



## Continuing Legal Education

# Getting it Right During a “Taxing” Time: Dos and Don’ts Around Estates, Trusts and Taxation

Tuesday, April 21, 2020

Rodd Charlottetown Hotel, 75 Kent St., Charlottetown

Presented by the CBA/Law Society of PEI CLE Committee  
*Event chaired by Kerri Seward Carpenter & Isabelle Keeler*

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The Joint Continuing Legal Education Committee is pleased to be offering a morning of professional development focused on trust and estate law. Attendees will benefit from a review of common trust structures along with their respective uses and limitations in estate planning; a look at trusts and estate planning from a tax perspective; and finally, a panel review of recent case law developments in the area of trusts and estates.

### Schedule

- 8:00AM Registration & Hot Buffet Breakfast
- 8:30AM [Trusts 101](#)- presented by [Richard Niedermayer](#), TEP, Stewart McKelvey, Halifax. This presentation will provide a general overview of trust law and will explore specific topics, such as the various types of trust structures, the advantages and disadvantages of each trust structure, and a high-level review of the taxation rules surrounding trusts.
- 10:00AM BREAK
- 10:15AM [Tax Fundamentals for the Estate Practitioner](#) presented by [Jennifer Dunn](#), BDO, Charlottetown. This presentation provides an overview of the basic tax rules that are integral in the area of trust and estate law. In particular, there will be discussion surrounding the common areas in which tax implications can arise in trust and estate law and recommended best practices for drafting trust and estate documents from a Chartered Professional Accountant’s perspective.
- 11:15AM [Practitioners’ Update: Exploring Recent Trust & Estate Law Cases](#) -  
– Presented by [Robin K. Aitken](#), TEP, Cox & Palmer, Charlottetown, [Richard Niedermayer](#), TEP, Stewart McKelvey, Halifax, and [Barbara E. Smith](#), Q.C., Stewart McKelvey, Charlottetown. The presenters will review recent trust and estate case-law across the country and highlight the lessons that can be taken from them and applied to your practice.

The CLE is expected to wrap up about 12:30PM and provides 3.5 hours CPD

# CLE REGISTRATION FORM

## Trusts

TUESDAY, APRIL 21<sup>ST</sup>, 2020

PROVIDES 3.5 HOURS CPD CREDIT

### MEMBER INFORMATION

Name (for name tag):

Firm:

CBA #:

Name of Guest:

Telephone:

Email:

Dietary Restrictions and Other Special Needs:

### REGISTRATION FEES

Continuing Legal Education	Fee	HST	Total	Amount Due
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	

Register **before April 10th, 2020** by completing this 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.

**CLE Cancellation Policy:** Registrants who cancel within two weeks but more than twenty-four (24) hours before the CLE will receive a fifty per cent (50%) refund and will be entitled to receive a copy of any CLE materials. Registrants who cancel within 24 hours of the CLE or who do not show will not be refunded any portion of the registration fee, but the registrant will be entitled to receive a copy of the CLE materials.