



*Avoid conflicts
between executors
and beneficiaries!*



Executor Duties, Beneficiary Rights, and Your Role

with Lynne Butler

Thursday, May 23, 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)

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 all lawyers involved in advising executors and beneficiaries.

ABOUT THE PROGRAM

The relationship between you and your client, who is acting as executor, can be complicated - especially when disputes arise between the executor and beneficiaries. While the question as to whom you owe a duty when representing an executor - who, in turn, owes duties to the beneficiaries - may be answered in law, successfully navigating that relationship in practice requires a little expert guidance. This new, 90 minute program with experienced estates lawyer Lynne Butler will explore common questions about the responsibilities and powers of executors, and the rights of beneficiaries, with a focus on how counsel for the executor can avoid controversy! Among the subjects Lynne will address are:

- Who can see the will?
- How does a lawyer work with co-executors who can't get along?
- How can an executor defend against an accusation of breach of trust?
- Is an application to remove an executor reasonable?
- What is the limitation period on a claim for breach of trust?
- What happens if an executor overpays a beneficiary?
- Is there a right to an interim distribution?
- Can executors demand releases from beneficiaries before paying them their inheritance?

In addition, Lynne will offer suggestions for: working with a trust company executor; dealing with “rogue” executors; and, resolving disputes about executor’s fees. Don’t miss this unique opportunity to get answers to everyday questions about the divergent interests of executors and beneficiaries, and your role as lawyer! You’ll leave with a better understanding of how to successfully explain and approach real-life situations, without “crossing the line” or driving up costs.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

The lawyer-executor relationship

Core duties, responsibilities and powers of executors

Key rights of beneficiaries

Sources of confusion and conflict between executors and beneficiaries

Strategies for avoiding disagreements

Ethical issues

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.

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.

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MEET YOUR PRESENTER



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 20 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 former co-host of *The Law Show*, and is the author of ten books about estate planning.

✓ **Yes, I want to attend *Executor Duties, Beneficiary Rights, and Your Role with Lynne Butler* Thursday, May 23 2019 • Live webinar (slides and audio) with chat and 60 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 May 3, 2019: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After May 3, 2019: \$165.00 + \$21.45 (13%) HST* = \$186.45

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