Understand tax rules that drive planning strategies!

Tax Basics for Estate Planners

with Kathleen Butler

Thursday, October 20, 2022

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 is designed for lawyers who practice or are thinking about practising in the areas of estate planning and estate administration.

ABOUT THE PROGRAM

Do you assist clients with estate planning or advise executors of their duties in estate administration? Are you thinking about building a trusts and estates practice? Don’t forget the tax! Trusts and estates practice requires a fundamental understanding of some basic tax rules. Attend this webinar and get the information you need to be a more effective advisor. Experienced tax and estate planning lawyer Kathleen Butler will explain common scenarios that give rise to tax issues and break down important tax concepts that drive many estate planning strategies. You’ll learn about taxation of capital gains, lifetime transfers and gifts, tax consequence on death, registered plans, taxation of trusts, and more! The program will give you a sufficient grounding to identify tax issues in your files, recognize planning opportunities for clients, warn clients of potential tax issues, and know when to seek a second opinion from a tax lawyer or accountant. Don’t miss this condensed opportunity to enhance your understanding of essential tax rules, so you can confidently assist your next trusts and estates client!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Fundamental Tax Concepts

Taxation of Capital Gains

Lifetime Transfers and Gifts

Tax Consequences on Death

Registered Plans (RRSPs, RRIFs, TFSAs)

Taxation of Trusts

Planning Strategies to Minimize Tax

Program Wrap-up and Evaluation

Register today! • seminarpartners.ca • 1.866.606.4212 • jennifer@seminarpartners.ca

PRAISE FOR PAST TAX 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 drafting wills. I really enjoyed the presentation."

"Presenter was very knowledgeable and very efficient in getting through her 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.*
ON: *This program contains 1.5 Substantive hours.*
SK: *This program has been approved for 1.5 CPD hours.*
NB: *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.

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

Kathleen Butler is a tax lawyer with Dwyer Tax Law in Victoria, British Columbia, where she focuses on tax and estate planning strategies. Kathleen makes use of numerous planning tools, including various types of living and testamentary trusts, corporate reorganizations, wills, probate bypass structures, family shareholder agreements for family corporations, income-splitting strategies, and advance positioning to take advantage of post-mortem planning strategies. Kathleen is a member of the Society of Trust and Estate Practitioners and an Executive Member of the Wills, Trusts and Estates Subsection (Vancouver Island), Canadian Bar Association (BC Branch). Before deciding to focus on tax law, Kathleen had 20 years of experience in corporate and business law (including private-public partnerships). She obtained her Masters in Tax Law from Osgoode Hall (York University, Toronto) in 2015. Kathleen is a frequent speaker on tax and estate planning matters to business and professional groups.

√ Yes, I want to attend Tax Basics for Estate Planners, *with Kathleen Butler*

Thursday, October 20, 2022 ● Live webinar (slides and audio) with chat and 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)

* 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 September 30, 2022: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After September 30, 2022: $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

Name: ______________________________ Firm: ______________________

Address: ____

City: __________________ Province: ________________ Postal Code: ______________

Telephone: ________________ Fax: ________________ Email: ______________________

Payment information (or cheque payable to Seminar Partners)
□ Please charge $____________ to my VISA/MC Card #: ______________________________
CVV: ______ Card Expiry: __________ Signature: ______________________________

Register today! • seminarpartners.ca • 1.866.606.4212 • jennifer@seminarpartners.ca