

CPD/CE Accreditation List

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Branch/ Chapter	Original Event Date	Event Title	Credits/ Hours	FP Canada	The Institute for Advanced Financial Education (IAFE)	MFDA/ CIR	Alberta Insurance Council (AIC)	Insurance Council of Manitoba (ICM)	Law Society of British Columbia (LSBC)	Law Society of Ontario (LSO)	Financial Services Regulatory Authority of Ontario (FSRA)
Atlantic	September 26, 2024	All Things Digital	1.75	Yes	Yes	Yes	-	-	-	-	-
Atlantic	November 28, 2024	Bare Necessities: Is Probate Avoidance Planning Still Worth the Hype?	2.00	Yes	Yes	Yes	-	-	-	-	-
Atlantic	March 27, 2025	Capacity Considerations in the 21st Century: Grey Wave or Grey Tsunami?	2.00	Yes	Yes	Yes	-	-	-	-	-
Atlantic	May 22, 2025	Life Insurance Isn't Just an Expense, It's a Valuable Asset	2.00	Yes	Yes	Yes	-	-	-	-	-
Calgary	September 10, 2024	Leveraging the Guardianship & Trusteeship Process to Protect Vulnerable Persons	2.00	Yes	Yes	Yes	N/A	-	-	-	-
Calgary	November 27, 2024	Trust and Estate Issues Through a Tax Lens	1.00	Yes	Yes	Yes	N/A	-	-	-	-
Calgary	January 29, 2025	Beneficiary Designations & Family Law: What's Not to Consider?	1.75	Yes	Yes	Yes	N/A	-	-	-	-
Calgary	February 26, 2025	Equal is in the Eye of the Beholder: Division of Assets in Complicated Estates	1.50	Yes	Yes	Yes	N/A	-	-	-	-
Calgary	April 1, 2025	Case Law Update: Tax, Trusts and Estates	1.50	Yes	Yes	Yes		-	-	-	-
Edmonton	January 23, 2025	Bankrupt Estates & How to Handle/Avoid Them	1.25	Yes	Yes	Yes	N/A	-	-	-	-
Edmonton	February 20, 2025	Disability Planning: Navigating AISH and Other Obstacles	1.25	Yes	Yes	Yes	N/A	-	-	-	-
Edmonton	March 25, 2025	Trusts and Trust Reporting: A Brave New World	1.00	Yes	Yes	Yes	N/A	-	-	-	-
Edmonton	May 15, 2025	US Estate Tax: Where Are We Now? & Annual Branch Meeting	1.00	Yes	Yes	Yes	N/A	-	-	-	-
Montreal	September 26, 2024	Charitable Donations, AMT, Budget, Donations of Private Co Shares	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	October 23, 2024	Distribution of Trusts and Marital Claims	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	November 21, 2024	Bring Your Own Topic - Pot-Pourri de sujets	1.50	N/A	N/A	N/A	-	-	-	-	-
Montreal	December 3, 2024	Départ du Canada	1.50	Yes	Yes	Yes	-	-	-	-	-

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Montreal	January 23, 2025	Planning for the Modern Art Estate	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	February 25, 2025	Transmission des droits de votes et du contrôle dans une entreprise familiale / Transmission of voting rights and control in a family business	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	March 20, 2025	Fiscalité et assurances	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	May 15, 2025	Résumé de jurisprudence	1.50	Yes	Yes	Yes	-	-	-	-	-
Montreal	June 19, 2025	Retour sur la conférence nationale de STEP	1.50	N/A	N/A	N/A	-	-	-	-	-
Okanagan	October 15, 2024	Update on Joint Tenancy and Resulting Trust (Lambrecht v. Lambrecht Estate)	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Okanagan	November 19, 2024	Estate Planning for Business Owners: Tips and Traps	1.25	Yes	Yes	Yes	-	-	Yes	-	-
Okanagan	April 8, 2025	Family Offices: A Key Tool for Succession Planning	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Okanagan	May 20, 2025	Update on Trust Reporting and Bare Trust Treatment & ACM	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Ottawa	October 16, 2024	Power Struggles: Navigating Administrative Hurdles with POAs	1.25	Yes	Yes	Yes	-	-		-	-
Ottawa	November 6, 2024	Understanding the Mechanics: Registered Plans and Pensions in Estate Planning	0.75	Yes	Yes	Yes	-	-	-	-	-
Ottawa	January 22, 2025	Empowering Entrepreneurs: Insurance Solutions and Wealth Planning for Business Owners	1.00	Yes	Yes	Yes	-	-	-	-	-
Ottawa	February 12, 2025	Navigating the CRA: Essential Insights for Advisors	1.00	Yes	Yes	Yes	-	-	-	-	-
Ottawa	March 19, 2025	Cross-Boarder Estate Planning: Considerations for US Assets, Clients and Beneficiaries	1.25	Yes	Yes	Yes	-	-	-	-	Yes
Ottawa	May 14, 2025	Smooth Sailing: Strategies for Wealth Planning and Transition Success	1.25	Yes	Yes	Yes	-	-	-	-	Yes
Saskatchewan	October 24, 2024	Planning for Beneficiaries with Disabilities	1.75	Yes	Yes	Yes	-	-	-	-	-

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Saskatchewan	November 6, 2024	Business Transitions - How to Navigate Change and Create Maximum Value for Business Owners	1.00	Yes	Yes	Yes	-	-	-	-	-
Saskatchewan	April 9, 2025	Estate Litigation: What is it, and How to Avoid It	1.75	Yes	Yes	Yes	-	-	-	-	-
Saskatchewan	May 7, 2025	Tax Consequences of Canadian Residents Owning US Real Property	1.50	Yes	Yes	Yes	-	-	-	-	-
SWO	September 24, 2024	Life Insurance Ownership – Is There A Sweet Spot?	1.50	Yes	Yes	Yes	-	-	-	-	-
SWO	September 24, 2024	Maximizing Estate Planning with Beneficiary Designations	1.50	Yes	Yes	Yes	-	-	-	-	-
SWO	February 11, 2025	Corporate reorganizations and life insurance	1.50	Yes	Yes	Yes	-	-	-	-	-
SWO	May 13, 2025	Unlocking opportunities: transferring foreign pensions to Canada on a tax-deferred basis	1.25	Yes	Yes	Yes	-	-	-	-	Yes
Toronto	October 1, 2024	Insurance Audits: When It's Time to Have Your Client's Insurance Plan Reviewed	1.50	N/A	N/A	N/A	-	-	-	-	-
Toronto	November 18, 2024	Communicating with Clients: Discussion Regarding Use of Language When Speaking to Clients About Gender, Illness, and Mental Illness	1.50	Yes	Yes	Yes	-	-	-	1.25 (Ethics) 0.25 (EDI)	-
Toronto	January 27, 2025	Have You Done Your Succession Planning: Succession Planning for Professionals - How to Advise Yourself and Your Professional Clients	1.50	Yes	Yes	Yes	-	-	-	-	-
Toronto	February 24, 2025	Family Trusts and Family Law: Family Lawyers Answer Our Burning Questions	1.25	Yes	Yes	Yes	-	-	-	-	-
Toronto	March 24, 2025	How to Plan for Assets Across Canada: A Deep Dive into What to do When Your Clients Own Assets in BC, Quebec, and Nova Scotia	1.50	Yes	Yes	Yes	-	-	-	-	Yes
Toronto	April 21, 2025	The Estate Planner's Window to the World: What to do When Your Clients Own Assets Abroad	1.50	Yes	Yes	Yes	-	-	-	-	Yes



2024-25 | BRANCH/CHAPTER PROGRAMS

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Vancouver	September 19, 2024	Coming and Going: The Practical Consequences of Immigration and Emigration	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Vancouver	November 21, 2024	Dealing with a “Simple” Asset: Registered Plans	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Vancouver	February 20, 2025	What’s Mine is Yours: Thoughts on Privacy and Disclosure in the Modern Era	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Vancouver	April 3, 2025	Waxing and Waning: A Practitioners Discussion on Anticipating the Incapacity of Clients	1.75	Yes	Yes	Yes	-	-	Yes	-	-
Vancouver	May 15, 2025	Year in Review	1.50	Yes	Yes	Yes	-	-	Yes	-	-
Winnipeg	September 24, 2024	September Showcase - Focus Group Discussion	1.25	Yes	Yes	Yes	-	Yes			
Winnipeg	October 22, 2024	Tax Planning in a High-Interest Rate Environment	1.50	Yes	Yes	Yes	-	Yes	-	-	-
Winnipeg	December 10, 2024	Planning in the Age of Unending Tax Reform	1.00	Yes	Yes	Yes	-	N/A	-	-	-
Winnipeg	January 21, 2025	Death of the Homeowner - Planning with Interests in Real Estate	1.50	Yes	Yes	Yes	-	N/A	-	-	-
Winnipeg	February 11, 2025	Update on Insurance Planning	1.50	Yes	Yes	Yes	-	Yes	-	-	-
Winnipeg	March 11, 2025	When Love Dies: Separation, Divorce, and the Tax Plan	1.50	Yes	Yes	Yes	-	N/A	-	-	-
Winnipeg	May 13, 2025	Coming to Canada - Planning for the New Canadian	1.00	Yes	Yes	Yes	-	N/A	-	-	-

- Barreau de Québec
 - Chambre des notaires du Québec
 - CPA Canada
 - Law Society of Alberta
 - Law Society of Manitoba
 - Law Society of New Brunswick
- Law Society of Newfoundland and Labrador
 - Law Society of Nova Scotia
 - Law Society of Ontario (substantive only)
 - Law Society of Prince Edward Island
 - Law Society of Saskatchewan
 - Society of Trust and Estate Practitioners (STEP)

***Delegates who report their credits/hours to these institutions, must use credits/hours indicated in the chart above.*

Accreditation Applications are pending.