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TRUST TROUBLES LITIGATION, TAX AND ETHICAL ISSUES

A CLE Workshop for Lawyers and Accountants | Tuesday June 4th, 2019



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On June 4, 2019, the B'nai Brith Canada Estates and Trusts Group will present its CLE seminar. What follows is a summary of the fictional

scenario, and a description of the issues to be addressed in the vignettes and panel discussions. In our scenario, Brad Phillips was a child actor in TVO's 1985 *Dear Aunt Agnes* children's show. While Brad's TV role is factual, the scenario is fictional. Brad's earnings were invested by his father and greatly increased in value. His parents persuaded Brad to place all the money in a trust benefiting Brad and his sister. The lawyers and accountants involved arguably

made some mistakes. In the years that followed the trustee lost a good deal of money, refused to distribute and declined to account. Brad sues the professionals and seeks an accounting. This sets the stage for vignettes and panel discussions to deal with the litigation and tax issues. Our scenario also includes facts serving as a segue to educate attendees on the Law Society of Ontario's Employment Diversity Initiative ("EDI"), which deals with the systematic

discrimination faced by minorities in general and women in particular in the legal profession. The vignettes feature top-tier lawyers and accountants role-playing the clients and professionals involved in the fictional fact scenario and presenting on the panels addressing the issues raised. Our program qualifies for CPD & EDI hours. As this annual event grew in stature, more organizations signed on to sponsor. B'nai Brith Canada expresses its gratitude to its sponsors.



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Registration & Breakfast: 7:30 AM | Program: 8:00 AM - 12:35 PM | Cost: \$136 plus HST
This program is eligible for CPD hours required of Lawyers and Accountants

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