THE OSGOODE INTENSIVE PROGRAM IN WILLS AND ESTATES 2021

Advance your wills and estates practice with the Osgoode Intensive Program in Wills and Estates

This unique intensive program, designed and delivered by 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.

Registrants who complete all programs set out below within two years will receive a certificate of completion. Required programs are as follows:

- **Wills and Estates 101: Webinar Series** – Available online anytime
- **Estate Planning and Administration:** January 12, 21 and 26, 2021
- **Taxation in Wills and Estates:** February 4 and 11, 2021
- **Intensive Skills Workshop: Will Drafting:** February 19, 2021
- **Managing Consent and Capacity:** March 9, 2021
- **Passing of Accounts and Fiduciary Accounting:** April 6, 2021
- **Powers of Attorney and Guardianship: Non-Contentious and Contentious Matters:** April 27, 2021

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

Kimberly A. Whaley
WEL Partners

Format

Online – Live, Interactive

Includes 120-day access to program archive

Register today at:
osgoodepd.ca/wills-and-estates

OSGOODE
OSGOODE HALL LAW SCHOOL
PROFESSIONAL DEVELOPMENT
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Attend all of the programs within two years and earn a Certificate of Completion.

This unique series of programs 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 your 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 two consecutive years.
- **Curated.** Taking all of the program offerings will provide you with the need-to-know topics in wills and estates.
- **Leaders in the field.** Learn from top legal minds about the latest best practices and case law.

Programs at a Glance

Wills and Estates 101: Webinar Series

Available online anytime

Composed of three distinct, one-hour sessions. Each webinar gives you proven strategies and techniques to build your foundational knowledge:

- Estate Planning, Review and 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

January 12, 21 and 26, 2021

Over three live online 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 and Estates

February 4 and 11, 2021

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 online evening programs.

Intensive Skills Workshop: Will Drafting

February 19, 2021

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

Managing Consent and Capacity

March 9, 2021

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. In this evening program, hear from our faculty of both legal and medical experts on how to deal with these challenging situations.

Passing of Accounts and Fiduciary Accounting

April 6, 2021

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.

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

April 27, 2021

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, in one evening an expert faculty will discuss important contentious and non-contentious issues when dealing with powers of attorney and guardianship.

Register today at:

osgoodepd.ca/wills-and-estates

Program-Specific Details

Wills and Estates 101: Webinar Series

Available online anytime

- **Estate Planning, Review and 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 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. Errors when drafting retainer letters and wills, are the most common areas of negligence claims in the wills and 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 & Hull LLP. While you may not practice in litigation, the most astute wills and 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

January 12, 21 and 26, 2021
6:00 p.m. – 8:45 p.m. EST

Chair:
Ambie Edgar-Chana, Edgar Chana LLP

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 and Estates

February 4 and 11, 2021
6:00 p.m. – 8:30 p.m. EST

Chair:
Brian Cohen, Gowling WLG
Robert Kepes, Morris Kepes Winters LLP Tax Lawyers

In this two-evening program, an expert faculty will help unpack critical, and often complex, tax issues in the area of wills and 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 19, 2021
9:00 a.m. – 5:00 p.m. EST

Chair:
Corina S. Weigl, Fasken

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 and Capacity Issues in Wills and Estates Practice

March 9, 2021
6:00 p.m. – 9:00 p.m. EDT

Chair:
Nimali D. Gamage, Goddard Gamage LLP

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

Passing of Accounts and Fiduciary Accounting

April 6, 2021
6:00 p.m. – 9:00 p.m. EDT

Chair:
Kimberly A. Whaley, WEL Partners

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

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

April 27, 2021
6:00 p.m. – 9:00 p.m. EDT

Chairs:
Ian Hull and Suzana Popovic-Montag, Hull & Hull LLP

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

Register today at:
osgoodepd.ca/wills-and-estates

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

Program Chairs

Brian Cohen, Gowling WLG

Ambie Edgar-Chana, Edgar Chana Law

Nimali D. Gamage, Goddard Gamage LLP

Ian Hull, Hull & Hull LLP

Robert Kepes, Morris Kepes Winters LLP Tax Lawyers

Suzana Popovic-Montag, Hull & Hull LLP

Corina S. Weigl, Fasken

Kimberly A. Whaley, WEL Partners

Advisory Board

Rachel L. Blumenfeld, Aird & Berlis LLP

Ian Hull, Hull & Hull LLP

Corina S. Weigl, Fasken

Kimberly A. Whaley, WEL Partners

Faculty Includes:

Katherine Antonacopoulos, Office of the Children's Lawyer

Jordan M. Atin, Hull & Hull LLP

Maureen Berry, Fasken

Rachel L. Blumenfeld, Aird Berlis LLP

Laura Cardiff, Casey & Moss LLP

Ed Esposto, Aird & Berlis LLP

Nick Esterbauer, Hull & Hull LLP

Rebecca Fisch, RSF Law

A. Sean Graham, Graham Estate Law

Alanna Kaye, A.S. Kaye Consultants

Bianca La Neve, WeirFoulds LLP

Holly LeValliant, Eisen Law

Alison Minard, McCarthy Tétrault LLP

Meghan O'Neil, Mills & Mills LLP

Albert H. Oosterhoff, Professor Emeritus, WEL Partners

Tracey Phinnemore, WEL Partners

Elie Roth, Davies Ward Phillips & Vineberg LLP

Amanda Stacey, Norton Rose Fulbright Canada LLP

Judith A. Wahl, Wahl Elder Law

Heela Donsky Walker, Robins Appleby LLP

Genevieve Giroday Warren, Giroday Law

Register today at:

osgoodepd.ca/wills-and-estates

Here's what participants of past Osgoode Wills and 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*)

Certificate of Program Completion

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

- **Wills and Estates 101: Webinar Series**
  - Estate Planning, Review and 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**
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- **Intensive Skills Workshop: Will Drafting**
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- **Passing of Accounts and Fiduciary Accounting**
- **Powers of Attorney and Guardianship: Non-contentious and Contentious Matters**

Participants must take 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 2021
Take advantage of special bundle pricing when registering for all programs below **$2,795 + HST**
Newly Licensed (2017 – Present): **$1,397.50 + HST**

Wills and Estates 101: Webinar Series
- **Estate Planning, Review and 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
Fee per Delegate: **$795 + HST**
Newly Licensed (2017 – Present): **$397.50 + HST**

Taxation in Wills and Estates
Fee per Delegate: **$495 + HST**
Newly Licensed (2017 – Present): **$247.50 + HST**

Intensive Skills Workshop: Will Drafting
Fee per Delegate: **$695 + HST**
Newly Licensed (2017 – Present): **$347.50 + HST**

Managing Consent and Capacity Issues in Wills and Estates Practice
Fee per Delegate: **$345 + HST**
Newly Licensed (2017 – Present): **$172.50 + HST**

Passing of Accounts and Fiduciary Accounting
Fee per Delegate: **$345 + HST**
Newly Licensed (2017 – Present): **$172.50 + HST**

Powers of Attorney and Guardianship: Non-contentious and Contentious Matters
Fee per Delegate: **$345 + HST**
Newly Licensed (2017 – Present): **$172.50 + HST**

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, 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:
Paul Truster, Program Lawyer at ptruster@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 and Estates 101: Webinar Series – Per complete series: 3h CPD (30m Substantive; 2h 30m Professionalism)

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

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

Intensive Skills Workshop: Will Drafting – 6h 25m CPD (5h 25m Substantive; 1h Professionalism)

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

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

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

Approved For LawPRO Risk Management Credit

This program is approved for LawPRO Risk Management Credit.

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

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Learn more about the Osgoode Intensive Program in Wills and Estates 2021 or register today at:

osgoodepd.ca/wills-and-estates