



*Learn how to
structure inheritances
for people with
disabilities!*



Estate Planning for Beneficiaries with a Disability

with Brendon Pooran

Thursday, October 12, 2023

**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

New and experienced estate planners will benefit from attending this program.

ABOUT THE PROGRAM

Creating an estate plan for a family that includes a person with a disability raises special issues and considerations outside of the typical estate planning engagement. Families must make careful choices about estate planning strategies and tools, taking into consideration their loved one's unique circumstances and anticipated needs. This program will introduce estates practitioners to the opportunities, challenges and emotions unique to planning for a person with a disability. Noted disability lawyer Brendon Pooran will review the resources, funding, documents and structures involved in disability planning and share practical advice to help ensure the financial, living, and health requirements of individuals with disabilities continue to be met after a caregiver or provider passes away. In addition, Brendon will discuss common planning errors that can reduce the financial support available to beneficiaries with a disability and expose them to financial exploitation. Topics include:

- Planning tools, including Henson Trusts
- Appointing decision-makers
- Creating supports to assist with incapacity issues
- Addressing risks of susceptibility

Don't miss this chance to learn how you can help give families peace of mind that their loved one's needs will continue to be met, even when a family member is no longer there to organize and advocate on their behalf.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Disability Planning

Wills

Trusts

Legal Decision-Making, including Powers of Attorney

Other Planning Tools

Tax Considerations

Program Wrap-up and Evaluation

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PRAISE FOR PAST PROGRAMS

"I learned a lot that will be very useful in my wills and estate practice."

"This subject is so interesting and important for those doing this work. I really enjoyed the presentation."

"Presenter was very knowledgeable and very efficient in getting through the presentation. I learned a lot."

"Probably the most useful and relevant seminar I have attended in years."

"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.

ON: This program contains 1.5 Substantive hours.

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



Brendon Pooran has been involved with various disability organizations as a member, volunteer, employee or director for most of his life. He created PooranLaw to provide support to this community and to influence disability law and

policy across Canada. Prior to founding PooranLaw, Brendon worked for a large multi-national law firm where he practised labour and employment law and at a boutique law firm that specialized in accessibility issues. Before entering the legal profession, Brendon spent several years as a management consultant where he regularly provided strategic advice to human services clients in the United States. In addition to practising law, Brendon teaches Critical Disability Law at York University, is the Past-President of Community Living York South and is a founding director of both PLAN Toronto (now Partners for Planning) and Microboards Ontario. He is a former Senior Lawyer Member on the Ontario Consent and Capacity Board.

✓ **Yes, I want to attend Estate Planning for Beneficiaries with a Disability**

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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 September 22, 2023: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After September 22, 2023: \$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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