

# THE ANNOTATED Powers of Attorney for Property and for Personal Care 2019

CO-CHAIRS: **M. Jasmine Sweatman, C.S., *Sweatman Law Firm***

**Melanie Yach, *Aird & Berlis LLP***

**February 21, 2019**

**9:00 a.m. – 12:00 p.m.**

**Total CPD Hours = 2h 15m Substantive + 45m Professionalism <sup>P</sup>**

**Law Society of Ontario  
The Donald Lamont Learning Centre  
130 Queen Street West  
Toronto, ON**



**SKU CLE19-00203**

## **Agenda**

**9:00 a.m. – 9:05 a.m.**

**Welcome and Opening Remarks**

*M. Jasmine Sweatman, C.S., Sweatman Law Firm*

*Melanie Yach, Aird & Berlis LLP*

**9:05 a.m. – 10:00 a.m.**

**Discussion of the Annotated Power of Attorney  
for Property (25 minutes <sup>P</sup>)**

- Interplay between Alto-Ego Trusts and powers of attorney for property

- Gifts & Loans by attorney for property
- Joint Assets & attorneys – drafting considerations and administration considerations
- Use of POAs with financial institutions
- Record Keeping, Accounting & Compensation

Carol Dalgado  
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**10:10 a.m. – 10:20 a.m.**

**Question and Answer Session**

**10:20 a.m. – 10:40 a.m.**

**Coffee and Networking Break**

**10:40 a.m. – 11:50 a.m.**

**Discussion of the Annotated Power of Attorney for Personal Care (20 minutes 🕒)**

- Managing End of Life Decisions and the Role of Advanced Directives
- Compensation Issues Relating to Attorneys for Personal Care
- The Nature and Extent of the Duty to Consult
- Challenging Decisions Made by Attorneys for Personal Care

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**11:50 a.m. – 12:00 p.m.**      **Question and Answer Session**

**12:00 p.m.**                      **Program Ends**