Get proactive planning strategies for your entrepreneur clients!

Estate Planning for Entrepreneurs and Business Owners

with Daniel Nelson & Jeffrey Dessau, CPA, CA

Thursday, June 10, 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 estates and trusts practitioners, lawyers who advise privately-owned businesses, and individuals who own private businesses.

ABOUT THE PROGRAM

Estate planning is important for everyone but especially for entrepreneurs and business owners. Issues relating to incapacity, the transfer of property, continuity of the business and minimizing taxes go beyond simply having a will. This new 90-minute webinar examines critical considerations and estate planning tools available to practitioners who advise business owners. Experienced estates lawyer Daniel Nelson and CPA, CA Jeffrey Dessau will address the unique issues stemming from business interests in estate planning and administration and share practical planning and administration tools, including multiple wills, estate freezes, alter ego trusts and leadership succession planning. By the end of the program you'll have a better understanding of special tax and other planning considerations when working with entrepreneurs, and you'll be more comfortable with the various estate planning tools and techniques available to you to help meet your client's needs. Among the questions the presenters will address are:

- What are the key planning considerations for business owners?
- What are the estate planning and administration challenges for business interests?
- What are the factors to consider in effectively implementing a succession plan?
- What are the tax challenges and potential pitfalls to avoid?

Don't miss this opportunity to get expert guidance and practical tips to help you properly explain, design and draft an appropriate and effective estate plan for your entrepreneur clients!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Key planning considerations and documents for business owners

Challenges of co-owned or non-family business interests

Valuation issues

Special tax considerations

Succession planning

Program Wrap-up and Evaluation

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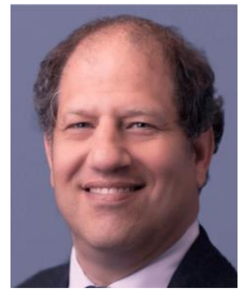
MEET YOUR PRESENTERS

Dan Nelson is a senior partner at Civis Law LLP in Toronto. An experienced estates lawyer, Dan is an expert at guiding clients at all stages of life through the process of preparing wills, powers of attorney and trusts, and offers practical business advice to both new and experienced entrepreneurs. Dan is a frequent lecturer and writer, with appearances on CBC TV, CBC Radio, Global News, CTV and Canadian AM, and expert quotes in the *Washington Post*, *Canadian Business*, and the *Toronto Star*. An experienced adjudicator and mediator, he is also a member of the Conservation Review Board. Dan is a past recipient of the OBA's Widdifield Award for his work on the intersection of estate planning, estate administration, and social media, known as digital legacy.



Jeffrey Dessau is a partner with Yale PGC, a progressive mid-sized accounting, audit, taxation, and business advisory firm, serving the Greater Toronto area. For over 20 years, Jeff has enjoyed working with entrepreneurial companies looking for sound business advice. He has more than 25 years of experience in providing advice on accounting, personal wealth preservation, taxation, and succession planning to business owners, with experience in industries such as real estate, software development, biotech, retail and wholesale distributers and not-for-profit organizations. Jeff holds a Bachelor of Business Administration degree and is a member of the Chartered Professional Accountants of Canada and the Chartered Professional Accountants of Ontario.

CPD CREDIT

ON: *This program contains 1.5 Substantive hours.* **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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√ Yes, I want to attend Estate Planning for Entrepreneurs & Business Owners

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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 21, 2021: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After May 21, 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.*

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