Multi-Generational Planning: Capacities and Creativity

2016 Advocis Greater Vancouver Estate and Financial Planning Conference

October 18-19, 2016

Tentative Agenda*

Advocis® Greater Vancouver

* Please note that the following agenda is provided as a guideline and may be subject to change at this time.

DAY 1 | OCTOBER 18

07:00 AM	**BREAKFAST AND REGISTRATION**
08:00	**Welcome and Opening Comments** *David Chalmers, MC*
08:15	**Ageing and Loss of Capacity** *Speaker TBD*
08:45	**Assisting Individuals with Representation Agreements and Powers of Attorney** *Joanne Taylor, NIDUS*
09:30	**All this Incapacity Planning is Making me Crazy! A Primer on Representation Agreements and Powers of Attorney** *Rose Shawlee, Richards Buell Sutton Wealth Preservation Group*
10:15	**BREAK**
10:30	**Musical Heirs** *CASE STUDY: Representative of Bull Housser (TBC) and Micheline Varas*
12:00 PM	**LUNCH**
01:00	**Cross Border Issues** *Will Todd, LLB, DLA Piper*
01:45	**End of Life Issues and Doctor Assisted Dying** *Penny Washington, LLP, Bull Housser and Dr. Paul Sugar, Palliative Support Foundation*
02:45	BREAK
03:00	**Long Term Care and Critical Illness: Part of the Long Term Planning Process** *Laurel Pedersen, AVP Individual Health Insurance Product Development, Sun Life*
03:45	**Genetic Testing: What's Coming Down the Pipeline** *Warren Hong, Industrial Alliance*
04:30	**Day 1 Wrap Up** *David Chalmers, MC*
04:45	**Wine and Cheese Reception**

DAY 2 | OCTOBER 19

07:00 AM	**BREAKFAST AND REGISTRATION**
08:00	**Opening Comments and Recap of Day 1** *David Chalmers, MC*
08:15	**Becoming an Ideal Successor** *George Hartman, Grant Taggart Symposium*
09:00	**Will Substitutes: Alter Ego and Joint Partner Trusts - Making the Law Work for You** *Rutsu Shikano, Richards Buell Sutton Wealth Preservation Group*
09:45	**BREAK**
10:00	**Courage to Come Back** *Michael Coss*
10:30	**RDSP and Disability Trusts: Let's Talk Logistics, Eligibility and Funding** *Panel Discussion*
12:00 PM	**LUNCH**
01:00	**Trustees: How to Pick Them and How to Pay Them** *Debra Thomas, DLA Piper*
01:45	**Computerization and Financial Planning: How the Artificial Brain Works** *Tea Nicola, CEO & Co-Founder of WealthBar FS*
02:15	**New Life Insurance Legislation: Tax and Estate Planning Implications** *Jos Herman, Canada Life, National Estate & Tax Planning Consultant*
03:00	**Key Note Presentation** *Dr. Art Hister, Full-Time 'Media Doctor'*
04:00	**Wrap Up and Prize Draw** *David Chalmers, MC & Mark Schulhof, Chair*