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ESTATE PLANNING PRECEDENT'S
A SOLICITORS MANUAL
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Release No. 5, September 2023

"Estate Planning Precedents: A Solicitor's Manual" includes a wide variety of precedents covering all aspects of wills and estates. Also included are domestic contracts, trust deed documents, powers of attorney, appendices containing estate planning forms, checklists, and signing instructions, plus relevant legislation and IT Bulletins, Information Circulars and Advance Tax Rulings. This product is designed as a useful tool for everyday use by the busy estates practitioner.

What's New in this Release:

This release updates: Tables of Concordance, legal memos, CRA documents and legislation.

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Highlights

Appendices—Appendix TC—Tables of Concordance—All of the Tables of Concordance (TC:1. Will Planning Legislation; TC:2. Power of Attorney; TC:3. Adult Guardianship; TC:4. Health Care Consent; TC:5. Mental Health Act; TC:6. Perpetuities and Accumulation; and TC:7. Public Guardian and Trustee) have been reviewed and updated as necessary.

Appendices—Appendix H —Information Circulars—Some of the CRA documents that have been updated include the following: § H:1 Information Circular IC70-6R12 - Advance Income Tax Rulings and Technical Interpretations; § H:6 Information Circular IC82-6R13 - Clearance Certificate, § H:10 Information Circular IC 97-2R19 - Customized Forms, and § H:11 Guidance Reference number CG-023 - Qualified donee: Foreign charities that have received a gift from His Majesty in right of Canada.

Appendices—Appendix IF—Issues in Focus —§ IF:14 "What Estate Planning Factors Should Be Considered for Beneficiaries with Special Needs?" Has been updated.

ProView Developments

Your ProView edition of this product now has a new, modified layout:

- The opening page is now the title page of the book as you would see in the print work
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- The Table of Cases and Index are now in PDF with no searching and linking
- The Table of Contents now has internal links to every chapter and section of the book within ProView
- Images are generally greyscale and size is now adjustable
- Footnote text only appears in ProView-generated PDFs of entire sections and pages