# Essential Considerations for Cross-Border Estate Planning and Administration

*Trusts and Estates Law*

In person    Webcast

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| **Date:** | Wednesday, April 16, 2025\| 1:00 pm to 4:00 pm |
| **Location:** | OBA Conference Centre<br>20 Toronto Street, 2nd Floor, Toronto |
| **Program Chairs:** | **Brittany Miller,** Goddard Gamage LLP<br>**Aman S. Patel,** Aman S. Patel Barrister and Solicitor |

CPD

**Substantive Hours:** This program contains up to **3h 00m**.
**Professionalism Hours:** This program contains up to **0h 00m.**
*The OBA has been approved as an Accredited Provider of Professionalism Content by the Law Society of Ontario*

When advising clients on estate planning or administration, it is critical to consider interests across international borders. The legal and tax consequences of such a global footprint can be complex. Join our expert faculty to unravel the issues and gain practical guidance on a variety of topics, including:

- Asset protection and distribution strategies
- Legal tools for minimizing conflict and delays in cross-border estates
- Addressing challenges with foreign beneficiaries

Whether you are helping clients manage assets in multiple jurisdictions or advising on the transfer of wealth across borders, this program will equip you with essential tools and knowledge. Don't miss this opportunity to ensure you are fully prepared to serve your clients in today's increasingly interconnected world.

Don't miss our Inter-sections Networking Reception following the program to build your referral network by connecting with employment lawyers, as well as your fellow attendees.

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| 12:30 pm | Registration and Coffee |
| 1:00 pm | Welcome and Opening Remarks |
| 1:05 pm | **Key Considerations for Cross-Border Estate Planning**<br>**Andrew Besch, Hodgson Russ LLP**<br>**Stephanie Gabor, Torys LLP** |
| 2:15 pm | Health and Networking Break |
| 2:30 pm | **Essential Tools for Cross-Border Estate Administration**<br>**Rahul Sharma, Fasken Martineau DuMoulin LLP**<br>**Michael von Keitz, O'Sullivan Estate Lawyers LLP** |
| 3:30 pm | **Tax Consequences: What You Need to Know**<br>**Brandon Hodge, MNP LLP** |
| 3:55 pm | Q&A and Concluding Remarks |
| 4:00 pm | Program Concludes (Networking Reception to follow) |