



Law Society of Saskatchewan Continuing Professional Development



Wills & Estates

Attend this seminar to hear keynote speakers John Poyser and Ralph Neuman present on 'Challenges to Wills & Gifts'. In this discussion you will learn how to attack wills and inter vivos gifts, how to defend them, and how solicitors can build in protection during the planning stage. John and Ralph will discuss a number of issues including:

- Attacking and defending a will or gift on the grounds of mental incapacity – an old standby, but tricky to apply successfully to gifts.
- Attacking and defending a will or gift on the grounds of “knowledge and approval” – an underutilized but very powerful tool.
- Attacking and defending gifts on the grounds of resulting trust under *Pecore v. Pecore* – a body of law that is coming of age.
- Attacking and defending a will or gift on the grounds of undue influence – a workable attack for gifts but difficult for wills.
- Practical tools to be used while the will or gift is being planned and executed – efforts to preclude future disputes on those grounds.

This discussion is designed to be of use to litigators and solicitors alike, the principles under discussion will extend to codicils, beneficiary designations, trust settlements, and other voluntary wealth transfer instruments.

Afternoon presentations begin with a comprehensive discussion on trusts, including considerations regarding the structure of trusts, designing trusts for beneficiaries with special needs, and tax implications of trusts. You will benefit from other topics including tips, traps and plain language examples of drafting estate planning documents, the risks of joint ownership and beneficiary designations, and techniques for drafting Health Care Directives that work.

Regina

Tuesday, April 17, 2012

9:00 am to 4:30 pm

Registration: 8:30 am

Regina Inn

Saskatoon

Wednesday, April 18, 2012

9:00 am to 4:30 pm

Registration: 8:30 am

Hilton Garden Inn

Keynote Speakers

John E.S. Poyser was called to the Manitoba bar in 1987 and is a partner with Inkster Christie Hughes, LLP in Winnipeg and the Wealth and Estate Law Group in Calgary. John limits his practice to estate planning and estate litigation support. He is former chair of the Wills and Estates Section of the CBA. John has coauthored seven editions of the textbook “Taxation of Trusts and Estates, A Practitioner’s Guide”, and is finalizing a new textbook for Carswell on the law of capacity.

Ralph Neuman was called to the Manitoba bar in 1982 and is a partner with Taylor McCaffrey LLP in Winnipeg. Ralph is an estate litigator and is co-chair of the Wills and Estates Subsection of the Manitoba Bar Association. He has presented for both the Manitoba Bar Association and for the Law Society of Manitoba.

Program

9:00 Welcome and Introduction
Law Society Staff

9:05 Challenges to Wills & Gifts
John E.S. Poyser
Inkster Christie Hughes, LLP (Winnipeg)
Ralph Neuman
Taylor McCaffrey LLP (Winnipeg)

10:15 Nutrition Break

10:30 Challenges to Wills & Gifts
John E.S. Poyser
Inkster Christie Hughes, LLP (Winnipeg)
Ralph Neuman
Taylor McCaffrey LLP (Winnipeg)

12:00 Lunch

1:00 Trusts:
Hard and Soft Considerations in Structuring Trusts
Gregory E. Murphy
Miller Thomson LLP (Regina)
Trusts for Beneficiaries with Special Needs
James H. Gillis
Wardell Gillis (Saskatoon)
Tax Aspects
Crystal L. Taylor
Miller Thomson LLP (Saskatoon)

2:30 Nutrition Break

2:45 Drafting Estate Planning Documents: Tips, Traps and Plain Language Examples
Brenda A. Walper-Bossence, Q.C.
Walper-Bossence Law Office Prof. Corp. (Moose Jaw)

3:15 The Perils of Joint Ownership and Beneficiary Designations
Yens M. Pedersen
Miller Thomson LLP (Regina)

4:00 Health Care Directives that Work: The Doctors’ and Hospital’s Perspective
Reginald A. Watson, Q.C.
Miller Thomson LLP (Regina)

4:30 Adjournment

General Information

In the unlikely event that the Law Society of Saskatchewan is forced to modify its program schedule, registrants will be notified. We reserve the right to change speakers and/or revise content if necessary.

Please attend the registration table at the seminar. Any course materials will be given to you then. If, for any reason, the Law Society of Saskatchewan is unable to accept your registration, you will be notified prior to the seminar.

Confirmation of registration is not provided, unless requested, as we prefer not to have to pass on the added expense to our registrants.

Cancellation Policy

Notification of cancellation must be in writing and received by 4:00 p.m. two (2) days prior to the Seminar resulting in a \$20.00 (plus GST) cancellation fee. Non-Compliance will result in forfeiture of the entire registration fee. Non-attendance does not constitute cancellation. Upon receipt of a written request, consideration will be given for non-attendance caused by illness or weather conditions.

Note: Invoices and receipts will not be provided unless requested. This Registration Form is your invoice. Your cancelled cheque is your receipt.

Registration Form

Wills & Estates (CPD-44)

Please register me in the following location:

☐ Regina - Tuesday, April 17, 2012
Regina Inn Hotel & Conference Centre
1975 Broad Street

☐ Saskatoon - Wednesday, April 18, 2012
Hilton Garden Inn
90 - 22nd Street East

Registration includes course materials, lunch and refreshments.

NAME

FIRM

ADDRESS

CITY

PROVINCE

POSTAL CODE

PHONE

FAX

EMAIL

Registration Fees

☐	Law Society Member (Active)	\$250.00
☐	Law Society Member (Inactive)	\$125.00
☐	Articling Student	\$125.00
☐	College of Law Student	\$100.00
☐	Legal Support Staff	\$250.00
☐	Non-Members	\$325.00

Subtotal

GST Registration No. 107604381

Plus GST (5%)

Total Amount

Make cheques payable to:

Law Society of Saskatchewan
Avord Tower, #1100 - 2002 Victoria Ave.
Regina, SK S4P 0R7
Ph: 306-569-8242 Fax: 306-352-2989

Visa/Mastercard Number: _____

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