



*Avoid the Achilles heel
of claims for wills
& estates lawyers!*



Preventing & Dealing with Will Drafting Errors

with Jenny Bogod

Thursday, November 7, 2024

**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

All lawyers who draft Wills should attend this program.

ABOUT THE PROGRAM

Will drafting errors are the single most common issue in claims against lawyers practicing in the wills and estates area. Many of these claims stem from mistakes that are only discovered when the Will is brought forward in connection with the administration of the estate. Sadly, most of these Will drafting errors could have been prevented. In this webinar, experienced estates litigation lawyer and defence and repair counsel Jenny Bogod explains how lawyers who draft Wills can limit their potential claims exposure by implementing fulsome procedures for Will drafting and execution. Following these best practices will assist you not only in avoiding malpractice claims, but also in ensuring that full effect is given to your clients' wishes. After just 90 minutes, you'll better understand:

- the standard of care imposed upon a solicitor acting on a Will drafting retainer
- how a "drafting checklist" can help avoid typographical and other errors
- specific examples of practices that generate a well-documented file
- circumstances where you should self-report to your insurer

As guardian of your client's testamentary intentions, you must undertake careful consideration and inquiry at every stage of a Will drafting engagement. Don't miss this opportunity to gain practical tips to help you avoid the Achilles heel of mistakes and claims for wills and estates lawyers!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introductory Remarks

Duties of a Will Drafting Solicitor

Techniques to Avoid Will Drafting Claims

- Making Appropriate Inquiries
- Guarding Against Clerical Errors
- Reducing All Instructions and Advice to Writing
- Ensuring Competency to Act

Dealing with Drafting Errors Once Discovered

Program Wrap-up and Evaluation

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PRAISE FOR PAST PROGRAMS

"I learned a lot that will be very useful in my wills and estate practice."

"This subject is so interesting and important for those doing this work. I really enjoyed the presentation."

"Presenter was very knowledgeable and very efficient in getting through the presentation. I learned a lot."

"Probably the most useful and relevant seminar I have attended in years."

"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 of professional responsibility and ethics, client care and relations, and/or practice management.

ON: This program contains 1.5 Professionalism hours.

SK: This program qualifies for 1.5 CPD hours (1.5 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



Jenny Bogod is a passionate litigator whose litigation practice at Rosen Sack LLP focuses on estate, trusts and capacity litigation as well as professional negligence. Jenny represents dependants, estates, beneficiaries and persons whose capacity is being questioned by others in connection with Will challenges, Will interpretation applications, power of attorney disputes, dependant support claims and guardianship applications. Jenny is also designated as Preferred Counsel by the Lawyers' Professional Indemnity Company, the professional liability insurer for lawyers in Ontario. She acts as defence and repair counsel in connection with solicitor negligence matters related to estates and trusts, family law, civil litigation and real estate. Jenny regularly speaks and writes about estates related topics, including for the Law Society of Ontario, the OBA, *Advocate Daily*, *CanLII Connects*, and *OBA Section Insider: Elder Law*.

✓ Yes, I want to attend Preventing & Dealing with Will Drafting Errors

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* Materials will be distributed electronically in advance. Live webinars feature real-time audio and 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 October 18, 2024: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After October 18, 2024: \$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.

Register online: <http://seminarpartners.ca/register-for-courses/>

Register by mail, fax or phone: Return this form with payment to Jennifer Snoyer, Finance and Communications Coordinator, Seminar Partners, 2300 Yonge Street, Suite 1600, Toronto, ON M4P 1E4 Tel. 1.866.606.4212 or 647.352.8633 Fax 416.549.1619. Email: jennifer@seminarpartners.ca. Registration fee is refundable less \$50 admin fee if written cancellation received 10 working days before the program. No refunds will be made after the cancellation date. Program content, speakers and location may change without notice. See our website for all policies. In the event of program cancellation, our liability is limited to refund of registration fees. GST/HST #848208492

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