



*Learn
important tax
fundamentals!*



Taxation of the Average Estate

with Lynne Butler

Thursday, September 12, 2019

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 new lawyers or lawyers seeking to make a transition from another area of law, who want to develop an estates practice, and who do not have specialized estates or tax knowledge.

ABOUT THE PROGRAM

Thinking about building an estates practice? Don't forget the tax! Estate law and tax law issues can be very complex. Learn skills and gain confidence in this basic level course designed to introduce common taxation issues that most lawyers will encounter when assisting clients with estate planning or advising an executor in an estate administration. The program is geared towards lawyers who are new to estate and taxation practice, or who don't specialize in estate taxation. Using examples from her own practice, experienced estates and trusts lawyer Lynne Butler will touch on essential steps that need to be taken after the death of an individual, as well as some ideas for tax planning before death. The presentation will provide enough information for lawyers to identify taxation issues in their files, and recognize planning opportunities that exist for their clients. You'll learn common scenarios that give rise to tax issues, when to warn clients of potential tax implications, and when to seek a second opinion from a tax lawyer or a tax accountant. Don't get in over your head! Set aside just 90 minutes to gain valuable insights, and simple and useful tips on how to spot and navigate common tax issues in the average estate.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Introduction

How much does a wills and estates lawyer need to know about estate tax?

Taxation of the estate on death

- Federal tax
- Provincial estate tax
- Capital gains tax
- Income tax
- Where is tax paid from?
- Tax returns that must be done

Pre-death considerations/planning

- Allocation of assets to best effect
- Charitable bequests
- Estate freeze
- Early inheritance/gifting
- Life insurance
- Use of trusts

Taxation of beneficiaries

Program Wrap-up and Evaluation

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PRAISE FOR LYNNE BUTLER

- “*Fantastic job breaking difficult information down into digestible chunks that are very easy to absorb.*”
- “*A great help in an estate case that I am involved in. Thank you for the terrific information.*”
- “*Excellent insights with a no-nonsense approach.*”
- “*Wonderful. Lynne’s light tone makes serious and often scary issues seem non-threatening and possible to work through.*”
- “*Great presentation. Lynne’s expertise, integrity and experience were clearly evident.*”
- “*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: CPD application is pending.

Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

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MEET YOUR PRESENTER



Lynne Butler is a lawyer, mediator, and writer. She graduated from UBC Law School and was called to the Bar in Alberta in 1986. After more than 20 years, thousands of wills drawn and hundreds of estates probated, Lynne joined the estates department of a leading trust company for a further seven years. She now practises law in her home province of Newfoundland and Labrador, working exclusively in wills, estates, probate, elder law, trusts, and related matters. Lynne has appeared on, or been interviewed by CPAC, CityTV, Global TV, BNN, CBC Radio, the *Wall Street Journal*, the *Globe and Mail*, the *Vancouver Province*, the *Edmonton Journal*, the *Toronto Star*, the *Montreal Gazette*, *Canadian Lawyer*, *Today's Parent*, *Caregiver Solutions*, *Advisor's Edge*, and *Maclean's Magazine*, among other publications. She is the former co-host of *The Law Show*, and is the author of ten books about estate planning.

✓ **Yes, I want to attend Taxation of the Average Estate with Lynne Butler**

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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 August 16, 2019: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After August 16, 2019: \$165.00 + \$21.45 (13%) HST* = \$186.45

\$0 - I have a \$599.00 Annual All Access Pass. Enter Pass ID: _____

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