



The Annotated Alter Ego and Discretionary Trust 2013

Chair: M. Elena Hoffstein
Fasken Martineau Dumoulin LLP

**March 5, 2013
1:00 p.m. to 4:00 p.m.
SKU# CLE13-0030301**

**Donald Lamont Learning Centre
The Law Society of Upper Canada**



Schedule of Events

1:00 p.m. – 1:05 p.m. **Welcome and Opening Remarks from the Chair**

M. Elena Hoffstein
Fasken Martineau Dumoulin LLP

1:05 p.m. – 1:45 p.m. **Discussion of Annotated Discretionary Trust**

M. Elena Hoffstein
Fasken Martineau DuMoulin LLP

Joan Jung
Minden Gross LLP

- 1:45 p.m. – 1:55 p.m. **Questions and Answers (Discretionary Trust)**
- 1:55 p.m. – 2:10 p.m. **Coffee Break**
- 2:10 p.m. – 2:50 p.m. **Discussion of the Annotated Alter Ego Trust**
- Brian Cohen
 Fraser Milner Casgrain LLP
- David Stevens
 Gowling Lafleur Henderson LLP
- 2:50 p.m. – 3:00 p.m. **Questions and Answers (Alter Ego Trust)**
- 3:00 p.m. – 3:45 p.m. ***Panel Discussion on Important Professionalism Issues**
- Moderator:**
 M. Elena Hoffstein
 Fasken Martineau Dumoulin LLP
- Panelists:**
- Brian Cohen
 Fraser Milner Casgrain LLP
- Joan Jung
 Minden Gross LLP
- David Stevens
 Gowling Lafleur Henderson LLP
- 3:45 p.m. – 4:00 p.m. ***Questions and Answers (Professionalism)**
- 4:00 p.m. **Program Ends**

Total CPD = 2.0 Substantive Hours + *1.0 Professionalism Hours