PBLI Pacific Business & Law Institute

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USING TRUSTS EFFECTIVELY

Chaired by

Ingrid Tsui
Alexander Holburn Beaudin + Lang LLP

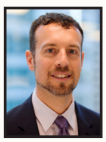
June 3rd, 2020 • Attend via Live Webinar

Chair

Ingrid Tsui, Partner, Alexander Holburn Beaudin + Lang LLP, Vancouver, BC. Ingrid leads the Wills, Estates + Trusts practice group at Alexander Holburn. She advises individuals regarding estate planning and estate administration, including wills, trusts, incapacity planning and other tools to achieve effective estate planning results. Ingrid regularly updates a chapter of the CLE Probate Practice Manual and the annotated *Power of Attorney Act*. She holds a TEP designation, is a member of the Estate Planning Council of Vancouver, and has written and lectured on a wide variety of estate planning topics for both legal and non-legal audiences. She has been selected by her peers for inclusion in *Best Lawyers in Canada* in the area of Trusts and Estates.

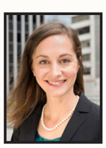
Faculty

Fiona Hunter, Partner, Horne Coupar LLP, Victoria, BC. Fiona Hunter is a partner at Horne Coupar LLP, named one of Canada's Top 5 Trusts & Estates Law Boutiques by Canadian Lawyer. Fiona practises exclusively in estate planning with an emphasis on trusts, and acts as a mediator in estate litigation. Fiona authors the Canadian edition of *Drafting Trusts and Will Trusts in Canada*, and is a co-editor of and contributor to two publications: *Financial and Estate Planning for the Mature Client in BC* and *British Columbia Estate Planning and Wealth Preservation*. She also authors an online wills practice resource for LexisNexis and has been qualified as an expert in the area of trust law by the Supreme Court of BC. As a former Assistant Adjunct Professor at the University of Victoria, she taught the Succession course at the Faculty of Law, and continues to speak at conferences across Canada on the subject of trusts. Fiona has just completed two terms on the University of Victoria Foundation and the board of the Art Gallery of Victoria. She is a member of the CBA, the International Society of Estate and Trust Practitioners and the Estate Planning Council of Victoria. Fiona has been recognized by her peers for inclusion in the Best Lawyers in Canada since 2008 and has twice been named 'Lawyer of the Year' (most recently in 2019) for Vancouver Island region in the area of estate planning.



Steve Ivacko, CV TrustCo Inc., Vancouver, BC. Steve Ivacko is a Principal at CV TrustCo Inc., a boutique trust company providing comprehensive tax, estate, succession, governance, and philanthropic planning along with fiduciary services to business owners and families with complex situations. Prior to his current role, he spent the last ten years working in both a single-family office and multi-family office. Steve holds the CPA designation (legacy CMA), as well as the Trust and Estate Practitioner (TEP), and Family Enterprise Advisor (FEA) designations. Steve is on the executive of the Estate Planning Council of Vancouver, and is involved with Canadian Association of Gift Planners. Steve is also an avid scuba diver, plays saxophone in a community big band, and is treasurer and board member of Anxiety Canada since 2016.

Alison Oxtoby, Lawyer and Founder, Balmains Law Corporation, Kelowna, BC. Alison Oxtoby is the founder of the boutique Okanagan law firm of Balmains Law Corporation, where she works primarily in the areas of trusts & estates and tax-planned corporate reorganizations. Alison obtained her law degree from the University of Victoria in 1996. She was a partner with a full-service national firm in Vancouver before moving to the Okanagan in 2007. She has also authored and lectured extensively to a variety of legal and financial professional organizations, including the Chartered Professional Accountants of BC, CBABC, STEP and, of course, PBLI as well at both the University of Victoria and University of British Columbia law schools. She is the Past Chair of the STEP Okanagan Chapter and Executive Committee Member for the STEP Vancouver Branch, Past Co-Chair of the CBA's Okanagan Wills & Trusts Section and the current President of the Kelowna Estate Planning Society.



Cheyenne Reese, Principal, Legacy Tax + Trust Lawyers, Vancouver, BC. Cheyenne assists clients with tax, estate and trust planning. Cheyenne received her J.D. from the University of Victoria in 2005 and her Masters of Law Degree in International Taxation from New York University in 2006. As a result, a major part of her practice is related to cross border U.S. – Canada transactions and estate planning, including estate, gift, and generation skipping tax issues. In addition, Cheyenne advises U.S. citizens and green card holders regarding U.S. tax compliance and the U.S. expatriation tax rules. Cheyenne was called to the British Columbia Bar in 2007 and has been at Legacy Tax + Trust Lawyers since that time, becoming a Principal in 2013. Cheyenne has completed Parts I and II of the Canadian Institute of Chartered Accountants' In-Depth Tax Course. She presents often on cross-border tax and estate planning issues.

Richard Weiland, Partner, Clark Wilson LLP, Vancouver, BC. Richard's practice is focused on tax and estate planning. He helps clients to realize their business and succession goals in a tax-effective manner. He also advises trustees on estate and tax matters. Richard has taught Taxation of Trusts and Estates as an adjunct professor at the Peter A. Allard School of Law at UBC, and regularly speaks and writes on tax and estate matters for professional and lay audiences.

Sindy Wong, Partner, Smythe LLP, Vancouver, BC. Sindy has over 15 years of experience in tax. She spent five years practising at a national firm and three years as a senior tax manager at CHC Helicopters. Sindy joined Smythe in 2009 where she found her passion advising owner-managed businesses. Sindy specializes in tax planning including corporate reorganizations, estate & succession planning, in-bound investments & structuring, personal tax planning and voluntary disclosures. Sindy is a member of the Canadian Tax Foundation.

Using Trusts Effectively

Trusts are an important planning tool; however, the complex nature of trusts law and its continual evolution pose a challenge for even experienced professionals. In order to effectively utilize this tool and successfully navigate the intricate arena of trusts law, it is essential to keep up to date on changes in the law, current issues, and emerging planning techniques.

This program assembles leaders in the fields of trusts and taxation to update you on recent developments in the law and key challenges facing practitioners today, and to provide you with current and emerging planning techniques, practice tips and practical solutions to your clients' most pressing issues. You will gain a solid understanding of important planning considerations, potential pitfalls and the techniques and structures currently available to best address your clients' unique circumstances and set them up for success.

You Will Learn About:

- Tips and traps for drafting trusts in various situations
- Key tax considerations when employing trusts in your planning
- Properly documenting trusts and their activities
- Planning and administration of trusts with US ties
- Real estate tips and traps when trusts are involved

Who Should Attend?

- Lawyers practising in the areas of trusts, wills, estates or tax
- Estate planning and administration specialists
- Investment managers and professionals
- Accountants providing tax and estate planning and administration advice
- Financial planners and other consultants helping clients protect wealth and minimize tax

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JUNE 3RD, 2020

9:00 Welcome and Introduction by PBLI

9:05 Chair's Welcome and Introduction

Ingrid Tsui
Alexander Holburn Beaudin + Lang LLP

9:10 Setting Up For Success: Trust Drafting Tips and Traps

Fiona Hunter
Horne Coupar LLP

- Flexibility vs certainty: making the right drafting choices
- Considerations when settling land and corporate interests on trustees
- Dealing with post planning challenges

9:55 Questions and Discussion

10:05 Morning Break

10:20 Trusts and Tax: Key Considerations

Richard Weiland
Clark Wilson LLP

- Navigating attribution rules
- Trust variations and changes
- Residence of trustees and beneficiaries

11:20 Questions and Discussion

11:35 Documenting Trusts and Their Activities

Steve Ivacko
CV TrustCo Inc.

- Trust minute books and record keeping
- Transparency registries
- Client verification rules

12:20 Questions and Discussion

12:30 Lunch Break

1:30 Planning and Administration of Trusts with US Ties

Cheyenne Reese
Legacy Tax + Trust Lawyers

- US beneficiaries, including minor beneficiaries and those lacking capacity
- US assets
- US trustees

2:20 Questions and Discussion

2:30 Afternoon Break

2:45 Real Estate Tips and Traps

Alison Oxtoby
Balmains Law Corporation

- Using trusts as a planning tool for real estate
- Estate administration where real estate is involved
- The transparency register and beneficial ownership

3:30 Questions and Discussion

3:40 A Case Study

Ingrid Tsui
Alexander Holburn Beaudin + Lang LLP
Sindy Wong
Smythe LLP

- An overview and application of the concepts reviewed throughout the day

4:20 Questions and Discussion

4:30 Chair's Closing Remarks – Program Concludes

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Information

Four Ways to Register:

1. Telephone us: 604-730-2500 or toll free 877-730-2555
2. Fax us: 604-730-5085 or toll free 866-730-5085
3. Mail your registration form with payment
4. Register at **www.pbli.com/1601**

Registration: The registration fee is $720.00 plus GST of $36.00 totalling **$756.00** covering your access to the live webinar and electronic materials.

Group Discounts: Register four persons from the same organization at the same time and you are entitled to a complimentary fifth registration.

Payment: You may pay by VISA, MasterCard or cheque. Cheques should be made payable to the Pacific Business & Law Institute. Registration fees must be paid prior to the program.

When and Where: Check-in begins at 8:30 a.m. The program starts at **9:00 a.m. (PDT)**. Attend via Live Webinar: All you need is a computer with a good internet connection and external plug-in speakers or good headphones for optimal audio and volume.

Materials: The faculty will prepare papers and/or other materials explaining many of the points raised during this program. Please contact us at **registrations@pbli.com** if you are unable to attend the program and wish to purchase a set of materials.

Your Privacy: We will keep all information that you provide to us in strict confidence, other than to prepare a delegate list containing your name, title, firm and city for our faculty and the program delegates. We do not share our mailing lists with any non-affiliated organization.

Cancellations: Full refunds will be given for cancellations (less a $60.00 administration fee) if notice is received in writing five full business days prior to the program (**May 27th, 2020**). After that time we are unable to refund registration fees. Substitutions will be permitted. We reserve the right to cancel, change or revise the date, faculty, content, availability of webinar or venue for this event.

Course Accreditation: Attendance at this course can be listed for up to **6 hours** of continuing professional development credits with the Law Society of BC.

Registration Form

Pacific Business & Law Institute

Unit 2 - 2246 Spruce Street
Vancouver, BC Canada V6H 2P3
Telephone: 604-730-2500; Fax: 604-730-5085
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Using Trusts Effectively

June 3rd, 2020

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