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Get step-by-step guidance for will planning!

Use of Checklists in Will Planning

with Jordan Atin

Thursday, November 28, 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 experienced estates practitioners who want to update their skills, and newer lawyers looking for a solid grounding in a wills and estates practice.

ABOUT THE PROGRAM

Learn how to use checklists to improve efficiencies and reduce claims in your wills practice! Drafting wills may seem straightforward, but have you mastered the basic steps from client intake to file closing? Attend this information-packed presentation with leading estates lawyer Jordan Atin and get step-by-step guidance for handling key stages of a will drafting engagement. After attending this program you will:

- Understand why checklists are important
- Be more aware of the risks of will drafting and ways to protect yourself
- Appreciate how technology can create a better client experience, and ensure no issues are overlooked
- Have an effective, systematic process for serving will clients

Don’t miss this opportunity to acquire new tools to help ensure you have considered and dealt with all relevant factors when drafting a will. Seasoned and novice practitioners alike will appreciate this well-organized, time-saving reference, and the valuable take-away resources Jordan provides. Sign up early to avoid disappointment!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks

Introduction
- Why checklists are important
- Insurance claims resulting from not using checklists

Client Information Checklist

Family Member Information Checklist

Asset Information Checklist

Additional Document Checklist

Interview Checklist

Planning and Drafting Checklist

Will Review Checklist

File Closing Checklist

Practice and Professionalism Issues
- Reducing liability using checklists
- Maintaining your file
- Closing of files and storage of wills

Program Wrap-up and Evaluation

Get unlimited access to all our live webinars for the year with an All Access Pass for $599 + tax!

PRAISE FOR JORDAN ATIN

"Jordan's approach provides a perfect balance – he referred to relevant case law and statute, but in the context of a real, everyday law practice."

"The precedents were very helpful."

"Very impressed… appreciate Jordan sharing his experience & practices with us & look forward to more."

"What makes Jordan's courses unique is his ability to cater to the mixed crowd of new and experienced counsel."

"I have been to dozens of CLE courses over the past 28 years and Jordan's courses are my favourite."

"Informative, enlightening and stimulating."

ON: *This program contains 1.0 Substantive hour and 0.5 Professionalism hours.*
BC: *This program has been approved for 1.5 CPD hours, including 0.5 hours of professional responsibility and ethics, client care & relations, and/or practice management.*
SK: *This program has been approved for 1.5 CPD hours, 0.5 hours of which qualifies as ethics.*
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

Jordan M. Atin is a Certified Specialist in Estates and Trusts Law and an Adjunct Professor of Law at Osgoode Hall Law School. Lexpert rates Jordan as one of its top recommended estate lawyers in Canada as well as being rated as a Best Lawyer in Canada. In addition to his planning and administration practice, he is Counsel to Hull & Hull LLP and an experienced estates mediator. He is a Past Chair of the OBA - Trust & Estates Section and a full member of the Society of Trusts and Estate Practitioners. He was the inaugural winner of the OBA's Hoffstein Prize in recognition of his contributions and achievements in the area of wills, trusts and estates. Jordan is the founder of IWEE - the Institute for Wills and Estate Education (www.iwee.ca), which provides workshops for estate professionals. He is a contributing author to the well-known text "Estate Litigation" and his articles are referred to in many of Canada's leading estates texts. Jordan's book for non-lawyers, *The Family War – Winning the Inheritance Battle*, has been featured on Canada AM, BNN and in dozens of Canadian and US newspapers.

√ Yes, I want to attend Use of Checklists in Will Planning, *with Jordan Atin*

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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 November 1, 2019: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After November 1, 2019: $165.00 + $21.45 (13%) HST* = $186.45

□ **$0 - I have a $599.00 Annual All Access Pass. Enter Pass ID: ______________**

**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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