



*Help keep a
treasured retreat
in the family!*



Succession Planning for Cottages & Recreational Properties

with Peter Lillico

Thursday, May 25, 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

All lawyers whose practice includes estate planning and administration will benefit from attending this program.

ABOUT THE PROGRAM

A treasured way to bring loved ones together and forget about everyday hassles, cottages and recreational properties often hold significant sentimental value for families. Proper succession planning for these assets requires knowledge of property, tax and estate law, but also practical client counselling skills. This program, with experienced estates lawyer Peter Lillico, will provide a real-world guide to the challenges and solutions available to successfully keep a cottage or recreational property in the family and prevent unnecessary disputes. The presentation will attempt to answer the question, what does a lawyer need to know about cottage/recreational property succession planning in order to appropriately advise clients and avoid future negligence claims? Topics will include succession planning issues; capital gains tax planning considerations, including maximizing the principal residence exemption; succession timing alternatives; post-succession protections; and, cottage sharing agreements. Along the way, Peter will address the importance of being realistic, the hard questions that needs to be asked about family members' expectations and finances, and what-if scenarios that, without proper planning, can lead to litigation. Don't miss this unique opportunity to learn how you can help your clients navigate the cottage succession planning process and create an estate plan that successfully transitions a cherished retreat to the next generation, despite the financial hurdles and inevitable family conflicts.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Overview of Cottage Succession Planning Issues

Capital Gains Tax Planning Considerations

Succession Timing Alternatives

Post-succession Protections

Cottage Sharing Agreements

Protecting Yourself Professionally

Program Wrap-up and Evaluation

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PRAISE FROM PAST PROGRAMS

- “Good practical info. I do a lot of this work and found it very useful.”
- “Excellent coverage of the topic. Right on point.”
- “Very helpful program, appreciated all the practical examples.”
- “Very informative and much better and more comprehensive than expected.”
- “Terrific program. A lot of useful information in a short time. Well done.”
- “Practical, thoughtful presentation. A good refresher and update to my practice in estates.”



ON: This program contains 1.0 Substantive hour and 0.5 Professionalism hours.

SK: This program has been approved for 1.5 CPD hours, 0.5 hours of which qualifies as ethics.

BC: This program has been approved for 1.5 CPD hours, including 0.5 hours of hours of professional responsibility and ethics, client care & relations, and/or practice management.

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



Peter Lillico is a partner in Lillico Bazuk Galloway Halka in Peterborough, Ontario. Peter's practice is concentrated in the areas of Estate Planning, Business and Corporate Law, and Real Estate, with a unique expertise in cottage succession planning. In addition to his practice, Peter teaches law courses at Sir Sandford Fleming College. Peter writes on legal topics for several publications, including a weekly column in *Peterborough This Week* and as a frequent contributor to *Cottage Life Magazine*. He has also written articles on estate planning for *Good Times Magazine* and appeared on *Cottage Life Television* on estate planning issues for cottage owners. Peter is a frequent presenter for legal and other audiences, including the Federation of Ontario Cottagers Association and the Ontario Real Estate Association. Peter is a Past President of the Peterborough Law Association. He is also a founding member of the Peterborough Estate Planning Council.

✓ Yes, I want to attend **Succession Planning for Cottages & Recreational Properties** **Thursday, May 25, 2023 • 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 5, 2023: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After May 5, 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.

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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