

## Tax Efficient Probate Avoidance

Thursday, February 25, 2010

Registration 2:00 pm Seminar 2:30 pm – 4:30 pm

**Main Venue:** Stewart McKelvey, 900-1959 Upper Water Street, Halifax NS  
Main Boardroom

### Speakers:

- Richard Niedermayer**, Partner, Stewart McKelvey
- Heath Moore**, CA, Grant Thornton

### Summary:

- This informative seminar will identify various ways to avoid probate in an income tax efficient manner, thereby saving probate taxes, enhancing the ease of estate administration and preserving confidentiality.
- Various topics such as joint ownership, beneficiary designations, alter ego and joint partner trusts, bare trusts, insurance trusts, RRSP trusts and related strategies will be discussed.
- In each case, the income tax treatment will be analysed, compliance issues addressed and the estate planning and administration pros and cons reviewed.

### Remote locations (by video conference)

Simultaneous audio visual presentations available at the following **Stewart McKelvey** offices.

- 65 Grafton Street, Charlottetown, PE
- Suite 600, Frederick Square, 77 Westmorland Street, Fredericton, NB
- Suite 601, Blue Cross Centre, 644 Main Street, Moncton, NB
- Suite 1000, Brunswick House, 44 Chipman Hill, Saint John, NB
- Suite 1100, Cabot Place, 100 New Gower Street, St. John's, NL

Seminar

Atlantic Branch  
presents:



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If attending at an alternate location, please check the appropriate box:

- Charlottetown, PE       Moncton, NB       St. John's, NL  
 Fredericton, NB       Saint John, NB

ONLINE REGISTRATION AVAILABLE AT [STEP.CA](http://STEP.CA)

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	Fee	HST	Total	Amount
STEP Member (Single program)	\$50.00	\$6.50	\$56.50	\$
NON-Member (Single program)	\$50.00	\$6.50	\$56.50	\$
GST Reg. # 891589327			<b>TOTAL AMOUNT</b>	\$

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