



Legal information and  
support designed for you

# Practice Gems: Administration of Estates 2011: Avoiding the Pitfalls

Chaired by: **Kimberly A. Whaley**  
*Whaley Estate Litigation*

## TWO DATES TO CHOOSE FROM:

**Date: SEPTEMBER 14, 2011**

**Time:** 1:00 p.m. – 4:00 p.m.

**Location:** Osgoode Hall  
130 Queen Street West, Toronto  
or view by live webcast

**Date: OCTOBER 31, 2011**

**Time:** 1:00 p.m. – 4:00 p.m.

**Location:** Osgoode Hall  
130 Queen Street West, Toronto  
or view by live webcast

This program will help you understand the complexities lawyers and executors face when administering an estate. Learn administration guidelines and best practices for estate trustees, how to avoid administration minefields, and things to consider in administering a bankrupt estate. Join us with our speakers as they share their valuable experience and to help you avoid troublesome pitfalls in estate administration.

### You will learn about

- Discharging fiduciary obligations — delineating the solicitor's role when advising the estate trustee in an administration
- Recognizing and avoiding common pitfalls
- Dealing with issues of abatement
- Administering the bankrupt estate and exploring the differences between handling an insolvent estate versus a bankrupt estate
- Understanding your obligations when litigation arises, including claims relating to Will Challenges, *Family Law Act* elections and other claims against the Estate
- Knowing when to advise your estate trustee client to retain litigation counsel
- Determining when tax planning is necessary in an administration
- Filing an interpretation application — when is it appropriate? Procedural Implications

### Speakers include:

**Clare E. Burns, WeirFoulds LLP** • **Jasmine Sweatman, Sweatman Law Firm** • **Robert Klotz, Klotz Associates** • **Craig Vander Zee, Hull & Hull LLP** • **Archie Rabinowitz, Fraser Milner Casgrain LLP** • **Gwen Benjamin, Wilson Vukelich LLP** • **Brian Wilson, Wilson Vukelich LLP**

**Spend the day learning and save 20%** when you register for this program and the morning presentation of "**Practice Gems: Probate Essentials 2011**". See website for pricing and details.

**PROGRAM FEE: \$210** plus taxes  
includes PDF materials and 30 day  
access to the archived webcast



Total CPD = 2 Substantive Hours  
+ 1 Professionalism Hour

New Members = 3 Hours

**Register at <http://ecom.lsuc.on.ca/cpd>**