The Estate Planning Conference Day
October 15, 2014
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October 15, 2014 | Vancouver Convention Centre, West Building

The Estate Planning Conference Day is a joint conference between the Society of Trust and Estate Practitioners (STEP) Vancouver and CPABC. It is designed to provide members with up-to-date, practical, and leading-edge estate-planning information. The objective of the conference is to focus on issues that are relevant and timely.

Our morning plenary session will cover the application of the division of property rules in the Family Law Act to tax and estate planning, while the afternoon plenary will highlight wills variation war stories from a panel of experts. Don’t miss out on this conference, and on the chance to meet and network with other members in the industry.

AGENDA

8:00 – 8:30AM     Registration and Continental Breakfast
8:30 – 8:45AM     Welcome and Introduction
8:45 – 10:15AM    Plenary
                  The Application of the Division of Property Rules in the Family Law Act to Tax and Estate Planning
10:15 – 10:35AM   Coffee Break
10:35AM – 12:00PM Concurrent Breakouts
                  - Blended Family Planning
                  - Life Insurance Planning Update
12:00 – 1:10PM    Lunch
1:10 – 2:00PM     Concurrent Breakouts
                  - To Be or Not to Be: An Executor
                  - Issues in Joint Partner/Alter Ego Trust Planning
2:00 – 2:55PM     Concurrent Breakouts
                  - New Testamentary Trust Rules
                  - 21-Year Issues for Trusts
2:55 – 3:15PM     Coffee Break
3:15 – 4:50PM     Plenary
                  Wills Variation War Stories

This conference qualifies for CPD credits for members of:
Financial Planning Standards Council
The Institute for Advanced Financial Education
The Law Society of BC
Chartered Professional Accountant of BC (all legacy bodies)

CONFERENCE FEE: $450 + GST
PD PASSPORT: Valid – 1 Passport Day

To register, please go to our website pd.bccpa.ca/conferences or email us at pdreg@bccpa.ca. We can also be reached by phone at 604 681.3264, or toll-free in BC at 1 800 663.2677.

Speakers

SHANE BROWN is a partner of Thorsteinssons LLP. Shane’s practice focuses on domestic and international tax planning for individuals, trusts, corporations and charities, including: estate planning, corporate reorganizations, division reorganizations, business restructuring, property acquisitions and offshore and cross-border structures. Shane also advises non-residents, and represents clients who have disputes with the CRA, and is a regular lecturer for the CPABC on various aspects of taxation law.

TIM BROWN advises owner-managed businesses on wealth preservation legal matters with practical, non-aggressive, creative and client-focused solutions. He particularly enjoys working in a team with Canadian and US accountants, financial advisors and lawyers to service clients with domestic and cross-border legal issues. Passionate about supporting his clients, Tim has developed a robust practice with many notable and loyal clients.

PAUL M. DAYKIN is a partner with Aaron Gordon Daykin Nordlinger LLP. Paul has an undergraduate degree from UBC and a law degree from the University of Toronto. He was called to the Bar in 1985. Currently, Paul specializes in finding tax-effective solutions to the settlement of cases involving complex corporate structures and trusts, and assisting tax and estate planners in structuring family-owned businesses.

FIONA HUNTER is a partner with Home Coupar, practicing primarily trust law. She has written extensively about trusts, including a book on trust drafting. She lectures, presents papers and chairs legal professional development courses and currently serves on five boards, including the British Columbia Law Institute, the University of Victoria Foundation and the Art Gallery of Victoria. Since 2008, Fiona has been recognized by her peers for inclusion in “The Best Lawyers in Canada” and as “Lawyer of the Year” for 2013 and 2014.

CHRIS IRELAND, CPA, CA, TEP, is the Senior Vice President of Planning Services for PPI Advisory. He has presented and written for the Canadian Tax Foundation and other organizations, and has been a lecturer and chair for the CPA Canada’s Advanced Tax Issues for the Owner-Manager and Wealth Preservation courses. Chris is a past President of the Vancouver Estate Planning Council, a past chair of STEP Vancouver, and is currently the treasurer of STEP Canada.

ROGER LEE is a partner at Davis LLP, and is a member of the firm’s litigation department, with an extensive estate litigation practice. Roger assists individuals with respect to their rights under the Wills Variation Act, as well as issues relating to the validity of wills. He also advises corporate and individual trustees, as well as personal representatives, of their legal obligations and duties on a regular basis, and also acts for beneficiaries who question the actions of the trustees of their particular trusts.

BRYCE MCGEE, CA is a principal of D+H Group LLP and practices in the area of tax. Bryce completed the CICA In-depth tax course in 2002 and the CICA Corporate Reorganization Course in 2004. Bryce has broad tax knowledge and experience, with an emphasis on tax planning for owner-managers and their businesses, estate and trust planning, post-mortem tax planning, scientific research and experimental development tax credit filings, and non-resident and cross border matters.

E. JANE MILTON, Q.C. is a senior litigator with a practice focused on estate and trust matters. Jane has appeared before all levels of the court system in B.C. and regularly advises clients in disputes relating to the validity of wills, the interpretation of trust documents and wills, variation claims, and the administration of estates and trusts. Jane is a frequent lecturer on estate and trust topics, and consistently ranked as one of Canada’s leading lawyers in the area of Wealth Preservation.

CHRISTINE MUickle is an associate at Legacy Tax + Trust Lawyers where she practices in the area of estate planning, trust and estate administration, and related tax matters, with a focus on cross border U.S.-Canada planning. Christine also advises U.S. citizens and green card holders with respect to U.S. expatriate tax rules and U.S. tax compliance issues.

ROSE SHAWLIE is a lawyer with the Richards Buell Bolton Wealth Preservation Group where her practice is primarily focused on assisting families and businesses with their planning, estate, and business needs. She is an author for the Continuing Legal Education BC Probate & Estate Administration Practice Manual and BC Estate Planning & Wealth Preservation Manual. She is also a course instructor and presenter for changes affecting wealth preservation.

GLENN STEPHENS is a Director of Planning Services for PPI Advisory. Glenn was called to the Ontario Bar in 1982 and spent two years with a major accounting firm before joining the insurance industry as a tax and estate planning consultant. In 1990, Glenn went into private practice where he became a partner with a law firm in Toronto, specializing in the areas of taxation, estate planning and corporate law. Glenn joined the PPI Financial Group in 2004. He has lectured and written extensively on the subjects of estate planning, taxation and life insurance.

DAVID G. THOMPSON is a partner with Thorsteinssons LLP, Tax Lawyers. He has practiced exclusively in taxation matters since 1985, and is a registered trust and estate practitioner certified by the Society of Trust and Estate Practitioners. He was a governor of the Canadian Tax Foundation. David is noted as a leading Canadian tax lawyer based on peer-review ratings in Lexpert and in Martindale-Hubbell. He is noted as a leading Canadian tax lawyer and a leading Canadian trust and estate lawyer based on peer-review ratings in The Best Lawyers in Canada.

WILL TODD is associate counsel with Davis LLP’s Vancouver office where, since 2008, he has chaired the Taxation – Wills, Estates and Trusts Practice Group. He provides tax and estate planning solutions for Canadian-resident U.S. citizens and their family members and Canadians holding or acquiring U.S. real property, among others with cross-border tax exposure. Before joining Davis, he practiced in Boston and Toronto. He is a member of the British Columbia and Ontario bars and is also admitted to practice law in New York and Massachusetts.

SADIE WETZEL is an associate in the Vancouver office of Davis LLP where she practices in the areas of Wills, Estates and Trusts. Sadie advises clients on their estate plan and regularly prepares wills, powers of attorney, representation agreements, advance directives and trusts. Sadie is a contributing author of Wills, Estates and Succession Act Transition Guide and Wills Precedents - An Annotated Guide. Sadie also advises clients involved in income tax disputes with the Canada Revenue Agency.

GEOFFREY W. WHITE is the principal of Geoffrey W. White Law Corporation. Within the Canadian Bar Association, he is the Past Chair of the National CBA Elder Law Section. He is Past President of the Wills & Trusts (Okanagan) Section, and a member of the Charity Law Section and Tax Law Section. Geoff is a co-editor of the “BC CLE Probate & Estate Administration Practice Manual” and helped to design the lawyer education program for BC’s new Wills, Estate and Succession Act. He is currently the Chair of the newly launched STEP Okanagan Valley Chapter.

The Application of the Division of Property Rules in the *Family Law Act* to Tax and Estate Planning
DAVID G. THOMPSON – Thorsteinssons LLP  |  PAUL M. DAYKIN – Aaron Gordon Daykin Nordlinger
The division of property rules in the *Family Law Act* fundamentally change a number of strategies applicable to tax and estate planning. The panel will discuss how these new rules apply to common tax and estate planning strategies including estate freezes, alter ego trusts, joint spousal and common-law partner trusts, discretionary trusts, testamentary trusts, gifts and loans. In addition the panel will discuss provisions that should be found in prenuptial agreements and cohabitation agreements and what the proposed amendment to paragraph 85(1)(f) of the *Family Law Act* actually does in respect of interests in discretionary trusts.

To Be or Not to Be: An Executor
CHRISTINE MUCKLE
This session discusses considerations to address in determining whether to accept an executor appointment, as well discussing risks, strategies for dealing with difficult co-executors and beneficiaries, and the steps and precautions that should be taken.

New Testamentary Trust Rules – Do Testamentary Trusts Still Make Sense?
TIM BROWN – Richards Buell Sutton LLP
ROSE SHAWLE – Richards Buell Sutton LLP
BRYCE MCGEE – D+H Group
This session addresses the new income tax rules pertaining to testamentary trusts, and examines whether testamentary trusts can still play a role in tax and estate planning.

Wills Variation War Stories
ROGER LEE – Davis LLP
JANE MILTON – Bull Housser
This panel of experienced practitioners will discuss a number of difficult wills variations issues they have dealt with, with thoughts on how they were resolved and how similar issues might be avoided in future cases.

To register, please go to our website at pd.bccpa.ca/conferences or email us at pdreg@bccpa.ca. We can also be reached by phone at 604 681.3264, toll-free in BC at 1 800 663.2677.