

January 12, 2024

The Annotated Will 2024



Co-Chairs: **Ian Lebane, C.S., TEP**, Vice President,
Tax and Estate Planner, *TD Wealth*

Kavina Nagrani, C.S., TEP
NIKA LAW LLP

Presenters: **Laura Geddes, TEP**, *Siskinds LLP*

Darren Lund, TEP
Fasken Martineau DuMoulin LLP

January 24, 2024

9:00 a.m. to 12:00 p.m.

Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism P

Webcast Only
Law Society of Ontario

SKU CLE24-00104

9:00 a.m. – 9:05 a.m.

Welcome

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

9:05 a.m. – 9:30 a.m.

Top 10 Drafting Errors

Laura Geddes, TEP, *Siskinds LLP*

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

9:30 a.m. – 9:35 a.m.

Question and Answer Period

9:35 a.m. – 9:50 a.m.

Post-Signing Practices
(15 m )

Laura Geddes, TEP, *Siskinds LLP*

9:50 a.m. – 9:55 a.m.

Question and Answer Period

9:55 a.m. – 10:10 a.m.

Beneficiary Designated Assets

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

10:10 a.m. – 10:15 a.m.

Question and Answer Period

10:15 a.m. – 10:35 a.m.

Break

10:35 a.m. – 10:50 a.m.

Multiple Wills

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

10:50 a.m. – 10:55 a.m.	Question and Answer Period
10:55 a.m. – 11:10 a.m.	The “Boiler Plate” Risks (15 m P)
	Laura Geddes, TEP, <i>Siskinds LLP</i>
	Ian Lebane, C.S., TEP, Vice President, Tax and Estate Planner, <i>TD Wealth</i>
	Darren Lund, TEP, <i>Fasken Martineau DuMoulin LLP</i>
	Kavina Nagrani, C.S., TEP, <i>NIKA LAW LLP</i>
11:10 a.m. – 11:15 a.m.	Question and Answer Period
11:15 a.m. – 11:40 a.m.	Testamentary Trusts
	Laura Geddes, TEP, <i>Siskinds LLP</i>
	Ian Lebane, C.S., TEP, Vice President, Tax and Estate Planner, <i>TD Wealth</i>
11:40 a.m. – 11:45 a.m.	Question and Answer Period
11:45 a.m. – 11:55 a.m.	Disclaimers and Acceleration of Interests
	Kavina Nagrani, C.S., TEP, <i>NIKA LAW LLP</i>
11:55 a.m. – 12:00 p.m.	Question and Answer Period
12:00 p.m.	Program Ends