

Tax, Retirement & Estate Planning Snapshot: Food for Thought

Whether it is imminent or on the distant horizon, retirement requires good early planning. Changes are coming to our retirement system in the next couple of years, which makes this is an ideal time to initiate or re-engage your planning activities – taking care of yourself in later years, and planning ahead to take care of those around you.

- Rates and brackets - where we're at
- Savings and retirement reforms
- The true value of TFSAs
- Joint ownership and the family cottage
- Tax benefits of testamentary trusts
- The last word

About the Speaker

Doug Carroll is Vice President, Tax & Estate Planning at Invesco Trimark. As part of the tax and estate planning team, he researches case law, legislation and financial media to prepare support material for advisors and their clients. The balance of his time is spent on professional speaking and consulting activities with key business partners.

Doug has worked in similar roles in the life insurance and investment industry at both the manufacturer and distributor levels. Combined with his hands-on experience running an estate planning law practice, he is able to offer practical insights in discussing personal wealth matters.

Apart from his legal work, Doug's background is as a professional conference planner, having organized and spoken at hundreds of conferences since the 1980's on estate planning matters, particularly on tax-informed insurance and investment issues. He contributes to and has been quoted in financial media including Advisor.ca, Advisor's Edge Reports, the Insurance Journal and Advocis Forum, and served as the estate planning correspondent for Global Television's MoneyWise consumer and business affairs program.

In addition to Doug's law degree, he is also a Certified Financial Planner (CFP) and a Trust and Estate Practitioner (TEP). Most recently, Doug obtained his Master of Laws (LLM) with a specialization in taxation.

Date:

Thursday, February 10th, 2011

Location:

Crystal Fountain Banquet Hall
60 McDowell Gate
Markham, ON L6G 1B5
905-513-1900
www.crystalfountain.com

Time:

5:30 p.m. – Registration
6:30 p.m. – Dinner
7:30 p.m. – Presentation

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Dinner:

Greek Salad, Chicken Souvlaki, Dessert, Coffee/Tea
Vegetarian option upon request

Cost:

\$45.00 plus HST – Members
\$50.00 plus HST – Non-Members

CPLD:

3 credits

REGISTRATION:

To register online please visit the CMA Ontario Member Portal at <http://members.cma-ontario.org>.

To register by email or fax please complete the form below and send to Leena Rosenberg at 416-977-1365 (fax) or rosenberg@cmaontario.org

Guests (non-members) may register by email or fax by completing the form below and sending to Leena Rosenberg at 416-977-1365 (fax) or rosenberg@cmaontario.org

REGISTRATION FORM

Please fax or email your registration form to Leena Rosenberg, Tel :(416) 204-3140 or (800) 387-2991 ext 140,
Fax (416) 977-1365, rosenberg@cmaontario.org

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Name: _____ I am a Member: I am a guest (non-member):

Member #: _____ Tel: _____

Credit Card (Visa/MasterCard): _____ Expiry Date: _____

Signature: _____ Dietary Restrictions: _____

No refunds for cancellations after February 3, 2011. Substitutions accepted at no charge.

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