



Pacific Business & Law Institute

Approved by the Law Society of BC for 6.25 hours of professional development credits



GREY DIVORCE AND PLANNING FOR THE FUTURE

Chaired by
Lorne MacLean, Q.C.
MacLean Family Law

April 21st, 2020 • UBC Robson Square • Vancouver, BC

Live Webinar also available!



RETURN POSTAGE GUARANTEED
PORT DE RETOUR GARANTI

CHAIR



Lorne MacLean, Q.C., Founder, MacLean Family Law, Vancouver, BC. Lorne MacLean is the founder of MacLean Law and one of Canada's most experienced and highly rated family lawyers dedicated to family law and divorce in British Columbia. Lorne has successfully protected clients' rights since 1983 in the field of high net worth and complex family

law disputes, dealing with issues such as spousal and child support, property division, child custody, guardianship and access, and marriage-like relationships. He has earned a reputation as a tough yet thoughtful advocate for his clients.

FACULTY



Cléa Amundsen, Lawyer, Kitsilano Family Law, Vancouver, BC. Cléa Amundsen is called to the Bar in both BC and Ontario and is fluent in both English and French. Cléa handles cases involving all aspects of family law. She favours a positive, child-centred, solution-oriented approach to thorny and difficult family law cases. Cléa's longstanding interest

in international humanitarian law led her to legal reform work with the International Commission of Jurists in Nairobi, Kenya from August 2012 to March 2013. Cléa began working in family law upon her return to Vancouver, with a focus on lessening the impact that separation and divorce have on children. She is part of the Canadian Bar Association and the B.C. Family Law Unbundling Roster, amongst others.



Candace Cho, Principal and Co-founder, Onyx Law Group, Vancouver, BC. Candace is known for her creativity and deep knowledge of both estate and family law, as well as the law of equity and trusts to craft claims for clients to get the best results possible. She deftly navigates the intricacies and interrelationships of family, estate and trust law to push

the development of the law in a better direction. She has appeared before all levels of court in British Columbia, and has lectured numerous times on issues of family, estate and trust law. She is a Board member of the TLABC Board of Governors, an editor on the Verdict Editorial Board and a member of the TLABC Women Lawyers Committee. In her free time, Candace is an avid traveller and foodie. She is also the co-founder of an educational not-for profit in Ecuador called Uno a Uno.



Nicholas Davies, Lawyer, MacLean Family Law, Vancouver, BC. Thanks to his previous unique and varied work/life adventures, Nicholas Davies is well regarded today as an astute, strategic thinker who can just as comfortably work under fire in the courtroom as navigate through calm negotiations to help people resolve their conflicts and move

forward. With 28 years of experience in family law, family law mediation, real property transactions and disputes, and corporate/commercial transactions and disputes, Nicholas Davies currently focuses his practice on family law and corporate/commercial litigation. His knowledge of complex property transactions is a particular asset for high net worth couples working to untangle the financial aspects of their relationship.



Andrea E. Frisby, Principal, Legacy Tax + Trust Lawyers, Vancouver, BC. Andrea focuses her practice on assisting clients with estate and trust planning and administration. She prepares wills, trust documents, powers of attorney and representation agreements for clients, and also provides legal advice on estate and trust administration. Andrea has authored

numerous papers in the areas of wills, estate, trusts and capacity issues and is a frequent speaker on these topics. Andrea has recently completed the Society of Trusts and Estate Practitioners (STEP) Diploma achieving a Distinction across all four examinations and has her TEP designation.



Georgiale A. Lang, Attorney & Arbitrator, Vancouver, BC. Ms. Lang has practised family law for 30 years, focusing primarily on trial and appellate litigation, including three leading cases in the Supreme Court of Canada. In 2011, she added arbitration to her arsenal of expertise, acquiring FCI Arb credentials from the Chartered Institute of Arbitrators, United

Kingdom, and served on the Board of Governors for the North American Board. Ms. Lang is a prolific writer, speaker, and media commentator, whose publications range from the Huffington Post to the National Post, The Advocate and The Lawyers Weekly. She has been named in Best Lawyers in Canada and Lexpert since the inception of each, and in 2013 was one of 60 women lawyers in Canada to be awarded Lexpert's Zenith Award for leadership in the profession. She is an elected Fellow of the International Academy of Family Lawyers, a world-wide group of lawyers who regularly engage in cross border matters.

GREY DIVORCE AND PLANNING FOR THE FUTURE

The number of people aged 55 and over who are getting divorced is exploding. Unique considerations must be taken into account when a divorcing couple is unable to rely on decades of future earnings to pay for a costly divorce. Lawyers and family advisors must prepare to meet these new challenges by providing timely and relevant advice. It is essential that practitioners have an understanding of how to advise their clients on family law matters as well as estate matters: support obligations from prior marriages may need to be reviewed, family businesses may be affected, and estate plans may need to be reconsidered in light of a late divorce.

Expert faculty will provide delegates with valuable insights into how traditional family law topics are being reconsidered for this growing group of divorcees. This program is essential for anyone with an interest in family law and asset management among people over 55 years old.

THIS PROGRAM WILL COVER:

- Planning for retirement after divorce late in life
- Joint tenancies, advancements and trust matters
- The effect of remarriage and adult children on estate matters
- High net worth clients and large property settlements
- Common law spouses in grey divorce and estate matters
- How to deal with international assets

WHO SHOULD ATTEND?

- Lawyers of all levels advising on family law, trusts, and estates
- Family law arbitrators and mediators
- Accountants and financial planners providing business and estate planning advice
- Government officials and employees engaged in family matters
- Charity representatives with interests in estates
- Family service providers

GREY DIVORCE AND PLANNING FOR THE FUTURE

APRIL 21ST, 2020

9:00 Welcome and Introduction by PBLI

9:05 Chair's Welcome and Introduction

Lorne MacLean, Q.C.
MacLean Family Law

9:10 Retirement After Grey Divorce

Georgiale A. Lang
Attorney and Arbitrator

- Planning for retirement, early retirement
- Pensions, benefits, double dipping
- Living off capital
- Repartnering

10:00 Questions and Discussion

10:10 Refreshment Adjournment

10:25 Joint Tenancies, Advancements and Trusts

Nicholas Davies
MacLean Family Law

- Trust matters involving parents, children and spouses
- Resulting trusts
- Gifts

11:15 Questions and Discussion

11:25 Remarriage, Adult Children and Estate Issues

Andrea E. Frisby
Legacy Tax + Trust Lawyers

- Adult children's interest in a parent's estate
- Marriage agreements and estate planning
- Beneficial interest of spouses to trusts created by third parties

12:15 Questions and Discussion

12:25 Networking Lunch

1:30 Large Property Settlements and High Net Worth Parties

Lorne MacLean, Q.C.
MacLean Family Law

- Special considerations for high net worth divorces
- Entitlement in large property awards
- High income spousal and child support awards
- Tax issues in international divorces

2:20 Questions and Discussion

2:30 Refreshment Adjournment

2:45 Common Law Spouses and Separation: the Beginning, the Middle and the End

Candace Cho
Onyx Law Group

- Spouses under the *Family Law Act* and the *Wills, Estates and Succession Act*
- Evidence for or against a common law relationship
- Common law separation, termination and estate questions
- Tips for documenting beginnings and endings, solving disputes over date of cohabitation and date of separation

3:35 Questions and Discussion

3:45 Dealing with International Assets

Cléa Amundsen
Kitsilano Family Law

- International assets in divorce and separation
- Jurisdictional disputes
- Injunctions and methods for protecting property: Mareva injunctions, Anton Pillar orders, security for overseas property

4:35 Questions and Discussion

4:45 Chair's Closing Remarks

4:50 Forum Concludes

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/1584

Registration: The registration fee is \$820.00 plus GST of \$41.00 totalling **\$861.00** covering your attendance at the program, materials, a light breakfast, a networking lunch and refreshments throughout the day. In-person attendees have the option to receive their materials electronically in advance of the program, or in a hard copy binder on the day of the program. If an in-person attendee requests both hard copy and electronic materials, an additional \$50 charge will apply with applicable taxes. Webinar attendees will always receive their materials electronically.

Early Bird Discount: Register by March 23rd, 2020 and receive a \$100 discount on the registration fee (\$720.00 plus GST).

Group Discount: Register four persons from the same organization at the same time and you are entitled to a complimentary fifth registration. Early Bird and Group Discount cannot be combined.

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.** UBC Robson Square is located at the basement level of **800 Robson Street** in Vancouver, BC. Please visit <http://www.robsonsquare.ubc.ca/find-us/> for directions.

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 (**April 14th, 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 **6.25 hours** of continuing professional development 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
E-mail: registrations@pbli.com

GREY DIVORCE AND PLANNING FOR THE FUTURE

April 21st, 2020
UBC Robson Square • Vancouver, BC

- In person** [HARDCOPY ONLY]
- In person** [PDF ONLY]
- In person** [HARDCOPY & PDF (+\$52.50)]
- Live webinar** [PDF]

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):

Tax Small Business Wealth Management Wills Estates & Trusts Other _____

How did you hear about this program?

Brochure Email Colleague PBLI Website Other _____

Register today at www.pbli.com/1584

Please recycle