



Networking to Learn Seminar

Topic: Estate Planning for Business Owners

- Are your Wills and Powers of Attorney current?
- Do you have a Corporate Will?
- Is your Insurance coverage sufficient?
- Is there a Shareholders Agreement to consider?
- Are you aware of the tax effects on your estate?
- Have you considered the succession of your business?

Date: Wednesday, November 18th, 2009

Time: 6:30pm – 9:30pm

Venue: Casa Victoria
8601 Warden Avenue, Unit 5-6, Markham, Ontario L3R 0B5

Speaker: SARA PLANT, as Vice President and National Director, Wealth Services, BMO Harris Private Banking, has oversight for the delivery of Personal Trust and Planning Services for private banking clients across Canada. In this role Sara also acts as a Director and Chief Operating Office of BMO Trust Company.

Sara left private practice to join the Private Banking group in 1994. She is a lawyer specialising in the areas of estates and trusts, and prior to her current role was part of the senior management team leading the GTA Wealth Services group in its provision of estate and tax planning services.

Sara graduated from Queen's University Law School in 1988, and was called to the Ontario Bar in 1990. To complement her extensive experience, she has successfully completed, the CICA In Depth Tax Course, the CICA Wealth Preservation Course and the Canadian Securities Course. She is a member of the Canadian Bar Association, Trusts and Estates section, a member of the Society of Trust and Estate Practitioners and serves on the Estate Planning Council of Toronto.

Fees: \$25

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