Practical strategies to avoid disputes and stay on track!

Managing Expectations in Estate Administration

with Lynne Butler

Thursday, January 30, 2025

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 and video 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 will be of interest to estates practitioners of all experience levels.

ABOUT THE PROGRAM

Estate administration involves multiple stakeholders, including beneficiaries, parents of minor beneficiaries, family members, creditors, and opposing lawyers, all of whom bring their own interests and goals to the table. Managing these competing expectations, particularly when your client is the executor, can be a delicate balancing act. This 90-minute webinar with experienced estates lawyer and popular presenter Lynne Butler will focus on practical strategies to help you navigate these complex dynamics and ensure a smooth and efficient administration process. Lynne will address essential topics such as holding a reading of the will, creating and using email lists, file management tools, delegating tasks, determining the appropriate level of transparency, and involving other professionals like accountants, valuators and realtors. You'll also learn how to identify potential conflicts early on, including when to refer a party to a lawyer of their own.

Learning objectives:

- Learn best practices to avoid misunderstandings and set expectations from the beginning
- Gain practical tips to streamline communication and stay organized
- Learn how to ensure the right people have the right responsibilities
- Know when to bring in other professionals
- Learn how to spot issues before they escalate

Don't miss this opportunity to gain actionable insights on how to manage stakeholder expectations, minimize disputes, and keep the estate administration process on track. Register early and save!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Setting Clear Expectations

Identifying Potential Conflicts and Establishing Boundaries

Practical Tools to Improve Efficiency

Program Wrap-up and Evaluation

PRAISE FOR LYNNE BUTLER

"Super practical. I learned a lot."

"Excellent presenter - well organized, thorough and very practical. Appreciated all the personal examples and explanations she shared."

"Liked getting the slides and sample letters. Always nice to have examples from good lawyers."

"Very informative, polished presentation. Top marks all around."

"I've been doing wills work for 5 years and found everything useful. Would definitely recommend."

LAW SOCIETY OF ONTARIO accredited **ON:** *This program contains 1.0 Professionalism hour and 0.5 Substantive hours.*
BC: *This program has been approved for 1.5 CPD hours, including 1.0 hours of professional responsibility and ethics, client care and relations, and/or practice management.*
SK: *This program qualifies for 1.5 CPD hours (1.0 of which qualify as ethics hours) under the Law Society of SK CPD Policy. 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, and trusts. Lynne has been interviewed by Global TV, BNN, CBC Radio, the *Wall Street Journal*, the *Globe & Mail*, the *Vancouver Province*, the *Edmonton Journal*, the *Toronto Star* and the *Montreal Gazette*, among other media. She is the former co-host of The Law Show and is the author of ten books about estate planning. She was the reviewer for Newfoundland and Labrador for LexisNexis *Drafting Wills in Canada: A Lawyer's Practical Guide*, 3rd Edition. She has chaired the Wills and Estates Section of the Newfoundland and Labrador Bar Admissions Course since 2019.

√ Yes, I want to attend Managing Expectations in Estate Administration, *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 60 days.

REGISTRATION FEE:

□ **On or before January 10, 2025: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After January 10, 2025: $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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