THE OSGOODE INTENSIVE PROGRAM IN WILLS & ESTATES 2018-2019

Advance your Wills & Estates Practice with the Osgoode Intensive Program in Wills & Estates

This unique Intensive Program, designed and delivered by Canada's leading experts, will give you the critical knowledge and skills you need to rapidly improve your practice. Participants will develop a thorough understanding of key areas that are essential for wills and estates practitioners, gain insight into potential pitfalls and how to avoid them, and participate in valuable skills practice.

You must complete all required programs set out below within 2 years to receive a certificate of completion. Required programs are as follows:

- **Wills & Estates 101: Online Webinar Series** – Available online anytime
- **Estate Planning and Administration** – October 30, November 6 and 13, 2018
- **Taxation in Wills & Estates** – January 17 and 22, 2019
- **Intensive Skills Workshop: Will Drafting** – February 14, 2019
- **Managing Consent & Capacity Issues in Wills & Estates Practice** – March 19, 2019
- **Powers of Attorney and Guardianship: Non-contentious and Contentious Matters** – April 9, 2019
- **Passing of Accounts & Fiduciary Accounting** – April 30, 2019

Note that it is recommended, but not required, to attend the courses in the order set out above.

ADVISORY BOARD

Rachel L. Blumenfeld
Aird & Berlis LLP

Ian Hull
Hull & Hull LLP

Corina S. Weigl
Fasken Martineau DuMoulin LLP

Kimberly A. Whaley
WEL Partners

FORMAT

A blend of online and in-person learning

LOCATION

Osgoode Professional Development
1 Dundas St. West, 26th Floor,
Toronto, ON

Register today at:

osgoodepd.ca/wills-and-estates

OSGOODE
OSGOODE HALL LAW SCHOOL
PROFESSIONAL DEVELOPMENT

YORK U
UNIVERSITÉ
UNIVERSITY

Attend all of the programs within 2 years and earn a Certificate of Completion.

This unique program is designed to give you the knowledge and skill set you need in today's challenging practice environment. Whether you are a junior lawyer still navigating this area of law, or a seasoned practitioner who wants to update their skills, the Intensive Program will allow you to rapidly improve your practice.

Designed to provide a curriculum-based learning platform, this Intensive Program offers the following:

- **Choice.** Opt for in-depth comprehensive coverage of the essential topics, or fill gaps in specific areas with separately bookable modules.
- **Certificate of Completion.** Set yourself apart in the eyes of your clients, and potential employers, with a certificate of completion, provided you complete all required courses over 2 consecutive years.
- **Curated.** Taking all of the program offerings will provide you with the need-to-know topics in Wills & Estates.
- **Leaders in the Field.** Learn from top legal minds about the latest best practices and case law.
- **Flexibility.** Most programs are available both in-person and by webcast, so you can learn from the comfort of your office or home.

Programs at a Glance

Wills & Estates 101: Online Webinar Series
Available online anytime

Composed of three distinct, 1 hour sessions, each webinar gives you proven strategies and techniques to build your foundational knowledge:

- Estate Planning, Review & Execution: Key Concepts and Practice Essentials
- Drafting the Retainer and Will: Tips for Protecting Your Client, the Will and You!
- Estate Litigation for the Non-Litigator

Note: Viewing of all three Webinar Sessions are required to obtain your Certificate; it is recommended that these are completed prior to the other programs.

Estate Planning and Administration
October 30, November 6 and 13, 2018

Over three evening sessions, this popular annual program, formerly known as the *Annual Intensive Wills and Estates Course,* will provide you with the essential knowledge, skills and precedents you need to confidently advise clients on matters related to estate planning and administration.

Taxation in Wills & Estates
January 17 and 22, 2019

Whether you're confronted with a complex estate planning matter, or retained to draft a basic will, a fundamental understanding of tax issues is essential to your practice. Learn the basics over two intensive evenings.

Intensive Skills Workshop: Will Drafting
February 14, 2019

Drafting a will that can stand up to challenges is a cornerstone of a successful estates practice. This intensive hands-on program provides a unique opportunity to hone your drafting skills while receiving individualized feedback.

Drawing on the expertise and experience of leading lawyers and experts, including:

Program Chairs

Rachel L. Blumenfeld, Aird & Berlis LLP

Brian Cohen, Gowling WLG

Corina S. Weigl, Fasken Martineau DuMoulin LLP

Nimali D. Gamage, Goddard Gamage LLP

Ian Hull, Hull and Hull LLP

Kimberly A. Whaley, WEL Partners

Register today at:

osgoodepd.ca/wills-and-estates

Advisory Board

Rachel L. Blumenfeld, Aird & Berlis LLP

Ian Hull, Hull & Hull LLP

Corina S. Weigl, Fasken Martineau DuMoulin LLP

Kimberly A. Whaley, WEL Partners

Faculty Includes

Jordan M. Atin, Hull & Hull LLP

Nick Esterbauer, Hull & Hull LLP

A. Sean Graham, Graham Estate Law

Mark Handelman, WEL Partners

Holly LeValliant, Mills & Mills LLP

Heather Mountford, Goddard Gamage LLP

Albert Oosterhoff, WEL Partners

Here's what participants of past Osgoode Wills & Estates programs had to say:

> *"Great faculty, interesting anecdotes, very knowledgeable."*

Jenny Kirshen, Associate, Gene Colman Family Law Centre, attended the *Annual Intensive Wills and Estates Course* (now the *Estate Planning and Administration*)

> *"Very personable speakers kept issues practical and provided many helpful examples."*

Valerie J. Tingey Professional Corporation, attended the *Annual Intensive Wills and Estates Course* (now the *Estate Planning and Administration*)

Managing Consent & Capacity Issues in Wills & Estates Practice

March 19, 2019

Consent and capacity issues have long intersected with wills and estates practice, and lawyers are increasingly called upon to make difficult judgment calls on these matters. Hear from our faculty of both legal and medical experts on how to deal with these challenging situations.

Powers of Attorney and Guardianship: Non-contentious and Contentious Matters

April 9, 2019

A power of attorney should not be an afterthought during the will drafting and estate planning process. Set up in an interactive and dynamic format, an expert faculty will discuss important contentious and non-contentious issues when dealing with powers of attorney and guardianship.

Passing of Accounts & Fiduciary Accounting

April 30, 2019

Whether you have been required to pass accounts, or have to advise someone in this area, passing of accounts requires complex and multi-part considerations. Over one intensive evening, our expert faculty will teach you how to effectively manage and advise on passing of accounts, compensation and fiduciary accounting issues.

Register today at:

osgoodepd.ca/ wills-and-estates

Program-specific Details

Wills & Estates 101: Online Webinar Series

Available online anytime

- **Estate Planning, Review & Execution: Key Concepts and Practice Essentials** – led by Jordan M. Atin, Hull & Hull LLP: There are clear steps and questions that every legal professional who is retained to draft a will must go through and ask. You'll walk through key stages – from the initial client interview to quoting fees to executing the will to storage and retention – and learn best practices and proven practice management techniques.
- **Drafting the Retainer and Will: Tips for Protecting Your Client, the Will and You!** – led by Corina S. Weigl, Fasken Martineau DuMoulin LLP: Errors when drafting retainer letters and wills, are the most common areas of negligence claims in the wills & estates practice area. Most, however, can be avoided. Referencing sample will clauses, checklists and roadmaps, this webinar will teach you techniques to avoid common drafting errors.
- **Estate Litigation for the Non-Litigator** – led by Ian Hull, Hull and Hull LLP: While you may not practice in litigation, the most astute wills & estates practitioners have a solid grasp of the basic steps involved in the estate litigation and mediation process. Referencing real-life templates and sample documents, this webinar will guide you through these processes and provide practical tips that every wills and estates practitioner should be familiar with.

Estate Planning and Administration

October 30, November 6, and 13, 2018
6:00 p.m. – 8:45 p.m. EDT/EST

Chair: Rachel L. Blumenfeld, Aird & Berlis LLP

Available in-person and by webcast

An in-depth and interactive learning program, you will have the opportunity to explore complex estate planning issues while updating and reinforcing your core knowledge and skills.

You will learn:

- Initial considerations in estate planning
- Key issues in taxation during estate planning
- Overview of will drafting, executing and reporting
- Fundamentals of estate administration

Taxation in Wills & Estates

January 17 and 22, 2019
6:00 p.m. – 8:30 p.m. EST

Chair: Brian Cohen, Gowling WLG

Available in-person and by webcast

In this two-evening program, an expert faculty will help unpack critical, and often complex, tax issues in the area of Wills & Estates.

You will learn:

- Fundamentals of Steps in an Estate Freeze to Minimize Tax on Death
- Dealing with Double Taxation
- Taxation on Death
- Terminal Returns
- The Graduated Rate Estate – Pits and Traps

Intensive Skills Workshop: Will Drafting

February 14, 2019
9:00 a.m. – 5:00 p.m. EST

Chair: Corina S. Weigl, Fasken Martineau DuMoulin LLP

Available in-person only

When a client comes into your office requesting a will, it is critical that you are prepared to competently draft based on varying, and sometimes, complicated scenarios. This one day learn-by-doing program includes sample fact scenarios, lectures and small group breakout sessions. Personalized feedback will provide you with ample opportunity to develop and refine your drafting skills.

You will learn:

- How to avoid common drafting errors
- The basic administrative and preamble clauses that should be included in a will, and how to revise them given different fact situations
- The components of a Simple Will, and the situations in which it is appropriate to use
- How to incorporate clauses to a situation where a family cottage or a second marriage may be involved
- When to use multiple wills, and how to effectively draft them

You must be prepared to participate in an introductory webinar and complete a pre-program drafting assignment which will be reviewed by an experienced faculty member and discussed in small groups at the program.

Managing Consent & Capacity Issues in Wills & Estates Practice

March 19, 2019
6:00 p.m. – 9:00 p.m. EDT

Chair: Nimali D. Gamage, Goddard Gamage LLP

Available in-person and by webcast

Our faculty of experienced lawyers and medical experts will provide you with a unique combination of insight from both legal and medical perspectives. Over one evening, you will learn practical takeaway points and receive checklists that can be implemented immediately in your practice. You will come away from this program more confident in your ability to handle difficult issues, such as:

- What are the red flags?
- Understanding your obligations to ask probing questions
- Assessing whether your client has capacity to give instructions
- When should you refuse to take the retainer?
- Understanding the *Health Care Consent Act*: Informed Consent and advance care planning

Powers of Attorney and Guardianship: Non-contentious and Contentious Matters

April 9, 2019
6:00 p.m. – 9:00 p.m. EDT

Chair: Ian Hull, Hull and Hull LLP

Available in-person and by webcast

Not to be underestimated, powers of attorney can open a host of issues, including complex guardianship matters. An expert faculty of practitioners will lead an interactive discussion on what you need to know, addressing both contentious and non-contentious matters, such as:

- Understanding key documentation in incapacity planning
- What are your Planning Options?
- Basic issues in guardianship
- Role and removal of Attorneys and Guardians
- Practice points on dealing with tricky scenarios involving the Power of Attorney

Passing of Accounts & Fiduciary Accounting

April 30, 2019
6:00 p.m. – 9:00 p.m. EDT

Chair: Kimberly A. Whaley, WEL Partners

Available in-person and by webcast

You need to understand the idiosyncrasies and common errors when passing accounts in order to have a successful Wills and Estates practice. In one intensive evening, you will learn the latest case law updates, and will benefit from hands-on exercises where you will review sample estate accounts.

You will learn:

- The basics of passing of accounts
- Overview of compensation
- The Office of the Children's Lawyer and the Office of the Public Guardian and Trustee in reviewing accounts: their role, review process and common objections
- Reviewing accounts: What lawyers need to look for

Register today at:

osgoodepd.ca/wills-and-estates

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Certificate of Program Completion

You will receive a certificate upon completion of the following required programs:

- Wills & Estates 101: Online Webinar Series
  - Estate Planning, Review & Execution: Key Concepts and Practice Essentials
  - Drafting the Retainer and Will: Tips for Protecting Your Client, the Will and You!
  - Estate Litigation for the Non-Litigator
- Estate Planning and Administration
- Taxation in Wills & Estates
- Intensive Skills Workshop: Will Drafting
- Managing Consent & Capacity Issues in Wills & Estates Practice
- Powers of Attorney and Guardianship: Non-contentious and Contentious Matters
- Passing of Accounts & Fiduciary Accounting

Participants must attend all required programs within a two year period to earn a Certificate of completion.

Note: When you have completed all the programs listed above, please contact cle@osgoode.yorku.ca to request your certificate.

Registration Details

Intensive Program in Wills and Estates 2018-2019
Take advantage of special bundle pricing when registering for all programs below
$2,795 + HST

Wills & Estates 101: Online Webinar Series
- **Estate Planning, Review & Execution: Key Concepts and Practice Essentials**
- **Drafting the Retainer and Will: Tips for Protecting Your Client, the Will and You!**
- **Estate Litigation for the Non-Litigator**

Individual Session **- $129 plus HST**
Series (3 Sessions) **- $295 plus HST**

Estate Planning and Administration
$795 + HST

Taxation in Wills & Estates
$495 + HST

Intensive Skills Workshop: Will Drafting
$695 + HST

Managing Consent & Capacity Issues in Wills & Estates Practice
$345 + HST

Powers of Attorney and Guardianship: Non-contentious and Contentious Matters
$345 + HST

Passing of Accounts & Fiduciary Accounting
$345 + HST

Fees include attendance, program materials, continental breakfast, lunch and break refreshments. Group discounts are available. Visit www.osgoodepd.ca/group-discounts for details. Please inquire about financial assistance.

Program Changes

We will make every effort to present the program as advertised, but it may be necessary to change the date, location, speakers or content with little or no notice. In the event of program cancellation, York University's and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.

Cancellations and Substitutions

Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 21 days prior to the program date. If a cancellation request is made with less than 21 days notice, a $150 administration fee will apply. No other refund is available.

For Further Program–Related Information please Contact:

Gail Geronimo, Program Lawyer at ggeronimo@osgoode.yorku.ca

LAW SOCIETY OF ONTARIO accredited

OsgoodePD has been approved as an Accredited Provider of Professionalism Content by the LSO. LSO (ON) Eligible CPD/MCLE hours:

Wills & Estates 101: Online Webinar Series
- Per complete series: 3h CPD Hours (30m Substantive; 2h 30m Professionalism)

Estate Planning and Administration
– 8h 10m CPD Hours (5h 10 m Substantive; 3h Professionalism)

Taxation in Wills & Estates – 5h CPD Hours (4h Substantive; 30m Professionalism)

Intensive Skills Workshop: Will Drafting
– 7h 55m CPD Hours (6h 40m Substantive; 1h 15m Professionalism)

Passing of Accounts & Fiduciary Accounting
– 2h 55m CPD Hours (2h 25m Substantive; 30m Professionalism)

Managing Consent & Capacity Issues in Wills & Estates Practice
– 2h 55m CPD Hours (1h 55m Substantive; 1h Professionalism)

Powers of Attorney and Guardianship: Non-contentious and Contentious Matters
– 2h 55m CPD Hours (1h 55m Substantive; 1h Professionalism)

OsgoodePD programs may be eligible for CPD/MCLE credits in other Canadian jurisdictions. To inquire about credit eligibility, please contact cpd@osgoode.yorku.ca

Learn more about the Osgoode Intensive Program in Wills & Estates 2018-2019 or register today at:

osgoodepd.ca/wills-and-estates