

January 15, 2024

The Annotated Alter Ego Trust and Discretionary Trust 2024



CO-CHAIRS: **M. Elena Hoffstein**, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

March 6, 2024

1:00 p.m. to 4:00 p.m.

Total CPD Hours = 2 h + 15 m Substantive + 45 m Professionalism ^P

Webcast Only

SKU CLE24-00305

Agenda

1:00 p.m. – 1:05 p.m.

Welcome

M. Elena Hoffstein, Miller Thomson LLP

Joan Jung, Miller Thomson LLP

1:05 p.m. – 1:35 p.m.

Overview of Tax Issues Related to Trusts (5 m ^P)

M. Elena Hoffstein, Miller Thomson LLP

Joan Jung, Miller Thomson LLP

James Murdoch, *Thorsteinssons LLP*

1:35 p.m. – 1:40 p.m.

Question and Answer Session

1:40 p.m. – 2:25 p.m.

Discussion of Annotated Discretionary Trust

M. Elena Hoffstein, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

2:25 p.m. – 2:30 p.m.

Question and Answer Session

2:30 p.m. – 2:50 p.m.

Break

2:50 p.m. – 3:15 p.m.

Discussion of the Annotated Alter Ego Trust

David Stevens, *Gowling WLG (Canada) LLP*

3:15 p.m. – 3:20 p.m.

Question and Answer Session

3:20 p.m. – 3:55 p.m.

Panel Discussion: Using Precedents, Errors Setting Up Trusts, Client Retainers, Reporting Letters, Etc. (35 m )

M. Elena Hoffstein, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

James Murdoch, *Thorsteinssons LLP*

Christopher Stankiewicz, Senior Claims Counsel, *Lawyers' Professional Indemnity Company (LAWPRO®)*

David Stevens, *Gowling WLG (Canada) LLP*

3:55 p.m. – 4:00 p.m.

Question and Answer Session (5 m )

4:00 p.m.

Program Ends