

# 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



ROYAL ONTARIO MUSEUM



TORONTO FOUNDATION

## 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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