SEMINAR PARTNERS 10 YEARS 2008 - 2018

Are you committing these simple estate planning mistakes?

Estate Planning Blunders and How to Avoid Them

with Lynne Butler

Thursday, January 25, 2018

Live webinar with chat

includes 30 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

Whether you're just starting out or are a seasoned estates practitioner, this entertaining, real-world look into common estate planning mistakes will help you protect your clients' legacies, and your reputation.

ABOUT THE PROGRAM

Estate planning *seems* relatively straightforward - a client asks for a will and you draw it up. You do what the client asks, and the client is happy, so all is well, right? Not exactly. Estate planning is complicated - it involves understanding estate and gift tax laws, income tax laws, probate procedure, financial planning, and long-term care planning. It also requires a tremendous amount of research, fact-finding and listening. Lawyers who dabble in will drafting, and even experienced estate planning practitioners who fail to have frank discussions with clients, can cause serious errors and invite negligence claims. Attend this program and learn how you can avoid costly mistakes for your clients, and for you.

Experienced estates lawyer Lynne Butler draws on personal and vicarious experiences to identify common estate planning blunders (and their consequences), and offers suggestions for how to avoid these mistakes in your own practice. Topics include joint bank accounts, leaving the cabin to the kids, choice of executor, and much more. Each "do not do" is followed by alternative strategies that can lead to vastly different results. Delivering practical and helpful information about a serious topic in a light tone, this presentation will make having difficult conversations with clients about assets, relationships and goals a little easier, and expose hidden pitfalls that can trip up even experienced estates practitioners. The principles and concepts taught will apply equally across the country.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Joint property

Joint bank accounts

Choosing representatives

Tax

Incapacity

Program Wrap-up and Evaluation

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Praise for Lynne Butler:

- *"Fantastic job breaking difficult information down into digestible chunks that are very easy to absorb."*
- *"A great help in an estate case that I am involved in. Thank you for the terrific information."*
- *"Excellent insights with a no-nonsense approach."*
- *"Wonderful. Lynne's light tone makes serious and often scary issues seem non-threatening and possible to work through."*
- *"Great presentation. Lynne's expertise, integrity and experience were clearly evident."*
- *"Information provided was superb and helped to answer a lot of questions that I have!"*

BC: *This program has been approved for 1.5 CPD hours.*
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Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

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Meet Your Presenter, Lynne Butler

Lynne Butler is a lawyer, mediator, and writer. She graduated from UBC Law School and was called to the Bar in Alberta in 1986. After more than 30 years, thousands of wills drawn and hundreds of estates probated, Lynne joined the estates department of a leading trust company for a further seven years. She now practises law in her home province of Newfoundland and Labrador, working exclusively in wills, estates, probate, elder law, trusts, and related matters. Lynne has appeared on, or been interviewed by CPAC, CityTV, Global TV, BNN, CBC Radio, the *Wall Street Journal*, the *Globe and Mail*, the *Vancouver Province*, the *Edmonton Journal*, the *Toronto Star*, the *Montreal Gazette*, *Canadian Lawyer*, *Today's Parent*, *Caregiver Solutions*, *Advisor's Edge*, and *Maclean's Magazine*, among other publications. She is the co-host of a weekly radio show, The Law Show, and is the author of ten books about estate planning.

√ Yes, I want to attend Estate Planning Blunders and How to Avoid Them *with Lynne Butler*

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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 30 days.

REGISTRATION FEE (with *ON* HST*):

On or before January 5, 2018: $135.00 + $17.55 (13%) HST* = $152.55 ***- Save $25.00!***

After January 5, 2018: $160.00 + $20.80 (13%) HST* = $180.80

**If paying by cheque, 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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