

The Annotated Will 2023



Co-Chairs: **Darren Lund, TEP**
Miller Thomson LLP

Kavina Nagrani C.S., TEP
NIKA LAW LLP

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

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

January 26, 2023

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

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

Law Society of Ontario

SKU CLE23-0010300

9:00 a.m. – 9:05 a.m.

Welcome


Darren Lund, TEP, *Miller Thomson LLP*

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

9:05 a.m. – 9:20 a.m.

Anatomy of a Will / Drafting Top Tips

Laura Geddes, TEP, *Siskinds LLP*

9:20 a.m. – 9:25 a.m.	Question and Answer Period
9:25 a.m. – 9:45 a.m.	Panel Discussion: Estate Planning Intake Issues & Tips (20 m )
	Laura Geddes, TEP, <i>Siskinds LLP</i>
	Darren Lund, TEP, <i>Miller Thomson LLP</i>
	Kavina Nagrani C.S., TEP, <i>NIKA LAW LLP</i>
	Ian Lebane, C.S., LL.M., TEP, Vice President, Tax and Estate Planner, <i>TD Wealth</i>
9:45 a.m. – 9:50 a.m.	Question and Answer Period
9:50 a.m. – 10:10 a.m.	Beneficiary Designations in Wills
	Darren Lund, TEP, <i>Miller Thomson LLP</i>
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. – 10:45 a.m.	The Young but Wealthy - Millennial & Gen Z Wills
	Kavina Nagrani C.S., TEP, <i>NIKA LAW LLP</i>
10:45 a.m. – 10:50 a.m.	Question and Answer Period
10:50 a.m. – 11:10 a.m.	Estate Planning for the Farm/Other Business Owner Clients
	Kavina Nagrani C.S., TEP, <i>NIKA LAW LLP</i>

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

11:10 a.m. – 11:15 a.m. Question and Answer Period

11:15 a.m. – 11:35 a.m. All About Trustees (10 m )

Laura Geddes, TEP, *Siskinds LLP*

11:35 a.m. – 11:40 a.m. Question and Answer Period

11:40 a.m. – 11:55 a.m. To Hotchpot or Not? Equalization Provisions Re-Considered

Darren Lund, TEP, *Miller Thomson LLP*

11:55 a.m. – 12:00 p.m. Question and Answer Period

12:00 p.m. Program Ends