

Wills & Estates Section Report 2013-14

October 25 - 26, 2013 - I attended CBA National Wills, Estates and Trusts in Ottawa. The most salient parts of the agenda included proposals for income tax reform related to charitable donations, terms of a draft letter to Canada Revenue Agency setting out the CBA position on the, at that time, intended changes to the tax treatment of testamentary trusts, educational project for Canadian Bankers Association for bank staff dealing with public on such things as powers of attorneys and joint bank accounts, initial steps in creating an estate planning course on a national level similar to the tax course held at Niagara on the Lake in May, as well as update on concordance table for estates across Canada.

October 25, 2013 - In my absence at national meeting, Justice H. Rempel and Bob Fabbri presented an update on the new tariff/rules for estate administration. Caroline Kiva acted as chair.

Mid-Winter January 23, 2014 - Digital and Online Assets. Johanna Caithness and Iain McDonald of Fillmore Riley LLP, address various issues relating to digital and online assets in the context of powers of attorney, wills and estate administration including issued related to access and ownership of photographs, social media accounts, email, online investing and trading accounts and iTunes purchases.

March 27, 2014 - Cynthia Hiebert-Simkin and Eleanor Wiebe discussed the daily issues concerning the amendments to Q.B. Rule 74 from a practitioner's perspective. Anita Southall was to be a co-presenter but was unable to attend. 55 people signed up. Hypothetical questions were discussed and considered.

April 21, 2014 - John Poyser and Michelle Laham Szutiak, Challenging *Inter Vivos* Gifts. Approximately 45 people in the room and another 7 by teleconference. Generated significant discussion on complex and interesting legal issues surrounding gifting.

Respectfully Submitted,
John Delaney, Chair