



Toronto Branch  
presents:



## Disclosure of Information Trust and Corporate Information

Registration 2:45 PM / Seminar 3:00 PM – 4:45 PM

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### Chairs:

Joan Jung, Minden Gross LLP  
Elena Hoffstein, Faskens LLP

### Speakers:

- Howard Black**, Minden Gross LLP - on beneficiary's right to Information from trustees
- Christina Tari**, Richler and Tari - on CRA's right/ power To inspect, examine and require information
- Arlene O'Neill**, Gardiner Roberts LLP - on shareholder rights to information from the corporation

### Summary:

This program will cover access to information rights from the perspective of:  
a beneficiary of an inter vivos trust  
a shareholder of a corporation  
Canada Revenue Agency

The typical estate freeze reorganization will result in an inter vivos trust becoming a common shareholder of a corporation. As relationships mature and/or change, disclosure and access to information may become sensitive concerns. Do the beneficiaries of the trust have rights to information and disclosure of trust documents and underlying assets? What are the rights of a shareholder of a corporation? Learn also about CRA's broad powers of audit and inspection under the Income Tax Act and its right to require information from third parties who are not under audit.

### Remote locations (webinars)

Simultaneous audio presentations available at the following remote locations.

- Barrie, **Scotia Private Client Group**, 44 Collier Street - 2nd Floor
- Burlington, **BDO Dunwoody LLP**, 3115 Harvester Road, Suite 400
- Hamilton, **Ross & McBride LLP**, 1 King St. West
- Kitchener, **Gowling Lafleur Henderson LLP**, 1020 - 50 Queen Street North
- London, **TD Waterhouse Private Trust**, 380 Wellington (at King) 18th floor
- Markham, **Wilson Vukelich LLP**, 710 - 60 Columbia Way
- Mississauga (Downtown), **Pallett Valo LLP**, 1600 - 90 Burnhamthorpe Road West
- Sarnia, **RBC Dominion Securities**, 340 North Front St.

### Main Venue

**The Lamont Learning Centre**,  
Osgoode Hall 130 Queen Street West,  
Toronto  
(Enter via the eastern doors of the Law  
Society building Osgoode Hall)

Seminar