

TRUSTS, ESTATES AND YOU:
A Contemporary Trip Around the World in 80 Minutes

By
GEOFFREY A. SHINDLER

PRELIMINARY PROGRAM

Speaker: Geoffrey Shindler, Lane-Smith & Shindler LLP, Manchester, England.

Geoffrey has been practising for over 30 years, focusing on trusts, inheritance tax, capital gains tax, wills and probate. Until recently, he was the National Group Head of the Trusts & Estates Department of Halliwells, LLP, Manchester, England. Geoffrey graduated from Cambridge University: Law Tripos 1st Class Degree MA LLM (Cantab) WM Tapp Scholar, Gonville & Caius College, Cambridge.

Geoffrey was Chairman of STEP from 1994 to 1998; Chairman of the Institute for Fiscal Studies, North West Branch from 1996 to 1998. He is a member of numerous organizations, including Trust Law Committee, American Bar Association and Law Society of England and Wales. Geoffrey writes and lectures extensively and is consulting editor to the Trusts and Estates Law and Tax Journal.

Program:

Issues dealing with Trusts and Estates are common around the world. Through a review of cases around the world (including Canada), Geoffrey will present the latest developments on issues concerning estates and trusts. Some of the issues that will be covered include:

- Has there been undue influence in making a charitable bequest?
- Is a charitable donation a completed gift?
- The validity of a will: is there testamentary capacity?
- Estate administration, including will construction; administration of company shares; transfer or transmission of shares; pre-emptive provisions and claims under family support legislation
- Trust issues covering:
 - Trustee mistakes; rule in Hastings-Bass
 - Disclosure by trustee of trust documents
 - Is there undue influence over retirement of a trustee
 - Fraud on a power
 - Breach of trust
 - Sham trust
 - Dishonest assistance