



*Take the
mystery out
of trusts!*



Use of Trusts in Estate Planning

with Fiona Hunter

Thursday, September 29, 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 basic level seminar is designed for wills and estates practitioners who have limited experience in trust law. It will also serve as an excellent refresher for more experienced estates and trusts lawyers.

ABOUT THE PROGRAM

Think trusts are just for wealthy people with tax problems? Think again! Trusts are a flexible estate planning tool that can be used to meet a wide variety of goals and objectives. Understanding what trusts are, how they work, and when they're useful can help you determine if they fit within your client's estate plan. In this practical, easy to understand session, experienced trusts practitioner Fiona Hunter provides current guidance on the basics of trust law and the use of trusts as an estate planning tool. You will learn:

- when, why and how to use trusts;
- the purposes, advantages and disadvantages of different types of trusts; and,
- common errors practitioners make when advising clients about trusts.

While the concept of a trust may be relatively straightforward, trust strategies can be complex. Attend this program and further your understanding of trusts and whether they are an effective vehicle to help achieve your client's estate planning wishes. Register early and save!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and introduction

What is a trust?

How to choose the right trust: *inter vivos* or testamentary

Constituting a trust

Commonly used testamentary trusts

- spouse trusts
- trusts for minors and young adults
- trusts for disabled beneficiaries

Commonly used *inter vivos* trusts

- spouse trusts
- alter ego and joint partner trusts
- bare trusts

Program wrap-up and evaluation

PRAISE FOR PAST PROGRAMS

"Fantastic job breaking difficult information down into digestible chunks that are very easy to absorb."

"Really enjoyed the presenter. Very thorough. I will be able to use this information in many files. Thank you."

"I really needed this. I'll definitely be changing the questions I ask."

"Very, very good program. Learned a lot in a short time. Have taken much less away from longer programs."

"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.

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MEET YOUR PRESENTER



FIONA HUNTER is a partner at Horne Coupar (named one of Canada's Top 5 Trusts & Estates Law Boutiques by Canadian Lawyer) in Victoria, BC. She practices exclusively in estate planning and estate litigation. Fiona has a Masters of Law in

trusts and has written extensively about them and other estate planning matters, including *Drafting Trusts and Wills Trusts in Canada* (Lexis Nexis Canada 2020, 5th ed.). She teaches at professional development courses and has been an adjunct professor at the University of Victoria law school. She is qualified as an expert in trust law by the Supreme Court of BC. Fiona is active in the Society of Estate and Trust Practitioners. Since 2008, Fiona has been recognized by her peers for inclusion in "The Best Lawyers in Canada" publication in the field of Trust and Estates and as the "Lawyer of the Year" for 2013, 2014, 2016, 2018 and 2019 in the Vancouver/Vancouver Island area.

✓ **Yes, I want to attend Use of Trusts in Estate Planning, with Fiona Hunter**

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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 September 9, 2022: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After September 9, 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.

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