



LAW SOCIETY
Newfoundland & Labrador

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FREE CLE WEBCAST

Tax-Effective Will Planning and Mistakes to Avoid

Date: Tuesday, December 8, 2020

Time: 9:30 am – 12:00 pm

Seminar Overview:

This session will discuss effective Will planning from an income tax perspective and some of the more common traps that can be avoided. When drafting Wills, tax minimization is often not front of mind, however, proper planning can help avoid potential conflict with beneficiaries if the CRA's share of the overall Estate is not minimized.

Topics will include:

- Minimizing tax on death while maximizing the value of the Estate;
- Ensuring taxation of assets is considered when planning for specific bequests vs. residual interests;
- Aligning the Will with the overall Estate plan;
- Testamentary Trusts and Graduated Rate Estates; and
- Charitable giving through a Will to ensure the associated tax credit is not wasted.

Seminar Presenters:

[Beth Porter, CPA, CA, CFP](#)

Partner, Noseworthy Chapman

[Denise Coombs, CPA, CA, CFP](#)

Partner, Noseworthy Chapman

Registration Fee: Free

PLEASE NOTE: THE REGISTRATION PROCESS IS ONLINE ONLY. TO REGISTER FOR THIS SEMINAR, PLEASE CLICK THE FOLLOWING LINK:

https://zoom.us/webinar/register/WN_d4kwX8xoTMqDGza9BjDTig

CLE Credit: 2.5 hours