

AGENDA

Session 1 – Basics of Estate Planning

1. Overview of Estate Planning
 - a. Key Components
 - i. Wills
 - ii. Powers of Attorney
 - iii. Trusts
 - iv. Advance Directives
 - b. Need for a Will
 - i. What happens if you die without a Will?
 - ii. Benefits of having a Will
2. Overview of Will Planning
 - a. 3-2-3 Model
 - b. Options for Surviving Spouse
 - c. Options for Descendants
3. Appointments
 - a. Executors
 - b. Trustees
 - c. Guardians
4. Other ways of giving away assets on death
 - a. Joint ownership
 - b. Beneficiary Designations
 - c. Inter Vivos Trusts

Session 2 – Advanced Estate Planning

1. Probate Avoidance
 - a. What is probate?
 - b. Joint Ownership
 - c. Beneficiary Designations

- d. Multiple Wills
 - e. Using Bare Trustees on title
2. US and Foreign Issues
 - a. US Estate Tax issues
 - b. Foreign Executors/Trustees
 - c. Foreign Assets
 - d. Foreign Beneficiaries
 3. Planning for Blended Families
 - a. Life Insurance
 - b. Spousal Trusts and Dual Trusts
 - c. Domestic Contracts
 - d. Mutual Wills
 4. Planning for Special Assets
 - a. Cottage
 - b. Corporate Shares
 - c. Pets
 - d. Loans

Session 3 – Life Planning

1. Overview of Capacity Issues
2. Powers of Attorney for Property
3. Powers of Attorney for Personal Care
4. Guardianships
5. Organ Donation
6. Medical Assistance in Dying