



Estate Planning for Families Who Have Children With Special Needs in B.C.

Presented by
Blair P. Dwyer

Friday, April 9, 2010

8:30 am – 9:00 am Registration

9:00 am – 3:30 pm Presentation

Fletcher Challenge Theatre, Harbour Centre Campus,
Simon Fraser University, 515 West Hastings Street, Vancouver

The Presentation

The purpose of this day is to provide important information for parents of children with special needs on how best to plan for their child's future. This presentation will cover both how to maximize the child's future financial security and how to protect that security once the parent is no longer able to do so. While this is a topic that many parents find very difficult to face, getting full information from an authoritative source actually helps to bring down the understandable anxiety that surrounds this important issue.

Some of the topics that will be covered, illustrated by case studies drawn from the extensive professional experience of the presenter, include:

- Financial and Health Care Representation Agreements and planning for when the child with special needs becomes an adult with special needs at age 19.
- Asset protection planning for parents and child.
- The use of trusts (including living trusts, testamentary trusts, Henson trusts, alter ego trusts and joint partner trusts).
- Guardianship.
- Government programs, including the new Registered Disability Savings Plan (RDSP). This program includes contributions from the federal government in the form of the Canada Disability Savings Bond and the Canada Disability Savings Grant.
- Wills and probate.
- Estate planning tips for the parents.

Who Should Attend this Presentation?

This presentation has been developed for parents and guardians of children and adults with all special needs. It will also be of use to community professionals who work with families who need guidance to address these important estate planning issues.

About the Presenter

Blair P. Dwyer is a well-known Canadian tax lawyer. He has served as senior Rulings Officer with Revenue Canada (now the Canada Revenue Agency) and is a former tax partner with the Vancouver office of McCarthy Tétrault. In 1995, Blair established Dwyer Tax Lawyers, a Victoria boutique law firm that restricts its practice to tax and estate planning: www.dwyertaxlaw.com. Blair is the author of several publications on Canadian tax law and has taught Advanced Taxation at the University of Victoria. He is the father of two children on the autism spectrum and is a member of the ACT Advisory Council.



Blair Dwyer has provided a chapter on estate planning for the ACT Manual: *Living and Working with Children with Autism Spectrum Disorder In British Columbia – A Manual for Parents and Community Professionals*. Chapter 11, "Estate Planning for Families Who Have Children with Special Needs in B.C.," can be downloaded, at no charge, from the ACT website at www.actcommunity.net/AI/Manual.htm. There are also a number of other topics covered in the manual relevant to all families who have children with special needs in BC.

Acknowledging Our Community Partners

ACT thanks the many parents and professionals across BC who volunteer their time to support our work. Our community volunteers range from local parents and community groups to members of the ACT Advisory Council and Board of Directors.

ACT recognizes the ongoing support received from the Ministry of Children and Family Development for our family support and information work and our new online training initiative – The ACT Online Learning Community (AOLC). The ongoing development of the AOLC has been made possible thanks to funding from the Inukshuk Fund (www.inukshuk.ca) and the support of Simon Fraser University's Learning and Instructional Development Centre. ACT gratefully acknowledges the Consortium for the Advancement of Child Health – SFU for co-sponsoring our events and providing excellent facilities in Vancouver at a reduced cost. See www.sfu.ca/autism-lab/. We particularly appreciate the willingness of Blair Dwyer to contribute his time to this event.

Location, Schedule & Hotel Information

Harbour Centre is located at 515 West Hastings Street in Downtown Vancouver and is close to the Seabus terminal, West Coast Express, Skytrain and major bus routes. Parking is plentiful but expensive; public transit is a great option. For hotel information and schedule, see www.actcommunity.net or call or e-mail ACT.

ACT Information & Support Services

ACT's Information Officers are available to answer questions about which of our events would be relevant for the child or student you support. ACT also offers extensive information and support to families and community professionals on diagnostic, treatment and educational topics. We can be reached by telephone at 604-205-5467, toll-free at 1-866-939-5188, or e-mail info@actcommunity.net.

A Note on Fees and Bursaries

Parents may use 20% of their autism funding to pay for training workshops and travel costs. Bursaries for low-income participants and/or those traveling from outside their region are available for residents of British Columbia. These are available for all parents who have children with special needs, regardless of diagnosis. See www.actcommunity.net/Foot/bursaries.htm. Bursaries are provided as reduced registration fees. Call ACT's office for info or e-mail info@actcommunity.net with your request before registering.

Donations to ACT for our bursary fund are gratefully received and enable us to make our workshops more affordable as they receive no external subsidy. ACT is a registered charity: #86169 1236 RR0001. Tax receipts are issued.

For the latest listing of ACT's Online Videos, see www.actcommunity.net/webcast/CurrentWebcasts.htm.

REGISTRATION FORM

Estate Planning

You may register online at www.actcommunity.net, unless you are requesting a bursary. Please confirm registration before booking flights.

Name: _____ Phone: _____

Organization: _____

Address: _____

City: _____ Province/State: _____ Postal/Zip Code: _____

E-mail (for e-mail confirmation of your registration): _____

Do you wish to receive ACT info by post? Yes Do you wish to receive workshop updates by e-mail? Yes

Your information will remain confidential. ACT is committed to respecting your privacy. We do not share your information with any other organization or individual. See www.actcommunity.net for privacy policy.

COST OF WORKSHOP

- Early Bird Rate (postmarked by March 21, 2010) = \$75 CDN
- Regular Rate (postmarked by March 21 – March 31, 2010) = \$110 CDN
- Late Registration (after April 1 & at the door, space permitting) = \$140 CDN

Are you a parent/guardian of a person with ASD? Yes Does your child have another special need? Yes

If you are not attending in a parental capacity, please indicate your professional or para-professional status: _____

Para-professionals include group home staff, childcare workers, special education assistants, behaviour interventionists, preschool & supported childcare staff and foster parents. Students, please attach copy of student ID.

METHOD OF PAYMENT: Cash Cheque Name on Card: _____
 Mastercard VISA Card #: _____ Exp. Date: _____

In addition to on-line registration, ACT accepts telephone registration using a credit card at 604-205-5467, toll-free 1-866-939-5188 or by fax at 604-205-5345. Registrations are accepted only when accompanied by payment. Refunds for registration, less a \$25 handling charge are available until seven days prior to the workshop. Details of the cancellation policy are available on ACT's website. Cheques that are not honoured will result in a loss of registration status. Bank charges incurred by ACT as a result of a NSF cheque are the responsibility of the registrant. Cheques or money orders should be made out to: ACT—Autism Community Training. Mail to: Suite 240–2250 Boundary Road, Burnaby, BC Canada V5M 3Z3. To confirm registration, e-mail info@actcommunity.net or telephone 604-205-5467, toll-free 1-866-939-5188.