

The Annotated Alter Ego Trust and Discretionary Trust 2019

CO-CHAIRS: **M. Elena Hoffstein**, *Fasken Martineau DuMoulin LLP*

Joan Jung, *Minden Gross LLP*

February 21, 2019

1:00 p.m. – 4:00 p.m.

Total CPD Hours = 2h 15m Substantive + 45m Professionalism 

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON**

SKU CLE19-0020401



Agenda

1:00 p.m. – 1:05 p.m.

Welcome and Opening Remarks



M. Elena Hoffstein, *Fasken Martineau DuMoulin LLP*

Joan Jung, *Minden Gross LLP*

1:05 p.m. – 1:35 p.m.

Overview of Tax Issues Related to Trusts (5 minutes )

Joan Jung, *Minden Gross LLP*

1:35 p.m. – 1:40 p.m.	Questions and Answers
1:40 p.m. – 2:25 p.m.	Discussion of Annotated Discretionary Trust Sheila Crummey, C.S., TEP, <i>McCarthy Tétrault LLP</i> M. Elena Hoffstein, <i>Fasken Martineau DuMoulin LLP</i>
2:25 p.m. – 2:30 p.m.	Questions and Answers
2:30 p.m. – 2:50 p.m.	Coffee and Networking Break
2:50 p.m. – 3:15 p.m.	Discussion of the Annotated Alter Ego Trust David Stevens, <i>Gowling WLG (Canada) LLP</i>
3:15 p.m. – 3:20 p.m.	Questions and Answers
3:20 p.m. – 3:55 p.m.	Panel Discussion Including Appropriate Use of Precedents, Top 10 Errors Made in Setting Up Trusts, Client Retainer, Reporting Letters, Etc. (35 minutes ) Sheila Crummey, C.S., TEP, <i>McCarthy Tétrault LLP</i> M. Elena Hoffstein, <i>Fasken Martineau DuMoulin LLP</i> Joan Jung, <i>Minden Gross LLP</i> David Stevens, <i>Gowling WLG (Canada) LLP</i>
3:55 p.m. – 4:00 p.m.	Question and Answer Session (5 minutes )
4:00 p.m.	Program Ends