

# THE ESTATE PLANNING COUNCIL OF VANCOUVER

## Past Meetings

### ***1999 - 2000***

- October 26, 1999: Jodi Norrison of Christie's Art Antiques and Collectibles on "A Fiduciary's Guide"
- November 30, 1999: Jay Chalke, Public Trustee on "Planning for the Future: The New Representation Agreement"
- January 25, 2000: Murray Leith, Chairman of Leith Wheeler Investment Counsel Ltd. On "Canadian Shareholders are Wimps"
- February 29, 2000: Tricia McIver on "Living Buyouts: The Attendant Risks and Rewards"
- March 28, 2000: Tom Morton & Joan Harrison, Smythe Ratcliffe, Chartered Accountants on "Executive Compensation: Recognizing the Stakeholders and their Needs"
- May 2, 2000: Margaret Mason, Partner, Bull, Housser & Tupper on "New Wills Variation Act Challenges: Consideration of Charitable Giving as a Planning Tool" and Ron Walsh on "Review of the Small Business Rollover-Federal Budget Proposals"
- June 6, 2000: A Mock Mediation led by Arlene Henry, Canadian Dispute Resolution Corporation on "Mediation in the Area of Will Planning & Estate Administration"

### ***2000 - 2001***

- October 24, 2000: David Chalmers, Rogers Group Regulations on "Commissions, Fees and Conflicts of Interest in the Financial Services Industry"
- November 28, 2000: Diane Dupuis, President of Dupuis Langen Financial Management (1985) Ltd. On "Critical Illness Insurance" and T. Douglas Roe on "Living with Disability"
- January 30, 2001: Technical Topics Potpourri  
Sandra Ballance, Partner, Legacy Tax & Estate Lawyers, The New Definition of Spouse, John Kenyon, CA, KPMG on "Tax Rate Update & Planning Opportunities", Margaret Mason, Partner, Bull Housser & Tupper on "Updating the Activities of the Committee for the Modernization of the Trustee Act" and Mike Ryan, Vice President, Leith Wheeler Investment Council Ltd. On "The Calm After the Storm"
- February 27, 2001: David Bentall on "Family Succession Planning"
- March 27, 2001: Justice Frank Maczko on "A View from the Bench"
- May 29, 2001: Dr. Sherry Cooper, Global Economics Strategist and Vice-President, Harris Bank (Chicago) and Bank of Montreal (Toronto) on "Reasons for Optimism in this Volatile Market Environment and Shows us how Investors with a Long View and an Eye on Winning Strategies will be Rewarded"

## **2001 - 2002**

- October 30, 2001: Carmen S. Thériault, Partner, Bull Housser & Tupper on “Using Alter-Ego and Joint Partner Trusts to Achieve a Variety of Estate Planning Goals”
- November 27, 2001: Kathleen Bartels, Director, Vancouver Art Gallery on “The Arts: Challenge and Change”
- January 29, 2002: S. Kelly Rodgers, CFA on “The Structure of the Investment Industry and How to Choose an Investment Advisor”
- February 26, 2002: Felicia Flock, Practice Advisor for the Law Society of BC on “Understanding the Anti-Money Laundering Legislation” and Dean Holley, President of Capital Marketing Consulting Corp. on “Suspicious Transactions”
- March 26, 2002: Dan McNeil, VP Advanced Marketing, Hub Financial Inc. on “Leveraged Corporate Insured Annuities and Leveraged Compensation Agreements – All You Need is Loans”
- May 7, 2002: Dr. Dan Muzyka, Dean of Commerce & Business Administration, UBC on “Insight into the Entrepreneurial Mind”
- June 4, 2002: Marvi Ricker, Managing Director of Philanthropic Advisory and Management Services, BMO Harris Private Banking on “New Trends in Philanthropy”

## **2002 – 2003**

- October 29, 2002: Christopher F. Ireland, KPMG LLP on “Post Mortem Planning for Private Corporations – the New Regime”
- November 26, 2002: Brian Day, M.D., President and CEO, Cambie Surgeries Corp. on “Medicare in Canada – a Political and Economic Disaster”
- January 28, 2003: Tony Gage, Chairman and Director of Phillips, Hager & North Investment Management Ltd. On “The Investment Law of Gravity”
- February 25, 2003: Bill Maclagan, Tax Partner at Blake, Cassels & Graydon LLP on “A Report of Recent Case Law and CCRA Views on ‘REOP’ and Interest Deductibility”
- March 25, 2003: David Buchanan, Q.C., Partner of Clark, Wilson on “Family Law Issues in Estate Planning”
- May 6, 2003: Panel Discussion on “Will Challenges: a Potpourri of Issues Related to Charities and Bequests”  
Moderator – Diana Reid, Vice President & Managing Director, B.C., BMO Harris, Private Banking and Panel members Sandra Enticknap, Miller Thomson LLP, Janice L. Margolis Senior Director, Major & Planned Gifts, B.C. Cancer Foundation and Grant Monck, Director of Development, Lester B. Pearson College of the Pacific

June 3, 2003: Doug Hyndman, B.C. Securities Commission on “Securities Regulation That Works – The BC Model”

### **2003 - 2004**

October 28, 2003: Jeffrey Vicq and Chris Wilson, Bull, Housser & Tupper on “New Privacy Legislation: Not-for-profit and private-sector privacy in B.C.”

November 25, 2003: David G. Thompson, Thorsteinssons on “Innovative Estate Freezing Techniques”

January 27, 2004: Michael Campbell, Journalist, Vancouver Sun on “Economic Forecast for 2004”

February 24, 2004: Panel Discussion on Estate Administration in the New Millennium – a Panel Discussion of Some of the More Challenging Issues Facing Trust Companies Today  
Moderator: Debra Thomas, TD Waterhouse and Panel members Diana Reid, Vice President & Regional Market Leader, BMO Harris Private Banking Pamela Skinner, Vice-President, Private Trust Services, HSBC Trust Company Rod Sheurman, Vice-President, Personal Trust Services, Bank of Nova Scotia Trust Company

March 30, 2004: Florence Marino, Manulife Financial on What’s New? An Update on the Latest Tax and Legal Issues Relevant to Planning Involving Life Insurance

May 11, 2004: Frank Minton on “Planned Giving in North America”  
A joint presentation with the Canadian Association of Gift Planners

June 1, 2004: Gordon MacRae, Legacy Tax & Trust Lawyers - Recent Probate Tax Act Amendment, Helen H. Low, Fasken Martineau DuMoulin LLP on “The Latest Law on the State of Common Law Unions” and Kerry D. Sheppard, Legacy Tax & Trust Lawyers on “Powers of Attorney in the Spring—The nature and validity of springing powers of attorney in light of the Goodrich decision”  
A joint presentation with CBABC- Wills & Trusts Section Meeting

### **2004 - 2005**

October 26, 2004: Benita Loughlin, Partner, International Executive Services, KPMG LLP (Vancouver) and Elaine Reynolds, Partner, Legacy Tax + Trust Lawyers on “A Planning Challenge: the U.S. Beneficiary”

November 23, 2004: Josephine Margolis Nadel, Director, Pricewaterhouse Coopers LLP Centre for Entrepreneurs and Family Business on “Governance and Succession for the Family Enterprise”

January 25, 2005: Colin Hansen, Minister of Finance, Government of British Columbia on “State of The Economy”

February 22, 2005: Catherine Romanko, Deputy Public Guardian and Trustee — Public Guardian and Trustee of British Columbia on “Estate Administration Issues when Minors Share in an Estate”

March 29, 2005: Mark Yamata, Managing Director, Guardian Capital Advisors LLP on “Active vs. Passive Money Management”

May 10, 2005: Malcolm Burrows, Financial Consultant, Charities & Gift Planning, Scotia Private Client Group on “Why Philanthropy is Important to Donors”

June 7, 2005: Jack Styan, Director of Social Policy and Rita Morin, Director of Social Enterprise Development, Planned Lifetime Advocacy Network on “PLAN for a Good Life”

### **2005-2006**

October 25, 2005: Albert McClean, Q.C. Associate Counsel, Faskin Martineau Dumoulin LLP on “New Developments in Testate Selection”

November 29, 2005: Peter Silin, Principal, Diamond Geriatrics, Inc. on “Criteria for the Selection of Care Facilities for Eldercare”

January 31, 2006: Patti Croft, Chief Economist, Phillips, Hager & North Investment Management Ltd. On “the Financial Outlook for 2006”

February 28, 2006: Dr. Nancy Langton, Associate Professor, Sauder School of Business on “Women in Family Business Leadership”

March 28, 2006: Stephen Cheng, Principal, Westcoast Actuaries Inc. on “Private Pensions and Retirement Compensation Arrangements”

May 9, 2006: Carole Gillam, Director, Community Care Network, Richmond Hospital on “The Impact of Cross Cultural on End of Life Decisions and Estate Planning”

June 6, 2006: Jane Milton, Partner, Bull Housser & Tupper LLP on “Properly Documenting Your Files-Cheap Insurance Against Potential Litigation”

### **2006-2007**

October 24, 2006 Robert B. Carrothers, Partner, Legacy Tax + Trust Lawyers on “Hybrid Entities”

November 28, 2006: Helen Low, Litigation Partner, Fasken Martineau DuMoulin LLP on “Issues Relating to Jointly Owned Property”

January 30, 2007: Gordon S. Funt, Partner, and John R. Sandrelli, Partner, Fraser Milner Casgrain, LLP on “Income Trusts”

February 27, 2007: Ross Hagen, Wealth Preservation Specialist, TD Waterhouse and Donna Thorne, Regional Sales Manager - Living Benefits, Manulife Financial on “Critical Illness and Long-Term Care Insurance”

March 27, 2007: Carmen Thériault, Partner, Bull, Housser & Tupper and Janine Thomas, Lawyer, Janine AS Thomas Law Corporation on “Letters of Wishes and Incentive Trusts/Use of Multiple Wills in Estate Planning”

May 8, 2007: Susan M. Manwaring, Partner, Miller Thomson LLP on “Options and Opportunities for Clients' Philanthropy”  
A joint presentation with the Canadian Association of Gift Planners

June 5, 2007: The Honourable Madame Justice Sandra Ballance, Supreme Court Justice The Supreme Court of British Columbia on “A View From The Bench” This is a joint meeting with the Canadian Bar Association - Wills & Estates Subsection

### **2007-2008**

October 30, 2007: Panel discussion on “Tips and Traps of Jointures” by Rhys Davies, Q.C., Davis LLP, Mark Horne, Horne Coupar and Debra J.P. Thomas, TD Waterhouse

November 27, 2007: Pirooz Pourdad, Vice President, PricewaterhouseCoopers LLP, Corporate Finance on “What is Your Business Worth?”

January 29, 2008: Lee Hausner, Vice Chairman, National Director, Family Enterprise Division, IFF Advisors, LLC on “Passing the torch - transitioning the values as well as the value”

February 26, 2008: Panel Discussion on Estate Administration Challenges - Three Different Perspectives by Marilyn Kerfoot, Charitable Gift Consultant & Lawyer, Larry Neilsen, Vice President, Risk and Compliance, Phillips, Hager & North Investment Management Ltd. And Robin Smith, Executive Trust Officer, TD Waterhouse Private Trust

March 25, 2008: Paul Taberner, LLB, C.Med, on “Mediation in Estate and Succession Planning and Litigation Getting Your Clients Better Results, Faster; Using Negotiation and Mediation Skills in the Process

May 6, 2008: John Bathurst, Vice President & Regional Director Wealth Services, BMO Harris Private Banking and Alanna Donahue, Director of Philanthropy, BC Children's Hospital Foundation on “Gifts of Securities - Basics and Beyond” A joint presentation with the Canadian Association of Gift Planners

June 3, 2008: Robin Goodman, Assistant Vice President, Tax and Estate Planning, Manulife Financial on “Beneficiary Designations on Insurance - Panacea or Peril?” A joint meeting with the CBA, Wills and Estates subsection

### **2008-2009**

October 28, 2008: Nicole Bradbury, Vice President and Paul Richardson, President of Renewal2 on “Investing for Change: Explore the world of social investing with local social venture capitalists”

November 25, 2008: William J. Hallett, CA, Senior Vice President and Chief Operating Officer, Sport BC on “Amateur Sport – A Giving Opportunity “and Sandra Stevenson, CEO, Kidsport™ Canada on “Giving to Sport as Part of Estate Planning”. A joint meeting with the Canadian Association of Gift Planners

January 27, 2009: Ken Peacock, Director of Economic Research, Business Council of British Columbia, “Troubled Times: 2009 Economic Outlook”

- February 24, 2009: Panel on “Tips and Traps of Beneficiary Designations for Registered Plans” by Stephen W.I. Cheng, Managing Director and Senior Consulting Actuary, Westcoast Actuaries Inc., Mary B. Hamilton, Associate Counsel, Davis LLP and Chris Ireland, Vice President – Planning Services, PPI Financial Group
- March 31, 2009: Carmen S. Thériault, Partner, Bull, Housser & Tupper LLP on “Trustees-Directors of private companies: Which hat rules?”
- May 5, 2009: Jay Chalke, Q.C., Public Trustee and Guardian, Public Trustee and Guardian of British Columbia on “Public Trustee and Guardian: Trends in Law, Policy and Services” This was a joint meeting with the Canadian Bar Association, Wills and Trusts subsection.
- June 2, 2009: Dr. Martin Collis, Speakwell, on the “Wild World of Wellness: Untangling the web of wellness”

### ***2009-2010***

- October 27, 2009: Dr. John Crawford on “Cohorts and Caveats: Estate Planning Across the Age Gap”
- November 24, 2009 Faye Wightman, President and CEO, Vancouver Foundation, on “The Changing Landscape of Philanthropy” This was a joint meeting with the Canadian Association of Gift Planners.
- January 26, 2010 Cindy Radu, President, Cidel Trust Company, on “Practical Considerations on Choice of Trustee in light of the recent Garron and Antle cases and CRA Audit Activity”
- March 2, 2010 Daniel F. Muzyka, Dean, Sauder School of Business, on “The World in 2010: An Update”
- March 30, 2010 Lisa Slater, Associate, Davis LLP, on “Family Law & Estate Planning- Impact of separation agreements, prenuptial and marriage agreements and maintenance obligation on estate planning”
- May 4, 2010 Timothy Duholke, Senior Tax Advisor, Davis LLP, on “A Tax Accountant’s Thoughts on Managing the Estate Freeze Process”
- June 1, 2010 Christopher Gaze, Artistic Director, Bard on the Beach Festival, on “Shakespeare: Case Studies in Estate Planning”

### ***2010-2011***

- October 12, 2010 David G. Thompson, Tax Lawyer, Thorsteinssons LLP Tax Lawyers, on “21 Year Rule – What’s the Plan?”
- November 30, 2010 Hugh Bulmer, Vice President, Maynards Fine Art and Antiques, on “Antiques and Fine Art from an Estate Planning Perspective.”
- January 25, 2011 David Schaffner, President and CEO, Leith Wheeler Investment Counsel Ltd., on “ We’ll Get By With A Little Help From Our Feds”

- February 22, 2011 Ernest Lang and Vince Cardella, Principals, Meritus Financial Inc., on “Insurance – Just ‘Another’ Business Decision” and short snapper by Elaine Reynolds and Cheyenne Reese of Legacy Tax + Trust Lawyers on “Update on US Estate Tax Changes”
- March 29, 2011 Michelle L. Isaak, Associate, Davis LLP on “Bankrupt Beneficiaries or Insolvent Estate” and short snapper by Andrew MacKay of Alexander Holburn Beaudin & Lang, LLP on “the Case of Wilson v. Lougheed”
- May 3, 2011 Mary Anne Bobinski, Dean and Professor, UBC Faculty of Law, on “Reproductive Technology/Bioethics Related to Estate Planning Issues and a short snapper by Bill Watt of TRG Group Benefit & Pensions, Inc., on “Proposed Changes to Individual Pension Plans (IPPs)
- June 7, 2011 Owen C. Dolan, Q.C. and David R. L. Rolfe, Rolfe Benson LLP Chartered Accountants with “Celebrating our Past and Looking to the Future.” The Estate Planning Council of Vancouver’s 50<sup>th</sup> Anniversary Celebration
- 2011-2012**
- October 25, 2011 Kathleen Cunningham and Hugh McLellan, Partner, McLellan Herbert Barristers & Solicitors, on “Recent Changes and Practical Issues related to the Power of Attorney Act”
- November 29, 2011 Craig Hikida, Director, Development and Donor Services, Vancouver Foundation, Margaret H. Mason, Partner, Bull Housser & Tupper LLP, Lauren Storer, Senior Account Manager, Foundation Services, Scotiatrust – Scotia Private Client Group, on “Family Philanthropy and Planning”. A joint meeting with the Canadian Association of Gift Planners.
- January 31, 2012 Jock A. ‘Finlayson, Executive Vice-President – Policy, Business Council of B.C., on “Turbulent Times: Economic Prospects for Canada and B.C.
- February 28, 2012 Benita Loughlin, Tax Partner, International Executive Services, KPMG LLP, on “Canada-US Cross Border Planning”
- March 27, 2012 Brenda McEachern, Estate & Tax Planning Consulting, Canada Life, on “Life Insurance Trusts”