

Estates&TrustsSource®

Get the Westlaw® Canada Advantage

Estates&TrustsSource® combines the 145-year tradition of Carswell editorial excellence with leading-edge technology to deliver relevant, on-point information you can rely on for true insight into your estates and trust case or issue.

Intelligent finding tools and effective research pathways bring relevant, on-point content right to the surface – quickly and efficiently. More than just information, you get insight you can use to make critical decisions, create compelling arguments, and achieve better results for your clients.

DEEPER CONTENT

Go beyond case law and legislation to get the true insight you need.

INTELLIGENT FINDING TOOLS

Leave nothing to chance with finding tools that ensure you never miss a case on point.

EFFECTIVE RESEARCH PATHWAYS

Experience seamlessly integrated research that's illuminating and efficient, not confusing and frustrating.

CONVENIENT HOME PAGE ACCESS TO EVERYTHING YOU NEED

The screenshot shows the Westlaw Canada Estates&TrustsSource homepage. The navigation bar at the top includes links for LPSources, Litigator, Estates&TrustsSource, and various other legal resources. The main content area is divided into several sections: Custom Search Templates, Browse Tables of Content, Related Links, About Estates&TrustsSource, and Forms & Precedents Collection. The search section at the bottom features a 'Find/KeyCite a Document' form with fields for Name, Jurisdiction, Title, Section, Jurisdiction, Document Number, and Citation. The callouts are: 1. Currency Tools (Newsletter), 2. Workflow-based Shortcuts (Checklists, Jurisdiction dropdowns), 3. Custom Search Templates (WebFouls), 4. Browse Tables of Content (Canadian, U.S. Estate Materials), 5. Find/KeyCite a Document (Search form), 6. Related Links (Taxnet Pro, U.S. Estate Materials), 7. About Estates&TrustsSource (What's New, Currency Notice), 8. Navigation bar (Home page Source tabs/ Navigate bar).

- 1 Currency Tools:** Newsletter, Court of Appeal and SCC cases and new and amended CRA publications provide one-click access to legislative, case law and tax policy developments.
- 2 Workflow-based Shortcuts:** Provide quick points of access to the material used most often.
- 3 Custom Search Templates:** Allow practitioners to search specific content in the areas in which they are interested.
- 4 Browse Tables of Contents:** Find exactly what you need by browsing the Table of Contents.
- 5 Find/KeyCite a Document:** Find or KeyCite (note up) cases and legislation by name/title or any document by citation.
- 6 Related Links:** Link directly to Taxnet Pro® or U.S. Estate Material. U.S. materials are available by separate subscription or pay-per-view.
- 7 About Estates&TrustsSource:** Review content coverage and currency.
- 8 Navigation bar:** Home page Source tabs/ Navigate bar.

What's in Estates&TrustsSource®

DEEPER CONTENT

Westlaw Canada goes behind the case law and the legislation, taking you deep into the law to reveal the subtleties and intricacies that will give you true insight into your case or issue.

Case Law

Comprehensive Estates & Trusts Case Law Collection of unreported and reported decisions drawn from the Carswell case law database with the Estates & Trusts, Civil Practice, Tax and Family General headings and includes expert selection of important cases and articles and annotations from the Carswell Estates and Trusts Reports

The only online research service that provides access to Actual court documents* from leading Canadian estate litigation actions including motions, pleadings, and facts. The Estates & Trusts court document collection is derived from the Estates and Trusts Reports (ETR), and covers the most significant cases in the practice area from 1995 on.

Estates and Trust Court of Appeal Cases
Latest estates and trusts Court of Appeal cases help you stay current with appellate decisions from your jurisdiction and you can link from the case to determine whether an application for leave to appeal, or notice of appeal, to the SCC has been filed. For those estates and trusts lawyers who practice in other areas, Latest SCC cases bring all SCC decisions to your attention, not just estates and trusts related ones.

Case Citor – KeyCite® Canada for cases covers the direct appellate history of Canadian cases plus treatments for any case, whether foreign or Canadian, discussed by a Canadian court or tribunal, or a secondary source on Westlaw Canada.

EXCLUSIVE Quantum Services* – Why spend hours distilling a quantum? Litigator tells you in a matter of minutes what a claim is worth.

- **Dependants' Relief Quantum** – 30 years of decisions where the courts have determined whether a dependant was adequately provided for out of the estate

Legislation

All Legislation, including complete estates regulation coverage, for all common law provinces (i.e. all except Quebec)

Canadian Bar Association (CBA) National Concordance relating to wills, estate planning and the administration of estates

Legislative Citators – KeyCite Canada is Canada's only complete legislative citator. It is the only statute citator with true historical depth, and the only rules citator and regulations citator in Canada. It's now possible to KeyCite all types of legislation – statutes, rules, and regulations

INTELLIGENT FINDING TOOLS

Only Westlaw Canada combines the advantages of authoritative editorially-created search tools and state-of-the-art search technology, ensuring that you always find exactly what you need – using fewer steps to get better results faster.

Workflow-Based Shortcuts

Access the content you use most often – whether you do estate planning, administration or litigation. The Estate Planning “shortcut” lets you search Histrop, access fillable estate planning forms and link to will precedents in Build-a-Will. The Administration “shortcut” takes you to practice manuals and fillable forms. And the litigation “shortcut” takes you to *Schnurr's Estate Litigation* and fillable court forms.

Authoritative

The Canadian Abridgment – a comprehensive collection of over 750,000 digests of Canadian case law that is organized by legal issue according to a single taxonomy exclusive to Carswell. Covers virtually every case reported in Canada since 1803.

The Canadian Encyclopedic Digest – selected CED titles relevant to estates and trusts practitioners that provide a concise summary of the law, leading cases and applicable statutes will serve as a useful starting point for research in an area of law that may be unfamiliar to you or as a quick refresher.

Authored Treatises by Canada's foremost Estates and Trusts law experts to ensure authoritative and reliable research is at your desktop – fully integrated with links to both case law and legislation. Exclusive to Estates&TrustsSource:

- **Waters' Law of Trusts in Canada, 3rd Edition** (Waters et al.)
- **Widdifield on Executors and Trustees** (Therault, ed.)
- **Estate Planning Precedents: A Solicitor's Manual** (Histrop)
- **Estate Litigation, 2nd Edition** (Schnurr)
- **Estate Planning Handbook, 3rd Edition** (Allen and Allen)
- **Estate Administration Manuals for Jurisdiction-Specific Guidance** (practical step-by-step estate administration guidance; interactive checklists; fillable authored forms, documents and correspondence)
 - Armstrong's, **Ontario Estate Administration Manual** with provincial equivalents – only on Estates&TrustsSource – available for Alberta, British Columbia (Seckel), Manitoba (Geisbrecht), Saskatchewan (Hildebrandt), Atlantic Canada (Adlington) (new edition of Howlett, Estate Matters in Atlantic Canada).

Innovative

- Natural language, terms and connectors, or templates customized by document type
- *Search-within-a-search* features a locate option for precise results
- Search or browse Table of Contents
- Link from the *Canadian Encyclopedic Digest* to the applicable Canadian Abridgment classification to find more cases related to your issue

* Available with a Litigator subscription or on a pay-per-view basis.

EFFECTIVE RESEARCH PATHWAYS

All Westlaw Canada content is seamlessly linked so you never have to back track to find related information. You'll find everything you need in one place and we'll point out and provide links to relevant related material along the way. This logical linking ensures that you always move forward in your research, giving you the fastest route to better results.

Estates&Trusts Home Page – built to allow you to efficiently handle any estates and trusts matter whether your practice involves estate planning, estate administration and estate litigation.

- Find specific information without having to choose multiple databases or learn database codes.

Extensive workflow tools such as high-quality, high-value precedents and document-generation capability, integrated with all related resources.

Document-assembly (Build-a-Will) – create a customized will for your client based on their unique circumstances utilizing Histrop's *Estate Planning Precedents*.

Provides a CRA Publications (Selected) Archive of Interpretation Bulletins, Information Circulars, CRA Views and Advance Tax Rulings for easy access to policy documents of particular relevance to estates and trusts practitioners.

Home page access to U.S. estate materials (available on a pay-per-view basis or by subscription) and to Taxnet Pro (by subscription). Natural language, terms and connectors, or templates customized by document type.

KeyCite® Canada – Case and Legislative Citator

- Trace the history of a case to determine if it is good law, to support and strengthen your legal argument.
- Further refine your search results by quickly zeroing in on the specific references you need. Limit the results by jurisdiction, court level, key word and date.

- Note-up cases, statutes and rules of practice to receive a list of all citing references, including judicial treatments and expert domestic and international commentary, that have discussed your case, statute, or rule.
- When you note up a decision with KeyCite Canada, you see not only case law that has cited the decision you have noted up, but also secondary sources, including:
 - Commentary
 - Court Documents
 - Law review and journal articles
 - Newsletters
 - *Canadian Encyclopedic Digest (CED)*
 - Words & Phrases entries

Productivity Tools

- **KeyCite Alert** – Fully integrated into your KeyCite searching, this powerful tool takes citations research one step further by keeping you apprised, via e-mail, fax, or wireless, of developments affecting cases or legislation that matter most to you.
- **EXCLUSIVE – Fillable Forms and Precedents** – Fillable forms vital to this practice area.
 - **For Estate Planning**, Fill-A-Form provides you with fillable versions of documents based on Histrop's highly regarded *Estate Planning Precedents* product. Create documents such as Trusts, Deeds, Domestic Contracts, Powers of Attorney, Life Insurance Declarations and many more.
 - **For Estate Administration**, Fill-A-Form includes all the statutory and authored forms and letters that are used in the process of estate administration, including checklists, sample letters and precedents, so you can be confident nothing is missed or overlooked. Ontario materials are from the authoritative Armstrong, *Estate Administration: A Solicitor's Manual* and provincial equivalents for B.C., Alberta, Saskatchewan, Manitoba and Atlantic Canada are exclusively available online on Estates&TrustsSource.
 - **For Estate Litigation**, Fill-A-Form includes statutory forms for every Canadian common law jurisdiction plus sample litigation forms and precedents and commentary from Schnurr, *Estate Litigation*.

- **EXCLUSIVE to Estates&TrustsSource Build a Will** is a state-of-the-art application that allows you to create customized wills for clients who have simple to more complex estate situations, utilizing the precedent clauses from Histrop, *Estate Planning Precedents: A Solicitor's Manual*. Reduce the time spent drafting and researching alternate clauses by referencing this intuitive application and gain efficiencies in preparing high-quality, client ready wills.

Currency Tools

- **WestClip** allows you to monitor legal developments that could affect you, your organization and your clients. Clips can be delivered to your e-mail box, wireless device, printer or fax machine.
- **SCC bulletin boards** are available from the home page and updated daily.
- **CRA Policy Documents** – New and amended CRA IT Bulletins and Circulars and other CRA publications, as issued, selected for relevance to estates and trusts practice.
- **Latest Court of Appeal cases** – Quickly identify the latest estates and trust cases with a jurisdiction-specific view
- **Abridgment eDigests** are electronic case digest on estates and trusts topic areas, delivered right to your desktop.
- **Newsletters** – Stay current on the most recent developments and consult with pre-eminent authorities in the field; *WeirFoulds Estates&Trusts Newsletter* is written by expert Lori Duffy, partner with Weir Foulds LLP.

Superior Support

Training Options

To ensure our customers are fully trained on how to use and maximize the content and functionality on Westlaw Canada we offer multiple types of training sessions; group sessions, hands-on lab sessions, telephone and, of course, individual sessions.

Research Support

We offer free, unlimited, 24/7 access to live telephone support to assist you with your research.



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