

Updated as of March 17, 2021

## JANUARY

TUESDAY  
**January 12, 2021**  
3:00 PM – 5:00 PM PT

### **Alter Ego Trusts - Technical and Practical Issues**

**Moderator:** Kelly Watson, CPA, CA, TEP, Kelowna: KPMG LLP

**Speaker:** Nicole Watson, CPA, CA, TEP, Kelowna: KPMG LLP

## FEBRUARY

THURSDAY  
**February 18, 2021**  
9:00 AM – 11:00 AM PT

**Tax Update:** What the 2020 Election Means for Estate Planning; Compliance Issues and Relief Programs Arising from the Pandemic; and Trust Audits

**Moderator:** Paul Taylor, LLB, TEP, Ottawa: Borden Ladner Gervais LLP

### **Speakers:**

Brent Nelson, LLM, JD, TEP, Tuscon, AZ: Rimôn

Shannon James, JD, Calgary: Borden Ladner Gervais LLP

Kim Maiatico, CPA, CA, Oakville: PricewaterhouseCoopers LLP

William Fowles, QC, FCPA, FCA, TEP, FEA, Calgary: Miller Thomson LLP

## MARCH

WEDNESDAY  
**March 24, 2021**  
9:00 AM – 11:00 AM PT

**Conflict of Laws in Estate Planning:** An Estate Planning Case Study + an Estate Administration Case Study; Each Intertwining Three Different Jurisdictions

### **Moderators:**

Rhonda Johnson, LLB, TEP, Edmonton: Dentons Canada LLP

Harmanjit Mavi, JD, MBA, TEP, Winnipeg: MLT Aikins LLP

### **Contributors:**

Solange Buissé, LLB, Winnipeg: Taylor McCaffrey LLP

Tanya Butler, LLB, TEP, Halifax: Touchstone Legal Inc.

Jasmin Chohan, Vancouver: Lindsay Kenney LLP

Amanda Doucette, LLM, TEP, Saskatoon: Stevenson Hood Thornton Beaubier LLP

Daniel Frajman, BCL, LLB, TEP, Montreal: Spiegel Sohmer

Thomas Grozinger, LLB, TEP, Ottawa: RBC Wealth Management

Barbara Janzen, LLB, TEP, Vancouver: Lindsay Kenney LLP

Barbara Kimmitt, LLB, TEP, Calgary: Bennett Jones LLP

Megan Lambert, JD, Ottawa: Borden Ladner Gervais LLP

Timothy Matthews, QC, TEP, Halifax: Stewart McKelvey

Paul Taylor, LLB, TEP, Ottawa: Borden Ladner Gervais LLP

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## MAY

TUESDAY

May 11, 2021

3:00 PM – 5:00 PM PT

### Creating a Financial Projection as Part of an Overall Estate Plan

**Moderator:** Kelly Watson, CPA, CA, TEP, Kelowna: KPMG LLP

**Speaker:** Magnus Aaserud, CPA, CA, CFP, TEP, Kelowna: BMO Nesbitt Burns

## JUNE

WEDNESDAY

June 3, 2021

9:00 AM – 11:00 AM PT

### Le concept du fractionnement du revenu et les règles fiscales de l'IRF

**Modérateur:** Mark Potechin, BCL, LLB, TEP, Montreal: DLA Piper

**Conférenciers:**

Pierre-Paul Persico, LLB, LLM, Montreal: Spiegel Sohmer

Sébastien Desmarais, LLB, LLL, JD, TEP, Ottawa: TD Wealth