



*Avoid
unnecessary
drama!*



Planning for & Managing Difficult Beneficiaries

with Charles Ticker

Thursday, June 8, 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

This program will appeal to lawyers whose practice includes estate planning and administration, especially those who advise or act as executors and trustees.

ABOUT THE PROGRAM

Difficult beneficiaries can create a long, expensive and unpleasant estate administration. From feeling slighted to simply misunderstanding the process, disgruntled beneficiaries can act out in any number of ways. Examples include inserting themselves into administration of the estate, threatening to sue or contest the will, withholding necessary information, or harassing the executor. Fortunately, many of the dynamics that lead to difficult beneficiaries can be anticipated and even avoided. In this entertaining and highly practical presentation, veteran estates mediator and litigator Charles Ticker reveals the circumstances that give rise to difficult beneficiaries and offers important planning, drafting and estate administration advice to avoid conflict and help protect the estate, other beneficiaries, and the executor from unnecessary drama and possible legal claims. Drawing on a blend of psychological research, cases from his own practice and noted celebrity estates, Charles describes typical troublesome or uncooperative beneficiary scenarios, and shares defensive planning and administration strategies to head off common and not so common beneficiary complaints. By the end of the program, you'll be more aware of situations that contain heightened risk for difficult beneficiaries, and you'll have new tools to successfully plan for and manage difficult beneficiaries. Don't miss this opportunity to get practical solutions to one of the biggest challenges that estate practitioners and executors face!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Who are Difficult Beneficiaries?

What Make Beneficiaries Difficult?

**Building Tools into the Estate Plan to Reduce
Conflict**

Estate Administration Strategies to Limit Conflict

Options to Resolve Conflict

Program Wrap-up and Evaluation

PRAISE FOR CHARLES TICKER

- "Very useful presentation with some good tips."*
- "Comprehensive program, covered all of the ground promised."*
- "Some good suggestions and valuable information. I enjoyed the courses. Thank you."*
- "Information provided was very relevant to an estate practice and well presented."*
- "Informative presentation. I appreciated the quotes, stories and caselaw attached to the materials."*
- "Enjoyable and informative. Useful for my personal situation as much as my professional practice."*



ON: This program contains 1.5 Substantive hours.

BC: This program has been approved for 1.5 CPD 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.

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MEET YOUR PRESENTER



Charles B. Ticker is a Toronto based mediator and estate litigator with over 40 years of experience. He restricts his practice to estate litigation, estate administration and mediation of estate disputes. Charles has appeared as counsel at all levels of Court in Ontario, including the Court of Appeal. He is a member of the Canadian and Ontario Bar Association (Trusts and Estates and ADR sections), and the Society of Trust and Estate Practitioners. An active writer and presenter, Charles has chaired and spoken at several legal conferences on estate issues and mediation. He publishes a blog "The Sibling Fight" which deals with sibling disputes in estate matters. He has produced a CD set entitled "How to Make the Most of Your Mediation" and is the author of the book, *Bobby Gets Bubkes: Navigating the Sibling Estate Fight*. A graduate of McGill University and Osgoode Hall Law School, he is a past recipient of the Queen Elizabeth II Diamond Jubilee Medal. Charles is listed in *Best Lawyers in Canada* for Trusts and Estates.

✓ Yes, I want to attend **Planning for & Managing Difficult Beneficiaries**

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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 19, 2023: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!**
- After May 19, 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.

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