

Earlybird Special!

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Cancellation Policy: Cancellations received up to 14 working days before the workshop are refundable, minus a \$50 registration service charge. After that, cancellations are subject to the entire fee, which you may apply toward a future conference or workshop. Please note: if you don't cancel and don't attend, you are still responsible for payment. Substitutions may be made at any time. For more information regarding refund, complaint, and/or program cancellation policies, please contact our office at 1-800-875-1760.



Topics include:

- ◆ Steps to Success (full-day)
- ◆ Tracing in Family Law Matters
- ◆ Using "DivorceMate" and "Family Law" software: case studies and Q&A
- ◆ Pension Valuation Update
- ◆ Marketing your Divorce Practice

Who should attend?

The level of this series is advanced; attendees will include CDFAs™, CAs, CGAs, CFPs®, financial professionals, and lawyers. Even if you have attended a prior Advanced Workshop, you won't want to miss this newest series.

**Receive up to 15 CE Credits for
your CDFA™ and CFP® designations**

Prerequisites

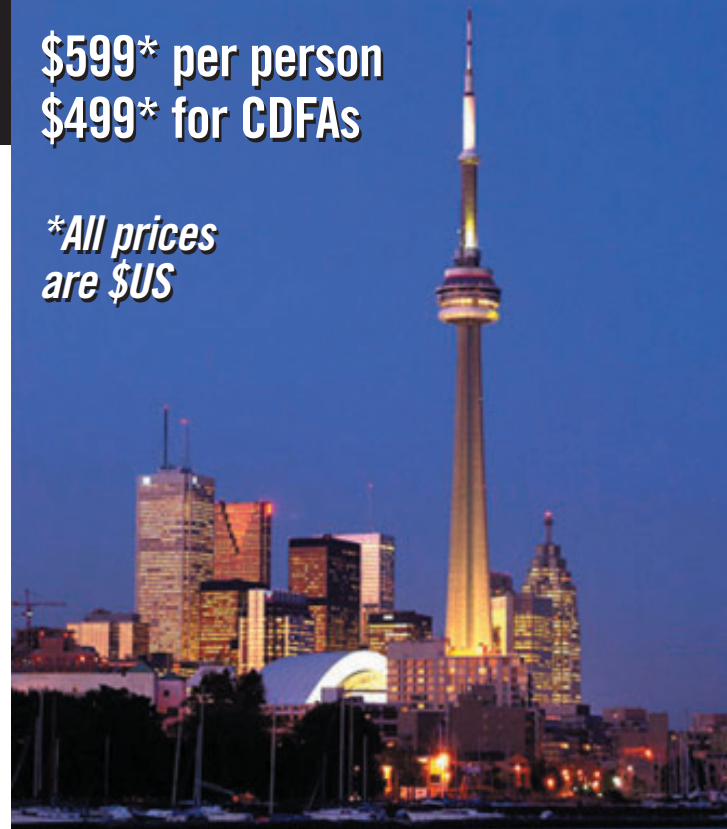
No advance preparation is required. In order to attend, you must currently be a CDFA™ member, CA, CGA, CFP®, financial professional, or a lawyer.

Toronto, ON June 15–16, '12

Canadian Advanced Topics Workshop

\$599* per person
\$499* for CDFAs

****All prices
are \$US***



Earlybird Special!

**Save \$100 off the regular prices
if you book and pay for the
Workshop by May 22, 2012**

The Topics and Presenters

Pension Valuations on Divorce: Update

This session will provide an overview of the process, showing how the valuator arrives at the values shown in the final report, and what information the valuator needs to provide an accurate report. We will also discuss the new rules for the division of pension assets on marriage breakdown under Ontario's *Pension Benefits Act (PBA)*, which came into force on January 1, 2012.

Presenter: David Gershuni (F.C.I.A., F.S.A.)

Protecting the Family during and after Divorce: Estate Planning, Wills, and Trusts

How does someone considering a second (or third) marriage protect the inheritance rights of children from his/her first marriage? Can you disinherit a separated spouse from your estate? Should your client consider creating a trust? Can estate planning help your client reduce income and probate taxes? This session will give you easy-to-use systems to ensure that nothing gets missed during the separation/divorce process.

Presenter: Jag Gandhi (M.A., LL.B.)

Software and the CDFA: Using DIVORCEmate and Family Law in your Divorce Practice

Presenters will work through case studies with their software showing what each can and cannot do. Learn tips and tricks, and how to harness the full power of each program. **Presenters:** Michael Perlman (DIVORCEmate Software) and Daniel Caine (Family Law Software).

Steps to Success

This full-day session offers everything you need to know to set up and maintain a successful CDFA practice. One of the most successful, experienced

CDFAs in North America will teach you how to:

- Connect with and make yourself indispensable to lawyers
- Determine what documents are needed
- Ask for documents
- Create an effective tracking system
- Communicate/provide status updates as your work progresses
- Create working drafts
- Finalize drafts and reports
- Prepare reports and distinguish the differences for court exhibits, mediation sessions, collaborative cases, or settlement purposes.

You will leave this session with sample drafts, reports, and other documents you can use as templates for your own divorce practice.

Presenter: Andrew Hoffman (FCA, CFP®, CDFA™)

Tracing in Family Law Matters: Hidden Assets, Financial Infidelity, Co-Mingling, and Other Issues from Start to Finish

Where did the money go? How did it get there? How much of that account is my separate property? Can I be reimbursed for funds that my spouse used after we separated? How much does he/she really make? In this workshop, we will define the term "tracing" as it applies to family law matters, discussing different types of tracing and various strategies that can be used. We'll "roll up our sleeves" to review and analyze examples, and work through a case study from beginning to end. This "A-Z" approach will address the various steps that need to be taken to complete a family law "tracing" assignment, and give you the skills and confidence to incorporate it into your practice.

Presenter: Dawn Hawley (CFP®, R.F.P., TEP, CDFA™)

The Schedule

Friday, June 15, 2012

7:00 a.m.–8:00 a.m. **Registration/Light Breakfast**

8:00 a.m.–10:00 p.m.

◆ "Pension Valuations: Update"

10:00 a.m.–11:00 p.m.

◆ "Using DIVORCEmate Software"

11:00 a.m.–12:00 p.m.

◆ "Using Family Law Software"

12:01 p.m.–1:00 p.m. **Gourmet Lunch Buffet**

1:00 p.m.–3:00 p.m.

◆ "Tracing in Family Law Matters"

3:00 p.m.–5:00 p.m.

◆ "Estate Planning, Wills, and Trusts"

Saturday, June 16, 2012

8:00 a.m.–9:00 a.m. **Light Breakfast**

9:00 a.m.–12:00 p.m.

◆ "Steps to Success: Part I"

12:00 p.m.–1:00 p.m. **Gourmet Lunch Buffet**

1:00 p.m.–4:00 p.m.

◆ "Steps to Success: Part II"

4:00 p.m.–5:00 p.m.

◆ "Marketing your Divorce Practice"

For more information, or to reserve your space in the Conference, please contact IDFA™ today.

◆ Phone: (800) 875-1760

◆ Fax: (416) 981-7679

◆ E-mail info@InstituteDFA.com

◆ Website: www.InstituteDFA.com