

Wills and Estate Planning: A Primer

Trusts and Estates Law / Young Lawyers Division



In-Person



Live Online

Date: Tuesday December 1, 2026 | 9:00 am – 12:30 pm

Location: OBA Conference Centre
20 Toronto Street, 2nd Floor, Toronto

Program Chairs: **Nicole Ciani**, RBC Wealth Management
Michael von Keitz, Mills & Mills LLP



This program contains 1 Professionalism Hours
This program is eligible for up to 2.5 Substantive Hours

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.

Preparing a will and developing an estate plan requires a critical knowledge of various areas of law, as well as tax obligations and implications. To ensure your client's intention is ultimately fulfilled, careful planning and drafting is essential. Gain a fundamental understanding of the need-to-know issues, and take home practical tools and strategies to implement in your practice. Learn how to manage your clients' expectations, avoid costly errors and protect yourself. This program is a must for those in the early stages of their Wills and Estates practices, and for experienced practitioners looking to brush up on these important basics.

Register now to secure your spot!

9:00am	Welcome and Opening Remarks	10:55am	How to Prepare Powers of Attorney (POAs) • Key principles in POAs for personal care and for property • My client has asked me to prepare a living will. What is that? • Opportunities and obstacles in limited POAs and restrictions in POAs
9:05am	Case Comment		
9:20am	Best Practices for the Initial Client Meeting • Information gathering and using checklists • Retainers and engagement agreement essentials • Advising spouses: when is a joint retainer, independent legal advice or independent representation appropriate? • Navigating capacity concerns • Managing family dynamics • Getting paid: managing your client's expectations early and other helpful advice for handling payment	11:15 am	Expert Guidance on Drafting Wills • Pitfalls to avoid • How to use precedents and delegation to maximize efficiency, while maintaining standards • Making the most of codicils and other useful testamentary documents
10:00am	Practical Advice for Tackling Challenging Planning Issues • Anticipating and planning for tricky tax issues • Help! My client has foreign assets • What you need to know about using trusts in a will • Dealing with assets passing outside of the estate • How to use dual wills to limit estate administration tax, and other tax complications	11:40 am	Finalizing the Will and Next Steps • Signing the will and other execution requirements • What are your obligations in storing wills and POAs? • Parting advice to your client: updating wills and other crucial considerations • What to include in your reporting letter
10:40am	Networking Break	12:05 pm	Q&A/Closing Remarks
		12:30 pm	Program Concludes

www.oba.org/pd
Questions? pd@oba.org