

MARK YOUR CALENDAR
November 2, 2018 (Calgary)



Legal Education
Society of Alberta

Advanced Estate Administration

Limited Enrolment.
Register online
at LESA.org.

Analyze unique, complex issues that senior practitioners

face in estate administration. Engage in discussions from both a practical and philosophical point of view, and contribute your expertise on best practices and effective strategies for managing estate administration matters.

Visit LESA.org for full program details and registration options.
Your lifelong partner in continuing legal excellence



Legal Education
Society of Alberta

NOV
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2018

CALGARY

Radisson Hotel & Conference
Centre Calgary Airport
6620 36 Street NE
9:00 AM-4:30 PM

CHAIR

Hon. Justice C. Jones | Court of Queen's Bench of Alberta | Calgary

FACULTY

Aaron Bickman TEP | McLeod Law LLP | Calgary

Sherrilynn J. Kelly | Parlee McLaws LLP | Calgary

Shel Laven | Laven and Company LLP | Calgary

Malcolm F. Pritchard TEP | Pritchard & Co. Law Firm LLP | Medicine Hat

Helen R. Ward TEP | Duncan Craig LLP | Edmonton

WHO SHOULD ATTEND

This program is designed for experienced practitioners with 10 or more years of practice exclusively or predominantly in wills, estates, and trusts.

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.

Visit LESA.org for full program details and registration options.

Advanced Estate Administration

Take part in a non-traditional, highly interactive program designed specifically as a discussion forum for experienced practitioners. Participate in an in-depth analysis and discussion of the practical and philosophical issues faced by senior-level practitioners.

Come prepared to share your approaches and best practices in relation to the topics below.

Validation, Revocation, and Rectification: Which is which?

PRESENTER: Sherrilynn J. Kelly

Analyze when, why, and how to use each.

RRSP and Insurance Beneficiary Designations:

Better in the will than the contract? | PRESENTER: Shel Laven

Take a practical look at when, why, and why not, with examples. Peek into how the court deals with beneficiary designations and review the implications of *Re Morrison Estate* and the *Judicature Act*.

Undue Influence | PRESENTER: Helen R. Ward TEP

Explore undue influence, including potential challenges to *inter vivos* and testamentary dispositions.

Implications of Reproductive Technology | PRESENTER: Helen R. Ward TEP

Review the implications for estate planning and personal representatives.

Business Estate Planning | PRESENTER: Malcolm F. Pritchard TEP

Delve into business estate planning, including new federal tax proposals for business owners.

Surviving the Game | PRESENTER: Aaron Bickman TEP

Discuss the Calgary experience with rush applications and limited grants under the Surrogate Court's Limited Grant Protocol. Review what qualifies as a "rush".

Participants must come prepared to contribute to discussion at an **advanced level**. While participants will receive some materials on the program day, Aaron Bickman TEP (McLeod Law LLP) will take comprehensive notes on program content which will be provided to participants shortly after the program's conclusion.



Legal Education Society of Alberta

Advanced Estate Administration

REGISTER ONLINE

Limited enrolment. Reserve your spot in this program.

01 | Visit LESA.org.

02 | Enter code **32131** into the search field.

03 | 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 | FAX: 780.425.0885



- CALGARY** November 2, 2018
- EARLY BIRD:** On or before September 11, 2018 \$395 + GST (Lunch is included.)
- REGULAR:** \$445 + GST (Lunch is included.)

LESA offers a range of Access Bursaries on select programs. A limited number of Access Bursaries are available, including bursaries on the basis of financial need. Please contact LESA for details.

- I am a law student or student-at-law (25% reduction in fees)

NAME/NAME FOR TAG: _____

FIRM: _____

EMAIL/PHONE NUMBER: _____

DIETARY RESTRICTIONS/SPECIAL NEEDS: _____

VISA MASTERCARD CHEQUE TOTAL ENCLOSED: _____

CARD NUMBER: _____ CVV: _____ EXPIRY DATE: _____

Please do not send credit card information via email. Cheques are payable to the **Legal Education Society of Alberta**.

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.

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 program. Refunds cannot be given after that date; however, program materials, if any, will be forwarded. Registrant substitution is permitted at all times.

RECORDING: This program may be audio/video recorded and retained by LESA for the purpose of providing legal education.

QUESTIONS? Contact us at info@lesa.org.