

MARK YOUR CALENDAR

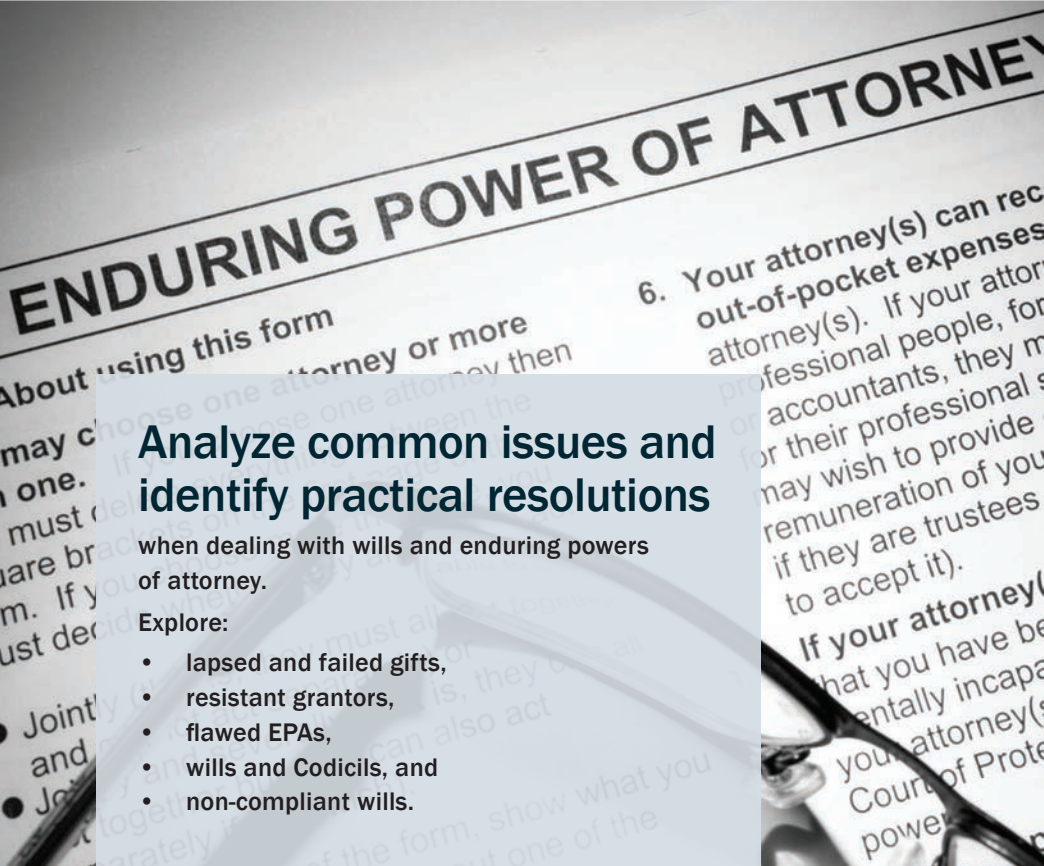
January 23, 2019 (Edmonton)

January 30, 2019 (Calgary)



Legal Education
Society of Alberta

Wills & EPAs—Commonly Occurring Issues



Analyze common issues and identify practical resolutions

when dealing with wills and enduring powers of attorney.

Explore:

- lapsed and failed gifts,
- resistant grantors,
- flawed EPAs,
- wills and Codicils, and
- non-compliant wills.

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JAN
23
2019

EDMONTON

Chateau Louis Hotel
& Conference Centre
11727 Kingsway NW
9:00 AM-4:30 PM

JAN
30
2019

CALGARY

The Glenmore Inn
& Convention Centre
1000 Glenmore Court SE
9:00 AM-4:30 PM



PROGRAM MATERIALS

Materials for this program will be provided to all registrants in electronic format only and will be available for download in advance.

CO-CHAIRS

Patricia L. Daunais QC | Daunais McKay + Harms | Calgary

John E.S. Poyser | The Wealth and Estate Law Group | Calgary

FACULTY

Peter J. Glowacki | Borden Ladner Gervais LLP | Vancouver (*Edmonton only*)

Sandra L. Hawes | Miller Thomson LLP | Edmonton

Shannon James | Borden Ladner Gervais LLP | Calgary (*Calgary only*)

Jennifer R. Lamb | Carscallen LLP | Calgary

WHO SHOULD ATTEND

This program is intended for lawyers with 2 or more years of practice experience.

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Wills & EPAs—Commonly Occurring Issues

Rules for Lapse and Other Failed Gifts | PRESENTER: Sandra L. Hawes

Learn the rules for lapse and other failed gifts through an examination of ss 32 and 33 of the *Wills and Succession Act* [WSA], including: circumstances covered by ss 32 and 33, possible alternative gift recipients, the interaction between ss 21(1) (void gifts) and ss 32 and 33, removal of the distinction between specific gifts and gifts of residue in the WSA, and interesting cases where ss 32 and 33 have been applied.

The Resistant Grantor: Best Practices and Ethical Considerations for Attorneys | PRESENTER: Jennifer R. Lamb

- When is it time for a person to consider granting Power of Attorney?
- Who is the best person to appoint as attorney?
- What issues are at play when a donor is reluctant to grant Power of Attorney?

These are just some of the ethical considerations that can arise when a donor is preparing to relinquish control of their affairs to someone else. Learn to identify challenging issues for attorneys, and discuss a variety of outcomes and dispute resolution tactics for those issues. Discuss conflicting Power of Attorney documents and ethical considerations for third parties (such as financial institutions).

Flawed EPAs and Diminished Clients | PRESENTER: John E.S. Poyser

Learn the unique world of managing EPAs on the grounds of capacity and undue influence. Get answers to questions, including:

- Once the EPA is validly in place, can I still take instructions from the donor?
- When should an attorney give instructions?
- When does a litigation guardian supersede an attorney?

Tricky Sticky Wills and Codicils | PRESENTER: Patricia L. Daunais QC

Engage in an overview of cases specifically dealing with ss 22, 23, and 24 of the WSA, and explore the process of changing designated beneficiaries under plans after a will has been executed, including common pitfalls and what to watch for. Explore the 3 Rs (revocation, revival, and republication) and 2 As (alteration and amendment).

Non-Compliant Wills: When Scribbles on a Napkin May Actually Be a Will | PRESENTERS: Shannon James (*CAL only*) & Peter J. Glowacki (*EDM only*)

Many Canadian provinces now provide their Courts with the discretion to cure deficiencies when: (a) the normal execution formalities for a will have not been complied with, and (b) some errors require rectification. Texts, notes, and fill-in-the-blank forms can now be considered a will. Review relevant legislation and leading cases, and identify key factors as they relate to non-compliant wills.



Legal Education Society of Alberta

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REGISTER ONLINE

Reserve your spot in this program.

01 | Visit LESA.org.

02 | Enter code **32108** into the search field.

03 | Add to your cart, **complete** your purchase, and **mark** your calendar.

MORE REGISTRATION OPTIONS

MAIL: 2610 - 10104 103 Avenue Edmonton, Alberta T5J 0H8 | PHONE: 780.420.1987

TOLL FREE IN AB: 1.800.282.3900 | FAX: 780.425.0885



- EDMONTON** January 23, 2019
- CALGARY** January 30, 2019
- EARLY BIRD:** On or before December 11, 2018 \$395 + GST (Lunch is included.)
- REGULAR:** \$445 + GST (Lunch is included.)

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- I live more than 250km (one way) driving distance from nearest program site (50% reduction in fees)
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CANCELLATIONS: Registration fees, less a **\$50.00** administration fee, will be refunded for cancellations received in writing at least **3** full business days prior to the program. Refunds cannot be given after that date; however, program materials, if any, will be forwarded. Registrant substitution is permitted at all times.

RECORDING: This program may be audio/video recorded and retained by LESA for the purpose of providing legal education.

QUESTIONS? Contact us at info@lesa.org.