Agenda - A Primer on Charitable Bequest Administration
April 9 2019 - 8:00 a.m. – 5:00 p.m.
7:30 a.m. – Registration & breakfast

In this full day intensive we explain the standard administration of an Estate (Parts 1 – 4) and discuss best practices, challenges and solutions in charitable bequest gift management at the Charity. Participants will receive checklists and templates they can put to work right away in the office, as well as knowledge and perspective to help them in the future.

Welcome and Introductions

Overview & Definitions

- Legal & regulatory framework (Statutes Provincial & Federal; Common Law; Civil Code)
- The role and importance of the Will in both common law and civil code
- Participants in the process

Steps in the Estate Admin Process, Part 1

How the Executor or Liquidator starts the process

Common challenges & how a Charity can handle them

- **Challenges to the Will, Claims against the Estate, Interpretation Issues**

Break

Steps in the Estate Admin Process Part 2

Applying for "Probate"

Income Tax: Terminal T1, Estate returns, and charitable gifts in a Graduated Rate Estate

Steps in the Estate Admin Process Part 3

Interim distribution, Accounts & Trusts

Best practices in Charity administration of gifts from estates
Policies, Preparing, Accepting, Recording, Monitoring, Communications & Recognition

Working Lunch discussing Case Study

Debrief Case Study as a group: tactics for delicate communication with Estate administrators

Reviewing Estate Accounts as a Residual beneficiary, what a beneficiary should receive, and how to review.

Break

Discuss a set of Estate Accounts in small groups and walk through the review as a large group.

Steps in the Process – Part 4

Wind up

Releases & Income Tax Receipts

Wrap up/Evaluation