



## THE ANNOTATED WILL 2018

Chairs: **Susannah Roth, TEP**  
*O'Sullivan Estate Lawyers*

**Mary-Alice Thompson, C.S., TEP**  
*Cunningham, Swan, Carty, Little & Bonham LLP*

Presenters: **Darren Lund**  
*Fasken Martineau LLP*

**Jane Martin**  
*Dickson Appell LLP*



**January 15, 2018**

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

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


**Law Society of Ontario**  
**130 Queen Street West**  
**Toronto, ON**





**SKU CLE18-00103**

### **Agenda**

**9:00 a.m. – 9:05 a.m.      Welcome and Opening Remarks**

**9:05 a.m. – 9:15 a.m.      Drafting Principles (10 minutes) **

**9:15 a.m. – 9:30 a.m.      Intake and Instruction Forms (15 minutes) **

<b>9:30 a.m. – 9:45 a.m.</b>	<b>Beneficiary Designations</b>
<b>9:45 a.m. – 9:50 a.m.</b>	<b>Question and Answer Period</b>
<b>9:50 a.m. – 10:00 a.m.</b>	<b>CLRA Revisions and Posthumous Conception</b>
<b>10:00 a.m. – 10:15 a.m.</b>	<b>Personal Effects (5 minutes) </b>
<b>10:15 a.m. – 10:25 a.m.</b>	<b>Question and Answer Period</b>
<b>10:25 a.m. – 10:45 a.m.</b>	<b>Coffee and Networking Break</b>
<b>10:45 a.m. – 11:00 a.m.</b>	<b>Survivorship, Lapse and Anti-Lapse (5 minutes) </b>
<b>11:00 a.m. – 11:15 a.m.</b>	<b>Cottage Clauses (5 minutes) </b>
<b>11:15 a.m. – 11:20 a.m.</b>	<b>Question and Answer Period</b>
<b>11:20 a.m. – 11:35 a.m.</b>	<b>Hotchpot Clauses (5 minutes) </b>
<b>11:35 a.m. – 11:50 a.m.</b>	<b>Henson Trusts</b>
<b>11:50 a.m. – 12:00 p.m.</b>	<b>Question and Answer Period</b>
<b>12:00 p.m.</b>	<b>Program Ends</b>