THE 2024 OSGOODE INTENSIVE PROGRAM IN
WILLS AND ESTATES

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

Online (Live)

Includes 120-day access to program archive for most programs

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 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 6 (full day) and 7 (morning), 2024
- **Taxation in Wills and Estates:** February 13 and 15, 2024 (evenings)
- **Intensive Skills Workshop: Will Drafting:** March 5 and April 1, 2024 (half days)
- **Managing Consent and Capacity:** March 19, 2024 (evening)
- **Passing of Accounts and Fiduciary Accounting:** April 2, 2024 (evening)
- **Powers of Attorney and Guardianship: Non-Contentious and Contentious Matters:** April 22, 2024 (evening)

Register today at:

osgoodepd.ca/
wills-estates

OSGOODE
OSGOODE HALL LAW SCHOOL
PROFESSIONAL DEVELOPMENT

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

Program Chairs

Ian Hull
Hull & Hull 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

Faculty Includes

Aaron Edgar
Edgar Chana Law

Robin Ellis
Miller Thomson LLP

Nick Esterbauer
Hull & Hull LLP

Bryan Gilmartin
WEL Partners

Heather Hogan
Office of the Public Guardian and Trustee

Emily Hubling
Fasken

Ian Hull
Hull & Hull LLP

Holly LeValliant
Scotiabank

Alexandra Mayeski
MayLex Litigation

David Mills
Mills & Mills LLP

Alison Minard
McCarthy Tétrault LLP

Meghan O'Neil
Mills & Mills LLP

Albert H. Oosterhoff
Professor Emeritus, WEL Partners

Marni Pernica
Aird & Berlis LLP

Tracey Phinnemore
WEL Partners

Raphael Tachie
Gowling WLG

Kimberly A. Whaley
WEL Partners

Nicole Woodward
Miller Thomson LLP

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*)

Register today at:
osgoodepd.ca/wills-estates

Attend all of the programs 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.
- **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 6 (full day) and 7 (half day), 2024

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 13 and 15, 2024 (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 5 and 1, 2024 (half days)

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

Managing Consent and Capacity

March 19, 2024 (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.

Passing of Accounts and Fiduciary Accounting

April 2, 2024 (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.

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

April 22, 2024

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-estates

Program-Specific Details

Wills and Estates 101: Webinar Series

Available online any time. 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 6, 2024
9:00 a.m. – 4:30 p.m. ET

February 7, 2024
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 13 and 15, 2024
6:00 p.m. – 8:30 p.m. ET

Chairs:
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 5 and April 1, 2024
9:00 a.m. – 12:30 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 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 mandatory 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

March 19, 2024
6:00 p.m. – 9:00 p.m. ET

Chair:
Kimberly A. Whaley
WEL Partners

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 2, 2024
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

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

April 22, 2024
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

Register today at:
osgoodepd.ca/wills-estates

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 2024 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**
- **Passing of Accounts and Fiduciary Accounting**
- **Powers of Attorney and Guardianship: Non-contentious and Contentious Matters**

Participants must take all required programs within the program cycle to earn a Certificate of Completion. Participants must register for the Intensive Program in Wills and Estates bundle before February 28, 2024 in order become eligible for the 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
Take advantage of special pricing when registering for all programs in the 2024 Osgoode Intensive Programs in Wills and Estates 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
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 before the start of the program. 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)

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

Learn more about the 2024 Osgoode Intensive Program in Wills and Estates or register today at:

osgoodepd.ca/wills-estates