



*Learn what you
need to know to
draft basic wills!*



Drafting Simple Wills

with Jasmine Sweatman

Thursday, January 31, 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 program is designed for general practitioners, new lawyers, and support staff who have little or no experience in will drafting.

ABOUT THE PROGRAM

Whether for a client, relative, or friend, sooner or later many lawyers will be asked to draft a will. You follow your old Bar Admission materials with a few online updates you've found, and all is well, right? Wrong. Drafting even a basic will can be a difficult and time-consuming task, requiring specialized knowledge and skill. While you don't have to be an expert, you do need a general understanding of the technical and human aspects of will drafting, and essential estate and gift tax laws, and income tax laws. This new short course with experienced estates lawyer Jasmine Sweatman is designed for early career lawyers or those new to will drafting. In just 90 minutes, Jasmine will explain how to draft a basic will in a way that distributes the client's assets according to their wishes, with the least amount of friction, taxes, and hassles. You'll learn the components of a simple will and the situations in which it is appropriate to use, what questions to ask in the client interview, how to be alert to issues of capacity and abuse, basic will drafting techniques and potential pitfalls, 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. I do a lot of work in this field, and I learned several new things.”



BC: This program has been approved for 1.5 CPD hours.

ON: This program contains 1.5 Substantive hours.

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 Drafting Simple Wills with Jasmine Sweatman**

Thursday, January 31, 2019 • Live webinar (slides and audio) with chat and 30 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 January 18, 2019: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!**
- After January 18, 2019: \$165.00 + \$21.45 (13%) HST* = \$186.45**
- \$0 - I have a \$599.00 Annual All Access Pass to 40+ programs. Enter Pass ID: _____**

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