

THE OSGOODE INTENSIVE PROGRAM IN WILLS AND ESTATES 2023

Advance your wills and estates practice with the Osgoode Intensive Program in Wills and 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 two years to receive a certificate of completion. Required programs are as follows:

- **Wills and Estates 101: Webinar Series** – Available online anytime
- **Estate Planning and Administration:** February 8 (full day) and 9 (morning), 2023
- **Taxation in Wills and Estates:** February 21 and 23, 2023 (evenings)
- **Intensive Skills Workshop: Will Drafting:** March 27, 2023 (full day)
- **Managing Consent and Capacity:** April 4, 2023 (evening)
- **Powers of Attorney and Guardianship: Non-Contentious and Contentious Matters:** April 19, 2023 (evening)
- **Passing of Accounts and Fiduciary Accounting:** April 26, 2023 (evening)

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)

*Includes 120-day access to program
archive for most programs*

Register today at:

[osgoodepd.ca/
wills-and-estates](https://osgoodepd.ca/wills-and-estates)



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 (exclusive access through the Intensive Program in Wills and Estates bundle)

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 is required to obtain your certificate of completion. It is recommended that these are completed prior to the other programs.

Estate Planning and Administration

February 8 (full day) and 9 (half day), 2023

Over one and a half days, 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 21 and 23, 2023 (evenings)

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

March 27, 2023 (full day)

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



Program-Specific Details

Managing Consent and Capacity

April 4, 2023 (evening)

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.

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

April 19, 2023 (evening)

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.

Passing of Accounts and Fiduciary Accounting

April 26, 2023 (evening)

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](https://osgoodepd.ca/wills-and-estates)

Wills and Estates 101: Webinar Series

Available online anytime. Access is exclusive to registrants in the Intensive Program in Wills and Estates bundle.

- **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

February 8, 2023

9:00 a.m. – 4:30 p.m. ET

February 9, 2023

9:00 a.m. – 12:30 p.m. ET

Chair:

Amanda Stacey

Miller Thomson 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 21 and 23, 2023

6:00 p.m. – 8:30 p.m. ET

Chairs:

Robert Kepes

Morris Kepes Winters LLP Tax Lawyers

Ray Rubin

Davies, Ward, Phillips, Vineberg LLP

Robert Santia

Davies, Ward, Phillips, Vineberg LLP

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

March 27, 2023
9:00 a.m. – 4:30 p.m. ET

Chair:
Marni Pernica
Aird & Berlis LLP

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.

Because of the hands-on, interactive nature of this program, this workshop requires live attendance and participation.

Managing Consent and Capacity Issues in Wills and Estates Practice

April 4, 2023
6:00 p.m. – 9:00 p.m. ET

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

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

April 19, 2023
6:00 p.m. – 9:00 p.m. ET

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

Passing of Accounts and Fiduciary Accounting

April 26, 2023
6:00 p.m. – 9:00 p.m. ET

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

Register today at:
[osgoodepd.ca/
wills-and-estates](https://osgoodepd.ca/wills-and-estates)

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

Program Chairs

Nimali D. Gamage
Goddard Gamage LLP

Ian Hull
Hull & Hull LLP

Robert Kepes
Morris Kepes Winters LLP

Marni Pernica
Aird & Berlis LLP

Suzana Popovic-Montag
Hull & Hull LLP

Ray Rubin
Davies Ward Phillips
Vineberg LLP

Robert Santia
Davies Ward Phillips
Vineberg LLP

Amanda Stacey
Miller Thomson LLP

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

Jordan M. Atin
Hull & Hull LLP

Laura Cardiff
Casey & Moss LLP

Grace Chow
Cadesky Tax

Nick Esterbauer
Hull & Hull LLP

Rebecca Fisch
RSF Law

Matthew Getzler
Minden Gross LLP

Brian Gilmartin
WEL Partners

Ian Hull
Hull & Hull LLP

Alanna Kaye
A.S. Kaye Consultants

Holly LeValliant
Scotiabank

Alexandra Mayeski
MayLex Litigation

Brittany Miller
Goddard Gamage LLP

David Mills
Mills & Mills LLP

Meghan O'Neil
Mills & Mills LLP

Albert H. Oosterhoff
Professor Emeritus, WEL Partners

Marni Pernica
Aird & Berlis LLP

Tracey Phinnemore
WEL Partners

Lonny Rosen
Rosen Sunshine LLP

Corina S. Weigl
Fasken

Nicole Woodward
Miller Thomson LLP

Register today at:

[osgoodepd.ca/
wills-and-estates](https://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 of completion of the Intensive Program in Wills and Estates 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**
- **Taxation in Wills and Estates**
- **Intensive Skills Workshop: Will Drafting**
- **Managing Consent and Capacity Issues in Wills and Estates Practice**
- **Powers of Attorney and Guardianship: Non-contentious and Contentious Matters**
- **Passing of Accounts and Fiduciary Accounting**

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 2023

Take advantage of special pricing when registering for all programs in the Intensive Programs in Wills and Estates 2023 AND receive complimentary access to the Wills and Estates 101: Online Webinar Series: **\$2,995 + TAX**

Estate Planning and Administration

Fee per Delegate: **\$795 + TAX**
Newly Licensed*: **\$397.50 + TAX**

Taxation in Wills and Estates

Fee per Delegate: **\$495 + TAX**
Newly Licensed*: **\$247.50 + TAX**

Intensive Skills Workshop: Will Drafting

Fee per Delegate: **\$695 + TAX**
Newly Licensed*: **\$347.50 + TAX**

Managing Consent and Capacity Issues in Wills and Estates Practice

Fee per Delegate: **\$395 + TAX**
Newly Licensed*: **\$197.50 + TAX**

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

Fee per Delegate: **\$395 + TAX**
Newly Licensed*: **\$197.50 + TAX**

Passing of Accounts and Fiduciary Accounting

Fee per Delegate: **\$395 + TAX**
Newly Licensed*: **\$197.50 + TAX**

**This fee applies to newly licensed regulated professionals within the past 2 years*

Group discounts are available.

Visit www.osgoodepd.ca/group-discounts for details. Please inquire about financial assistance.

Financial Assistance

This program is eligible for OSAP funding. Federal and provincial job grants may be available. You may also apply for financial assistance with OsgoodePD. To learn more, visit: www.osgoodepd.ca/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 (or 21 days prior to the first date of the first program in the case of bundle pricing). 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



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

Wills and Estates 101: Webinar Series –
Per complete series: 3h CPD
(30m Substantive; 2h 30m Professionalism)

Estate Planning and Administration –
9h 25m CPD (6h 40m Substantive;
2h 45m Professionalism)

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

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

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



Learn more about the Osgoode Intensive Program in Wills and Estates 2023 or register today at:

osgoodepd.ca/wills-and-estates