Respond effectively to certain recurring questions!

Tax & Estate Planning Issues for New Canadians

with Rahul Sharma

Thursday, October 26, 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 be of interest to lawyers whose practice includes wills, estates, trusts or tax planning, as well as general practitioners.

ABOUT THE PROGRAM

The Canadian government plans to admit nearly 1.5 million new permanent residents over the next three years. This influx of newcomers will translate into more clients looking for information about how they will be taxed in Canada and how to maximize the wealth transferred to their heirs. With many of these individuals remaining tied to their families and to assets and structures in their countries of origin, these are not topics most lawyers are equipped to answer. Especially for higher net worth individuals, Canadian tax and estate planning raises complex issues; Canada's tax laws are often unintuitive, and Canada's tax and estate or succession laws can also be incongruent with those of foreign jurisdictions. This presentation with experienced tax, trusts and estate planning lawyer Rahul Sharma is designed to help non-tax specialists develop a working knowledge of Canada's tax system so they can respond generally to recurring questions from new and prospective Canadian taxpayers. While the presentation will not make attendees competent to practice in this area, it will allow attendees to meaningfully engage with clients and identify critical issues that require a co-ordinated plan. Sharing this advice early can avoid an estate being depleted by professional fees and reduce the risk of future negligence claims. Don't miss this opportunity to help ensure the growing number of Canadian newcomers receive the tax and estate planning advice they need.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

Is there a gift, estate or inheritance tax in Canada?

What happens to value of my non-Canadian investments for Canadian tax purposes?

Do I have disclosure and reporting obligations in respect of my non-Canadian assets?

Will I need new both foreign and Canadian Wills and Powers of Attorney?

Will I need a Canadian executor?

What are the implications and requirements of foreign trust structures?

Program Wrap-up and Evaluation

PRAISE FOR PAST PROGRAMS

"As lawyers, we need to at least understand the tax issues so we can effectively work with accountants. I found everything tremendously useful."

"The presenter managed to explain three complex tax concepts in 1.5 hours in a concise and easily understandable format. Great job!"

"Excellent program. It made me focus on the complexities that exist in the tax system and reinforced my understanding of areas that are necessarily within the scope of specialists."

"Very impressed with the presenter's level of knowledge and ability to make complex topics understandable."

CPD CREDIT **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.

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

Rahul Sharma is a Partner with Fasken. He advises international and Canadian clients on a variety of tax, trust, and estate planning matters, in particular cross-border and international trust and estate matters, and matters involving offshore or non-resident trusts with ties to Canada. Rahul also counsels high and ultra-high net worth individuals, corporations, trusts and estates on Canadian income tax matters, including succession planning for closely held businesses. Rahul is recognized by *Chambers and Partners* as a leading lawyer in the area of private wealth law in Canada. Rahul is also recognized by *Best Lawyers* as a leading lawyer for trust and estate matters in Canada. Fluent in English, French, Spanish, Hindi and Urdu, Rahul regularly speaks on private client and tax topics and has authored and co-authored various chapters, papers and articles on tax, trust and estate-related matters. Rahul is the Editor-in-Chief of Federated Press' *Personal Tax and Estate Planning* journal and a co-editor of Thomson Reuters' *Taxes and Wealth Management* publication.

√ Yes, I want to attend Tax & Estate Planning Issues for New Canadians

Thursday, October 26, 2023 ● 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 October 6, 2023: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After October 6, 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

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