ESSENTIAL TOOLS FOR DISABILITY PLANNING AND PRACTICE

Co-Chaired by

Shane Onufrechuk
KPMG LLP

Mary Hamilton
DLA Piper (Canada) LLP

April 12th, 2016 • UBC Robson Square • Vancouver, BC

Live Webinar also available!
Mary Hamilton, Associate Counsel, DLA Piper (Canada) LLP, Vancouver, BC. Mary has 25 years of experience in matters relating to wills, trusts and estate administration, and leads her firm’s Wills, Estates and Trusts group. She has held senior positions with various wills, estates and trusts groups in Vancouver and was named Vancouver Trusts and Estates Lawyer of the Year 2011 by Best Lawyers. Mary advises clients about their estates and also regularly prepares wills, powers of attorney, representation agreements and other types of documents to ensure her clients wishes are achieved after death.

Shane Onufrechuk, Partner, Tax, KPMG LLP, Vancouver, BC. Shane’s focus at KPMG LLP is in the area of Canadian corporate tax with an emphasis on PPP project finance structuring, corporate reorganizations, acquisitions and providing tax advisory services to oil and gas clients. Shane has been involved for a variety of industries and for audiences, including the Institute of Chartered Accountants of BC and the Society of Trust and Estate Practitioners. He plays an active role in ICABC professional development and has been involved in teaching and course development for the CA School of Business as well as the Sauder School of Business.

Emma Ferguson, Associate, DLA Piper (Canada) LLP, Vancouver, BC. Emma practises in the areas of family law and wills, estates and trusts. Emma articled with the firm and afterwads joined as an associate. Before joining the firm, Emma acted as a judicial law clerk for six justices of the Supreme Court of British Columbia. Emma has a broad, wide range of experience. She advises clients on all aspects of estate and incapacity planning, including wills, alter ego and family trusts, powers of attorney and representation agreements. Emma has experience advising clients on the use of trusts and estates for disability benefit and estate planning. She has been recognized by Best Lawyers in Canada as a Lawyer of the Year in the area of disability and accessibility policy initiatives, including regulation and legislation. Emma also advises clients on the administration of estates, including applications for grants of probate and letters of administration.

Andrea E. Frisby, Associate, DLA Piper (Canada) LLP, Vancouver, BC. Andrea focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trusts, documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration. Andrea was called to the Bar in 2008, after clerking at the BC Supreme Court. She has a broad legal background and has practised in all aspects of estate and incapacity planning, including wills, alter ego and family trusts, powers of attorney and representation agreements. Andrea’s focus is on estate planning issues and she has experience advising clients on the use of trusts and estates for disability benefit and estate planning. She has been recognized by Best Lawyers in Canada as a Lawyer of the Year in the area of disability and accessibility policy initiatives, including regulation and legislation.

Ivan Eleyff, Counsel, Ministry of Social Development and Social Innovation, Victoria, BC. Ivan Eleyff has over 13 years experience as a lawyer. He has provided senior policy advice and has a detailed understanding of government processes and operations in a number of capacities. Ivan joined the Legal Services Branch in 2007, after serving for a year and a half as a policy analyst with another department. He has given solicitor’s addresses to the Ministry of Social Development and Social Innovation, focusing on the areas of trusts, administration law, and statutory interpretation. He has also provided similar advice to other branches within the Ministry of Justice. Ivan has maintained a parallel part time career in the private sector through his legal forces courses and is currently an advocate advising Vancouver Island units through the office of the Assistant Judge Advocate General, Pacific Region. Prior to joining government, Ivan articled and practiced, primarily as a solicitor, at a private Victoria firm, after receiving his LLB from the University of Victoria in 2008.

Barbara Janzen, Partner, Bull, Houser & Tupper LLP, Vancouver BC. Barbara advises individuals, financial institutions and government regarding estate and trust administration matters. Her experience lies in the areas of estate planning, including all aspects of estate and incapacity planning, including wills, alter ego and family trusts, powers of attorney and representation agreements. Barbara advises clients on all aspects of estate and incapacity planning, including wills, alter ego and family trusts, powers of attorney and representation agreements. Barbara’s focus is on estate planning issues and she has experience advising clients on the use of trusts and estates for disability benefit and estate planning. She has been recognized by Best Lawyers in Canada as a Lawyer of the Year in the area of disability and accessibility policy initiatives, including regulation and legislation.

Ted Kuntz, Director, Planned Lifetime Advocacy Network (PLAN), Vancouver, BC. Ted is a psychotherapist with a private practice in Vancouver, British Columbia and an author. He has a Master’s Degree in Counseling Psychology and more than 25 years of clinical experience. Ted and his family became one of PLAN’s youngest Lifetime Members and over the years he has grown to become an active part of the future of PLAN. Ted is the current Board Chair of both PLAN and PLAN Institute.

Genevieve N. Taylor, Principal, Legacy Tax + Trust Lawyers, Vancouver, BC. Ms. Taylor provides legal counsel to clients regarding wills, estates, trust matters, and related taxation issues. She is particularly interested in helping disabled persons and other vulnerable clients to plan effectively for the after-death tax consequences associated with wills, powers of attorney, representation agreements and inter vivos trusts and applications for probate and letters of administration. She regularly advises beneficiaries, trustees, executors, estates and other related parties on the administration of personal property and real estate, as well as having been involved in the successful conduct and settlement of estate and trust litigation. Ms. Taylor has authored and co-authored a number of papers in the area of wills, estates, trusts and adult guardianship is a frequent speaker on these topics.

Samuel Turcott, Program Manager and Advocate, Disability Alliance BC, Vancouver, BC. Samuel Turcott is a program manager and disability advocate for Disability Alliance BC. He works with individuals to access a range of services and programs available for people with disabilities. He specializes in assisting with applications, reconsideration requests, and appeals for BC provincial disability (“PWD”) benefits and supplements. Sam holds a degree in law with a specialization in social justice issues from the University of British Columbia.
ESSENTIAL TOOLS FOR DISABILITY PLANNING AND PRACTICE
APRIL 12TH, 2016

9:00 Welcome and Introduction by PBLI

9:05 Chairs’ Welcome and Introduction
Shane Onufrechuk      Mary Hamilton
KPMG LLP                  DLA Piper (Canada) LLP

9:10 Decision Making Basics: The Building Blocks
Barbara Janzen
Bull, Housser & Tupper LLP
• What is capacity?
• Who can make a decision?
• The effect of incapacity

9:40 Questions and Discussion

9:45 Government Benefits and Tax Considerations: What You Need to Know Now
Shane Onufrechuk      Samuel Turcott
KPMG LLP                  Disability Alliance BC
• Federal and Provincial programs and benefits, including recent 2015 changes
• Avoiding clawbacks to benefits
• Tax credits and other income tax benefits
• 2016 revisions to the income tax rules

10:40 Questions and Discussion

10:50 Refreshment Adjournment

11:05 Old and New Ways of Thinking About Registered Disability Savings Plans
Sadie Wetzel
DLA Piper (Canada) LLP
• Planning considerations when establishing an RDSP
• Tips and traps:
  - Contributions
  - Withdrawals

11:50 Questions and Discussion

12:00 Networking Lunch

1:00 The Latest and Greatest Estate Planning Tools for Disabled Persons and Their Families
Genevieve N. Taylor
Legacy Tax + Trust Lawyers
• Testamentary planning in wills
• Inter vivos trusts
• Other opportunities and considerations

1:50 Questions and Discussion

2:00 Current Approaches to Substituted Decision Making
Andrea E. Frisby
Legacy Tax + Trust Lawyers
• Powers of Attorney
• Representation Agreements
• Advance Directives
• Appointment of Committee
• Practical applications of the planning tools

2:45 Questions and Discussion

2:55 Refreshment Adjournment

3:10 Unique Family Law Considerations
Emma Ferguson
DLA Piper (Canada) LLP
• Determining ongoing support upon marriage breakdown
• Support obligations when disability arises after marriage breakdown

3:40 Questions and Discussion

3:45 Stakeholder Roundtable: Learning From the Policy Makers
Ted Kuntz                Ian Ross & Ivan Elieff
Planned Lifetime Advocacy Network
Sarah Watson
Office of the Public Guardian and Trustee of BC
• An update on key developments and points of interest from the Ministry of Social Development and Social Innovation; the Public Guardian and Trustee of BC; and PLAN Canada

4:45 Questions and Discussion

5:00 Chairs’ Closing Remarks – Program Concludes
Registration Form
Pacific Business & Law Institute
305 – 1681 Chestnut Street
Vancouver, BC Canada V6J 4M6
Telephone: 604-730-2500; Fax: 604-730-5085
E-mail: registrations@pbli.com

Salute First Name Last Name Position/Title

Firm/Company

Address

City Province/Territory Postal Code

Telephone Fax Email

Paid by: □ VISA □ MasterCard □ Cheque payable to Pacific Business & Law Institute

Card Number Expiry Date

Please indicate your areas of interest for future notifications (select all that apply):
□ Estate Planning □ Tax Planning □ Financial Planning □ Charities □ Other

How did you hear about this program?
□ Brochure □ Email □ Colleague □ PBLI Website □ Other

Register today at www.pбли.com/1264