

12 hours of CLE per year is the LSUC's expressed minimum expectation. This program qualifies as 3 1/2 of the 12 hours.



THE HAMILTON LAW ASSOCIATION

presents:

THE 8th ANNUAL ESTATES & TRUSTS SEMINAR

Thursday, February 11, 2010

1:00 p.m. - 4:30 p.m.

The Sheraton Hamilton Hotel - Ballroom East 116 King Street West, Hamilton

Sponsored by:



Scotia Private Client Group

Co-Chairs: Jim Bird, Manulife Financial; Adam Cappelli, Ross & McBride LLP; Kristina Hyland, SimpsonWigle Law LLP; Eileen McIntyre, Scotia Private Client Group; Catherine Olsiak, SimpsonWigle Law LLP; Liza C. Sheard, Evans Sweeny Bordin LLP; Sandra Stephenson, Lazier Hickey LLP

Got an Estates Question? Submit your question in writing to Liza C. Sheard, Evans Sweeny Bordin LLP for a response by the co-chairs and/or our speakers. Questions may be submitted via fax: 905-523-8098, mail at Suite 1201- One King Street West, Hamilton, Ontario, L8P 1A4, or email: lsheard@esblawyers.com

TOPICS & GUEST SPEAKERS

1. **SERIAL MONOGAMY: Second Relationships**

- **Mutual Wills and Domestic Contracts**

Presented by: Lori Brown, Feltmate Delibato Heagle LLP

- **RSP's – Effectively creating a Spousal Trust**

Presented by: John Natale, LLB, Manulife Tax and Retirement Services

- **Support obligations on Death**

Presented by: William Tidball, Barrister & Solicitor

2. **TAINTED SPOUSAL TRUST – How to Avoid**

Presented by: Virginia McKenna, Virginia A. McKenna Professional Corporation

3. **FIDUCIARY DUTIES AND PRACTISING DEFENSIVELY**

- **Ownership of Private Corporations by an Estate**

Presented by: David Howell, Ross & McBride LLP

- **Trust Investments – How to be a Prudent Investor in Volatile Times**

Presented by: Adam Cappelli, Ross & McBride LLP and Joe Sardo, RBC Dominion Securities

4. **EMERGING ISSUES / CASE COMMENTS**

- **Insolvency Issues and Bankrupt Estates (BIA Amendments)**

Presented by: Rosemary Fisher, SimpsonWigle Law LLP

- **Trusts and the Tax Court After Garron and Antle**

Presented by: John Loukidelis, SimpsonWigle Law LLP

- **Estate Nuggets: TFSAs and RESP – Dream or Nightmare?**

Presented by: Eileen McIntyre, Scotia Private Client Group

5. **ESTATE ACCOUNTING – Litigation Perspectives**

Presented by: Michael Bruder, Lazier Hickey LLP

6. **RISK MANAGEMENT – File Management in Estates and Effective Use of New Technology**

Presented by: Liza Sheard, Evans Sweeny Bordin LLP

CERTIFIED SPECIALIST



Program accredited by the Law Society of Upper Canada

This program has been accredited by the Law Society of Upper Canada for 3 1/2 hours towards the professional development requirement for certification in Civil Litigation and Estates & Trusts Law.

APPROVED FOR



This program qualifies for an LPIC \$50.00 premium credit applied to your 2011 insurance premium.



REGISTRATION FORM

Registration Fees: Members in Good Standing of the Hamilton Law Association **\$180.00**

Articling Students, Law Clerks and Paralegals from Member Law Firms **\$140.00**

Non-member Lawyers **\$210.00**

(Fees include 5% GST; GST Registration #R122908171). Includes refreshments & materials.

Please register me for the 8th Annual Estates & Trusts Seminar to be held on February 11, 2010. I enclose a cheque for \$ _____ payable to the Hamilton Law Association, or I authorize the amount of \$ _____ to be charged to my MasterCard or Visa.

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Attn: Wendy MacNair

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Refund Policy: Registration fee less 25% plus GST is refundable if cancellation is received FIVE working days before the program.