

Lawrence Shum

Presents

Estate Planning

A Study of the Interaction between Life's Only Two Certainties

Date: 2008-07-11, Friday

Time: 09:00 ~ 17:00

Place: **Elm Hurst Inn & Country Spa**

415 Harris Street, Ingersoll, Ontario

☎ 800-561-5321 ☎ 519-485-6579

Cost: \$300

(\$45) Member discount (CanMAPP or 2020 Canada)

(\$20) Early-bird discount (registration by 2008-06-13)

Lunch & refreshments included

Register now at: CanMAPP.ca

Attendance qualifies for 7 verifiable/technical credit-hours towards:

CGAO – CPD

FPSC – CE

ICAO – CPD

LSUC – CLE

SMAO – CPLD



Remember the Beatles? The Monkees? Were you at Woodstock?

The greatest inter-generational transfer of wealth the world has ever seen is now under way. Planning for the transfer in the most tax-efficient manner with the least familial friction is no easy task. Are you up to the challenge?

The Workshop

In preparation for the transition to eternal life, some build pyramids, others build estate plans. This workshop examines the tools and techniques to use in building an estate plan, the pitfalls to avoid, and the human issues to consider. Cases and scenarios submitted by workshop participants will be studied and used in discussions. Different estate plans will be outlined and analysed for effectiveness.

The Contents

- Estate creation
- Estate administration
- Estate preservation
- Succession planning
- Estate distribution
- Executorship

The Participants

The workshop is designed with the following participants in mind:

- Practitioners wishing to keep current with issues in estate planning and administration
- Practitioners wishing to expand services into succession planning, will executorship or estate trusteeship
- Anyone interested in understanding the impact of life's only two certainties colliding with each other

Participants will be asked to submit cases, scenarios, or questions for discussion in the workshop. For full appreciation of the workshop, a good understanding of taxation, including capital gains, corporate and trust taxation, is desirable.

The Facilitator

Lawrence Shum, MBA, CMA, CFP, attended the Faculty of Arts & Science, the Computer Systems Research Institute and the Rotman School of Management of the University of Toronto. He has taught at the University of Toronto, York University, and Seneca College. His practice focuses on planning and taxation, including business planning, financial planning, tax planning, tax disputes, and litigation support.

The Venue

Elm Hurst Inn & Country Spa is located just off exit 218 of Highway 401 in the quaint southern Ontario town of Ingersoll, about 1½ hours' drive south-west of Toronto. For details or reservation, visit: www.elmhurstinn.com

