



THE CANADIAN  
BAR ASSOCIATION  
Prince Edward Island Branch

Law Society of PEI & CBA PEI Branch

# Professional Development Day & Annual General Meetings

## Information and Registration Package

June 23<sup>rd</sup> & 24<sup>th</sup>, 2017

Stanley Bridge Country Resort

Stanley Bridge, PEI

### With Thanks...

**2017 Annual Meeting Committee:** Dave Canvin, Charity Hogan, Cynthia Taylor, Jeff MacDonald, Matt Walters, Jason Morais, Nathan Beck, Mitch O'Shea, Jane Smith(CBA), Susan Robinson(Law Society)

**Joint CBA PEI Branch & Law Society Continuing Legal Education Committee:** Jennifer MacPherson, Robin Aitken, Kim McNeill Q.C., Jeff MacDonald, Paul Kiley, Kerri Seward Carpenter, Susan Connolly, Constance Robinson, Michael Zimmerman, Pamela Large-Moran, Lisa MacKay (Law Society), Jane Smith (CBA)

# SCHEDULE of EVENTS

Please indicate your attendance on the registration form attached.

## Friday, June 23<sup>rd</sup> , 2017

### **8:30am Registration for Professional Development Day**

Registration and check-in, Professional Development Day. A light breakfast will be served.

### **9:00am – 11:50am Professional Development Day**

Programing presented by the CBA PEI / Law Society Joint Continuing Education Committee. Please see the following page for detailed information on the session offerings.

### **12:00noon CBA PEI Branch Annual General Meeting & Luncheon**

Canadian Bar Association members and non-members are invited to attend a **complimentary buffet luncheon** hosted by the Canadian Bar Association, PEI Branch. Guest speaker will be Rene Basque, CBA National President.

### **1:00pm Golf Options**

Afternoon golf is being offered at two courses: Andersons Creek for 18 holes with tee times starting at 1:00pm and Red Sands for 9 holes with tee times starting at 1:30pm. Whether you are an individual or part of a foursome **please contact Dave Canvin**, Carr Stevenson & MacKay, [dcanvin@csmlaw.com](mailto:dcanvin@csmlaw.com) **by Friday June 9<sup>th</sup> to reserve your tee off time.**

### **Afternoon Social at Carr's Oyster Bar**

For those who don't golf there will be a social gathering at Carr's Oyster Bar, Stanley Bridge.

### **6:30pm Presidents' Reception**

Socialize with your colleagues over a drink and hors d'oeuvres while enjoying the beautiful vistas the Stanley River has to offer.

### **7:15pm Presidents' Dinner**

Join hosts Law Society President Bobbi-Jo Dow Baker and CBA Branch President Kerri Carpenter for the evening, featuring the presentation of the Law Society of PEI Distinguished Community Service Award.

### **9:30pm Late Night Party**

Don't want the night to end? Visit the Hospitality Suite or if it's a nice night join the circle around the bonfire for more socializing.

## Saturday, June 24<sup>th</sup> , 2017

### **9:30am – 11:30am Law Society of Prince Edward Island Annual Meeting**

The Law Society will host the annual business meeting. A light Breakfast will be served.

# Professional Development Day, Friday, June 23<sup>th</sup>, 2017

8:30 –  
9:00am

## Registration for Professional Development Day

Coffee, Tea, Muffins & Fruit will be served.

9:00 –  
9:50am

## Decisional Capacity and Undue Influence

- How are Courts applying the Presumptions in Capacity and Undue Influence Disputes
- Legal Criteria & Intersection of Medical Considerations in determining/assessing Capacity
- Interplay of Capacity & Undue Influence
- Independent Legal Advice where Capacity & Undue Influence are at Play

Kimberly A. Whaley, CS, TEP, LLM

Break

10:00 –  
10:50am

## Solicitor's Negligence: Estates Do's and Don'ts

- Will drafting;
- POA drafting;
- Documenting Intention to Gift/Joint Transfers

**Panel Discussion:** The Honourable Justice Jacqueline R. Matheson, Kimberly A. Whaley, CS, TEP, LLM, Moderated by Lionel J. Tupman.

Break

11:00 –  
11:50am

## Attacking and Defending Gifts

- Inter Vivos Gifts: Effective Planning Tool or Risky Venture?
- Validity of Gifts
- Setting Aside Gifts
- Evidence of Intention
- Equitable Remedies for Improvident Transfers

Kimberly A. Whaley, CS, TEP, LLM

This Continuing Legal Education session provides 2.5 CPD hours.

# REGISTRATION FORM

Due June 16<sup>th</sup>, 2017

**Annual Meetings June 23<sup>rd</sup> & 24<sup>th</sup>, 2017**

Stanley Bridge Country Resort

## MEMBER INFORMATION

Name (for name tag): \_\_\_\_\_

Firm: \_\_\_\_\_

CBA #:

Name of Guest: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Dietary Restrictions and Other Special Needs: \_\_\_\_\_

PLEASE SELECT YOUR ACTIVITIES by marking an 'X' in the appropriate boxes below.

		<i>Friday, June 23<sup>rd</sup></i>	
9:00 am	<b>Continuing Legal Education</b>	<input type="checkbox"/>	<input type="checkbox"/>
12:00noon	<b>CBA – PEI Annual Meeting &amp; Luncheon</b> <i>(Complimentary Lunch for Members &amp; Non-members)</i>	<input type="checkbox"/>	<input type="checkbox"/>
1:00pm	<b>Golf</b>	<input type="checkbox"/>	<input type="checkbox"/>
6:30pm	<b>Presidents' Reception &amp; Dinner, please select meal choice(s) below.</b>		
	Prime Rib	<input type="checkbox"/>	<input type="checkbox"/>
	Lobster	<input type="checkbox"/>	<input type="checkbox"/>
	Vegetarian	<input type="checkbox"/>	<input type="checkbox"/>
		<i>Saturday, June 24<sup>th</sup></i>	
9:30am	<b>Law Society Annual Meeting</b>	<input type="checkbox"/>	<input type="checkbox"/>

## REGISTRATION FEES

	Fee	HST	Total	Amount Due
<b>Continuing Legal Education</b>				
CBA Member	\$175.00	\$26.25	\$201.25	_____
CBA Member (<5 yrs.)	\$125.00	\$18.75	\$143.75	_____
Non CBA Member	\$200.00	\$30.00	\$230.00	_____
Non CBA Member (<5 yrs.)	\$150.00	\$22.50	\$172.50	_____
<b>Presidents' Dinner</b>				
# Tickets <input type="text" value=""/> X	\$60.00	\$9.00	\$69.00	_____

**Total Registration Fees Due \$** \_\_\_\_\_

Register **before June 16, 2017** by completing the form and submitting it to the Law Society electronically by emailing a copy to [lawsociety@lspei.pe.ca](mailto:lawsociety@lspei.pe.ca) or by faxing a copy to 902-368-7557.