 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



Justin de Vries is the Principal of DE VRIES LITIGATION LLP. He was a partner at Fraser Milner Casgrain LLP (now Dentons LP) and a partner and counsel at Hull & Hull LLP. Justin has appeared before all levels of the Ontario Court and the Federal Court and has

mediated a wide range of estates matters, including contested wills and will interpretation, passing of trustees' and executors' accounts, estate administration and probate applications, trustee disputes/variations of trusts, and powers of attorney and guardianship disputes. Justin is a member of the Society of Trust and Estate Practitioners and is a frequent speaker on estates-related topics, including for the Law Society of Upper Canada, the OBA, and the Estate Planning Council of Canada. He is also a prolific writer, with articles in Estates & Trusts Pensions, Gift Planning in Canada and other publications. Justin has been recognized by Lexpert, Canadian Lawyer Magazine, and Chambers and Partners, and has been listed in Best Lawyers in Canada each year since 2010.

✓ **Yes, I want to attend Best Practices for Surviving Deathbed Wills with Justin de Vries**

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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 17, 2024: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After May 17, 2024: \$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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