*Are multiple wills right for your client? Find out!*


# Multiple Wills as an Estate Planning Strategy

*with Rose Shawlee*

**Thursday, January 23, 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 is suitable for experienced wills and estates practitioners who want to refresh their knowledge of multiple wills, and those newer to an estates practice who are curious about when and how to use multiple wills.

## ABOUT THE PROGRAM

Multiple wills are an established estate planning strategy. Useful for a number of objectives, they often appeal to business owners, owners of foreign real estate, and individuals seeking additional privacy. While multiple wills may seem like a simple solution to some testamentary issues, there are important factors involved in weighing whether multiple wills are the right solution for individual clients. In addition, lawyers who prepare these documents must carefully draft them, with proper consideration of local laws, to avoid unintended and serious consequences. This program is designed to help you decide when to recommend multiple wills to a client and to offer insights on important drafting and administration considerations to avoid negative results. Experienced estates practitioner Rose Shawlee will address multiple wills as a strategy to reduce or avoid probate fees, the benefits and risks of multiple wills, and important provisions to include when drafting effective multiple wills. By the end of the program, you'll have a better sense of whether multiple wills are the right estate planning tool for your clients, know how to explain the need for multiple wills to your client, and understand how to avoid potential liability with multiple wills. Register early to avoid disappointment!

## SCHEDULE (Eastern)

**12:00 pm - 1:30 pm**

**Welcome and Opening Remarks**

**What's So Bad about Probate?**

**Using a Single Will v. Multiple Wills - Examples**

**Are Two Wills Worthwhile - Or Just More?**

**When to Recommend Multiple Wills to your Clients**

**Important Provisions for Effective Multiple Wills**

**Avoiding Potential Liability with Multiple Wills**

**Program Wrap-up and Evaluation**

## PRAISE FOR PAST PROGRAMS

- *"Excellent presenter - well organized, thorough and very practical."*
- *"Appreciated all the personal examples and explanations."*
- *"Liked getting the slides and sample language. Always nice to have examples from good lawyers."*
- *"Very informative, polished presentation."*
- *"I've been doing wills work for 5 years and found everything useful."*
- *"Immensely helpful. Would definitely recommend."*
- *"All in all, probably the best and most practical [time] that I have ever spent on CLE."*

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**ON:** *This program contains 1.0 Substantive hour and 0.5 Professionalism hours.*
**BC:** *This program has been approved for 1.5 CPD hours, including 0.5 hours of professional responsibility and ethics, client care & relations, and/or practice management.*
**SK:** *This program qualifies for 1.5 CPD hours (0.5 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.*

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

**Rose Shawlee** is a member of the Wills & Estates and Individual Tax Planning Groups at Boughton Law in Vancouver, B.C. She brings over 15 years' experience to her practice, which is primarily focused on assisting families and businesses with their planning, succession and reorganization, estate, and business needs. She strives to make life's inevitabilities, death and taxes, less daunting a topic for clients while being alert to the complications these raise from a legal, family, tax, probate fee, and cost perspective. Rose is a regular speaker and writer on estate planning, corporate freezes, and trusts, including for BC CLE and the Pacific Business & Law Institute. Rose is Past Co-Chair of the Canadian Bar Association Elder Law Section, BC Branch and a Member of Canadian Bar Association, the Estate Planning Council of Vancouver, and the Estate Planning Council of Canada. She has been included in Best Lawyers in Canada for Trusts and Estates since 2022.

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### √ Yes, I want to attend Multiple Wills as an Estate Planning Strategy, *with Rose Shawlee*

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* Materials will be distributed electronically in advance. Live webinars feature real-time video 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 3, 2025: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After January 3, 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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