

# 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 H. Mason, Partner, Bull Housser & Tupper LLP 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 Sheuerman, 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  
Nielsen, 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 Acitivity”
- 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 a 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 a 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, Scotiastrust – 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”
- May 5, 2012 E. Jane Milton, Q.C., Partner, Dispute Resolution + Litigation, Bull Housser & Tupper LLP and Roger Lee, Partner, Davis LLP, on “Estate Litigation Avoidance”
- June 5, 2012 Dr. Art Hister, Management Consultant, Healthy Living, on “A Simple Guide to Better Health, Happiness and Wellbeing”

### ***2012-2013***

- October 30, 2012 Chris Ireland, Senior Vice-President, Planning Services, PPI Advisory, on “Planning Opportunities with Shareholders’ Agreements”
- November 27, 2012 Michael Blatchford, Associate, Charities + Tax Exempt Organizations, Bull, Housser & Tupper LLP and David LePage, Program Manager, Enterprising Non-Profits on “Social Enterprise: The “Why” and the “How”. A joint presentation

with the Canadian Association of Gift Planners

- January 29, 2013 Helmut Pastrick, Chief Economist, Central 1 Credit Union on “Economic Outlook 2013” and a short snapper by Robert Ward., Tax Lawyer, Robert E. Ward & Associates on "America and the Fiscal Cliff or How to Spend Money Like a Drunken Sailor on A National Scale"
- February 26, 2013 Akane R. Suzuki, Owner, Partner, Garvey Schubert Barer Law on “A Practical Guide to US-Canada Estate Planning” and a short snapper by Andrew MacKay of Alexander Holburn Beaudin & Lang, LLP on “BCLI Report on Common Law Test for Mental Capacity”
- March 26, 2013 K. Thomas Grozinger, Principal Trust Specialist, RBC Wealth Management, Estate & Trust Services, Professional Practice Group, Royal Trust Corporation of Canada on “ Trustee Investing in Hard Times – Legal and Administrative Issues” and a short snapper by Loris Mar, Manager, U.S. Tax Services, Grant Thornton LLP on “FATCA: Definition and Implications”
- May 7, 2013 Anna Laing, Associate Counsel, Fasken Martineau DuMoulin LLP on “What the Family Law Act means to Estate Planners”
- June 4, 2013 Franco Lombardo, Managing Director, Veritage on “Great White Elephant – Why Rich Kids Hate Their Parents” and a short snapper by Janine A.S. Thomas, Lawyer, Janine AS Thomas Law Corporation on “Recent Registered Plan Life Insurance Designation Decisions from Ontario”. A joint presentation with the CBA Wills and Estates Subsection.

### **2013-2014**

- October 29, 2013 Ruth Steverlynk, Your Family Enterprise Advisors on “The How, Why &What of Family Meetings
- Nov 26, 2013 Marcel Lauzière, President and CEO, Imagine Canada on “The State of the Charitable Sector and Implications for Estate Planners”
- February 4, 2014 Douglas Porter, CA Chief Economist & Managing Director, BMO Capital Markets on “Outlook 2014: Dark Side of the Loon(ie)
- February 25, 2014 Robert L. Heinkel, PMF Alumni Professor of Finance, Sauder School of Business, University of British Columbia on “Risk and Reward: There’s No Free Lunch!”
- March 25, 2014 Paul Buitenhuis, Founder & President, Next Habitat Advisors Inc. on “An Overview of Seniors Housing: Assisting in the Process”
- May 6, 2014 Battle of the Lawyers 2014! "Where there's a Will?", by Stanley Rule, Lawyer, Sabey Rule LLP and Geoffrey White, Lawyer, Geoffrey W. White Law Corporation
- June 3, 2014 Paul Kershaw, UBC Professor & Founder, Generation Squeeze on “Generation Squeeze”

## **2014-2015**

- October 28, 2014 Ryan Howe, Associate, Alexander Holburn Beaudin + Lang LLP on “Understanding Digital Assets”
- November 25, 2014 “Current Issues in the Charitable Sector”, a panel discussion. A joint meeting with the Canadian Association of Gift Planners.
- Moderator:** Margaret H. Mason, Partner, Charities + Tax Exempt Organization, Bull Housser & Tupper LLP
- Speakers:** Michael Blatchford, Associate, Charities + Tax Exempt Organizations, Bull, Housser & Tupper LLP, Kevin McCort, President and CEO Vancouver Foundation and Pam Prior, KPMG Enterprise – Taxation Services on
- January 27, 2015 Dr. Roslyn Kunin, President, Roslyn Kunin & Associates on “Economic Outlook 2015”
- February 24, 2015 Holly Castle, Senior Manager, Grant Thornton, LLP on “Changes to the Taxation of Trusts”
- March 24, 2015 Cheryl Norton, Director, Advanced Planning, Wealth, Sun Life Financial on “The Value of Trusts and Segregated Funds – What Does Your Estate Need?” and a short snapper by John Trigardi, SecuriGene on "Legacies Now - the core of our health records - our DNA”
- May 5, 2015 Robert E. Ward, J.D., LL.M., Ward Chisholm, P.C. on “FATCA: Why Won’t It Go Away and What Do I Really Need to Know?” and a short snapper on “The Last Federal Budget” by Benita Loughlin, Partner, Tax, KPMG LLP
- June 2, 2015 Madam Justice Sandra K. Balance and Madam Justice D. Jane Dardi on “Estate Planning Professionals in the Witness Box”

## **2015-2016**

- October 27, 2015 Hugh Bulmer, Vice President, Maynards Antique and Fine Arts and Peter Malkin, Principal, Art Asset Planning Inc on “Personal Property – Appraising an Estate’s Other Asset Class
- November 24, 2015 Ruth MacKenzie, Executive Director, Canadian Association of Gift Planners on “Adding Value with Conversations on Philanthropy” and a short snapper on “Anticipated Tax Changes under the New Canadian Government” by Benita Loughlin, Partner, Tax, KPMG LLP
- January 26, 2016 Jim Allworth, Investment Strategist, RBC Dominion Securities on “ Economic Outlook 2016”
- February 23, 2016 Penny A. Washington, Partner, Dispute Resolution, Bull Housser & Tupper LLP, Dr. Marylene Kyriazis, Co-Founder and President, Paul Sugar Palliative Support Foundation Dr. Paul Sugar, Co-Founder and Vice-President, Paul Sugar, Palliative Support Foundation on “End of Life Decision Making”

- March 22, 2016 Alan Tynan, Vice President & Investment Counsellor — PH&N Investment Counsel on “Ellis Meets Marks - The Inter-Relationship of Sports and Investing” and a short snapper on "Federal Budget Update - Will We Be Crying In Our Coffee?" by Tom Morton, Partner - Tax, Smythe CPA
- May 3, 2016 Scott G. Cordell, Partner, Killam Cordell Murray on “Insurance for Lawyers, Accountants and others”
- June 7, 2016 John F. Helliwell, Senior Fellow, Canadian Institute for Advanced Research (CIFAR) and Co-Director of the CIFAR Programme on 'Social Interactions, Identity, and Well-Being', Professor Emeritus of Economics at UBC on “The Science of Happiness”

### ***2016-2017***

- October 25, 2016 Ross Young, Owner, Secure Capital Management Ltd. and Jason Boudreau, Principal and Founder, Vela Wealth Management Inc. on “Insurance Update”
- November 29, 2016 Malcolm Burrows, Head, Philanthropic Advisory Services, Scotia Wealth Management on “Updates from the Charitable Sector”. This is a joint meeting with the Canadian Association of Gift Planners.
- January 31, 2017 Christopher Gaze, Artistic Director, Bard on the Beach on “Where there is a Will, there is a way”
- February 28, 2017 Iain Black, President and CEO, Greater Vancouver Board of Trade on “Greater Vancouver’s Economy... and the 2017 BC Election”
- March 28, 2017 Wendy Sage-Howard, Senior Consultant, The Family Business Consulting Group on “From Succession to Continuity – A New Perspective on Succession Planning Family Enterprise Advising and the new FEX (Family Exchange)
- May 2, 2017 Greta I. Reiten, Associate Counsel and Rose Shawlee, Partner at Richard Buell Sutton LLP on “The Intersection of the Wills and Estates Succession Act (WESA) and Family Law Act (FLA). This is a joint meeting with the CBA, Wills & Trusts Section.

### ***2017-2018***

- October 24, 2017 Panel on “Private Company Tax Changes – Estate Planning Implications”, by Pam Prior, Partner, KPMG LLP, Laura E. West, Partner Norton Rose Fulbright LLP and Carmen Theriault, Partner, Norton Rose Fulbright LLP.
- November 28, 2017 Hayley Maschek, Associate KPMG Law LLP, practising in affiliation with KPMG Enterprise <sup>TM</sup> in Vancouver on “Tax Tips and Traps for Charitable Gift on Death”.
- January 30, 2018 Wayne Wachell, CEO & Chief Investment Officer (Founding Partner), Genus Capital Management Inc. on “Economic Update”

- February 27, 2018 Lisa Finden, Associate Director, Trust Services, BMO Trust Company/BMO Private Banking and Steve Ivacko, Principal, CV TrustCo Inc. on “The Benefits of a Corporate Trustee”
- March 27, 2018 Deena Chochinov, Consultant, Coach, Counsellor on “Family Enterprise – Hard Conversations and how to deal with them” and a short snapper on “The State of the Real Estate Market in Vancouver” by Jeff Benna
- May 8, 2018 Emma J. Ferguson, Associate Counsel, Alexander Holburn Beaudin + Lang LLP and Mary B. Hamilton, Partner, Alexander Holburn Beaudin + Lang LLP on “The World is Changing. Are You Asking Your Client the Right Questions?”. This is a joint meeting with the CBA Wills & Trusts Section.
- June 5, 2018 Karen Cutler, VP & Chief Underwriter, Manulife on “Certain Death...But When?”
- 2018-2019**
- October 30, 2018 Richard Weiland, Partner, Clark Wilson LLP on “Assessing the Gains: The Proliferation of Value-Based Land Taxes in BC and a short snapper on “Influences on Interest Rates and the Yield Curve” by Beau Howes, Jarislowsky, Fraser Limited.
- November 27, 2018 Panel on “Donor Advised Funds”, by Michael Blatchford, Norton Rose Fulbright LLP, Terri-Lynn Brown, Aqueduct Foundation, Calvin Fong, Vancouver Foundation and Darren Pries-Klassen, Abundance Canada.
- January 29, 2019 Benjamin Tal, Deputy Chief Economist, CIBC World Markets Inc. on “Economic Outlook” and a short snapper on “Medical Documents for Estate Planning” by Monique Shebbeare, Monique Shebbeare Law Corporation
- February 26, 2019 Michelle Isaak, Partner, DLA Piper and David Spratley, Partner, DLA Piper on “Estate Planning and Cryptocurrency/Block Chain/Digital Assets” and a short snapper on “What is a CRS Form and why is my financial advisor asking me to sign it?” by Kerby Sit, Investment Counsellor, RBC, PH&N Investment Counsel
- April 2, 2019 Vince Murton, Vice President, Longevity Planning, Raymond James Ltd. On “Sustainable Withdrawal Rates. Financial Planning in the new economy: how much is enough?” and a short snapper on “Gully V. Gully BCSC 1590” by Ingrid M. Tsui, Partner, Alexander Holburn Beaudin + Lang LLP
- May 7, 2019 The Honourable Mr. Justice Russell Brown, Justice of the Supreme Court of Canada on “View from the Bench” and a short snapper on “Pitfalls of principle residence planning for disabled persons” by Kirsten Jenkins, Partner, Norton Rose Fulbright Canada LLP.
- June 4, 2019 Hugh Bulmer, Vice President, Maynards Antiques and Fine Art and Sid Cross, ‘Wine & Food Guru’ on “Weird, Wonderful and Wine: Transferring Unique Assets”

## **2019-2020**

- October 29, 2019 Emily Griffiths-Hamilton, Build Your Family Bank on “Dogs, Orcas & Bears – The Griffiths Family through 4 Generations (includes AGM)”
- November 26, 2019 Ian Robertson, Vice President, Director, Portfolio Manager, Odlum Brown Limited on “Responsible Investment 101” and two short snappers. Kirsten Jenkins of Norton Rose Fulbright Canada LLP provided an update on the state of the rules around Qualified Disability Trusts. Kirsten presented to us on this issue in May 2019. Margaret Mason of Norton Rose Fulbright Canada LLP spoke about the recent announcement by BCFSFA (BC Financial Services Authority - formerly FICOM) on the 'cease and desist letter' with respect to the solicitation of gifts of life insurance policies to charities.
- January 28, 2020 Helmut Pastrick, Chief Economist, Central1 Credit Union on “Economic Update”
- February 25, 2020 Nicole Garton, Lawyer and Mediator, Heritage Trust on “The Rise of the "Family Office" in Canada”

## **2020-2021**

- October 27, 2020 Jim Harris, Disruptive Innovation Speaker and author of 'Blindsided' and 'The Learning Paradox' on “Strategies for Advisors to Thrive Amid COVID Disruption” (includes AGM)
- November 24, 2020 Fraser Green, Chief Strategist & Smartypants, Good Works Co. and Serena Hak, Associate, Stonegate Private Counsel on Telling the Perfect Story - the Key to Understanding Legacy Giving. A joint session with the Canadian Association of Gift Planners (CAGP). The short snapper is an “Income Tax Update” with Sheryne Mecklai, Tax Partner, Manning Elliot LLP.
- January 26, 2021 Jamie Golombek, Managing Director, Tax and Estate Planning, CIBC on “Hot Tax Tips for 2021!”
- February 23, 2021 Clare Burns, Partner, WeirFoulds LLP, Richard Weiland, Partner, Clark Wilson LLP on “Turning the Page: The Future of Virtual Witnessing and Electronic Wills”
- April 6, 2021 Dr. Peter Chan on “The Relationship between Mental Health and Capacity Issues in Dementia” and Kevin Love, Lawyer, Community Legal Assistance Society on “Serving Clients with Diminished Capacity”
- May 4, 2021 Alison Oxtoby, Lawyer & Founder, and Jennifer Eshleman, Associate Lawyer, Balmain Law Corporation on “Trusts: Holding Real Estate is Taxing”
- June 1, 2021 Michael Louie, Principal, and Jennifer Caldwell, Principal, D&H Group LLP on “The Forward-Thinking Advisor (An oxymoron)”

## ***2021-2022***

- October 26, 2021 Dr. Amy d'Aprix on "Has Financial Planning Hijacked Life Planning?" (includes AGM)
- November 30, 2021 JoAnne Mulligan, Vice President, Angela Huck, Vice President, Connor, Clark & Lunn Private Capital, Steve Gibson, Vice President, Connor, Clark & Lunn Private Capital on "The Impact of Low Interest Rates on Charities and Endowments". Monique Shebbeare, Lawyer, Monique Shebbeare gave a short Havinsnapper on "The Upcoming Amendments to WESA".
- January 25, 2022 Geoff Castle, Portfolio Manager, PenderFund Capital Management Ltd. on "Market Outlook 2022"
- February 22, 2022 Erica McGuinness, Partner, Sequeira Partners and Kira Gregson, Partner, Sequeira Partners on "Value Preservation & Maximization: Considerations for Estate Planning". J. Geoffrey Howard, Founder and Principal, Howard Employment gave a short snapper on "Employment Standards Update: 2 Quick Snappers"
- April 5, 2022 Joe Baratta, SVP, Head of Estates, West Coast, Bonhams and Cailin Broere, Regional Consultant for bonhams, Vancouver & Western Canada on "From Appraisal to Auction Block: Inside the Global Auction Market"
- May 3, 2022 M. Scott Kerwin, Partner, and Peter J. Glowacki, Partner, both of Borden Ladner Gervais LLP on "Current Cases of Note in Estate Litigation"
- June 7, 2022 Panel discussion on "Business / Practice Sales: multiple advisor perspective" with Marilouise Muller, Founder & Principal, Propel Solutions Ltd., Don Sihota, Partner, Clark Wilson LLP and Matt Baker, Senior Manager, Tax, Baker Tilly Corporate Finance and Moderator Axel Christiansen, Partner, Relay Transition Partners

## ***2022-2023***

- October 25, 2022 Russell Moldowan, CIM, Portfolio Manager, Pacifica Partners, Capital Management Inc. on "Estate Planning Issues with Cross-Border Investors" (includes AGM)
- November 29, 2022 Emma Ferguson, Associate Counsel, Alexander Holburn Beaudin + Lang LLP and Roger Lee, Partner, DLA Piper (Canada) on "Family Philanthropy: Keeping the Kids in the Picture". This session was in collaboration with the Canadian Association of Gift Planners – Greater Vancouver Chapter.
- January 31, 2023 Pierre Ouimet, Executive Director, Head Investment Strategist, Canadian Equities, UBS Bank (Canada) on "The Year Ahead 2023"
- February 28, 2023 Cindy David, President & Estate Planning Advisor, Cindy David Financial Group Ltd. on "Insurance Opportunities and Solutions in a post-COVID world"
- April 4, 2023 Ken H. Jiang, Partner, Thorsteinssons LLP on "Underused Housing Tax"
- Sheryne Mecklai, Partner, Manning Elliott LLP and Dagmar Zanic, Senior Tax Manager, Manning Elliott LLP on "Complex Tax Compliance Issues in Estates,

with Practical Solutions”

- May 2, 2023 Julia Chung, Partner, CEO, Sr. Financial Planner, Spring Planning and Kathy Bright, Family Enterprise Strategy and Governance Consultant on “Tales from the Front Line: Governance & Succession Pain Points and How to Avoid (some) of Them”. This session was hosted by EPCV in association with the CBABC Wills & Trusts – Vancouver Section.
- June 6, 2023 Geoffrey W. White, Counsel, Clark Wilson LLP on “A ‘State of the Union’ for Trusts and Trustees”

### **2023-2024**

- October 24, 2023 Nicole L. Garton, President, Heritage Trust Company Inc. on “Get it Together: Organize Your Critical Information & Documents to Assist Your Representative & Protect Your Estate” (includes AGM)
- November 28, 2023 Sarah Fitzpatrick, Partner, Miller Thomson LLP on “Having Fun with Donor Advised Funds”
- January 30, 2024 Candice Bangsund, Vice President and Portfolio Manager, Global Asset Allocation and Private Markets Solutions, Fiera Capital Corporation on “2023 Year in Review & 2024 Outlook”
- February 27, 2024 Dr. Grace H. Park, RMD Medical Assistance in Dying, Fraser Health Authority on “Medical Assistance in Dying”.
- April 2, 2024 Kathleen Cunningham, BCom, LLB, MPS, TEP, former Executive Director of the BC Law Institute and Canadian Centre for Elder Law on “Elder Abuse: Supporting Clients in Vulnerable Situations”
- May 7, 2024 Alison Oxtoby, Partner, Fasken Martineau DuMoulin LLP on” Bare Trusts: What the #!&% are they? What we thought we knew, but didn’t”
- June 4, 2024 Timothy Yeung, Family Enterprise + Executive Coach, Flourish Advising on “The Secret to Family Legacy Success: Why You Need Teamwork”

### **2024-2025**

- October 29, 2024 Alexander Demner, Partner, Thorsteinssons LLP and Jonathan Longcroft, Associate, Thorsteinssons LLP on “Death and Taxes - Latest Developments from Where the Two Intersect” (includes AGM)
- November 26, 2024 Michell Isaak, Partner, Vancouver, DLA Piper (Canada) LLP and Tamlin Cooper, Associate, Vancouver, DLA Piper (Canada) LLP on “The Treatment of Trusts in Family Law: Advice for Trust Planning, Drafting and Administration”
- January 28, 2025 Haley Hopwood, CFA, Institutional Portfolio Manager, PH&N Institutional, RBC Global Asset Management on “What is in store for 2025?”
- February 25, 2025 Myen Lim, Associate Principal, The Targeted Strategies Group and Jonathan Osten, Tax Partner, PwC Canada on “Succession Planning for the Family

Business”

- April 1, 2025 Robert E. Ward, J.D., LL.M., Ward Tax Law on “A Canadian Parent’s Guide to Estate Planning of U.S. Children or How To Be Sure Your U.S. Child’s Inheritance is Not Consumed by Ex-Spouses, Creditors, and the IRS”
- May 6, 2025 Mike Thiessen, MBA, CFA, Founder & CEO, ThreeCap on “Investing with Purpose: Building a Legacy Beyond Wealth”
- June 3, 2025 Panel on “The Power of Many: A Multi-Disciplinary Approach to Estate Planning” by Deena Chochinov, Director, GVA, KPMG Family Office, Peter Glowacki, National Leader, BLG Private Client Group and Pam Prior, National Leader, Estates and Trusts for Tax and Family Office, KPMG, with Panel Moderator Nicole Garton, President, Heritage Trust

## ***2025-2026***

- October 21, 2025 Max Reed, Principal, Polaris Tax Counsel on “Cross-Border Estate Planning” (Includes AGM)
- November 25, 2025 Cailin Broere, Regional Consultant, Bonhams, Vancouver & Western Canada, Trusts and Estates on “Planning for Art and Collectibles: Cross-Border Issues, Copyright and Export Rules for Canadian Estates”
- January 27, 2026 Susan Mowbray, Partner, Consulting, MNP LLP on “Economic Trends for 2026”
- February 24, 2026 Jamie Golombek, Managing Director, Tax & Estate Planning, CIBC Private Wealth on “2026 Tax Update”
- April 7, 2026 Gina Rotstein, Philanthropy Strategist, FEA, Social Impact Entrepreneur, Karma & Cents Inc. on “Gremlins in the Room: Navigating Complex Capital and Governance for Modern Legacy”