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# Torkin | Manes

Barristers & Solicitors

*Torkin Manes' Trusts & Estate Planning Group is pleased to present this seminar for financial advisors who need to understand the legal ramifications of their advice to clients.*

## Strategies to **PRESERVE WEALTH** *and leave a legacy*

Tuesday, October 6, 2009

THE ALBANY CLUB

Sir John A. Room  
91 King Street East, Toronto  
Tel: 416 364 5471

7:45 am – 8:15 am  
Registration and continental  
breakfast

8:15 am – 9:30 am  
Presentations

### Case Study:

#### CURRENT ESTATE PLANNING CHALLENGES FACING YOUR CLIENTS

##### Estate Freeze

- ♦ Tips for an effective freeze
- ♦ Tax benefits

##### Inter-vivos Planning

- ♦ Income splitting
- ♦ Types of planning to avoid
- ♦ Use of inter-vivos trusts

##### Testamentary Considerations

- ♦ Methods to minimize Estate Administration Tax
- ♦ Types of testamentary trusts

##### Charitable Planning

- ♦ Private foundations
- ♦ Endowment funds

*Torkin Manes is a full service law firm that offers the complete range of legal services required for tax and estate planning, and charitable giving.*

*In addition, the firm has a large Corporate & Commercial practice and a Family Law practice, for seamless service if clients' personal and business legal needs overlap.*



**Case Study:**

**CURRENT ESTATE PLANNING CHALLENGES  
FACING YOUR CLIENTS**



**Marc Weisman** will discuss the tax benefits associated with an estate freeze, and how an estate freeze works.

Marc's practice focuses on income tax and commodity tax law, including the goods and services tax and provincial retail sales tax, and has extensive experience advising with respect to domestic and international tax planning. He also practises in the area of personal tax, estate planning and trust taxation for entrepreneurs, individuals and families.

*Marc can be reached at 416 777 5455, or [mweisman@torikinmanes.com](mailto:mweisman@torikinmanes.com).*



**Sabina Mexis** will provide an overview of inter-vivos planning techniques and how to avoid certain common planning pitfalls.

Sabina's tax practice includes the structuring and implementation of tax planning solutions, for both individuals and corporations. Along with her tax expertise, Sabina advises on retirement and executive compensation. She sits on the Executive of the Ontario Bar Association (OBA) – Taxation Law Section and is also a member of the Trusts and Estates and Pensions and Benefits sections of the OBA.

*Sabina can be reached at 416 643 8807, or [smexis@torikinmanes.com](mailto:smexis@torikinmanes.com).*



**Risa Awerbuck** will discuss the pros and cons of various techniques to minimize Estate Administration Tax and the benefits provided by the use of different types of testamentary trusts.

Risa's practice focuses on estate planning including the structuring and implementation of the estate plan. Risa also advises clients on estate administration matters. She was an instructor for the Estate Section of the Bar Admission Course and for several years co-chaired the Estate Administration Course for law clerks presented at the Law Society of Upper Canada. Risa is also a co-author of The Practical Guide to Ontario Estate Administration.

*Risa can be reached at 416 777 5425, or [raverbuck@torikinmanes.com](mailto:raverbuck@torikinmanes.com).*



**Linda J. Godel** will discuss when to establish private foundations and how to structure endowment funds.

Linda's practice focuses on not-for-profit and charitable organizations. She has advised organizations in the third sector on structuring and restructuring matters, corporate governance, by-law interpretation, directors' and officers' liability, compliance issues, cross-border and international relationships and gifting, endowment and fundraising issues. She also provides general commercial advice to not-for-profits and charities. Linda is the Vice-Chair of the Charity and Not-for-Profit Law Section of the Ontario Bar Association.

*Linda can be reached at 416 643 8809, or [lgodel@torikinmanes.com](mailto:lgodel@torikinmanes.com).*

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[www.torikinmanespreservewealth.eventbrite.com](http://www.torikinmanespreservewealth.eventbrite.com)

Complete this form and send to:

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Fax: 1 (888) 312 0064 | Tel: (416) 643 8816  
[mthompson@torikinmanes.com](mailto:mthompson@torikinmanes.com)

There is no charge for this seminar.

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