



Legal Education
Society of Alberta

Capacity and Influence



LEARN to assess capacity, recognize signs of influence or control, and determine what steps to take in the face of “red flags”.

Your lifelong partner in continuing legal excellence



Legal Education
Society of Alberta

Dates & Locations

EDMONTON

March 1, 2017

Chateau Louis Hotel
& Conference Centre
11727 Kingsway NW

CALGARY

March 8, 2017

Glenmore Inn
& Convention Centre
2720 Glenmore Trail SE

9:00 AM–4:30 PM

Who Should Attend

This program is targeted to lawyers who want to explore capacity and influence issues, best practices, strategies, and legislation. The topics covered may range in complexity from basic through advanced. This program may also be of interest to legal support staff involved in these matters.

CHAIR

John Poyser

The Wealth and Estate Law Group
Calgary, Alberta

FACULTY

Dr. Arlin Pachet, Ph.D, R. Psych, ABPP-CN

Pachet Assessment
and Rehabilitation Services
Calgary, Alberta

Stan Rule

Sabey Rule LLP
Kelowna, British Columbia

Shelley E. Waite, TEP

McLeod Law LLP
Calgary, Alberta

Helen R. Ward

Duncan Craig LLP
Edmonton, Alberta

Kimberly A. Whaley, CS, TEP, LLM

WEL Partners
Toronto, Ontario



*This course will be available
as a seminar on demand.*



Capacity and Influence

Honing skills and developing strategies for identifying and addressing issues related to capacity and undue influence is imperative for all legal practitioners. Thoroughly explore these issues with seasoned and highly experienced professionals – from the fundamentals to advanced issues, including developing strategies and best practices.

Undue Influence

Learn the law governing attacks based on suggestions of undue influence, and explore the differences between these kinds of attacks on testamentary wealth transfers versus attacks on *inter vivos* wealth transfers.

Understand how to screen for undue influence at the time documents are prepared and executed, and explore strategies for identifying and addressing undue influence prior to document execution for both testamentary and *inter vivos* wealth transfers.

Capacity

Review the law governing attacks based on suggestions of a lack of capacity. Determine how to screen for potential capacity problems at the outset of the relationship with the client, and develop strategies for ensuring that capacity is duly assessed prior to execution.

Identifying “Red Flags”

Recognize “red flags”, and devise techniques for assessing and addressing scenarios such as:

- transfer of a house when the house comprises the largest asset,
- last-minute wills favouring one child over other siblings,
- impoverishing charitable gifts, and
- strings of gifts by an individual of diminishing capacity.

Thank You

The success of our programs relies on the generous contributions of time, talent, and energy from all our volunteers. We greatly appreciate the work of our volunteers and their service to the profession.

EDMONTON | March 1, 2017
CALGARY | March 8, 2017

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REGISTER ONLINE

Register online to reserve your spot in this program.

- 1 Visit **LESA.org**.
- 2 Enter the seminar code **62030** 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
Edmonton, Alberta T5J 0H8

PHONE: 780.420.1987

TOLL FREE IN AB: 1.800.282.3900

EMAIL: lesa@lesa.org

FAX: 780.425.0885

- EDMONTON** March 1, 2017
- CALGARY** March 8, 2017
- EARLY BIRD:** On or before January 10, 2017 \$355 + GST (Lunch is included.)
- REGULAR:** \$395 + GST (Lunch is included.)
- I am unable to attend this seminar, but please email me when the seminar on demand (materials and video recordings) is available.

**CHECK
ALL THAT
APPLY**

LESA offers a range of Access Bursaries on select programs.

- I live more than 125km (one way) driving distance (25% reduction in fees)*
- I live more than 250km (one way) driving distance (50% reduction in fees)*
- I am a law student or student-at-law (25% reduction in fees)

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EXPIRY DATE: _____

CANCELLATIONS: Registration fees, less a \$50.00 administration fee, will be refunded for cancellations received in writing at least 3 full business days prior to the seminar. Refunds cannot be given after that date; however, seminar materials, if any, will be forwarded. Registrant substitution is permitted at all times. **GUARANTEE:** We take pride in offering high quality programs. If this program does not meet your expectations, please contact us about our money back guarantee. **RECORDING:** This program is being audio/video recorded and will be retained by LESA for the purpose of providing legal education.

Please make cheques payable to the Legal Education Society of Alberta

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