



Understand the benefits and risks of joint ownership!



Using Joint Ownership in Estate Planning

with Jordan Atin

Wednesday, December 8, 2021
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 suitable for both experienced estates practitioners who want to refresh their knowledge of joint assets as an estate planning strategy, and those newer to an estates practice who are curious about joint ownership as an estate planning tool.

ABOUT THE PROGRAM

Joint ownership is frequently used in estate planning as a strategy to minimize probate fees and simplify estate administration. However, joint ownership may not be useful in all circumstances and decisions on such transfers should not be made lightly. This highly practical, 90 minute webinar with leading estates and trusts lawyer Jordan Atin will review the contexts in which joint ownership may be appropriate, factors to consider before recommending using joint ownership to clients as an estate planning tool, and unintended consequences of using joint ownership during and after the original owner's life. Among the topics Jordan will address are:

- loss of control over assets
- exposing assets to creditors
- inappropriate estate distribution
- income tax implications
- probate
- proper legal documentation

While joint ownership may seem to be a simple solution to address common estate planning goals, using it successfully requires careful consideration of its benefits and pitfalls, and each client's unique circumstances. Attend this program and get the expert guidance you need to help your clients make more informed decisions and avoid unexpected issues for them and their ultimate beneficiaries!

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome and Opening Remarks

Joint assets

Using joint ownership to reduce probate fees

Pitfalls with joint ownership

Advising clients on using joint ownership

Documenting true gifts of joint ownership

Executor liability for undeclared assets and other issues

Program Wrap-up and Evaluation

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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 Ontario Bar Association (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 a co-creator of eState Planner, a widely used Will planning and drafting software. 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 Using Joint Ownership in Estate 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 19, 2021: \$140.00 + \$18.20 (13%) HST* = \$158.20 - Save \$25.00!

After November 19, 2021: \$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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