

# Estate-planning mini-series

As an Investment and Wealth Advisor who understands the importance of estate planning, Lara is pleased to be presenting these complimentary workshops.

Open to General Public – limited to 14 people per session.  
(Note prior events had a waitlist).

**Location:** 777 Fitzgerald Ave, Courtenay (board room).  
Beverages and light snacks included.

## **Will and Estate planning — including NEW bare trust information**

April 3 | 1:00 p.m. – 2:30 p.m.

Choosing an executor and common Will errors are just two of the topics to be covered in this informative session. Our legal-expert guest speakers will also outline what to consider before meeting your estate lawyer, how to include charitable organizations in your planning, and how to structure your estate for financial/tax efficiency and to achieve your objectives in light of new provincial and federal reporting requirements, including rules around bare trusts.

## **Incapacity planning**

April 10 | 1:00 p.m. – 2:30 p.m.

Planning ahead for your own future, or that of a loved one? Gain expert insights on choosing a Power of Attorney, and their responsibilities, healthcare agreements, and what you need to know about medical assistance in dying (MAID). Other topics for discussion will include: When is the right time to act, and what can go wrong?

## **Executor planning**

April 17 | 1:00 p.m. – 2:30 p.m.

The role of executor is an important one, and we'll guide you through some of the key considerations. These include the duties of an executor, processing an estate, setting beneficiary expectations, probate, and who pays who and when?

## **Register**

Contact Una Guile at  
778-335-9425 to register.  
For more information, visit  
[www.LaraAustin.com](http://www.LaraAustin.com).

## **Hosted by:**

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## **With guest speakers:**

**Shane Landreville**  
Associate  
Ramsay Lampman Rhodes Lawyers

**Paul R. Ives, K.C.**  
Associate Counsel  
Ramsay Lampman  
Rhodes Lawyers



**Wealth Management**  
Dominion Securities