Understand the power of trusts!

Using Trusts in Estate Planning

with Richard Niedermayer

Wednesday, October 30, 2024

Live webinar with chat

includes 60 day replay*

9:00 am – 10:30 am (Pacific)
10:00 am – 11:30 am (Mountain)
11:00 am – 12:30 pm (Central)
12:00 pm – 1:30 pm (Eastern)
1:00 pm – 2:30 pm (Atlantic)
1:30 pm – 3:00 pm (Newfoundland)

**This program features real-time audio and video of the presenter with synchronized presentation slides, and a chat feature that allows for live Q & A. SK attendees please verify whether you align with Central (MB) or Mountain (AB) time based on season and location.*

WHO SHOULD ATTEND

This program is designed for all lawyers who want to improve their understanding of the purpose and functionality of trusts in estate planning.

ABOUT THE PROGRAM

Are you new to trusts or looking to refresh your understanding of how trusts are used in practice? Join noted trusts and estates practitioner Richard Niedermayer for this practical, introductory-level dive into the what, why, when and how of trusts. Richard will translate complex trust concepts into simple, understandable terms, making it easier for you to see how trusts can help support your clients' estate planning goals. You will:

- get to know the key types of trusts and their role in estate planning
- learn how to use trusts to meet diverse client needs, including protecting family assets and managing estate taxes
- understand the pros and cons of different trusts to solve common estate planning challenges
- benefit from expert guidance about how to successfully implement trusts as part of your clients' overall estate plans

Don't miss this opportunity to enhance your understanding of trust fundamentals and learn how trusts can help you create a customized estate plan that reflects each client's personal circumstances. Reserve your spot now and take the first step towards becoming more proficient in this crucial area of law.

SCHEDULE (Eastern)

12:00 pm - 1:30 pm

Welcome & Introduction
What is a Trust?
Taxation of Trusts
Trusts for Probate Planning
Inter Vivos Trusts
Alter Ego & Joint Partner Trusts
Testamentary Trusts
Bare Trusts
Client Checklist
Conclusion
Program Wrap-up & Evaluation

PRAISE FOR PAST PROGRAMS

"Very practical presentation that dealt with matters that arise constantly in my practice."

"Good practical info. I do a lot of this work and found it very useful."

"Excellent coverage of the topic. Right on point."

"Enjoyed the practical approach. One of the best CPD programs I have ever experienced."

"A dream presenter. Knowledgeable but very down to earth. Answers questions we deal with every day."

"Excellent. I do a lot of work in this field, and I learned several new things."

"Very impressed. Excellent value."

SK: *This program qualifies for 1.5 CPD hours under the Law Society of SK CPD Policy.*
BC: *This program has been approved for 1.5 CPD hours.*
ON: *This program contains 1.5 Substantive hours.*
Lawyers in other mandatory CPD jurisdictions may count their attendance towards their CPD requirement/plan.

Seminar Partners is an Accredited Provider of Professionalism Content by the Law Society of Ontario and a pre-approved CPD Provider of the Law Society of British Columbia.

MEET YOUR PRESENTER

Richard Niedermayer, KC, TEP is a partner in the Halifax office of Stewart McKelvey and a leading Canadian practitioner in trusts, tax and corporate law. He works primarily with individuals and owner-managed and family businesses on a range of estates, trusts, tax, and corporate matters.

Richard is a Past Chair of the CBA's Nova Scotia and National Wills, Estates and Trusts Sections, a Past Chair of the Atlantic Canada Branch of the Society of Trust and Estate Practitioners (STEP) and currently Deputy Chair of STEP Canada. He is also a member of the Canadian Tax Foundation. Richard is listed by Best Lawyers for Trusts and Estates and Corporate Law, by Lexpert for Estate and Personal Tax Planning/Estate Litigation, and by Who's Who Legal Canada for Private Client. He holds a BV Distinguished peer reviewed rating from Martindale Hubbell and the TEP designation from STEP. In 2021, he received a STEP Founder's Award. Richard is a frequent speaker and writer on trusts, tax and corporate matters.

√ Yes, I want to attend Using Trusts in Estate Planning, *with Richard Niedermayer*

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* Materials will be distributed electronically in advance. Live webinars feature real-time audio and video of the presenter with synchronized presentation slides, and a chat feature that allows for live questions and verbal responses by the presenter. The recording of the webinar is available for 60 days.

REGISTRATION FEE:

□ **On or before October 11, 2024: $140.00 + $18.20 (13%) HST* = $158.20** ***- Save $25.00!***

□ After October 11, 2024: $165.00 + $21.45 (13%) HST* = $186.45

**With ON HST. Please adjust tax for attendee's province as follows: 5% in AB, BC, MB, NWT, NU, SK, YK. 13% in ON. 15% in NS, NB, PEI & NL.*

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