



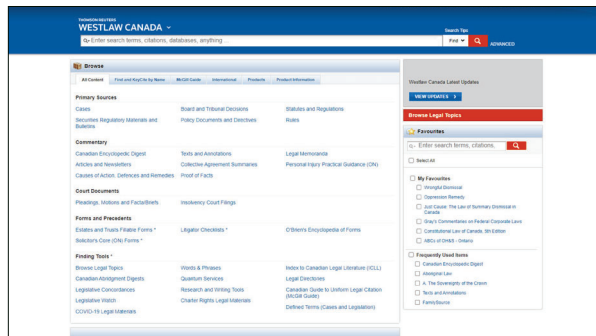
Westlaw Canada Estates&TrustsSource

Efficiently handle any estates and trusts matter, whether your practice involves estate planning, estate administration, or estate litigation.

Westlaw® is the standard for legal research because of our content, proprietary editorial enhancements like the Canadian Abridgment and KeyCite®, and market-leading technology.

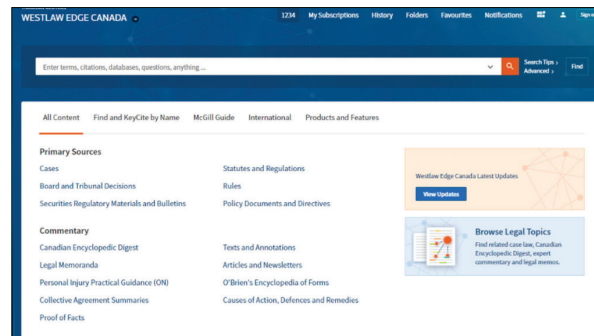


Westlaw Canada



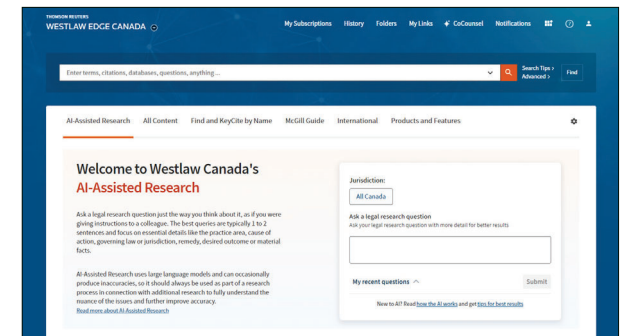
Westlaw® Canada is the award-winning online legal research service that helps you find the legal information you are looking for quickly and confidently. Access industry-leading legal content, unmatched editorial enhancements, and world-renowned research support.

Westlaw Edge Canada



~~Westlaw® Edge Canada brings together a legacy of quality and accurate legal research and innovative workflow enhancements so you can work, think, and deliver even faster. It builds on the premium content and editorial expertise of Westlaw Canada to offer an enhanced legal research experience to users.~~

Westlaw Edge Canada with CoCounsel



~~Westlaw Edge Canada with CoCounsel is the first professional-grade generative AI assistant that streamlines tasks and entire workflows, enabling you to deliver even more value to clients and organizations quickly and confidently. This, combined with the unparalleled library Westlaw content, makes Westlaw Edge Canada with CoCounsel the most powerful and trustworthy legal research solution available to the Canadian market.~~

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Westlaw Edge Canada	• Relevant, inclusive search results • KeyCite Canada • Market-leading content • Better organized and connected content • Integration	Advanced features, including: • Citation safeguards • Judicial Consideration • Common Queries • Outline Builder • and more	
Westlaw Canada	• Relevant, inclusive search results • KeyCite Canada • Market-leading content • Better organized and connected content • Integration		

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Westlaw Canada Comprehensive legal research.

Find the legal information you're looking for quickly and confidently. Access industry-leading legal content, unmatched editorial enhancements, and world-renowned research support.

Estates&TrustsSource

All the research and workflow tools you need, in one easy-to-use resource.

Efficiency and expertise, all in one place

- 1 Workflow Solutions:** Quick points of access to the material estates and trusts practitioners use most often, conveniently divided into Estate Planning, Estate Administration, and Estate Litigation.
- 2 Build-a-Will:** Create customized, authoritative documents in minutes utilizing precedent clauses from Histrop's *Estate Planning Precedents*. Reduce the time spent drafting and researching alternate clauses and gain efficiency in preparing high-quality, client-ready wills.
- 3 Forms, Precedents, and Checklists:** Statutory forms, authored precedents, and authored checklists, organized by practice area.
- 4 Primary Sources:** A comprehensive collection of case law, legislation, rules, and CRA policy documents.
- 5 Text and Annotations:** Direct access to highly regarded texts such as *Waters' Law of Trusts in Canada*, *Widdifield on Executors and Trustees*, and *Estate Litigation* by Brian Schnurr.
- 6 Estates and Trusts Related Titles:** Discover additional commentary from leading experts. Available as an additional subscription.
- 7 Estates and Trusts Law Newsletter:** Stay current on recent court decisions and other developments in Canadian estates and trusts law.
- 8 Estates and Trusts Courts of Appeal Cases:** Easy access to the most recent court of appeal decisions from Atlantic Canada, Ontario, and Western Canada.
- 9 Dependants' Relief Quantum Service:** Find what your claim is worth in minutes, not hours, with the Dependants' Relief Quantum Service. Available as part of an add-on to Litigator or via pay-per-view.
- 10 Estates, Trusts & Pensions Journal:** A critical tool for those involved in the estates, trusts, and pensions areas, such as lawyers, trustees, custodians, actuaries, and accountants. It covers new trends in estates and trusts with special coverage of pensions issues. Available as an additional subscription.

The screenshot displays the Westlaw Edge Canada Estates&TrustsSource interface. The top navigation bar includes the site name and a search bar. The main content area is organized into several sections, each with a red numbered circle (1-10) indicating its position in the numbered list on the left. The sections include:

- Workflow Solutions:** Divided into Estate Planning, Estate Administration, and Estate Litigation.
- Primary Sources:** Includes Cases and Decisions, Statutes and Regulations, Rules, and Policy Documents and Directives.
- Commentary:** Includes Canadian Encyclopedic Digest, Texts and Annotations, Estates and Trusts Related Titles, and Articles and Newsletters.
- Forms and Precedents:** Includes Forms and Precedents (not in Estates&TrustsSource search).
- Finding Tools:** Includes Finding Tools (not in Estates&TrustsSource search).
- Resources:** Includes Current Awareness, Westlaw Edge Canada Latest Updates, Estates and Trusts Courts of Appeal Cases, Tools & Resources, RELATED RESOURCES, Need Help/Training?, and About.

What's in Estates&TrustsSource – Workflow Solutions

Quick points of access to practical tools and key commentary, conveniently divided into Estate Planning, Estate Administration, and Estate Litigation.

Estate Planning

Histrop's Estate Planning Precedents

Access a highly regarded, well-drafted, current, and comprehensive collection of precedents in a searchable online format. Precedents include complete sample wills, will clauses, will drafting checklists, domestic contracts, powers of attorney, life insurance declarations, and precedents related to trusts.

Fill-a-Form

Documents from Histrop's *Estate Planning Precedents*, available as downloadable, fillable forms.

Build-a-Will

Create customized, authoritative wills in minutes utilizing precedent clauses from Histrop's *Estate Planning Precedents*. Reduce the time spent drafting and researching alternate clauses and gain efficiency in preparing high-quality, client-ready wills.

Estate Administration

Jurisdiction-Specific Estate Administration Manuals

Step-by-step estate administration guidance, with authored checklists, forms, and precedents.

- British Columbia
- Alberta
- Saskatchewan
- Manitoba
- Ontario
- Atlantic Canada

Fill-a-Form

Authored checklists and precedents, as well as statutory forms, all available as downloadable, fillable documents. Organized by jurisdiction.

Checklists

Quick access to fillable, jurisdiction-specific checklists.

What's in Estates&TrustsSource *continued*

Estate Litigation

Fill-a-Form

Statutory forms, as well as authored documents, organized by jurisdiction and statute, all available as downloadable, fillable documents.

Schnurr's Estate Litigation

A comprehensive, practical work covering all facets of estate litigation, including mental incompetency disputes, challenges to wills, Family Law Act claims, passing of executors' accounts, presumption of death, and dependant support claims.

Cases and Decisions

Estates&TrustsSource contains all full text cases dealing with estates and trust law from the Westlaw Canada case law collection.

Statutes, Regulations, and Rules

The Estates&TrustsSource legislation database contains the full text of all federal, provincial, and territorial legislation essential to a trusts and estates practice.

Policy Documents and Directives

Estates&TrustsSource also contains Canada Revenue Agency Interpretation Bulletins, Information Circulars, Views, Income Tax Folios, and Advance Tax Rulings deemed to concern estate planning, estate administration, and taxation of estates and trusts.

Canadian Encyclopedic Digest

The Canadian Encyclopedic Digest is a comprehensive statement of provincial, federal, and common law — as derived from legislation and case law. The following estates and trust law titles are included. Titles are regularly supplemented and updated.

- Absentees (Portman)
- Burial and Cremation (Ontario) (Russo)
- Burial and Cremation (Western) (Eccles)
- Charities (Whitaker)
- Devolution of Estates (Ontario) (Kaprielian)
- Devolution of Estates (Western) (Ruberto)
- Execution (Ontario) (Dukelow)
- Execution (Western) (Winans)
- Executors and Administrators (Ontario) (Portman)
- Executors and Administrators (Western) (Eccles)
- Family Law – Divorce (Wilton)
- Family Law – General (Wilton)



What's in Estates&TrustsSource *continued*

Family Law – Property (Wilton)
Gifts (Dunlop)
Income Tax (Hogg, Magee, Li)
Insurance – General (Adjin-Tettey)
Mental Incapacity (Ontario) (Schneider)
Mental Incapacity (Western) [Eccles]
Pensions – Private [Ozubko]
Pensions – Public [Mills, Taking]
Perpetuities and Accumulations [Portman]
Trusts [Levinson]
Wills [Kaprielian]

Texts and Annotations

Online access to authored treatises by Canada's foremost estates and trusts law experts. Build a legal strategy in less time and with more confidence.

Estate Litigation, 2nd Edition,
Brian A. Schnurr

A comprehensive, practical work covering all facets of estate litigation, including mental incompetency disputes, challenges to wills, *Family Law Act* claims, passing of executors' accounts, presumption of death, and dependant support claims.

Estate Planning Handbook,
John Pearson Allen and Brian J. Quinlan

A highly practical text providing an overview of estate planning. This work focuses on the tools of estate planning and general planning considerations. It also provides precedent materials essential to estate planners, as well as commentary reflecting the current state of estates and trusts law.

Estates&TrustsSource features the current edition of this text.

Estate Planning Precedents: A Solicitor's Manual,
Lindsay Ann Histrop

Designed for daily use by busy estates practitioners, this manual includes precedents covering all aspects of wills and estates, as well as domestic contracts, trust deed documents, powers of attorney, and more.

Waters' Law of Trusts in Canada, 5th Edition,
Donovan W.M. Waters, Mark R. Gillen,
Lionel D. Smith

This treatise examines the history and contemporary state of all facets of the law of trusts in every jurisdiction of Canada, including the nature of trusts under common law and civil law; it also considers the United States and some Commonwealth jurisdictions.



What's in Estates&TrustsSource *continued*

Widdifield on Executors and Trustees, 6th Edition, Carmen S. Thériault

This seminal classic of Canadian legal literature offers a comprehensive exposition of the law relating to the exercise of the duties and prerogatives of executors and trustees.

Canadian Bar Association Concordances

Tables of concordance to topical questions and answers relating to estate and trust planning and administration matters across Canada. These help you find what you need when you know the issue but not necessarily the specific section number of the relevant statute.

Jurisdiction-Specific Estate Administration Manuals

Step-by-step estate administration guidance, with interactive checklists and fillable authored forms and precedents.

- British Columbia
- Alberta
- Saskatchewan
- Manitoba
- Ontario
- Atlantic Canada

Newsletter

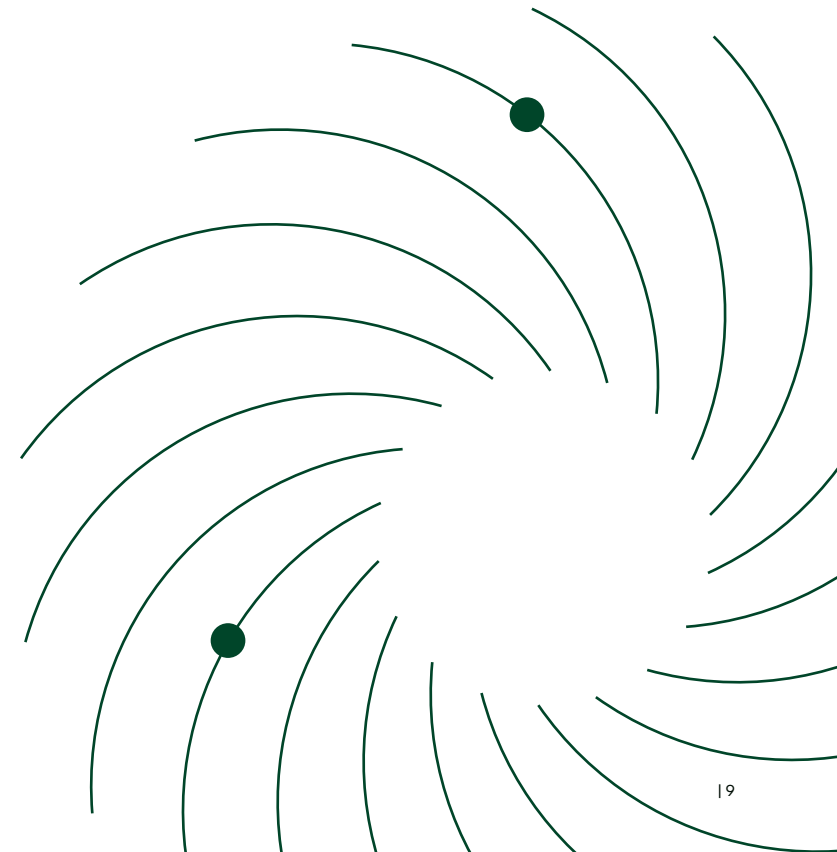
Estates and Trusts Law Newsletter, Lori M. Duffy

Stay current on recent court decisions and other developments in Canadian estates and trusts law.

Estates&TrustsSource also includes an archive beginning with the September 2007 issue.

Law Report Articles

Estates and Trusts Reports: Full text articles, annotations, and case comments beginning with 1992.



Additional resources

(not included in an Estates&TrustsSource subscription)

Quantum Service

Find what your claim is worth in minutes, not hours, with the Dependants' Relief Quantum Service. Available as part of an add-on to Litigator or via pay-per-view.

Estates, Trusts & Pensions Journal

A critical tool for lawyers, trustees, custodians, actuaries, accountants, and anyone else whose practice includes estates, trusts, or pensions. It covers new trends in estates and trusts law with special coverage of pensions issues. Available as an additional subscription.

Topical Texts and Annotations

Authoritative texts and annotations from leading experts to enhance your practice. Available as the Estates Topical Texts and Annotations bundle.

Annotated Ontario Estates Statutes, 2nd Edition,
Brian A. Schnurr

A comprehensive reference allowing easy access to the legislation and case law critical to the practice of estates law in Ontario.

Compensation & Duties of Estate Trustees, Guardians & Attorneys,
Jennifer J. Jenkins, H. Mark Scott, and
Edward Olkovich

This unique and valuable resource is divided into four easy-to-understand parts: Compensation for Estate Trustees, Duties of Estate Trustees, Estate Litigation, and Duties of Guardians and Attorneys. Each section answers important questions and gives you a solid understanding of the issues.

Miller-Thomson on Estate Planning,
Miller-Thomson

This invaluable resource offers insight into estate planning, trusts, estate administration, insurance planning, charitable planning, business succession planning, corporate restructuring, and the legal implications of immigration and emigration and other cross-border issues on planning.

Tax-Planned Will Precedents, 4th Edition,
Alison Scott-Butler

This service provides a general practitioner access to will clauses, checklists, and forms, all presented in an easy-to-use manner.

Court Documents on Litigator

Includes more than 200,000 court documents extracted from significant cases in every Canadian Common Law jurisdiction. Guided by the expert case selection standards of 12 leading litigation case reporters from Thomson Reuters on a variety of topics.

O'Brien's Encyclopedia of Forms

Division V—Wills and Trusts

O'Brien's Encyclopedia of Forms is Canada's most comprehensive collection of legal forms, precedents, commentary, and checklists, authored by experts in their fields. O'Brien's is designed to provide practitioners with a vast array of forms and precedents pertinent to individual areas of practice and adaptable to their specific needs.

Superior support



24/7 expert research help

Free, live telephone support 24/7 to assist you with your research.



Training options to meet your needs

Access thorough guides, videos, and tutorials with your subscription.

What's included

	Estates&TrustsSource	Additional Subscription
Workflow Solutions Quick points of access to practical tools and key commentary, conveniently divided into Estate Planning, Estate Administration, and Estate Litigation	✓	
Build-a-Will on Contract Express Create customized, authoritative documents in minutes	✓	
Estates and Trusts Fillable Forms Statutory forms, authored precedents, and authored checklists, organized by practice area	✓	
Estates and Trusts Cases and Decisions Full text cases dealing with estates and trusts law	✓	
Estates and Trusts Statutes, Regulations, and Rules All current federal, provincial, and territorial statutes, regulations, and rules essential to estates and trusts law	✓	
Policy Documents and Directives Canada Revenue Agency documents concerning estate planning, estate administration, and taxation of estates and trusts	✓	
Canadian Encyclopedic Digest Comprehensive statement of provincial, federal, and common law, as derived from legislation and case law, on estates and trusts related topics	✓	
Texts and Annotations Online access to authored treatises by Canada's foremost estates and trusts law experts	✓	
Articles and Newsletters Current awareness resources, including the Estates and Trusts Law Newsletter	✓	
Estates and Trusts Related Titles Authoritative texts and annotations from leading experts to enhance your practice, available as the Estates Topical Texts and Annotations bundle		✓
Quantum Services Find award amounts in minutes, not hours, with the Dependents' Relief Quantum Service		✓
O'Brien's Encyclopedia of Forms Comprehensive collection of legal forms, precedents, commentary, and checklists.		✓
Court Documents on Litigator Court documents extracted from the court files of significant cases in every Canadian Common Law jurisdiction.		✓
Estates, Trusts & Pensions Journal A critical tool covering new trends in estates and trusts, with special coverage of pensions issues		✓

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