

2018 Leave A Legacy™ Series



LEAVE A LEGACY™

PROGRAM OF:

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TORONTO REFERENCE LIBRARY - 789 YONGE STREET

Estate Planning 101: Basics & Key Considerations

Thursday, May 3 – 1:30 to 3:00 PM

Dorothy Brophy, Lawyer, Brophy Law
Kristine Anderson, Partner, Bales Beall LLP

Aging Confidently: Planning For Tomorrow

Thursday, July 12 – 6:00 to 7:30 PM

Audrey Miller, Founder, Elder Caring Inc.
Elaine Blades, Senior Manager, Professional Practice
Group, RBC Wealth Management, Estate and
Trust Services



Legacy Matters

Thursday, August 9 – 6:00 to 7:30 PM

Silvia Jacinto, Partner Tax, Crowe Soberman LLP
Ian Fraser, Legacy Advisor, *PhilanthroPlan*



Estate Planning for Inspiration: How Do You Wish To Be Remembered

Thursday, Sept 6 – 1:30 to 3:00 PM

Sharon Avery, President & CEO, Toronto Foundation
Bob Goldberger, Partner, Richardson GMP

ROYAL ONTARIO MUSEUM - 100 QUEEN'S PARK

Smart Estate & Philanthropic Planning For Women

Thursday, June 21 - 3:30 to 5:00 PM

Panelists:

Charlotte Paul, CFDA, Financial Advisor,
Perspective Wealth Management, Raymond James Ltd.
Yeti Agnew, Legal Sherpa® Lawyer, Yeti Law Professional
Corporation
Alexandra Spinner, CPA, CA, TEP, Partner Tax,
Crowe Soberman LLP
Susan Horvath, President & CEO, ROM Governors - Moderator

SCARBOROUGH AND ROUGE HOSPITAL - 3050 LAWRENCE AVE. E.

Legalities of Estate Planning

Thursday, July 19 – 1:30 to 3:00 PM

Sylvia Schumacher, Partner, Schumacher Law

NORTH YORK CENTRAL LIBRARY - 5120 YONGE STREET

How To Minimize Taxes & Maximize Giving

Thursday, October 11 – 1:30 to 3:00 PM

Mark Halpern, CFP - Trust & Estate Practitioner,
WEALTHinsurance.com Inc.
Stephen Altbaum, CPA, TEP Lipton LLP
Chartered Professional Accountants

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