

2019 WILLS & ESTATE PLANNING SERIES



TORONTO REFERENCE LIBRARY - BEETON HALL 789 YONGE STREET

Where There's a Will: Avoid Estate Planning Mistakes

Thursday, May 16 – 1:30 - 3:00 PM

Matthew Urback, Partner, Shibley Righton LLP
Jacqueline Cooper, VP, Development,
West Park Healthcare Centre Foundation

Tax Smart Estate Planning & Giving

Thursday, August 8 – 6:00 - 7:30 PM

Allan Madonik, Wealth & Health Broker,
Blue Swan Financial
Subhastin Kharag, CFP, Regional Vice President,
Ontario, Foresters Financial
Bri Trypuc, Founder, Trypuc Philanthropic Office

Evening Session

Choosing the Right Executor

Thursday, September 5 – 1:30 - 3:00 PM

Elaine Frost, President & Founder,
Trusted Transitions

LOCKE LIBRARY - 3083 YONGE STREET

Who needs a Will?

Why Estate Planning is Critical

Thursday, June 13 – 1:30 - 3:00 PM

Jag Gandhi, Partner, Miller Thomson LLP
Janice Correa, AVP Legacy Gifts, ROM Governors

SCARBOROUGH HEALTH NETWORK, BIRCHMOUNT HOSPITAL - IRENE STICKLAND CENTRE, 3030 BIRCHMOUNT RD.

Estate, Succession and Legacy

Wednesday, June 19 – 6:00 - 8:00 PM

Lydia Cheung, CFP, PFP, RRC, Financial Consultant,
IG Wealth Management
David Dai, CFP, RRC, Financial Consultant, IG Wealth Management
Eddy YT Leung, CPA, CA, CFP, Partner, Leung Luo Pang LLP
Rosetta Ting, Lawyer, DS Lawyers Canada LLP

Cantonese Evening Session

ROYAL ONTARIO MUSEUM - EATON THEATRE - 100 QUEEN'S PARK

Women's Wisdom: Wealth & Philanthropy

Monday, June 24 – 3:30 - 5:00 PM

Panelists:

Sharon Avery, President & CEO, Toronto Foundation
Robin Turack, VP, Business Development, PearTree Canada
Brenda Lee-Kennedy, Partner, PricewaterhouseCoopers LLP
Susan Horvath, President & CEO, ROM Governors - Moderator



PearTree



NORTH YORK CENTRAL LIBRARY - MEETING ROOM 1 5120 YONGE STREET

Planning for the Single, Divorced & Widowed

Thursday, October 3 – 1:30 - 3:00 PM

Amanda Stacey, Partner
Norton Rose Fulbright Canada LLP
Meredith Meads, CFRE Associate Director, Major Gifts &
Gift Planning, Trinity College

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