



Estate Planning for Blended Families

Family Estate Planning

Edmonton - May 10, 2016 | Calgary - May 17, 2016

Discuss the considerations and complications encountered when representing blended families. Examine various planning tools, including wills, enduring powers of attorney, personal directives, family agreements, trusts, and more.

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LOCATIONS & DATES

EDMONTON

May 10, 2016

Sutton Place Hotel
10235 101 Street NW

CALGARY

May 17, 2016

Glenmore Inn
& Convention Centre
2720 Glenmore Trail SE

9:00 AM - 4:30 PM

WHO SHOULD ATTEND

This program is targeted to practitioners with 5 or more years' experience in wills & estates who want to discuss frequently raised issues. Some segments may be low intermediate or basic; others may be high intermediate or advanced.

CHAIR

Karen A. Platten QC
McLennan Ross LLP
Edmonton, Alberta

FACULTY

Patricia L. Daunais QC
Daunais McKay Harms + Jones
Calgary, Alberta

Lois J. MacLean
de Villars Jones
Edmonton, Alberta

Dale Tumbach
TC Family Law Group
Edmonton, Alberta

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Estate Planning for Blended Families

LEARNING LEVEL | INTERMEDIATE

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Concerns Other Than Death | Karen A. Platten QC

Explore the unique concerns encountered when drafting enduring powers of attorney and personal directives in the blended family context. Discover ways to encourage the conversation and help clients find solutions.

Increasing Importance of Family Property Agreements | Lois J. MacLean

Consider the intersection of family law and estate law, and identify topics to discuss with clients who are considering entering into prenuptial, postnuptial, or cohabitation agreements involving their estates.

Competing Interests in Estate Planning | Patricia L. Daunais QC

Discuss strategies for handling difficult estate planning issues:

- Ensure estate plans honour support obligations to children and former spouses.
- Discover ways to leave a portion of an estate to a second spouse without disinheriting children from a previous relationship.
- Consider estate plan structures that reduce the risks of litigation or unequal distribution of wealth between family members.
- Evaluate estate tools used to ensure that all family members are reasonably cared for after death, including spousal trusts, children's trusts, and distribution (or testamentary) agreements.

Tough Love Succession Planning | Dale Tumbach

Review how the *Matrimonial Property Act* defines different types of property. Discuss the benefits and drawbacks of various succession plan elements: estate freezes, trusts, direct ownership, marriage agreements, and shareholder agreements.

WILLS & ESTATES



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ONLINE REGISTRATION

Immediately reserve your spot in this program. Register online!

- 1 Visit **LESA.org**
- 2 Enter the seminar code **31997** into the "Search our catalogue" field.
- 3 Add to your cart, complete your purchase, and mark your calendar!

MORE REGISTRATION OPTIONS

MAIL: 2610 - 10104 103 Avenue
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TOLL FREE IN AB: 1.800.282.3900

EMAIL: lesa@lesa.org

FAX: 780.425.0885

- EDMONTON** May 10, 2016
- CALGARY** May 17, 2016
- EARLY BIRD:** On or before April 5, 2016 \$355 + GST (Lunch is included.)
- REGULAR:** \$395 + GST (Lunch is included.)
- I am unable to attend this seminar, but please email me when the materials are available.

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