

January 20, 2022

The Annotated Alter Ego Trust and Discretionary Trust 2022



CO-CHAIRS: **M. Elena Hoffstein**, *Miller Thomson LLP*

Joan Jung, *Minden Gross LLP*

January 26, 2022

1:00 p.m. to 4:00 p.m.

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

Law Society of Ontario

SKU CLE22-00106

Agenda

1:00 p.m. – 1:05 p.m.

Welcome

M. Elena Hoffstein, Miller Thomson LLP

Joan Jung, Minden Gross LLP

1:05 p.m. – 1:35 p.m.

Overview of Tax Issues Related to Trusts (5 m ^P)

Colin Smith, Thorsteinssons LLP

- 1:35 p.m. – 1:40 p.m.** **Question and Answer Session**
- 1:40 p.m. – 2:25 p.m.** **Discussion of Annotated Discretionary Trust**
M. Elena Hoffstein, Miller Thomson LLP
Joan Jung, Minden Gross LLP
- 2:25 p.m. – 2:30 p.m.** **Question and Answer Session**
- 2:30 p.m. – 2:50 p.m.** **Break**
- 2:50 p.m. – 3:15 p.m.** **Discussion of the Annotated Alter Ego Trust**
David Stevens, Gowling WLG (Canada) LLP
- 3:15 p.m. – 3:20 p.m.** **Question and Answer Session**
- 3:20 p.m. – 3:55 p.m.** **Panel Discussion: Using Precedents, Errors Setting Up Trusts, Client Retainers, Reporting Letters, Etc. (35 m )**
M. Elena Hoffstein, Miller Thomson LLP
Joan Jung, Minden Gross LLP
Colin Smith, Thorsteinssons LLP
David Stevens, Gowling WLG (Canada) LLP
- 3:55 p.m. – 4:00 p.m.** **Question and Answer Session (5 m )**
- 4:00 p.m.** **Program Ends**