New to estate freezes? We've got you covered!

Understanding The Estate Freeze

with Jos Herman

Thursday, December 12, 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

Lawyers practicing in the areas of estates law, family law and tax law will be interested in this program.

ABOUT THE PROGRAM

Are you familiar with estate freezes but looking for a clearer understanding of how they work in practice? In this beginner-level seminar, noted trust and estate practitioner and CPA Jos Herman will outline the what, when, why and how of this important estate planning strategy – and why you should care. In basic terms and using simple fact scenarios, Jos will outline how estate freezes are used, when it's appropriate to use an estate freeze, the different forms an estate freeze can take, and the challenges involved in planning and implementing an estate freeze. Finally, Jos will share important considerations for once an estate freeze is in place. Along the way she'll share personal experiences and insights for dealing with family conflicts. Topics include:

- Using estate freezes for business succession planning and tax savings
- Avoiding common pitfalls
- Opportunities to drive more tax efficiency

Whether you're a general practitioner, estate planner or family lawyer, understanding this key wealth-transfer strategy will add value to your practice and enhance the advice you give to clients. Join us to learn how this powerful tool can help protect family wealth, minimize taxes, and plan for future generations. Don't miss out!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks
What is an Estate Freeze?
How an Estate Freeze Works - Examples
Why Implement an Estate Freeze?
When a Client Should and Should Not Implement an Estate Freeze
How to Implement an Estate Freeze - Examples
Altering an Estate Freeze
Other Considerations
Program Wrap-up and Evaluation

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PRAISE FOR PAST PROGRAMS

- *"Excellent presenter - well organized, thorough and very practical."*
- *"Appreciated all the personal examples and explanations."*
- *"Very informative, polished presentation."*
- *"I've been doing wills work for 5 years and found everything useful."*
- *"Immensely helpful. Would definitely recommend."*
- *"All in all, probably the best and most practical [time] that I have ever spent on CLE."*

CPD CREDIT **SK:** *This program qualifies for 1.5 CPD hours under the Law Society of SK CPD Policy.*
ON: *This program contains 1.5 Substantive hours.*
BC: *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

Jos Herman is the founder of Resources & Solutions, a boutique consulting firm. She has spent over 25 years serving the tax, business and estate planning needs of owner manager clients, professionals and their families. Jos provides private business and personal solutions focused on tax efficient investment and insurance strategies, asset protection and wealth planning. Jos has a Bachelor of Commerce degree and earned her Chartered Accountant (CA) designation from the Institute of Chartered Accountants of Alberta. Jos is a member of both the Chartered Professional Accountants (CPA) of Saskatchewan and Chartered Professional Accountants of British Columbia. She also has her Certified Financial Planners (CFP) designation and Chartered Life Underwriter (CLU). In addition, she holds her Trust and Estate Practitioner (TEP) designation. Jos is a frequent speaker on topics related to wealth planning for individuals, business owners and professionals.

√ Yes, I want to attend Understanding the Estate Freeze, *with Jos Herman*

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* Materials will be distributed electronically in advance. Live webinars feature real-time 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 November 29, 2024: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After November 29, 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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