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From: Kenneth C. Pope LLB TEP

To: Ontario Rett Syndrome Association
'Building Bridges' Conference

Date: September 17 – 19th, 2010

Re: Disability and Estate Planning Seminar

Dear Conference participants, these are the main topics we will be discussing at the conference seminar, along with other matters of interest to the audience that they may raise.

1. ODSP eligibility and benefits, increasing amounts from room and board to shelter plus supplementary benefits. Exempt asset arrangements.
2. Using and back filing the disability and caregiver tax credits, the disability child amount and the Canada Disability Child Benefit.
3. RDSPs, contributions and accumulations, payments from RDSPs.
4. Guardianship. Powers of Attorney from children and related issues.
5. Wills and Henson trust arrangements, and use of additional trusts for estate and tax planning purposes. Trustee 'conflict of interest' issues.
6. Funding trusts with life insurance.
7. 'Adult dependent survivor' pensions for children with disabilities, from OMERS, Teachers, OPG.
8. RRSP rollovers to adult children with disabilities and ODSP related issues.
9. Life time benefits trusts to receive RRSPs for children as parallel trusts.
10. Planned giving, bequests, charitable remainder gifts and minimization of income on death from RRSPs.
11. Accessing my web site for further information. www.kpopelaw.ca

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