



THE CANADIAN  
BAR ASSOCIATION  
Prince Edward Island Branch

Law Society of PEI & CBA PEI Branch

# Professional Development Day & Mid-Winter Meetings

## Information and Registration Package

February 7, 2020

Rodd Charlottetown Hotel

With Thanks...

**Annual Meeting Committee:** Susan Johnston, Dave Canvin, Cynthia Taylor, Jeff MacDonald, Nathan Beck, Melissa Trowsdale, Andrea LeClair Shefler, Jane Smith (CBA), Susan Robinson, Q.C. (Law Society), Lisa MacKay (Law Society)

**Joint CBA PEI Branch & Law Society Continuing Legal Education Committee:** Kerri Seward Carpenter, Kim McNeill, Q.C., Susan Connolly, Constance Robinson, Michael Zimmerman, Sophie MacDonald, Isabelle Keeler, Chris Montigny, Thomas Sutton, Lisa MacKay (Law Society), Jane Smith (CBA)

Friday, February 7 <sup>th</sup>	
8:30AM	Registration - A light breakfast will be served.
9:00AM	CBA PEI Branch Mid-Winter Meeting
9:30AM	<p>Professional Development Sessions, 3.5 hours CPD  <i>Chaired by Kerri Seward Carpenter &amp; Isabelle Keeler</i></p> <p><u>Trusts 101</u>- <i>presented by Richard Niedermayer, TEP, Stewart McKelvey, Halifax.</i> This presentation will provide a general overview of trust law and will explore specific topics, such as the various types of trust structures, the advantages and disadvantages of each trust structure, and a high-level review of the taxation rules surrounding trusts.</p>
11:00AM	Break
11:15AM	<p><u>Tax Fundamentals for the Estate Practitioner</u> <i>presented by Jennifer Dunn, BDO, Charlottetown.</i> This presentation will provide an overview of the basic tax rules that are integral to the area of trust and estate law. In particular, there will be discussion surrounding the common areas in which tax implications can arise in trust and estate law and recommended best practices for drafting trust and estate documents from a Chartered Accountant's perspective.</p>
12:00 Noon	<p>Luncheon</p> <p>Everyone is welcome to a <b>complimentary buffet luncheon</b> hosted by the Canadian Bar Association – PEI Branch.</p>
12:45PM	<p><i>Professional Development Sessions cont'd.</i></p> <p><u>Practitioners' Update: Exploring Recent Trust &amp; Estate Law Cases</u> - – Presented by <u>Robin K. Aitken</u>, TEP, Cox &amp; Palmer, Charlottetown, <u>Richard Niedermayer</u>, TEP, Stewart McKelvey, Halifax, and <u>Barbara E. Smith</u>, Q.C., Stewart McKelvey, Charlottetown. This presentation will review recent trust and estate case law across the country, discussing the lessons that arise from these cases that can be applied to your practice.</p>
2:00PM	Law Society of P.E.I. Mid-Winter Meeting
3:30PM	<p>Afternoon Social</p> <p>Come out and enjoy a fun social afternoon at <u>The Alley</u>, bar and bowling lanes at the Murphy's Community Centre, 200 Richmond St., Charlottetown.</p>
6:00PM	<p>Presidents' Reception &amp; Dinner</p> <p>Join hosts Law Society President Robert MacGregor and CBA Branch President Robin Aitken for the Presidents' Reception followed by roast turkey dinner.</p>

# REGISTRATION FORM

Due January 24<sup>th</sup>, 2020

Mid-Winter Meeting, February 7, 2020

## MEMBER INFORMATION

Name (for name tag):

Firm:

CBA #:

Name of Guest:

Telephone:

Email:

Dietary Restrictions and Other Special Needs:

**PLEASE SELECT YOUR ACTIVITIES** by marking an 'X' in the appropriate boxes.

Canadian Bar Association, PEI Branch Meeting	<input type="checkbox"/>
Continuing Legal Education sessions	<input type="checkbox"/>
Luncheon – Complimentary, hosted by CBA-PEI	<input type="checkbox"/>
Law Society of Prince Edward Island Meeting	<input type="checkbox"/>
Afternoon Social	<input type="checkbox"/>
Presidents' Reception & Dinner, <i>please indicate # of Tickets required.</i>	

## REGISTRATION FEES

	Fee	HST	Total	Amount Due
Continuing Legal Education				
CBA Member	\$175.00	\$26.25	\$201.25	
CBA Member (<5 yrs.)	\$125.00	\$18.75	\$143.75	
Non-CBA Member	\$200.00	\$30.00	\$230.00	
Non-CBA Member (<5 yrs.)	\$150.00	\$22.50	\$172.50	
Presidents' Dinner				
# of dinner tickets required _____	\$50.00	\$7.50	\$57.50	
<b>Total Registration Fees Due</b>			<b>\$</b>	

Register **before January 24th, 2020** by completing this form and submitting it to the Law Society electronically by emailing a copy to [lawsociety@lspci.pe.ca](mailto:lawsociety@lspci.pe.ca) or by faxing a copy to 902-368-7557.

**CLE Cancellation Policy:** Registrants who cancel within two weeks but more than twenty-four (24) hours before the CLE will receive a fifty per cent (50%) refund and will be entitled to receive a copy of any CLE materials. Registrants who cancel within 24 hours of the CLE or who do not show will not be refunded any portion of the registration fee, but the registrant will be entitled to receive a copy of the CLE materials.