

Estates&TrustsSource®

QUICK REFERENCE CARD



Estates&TrustsSource® provides one-click access to the most valued estates and trusts information. It offers a wealth of content combined with powerful search tools so that you never have to wonder if there is somewhere else you should be looking.

- 01 WHAT INFORMATION IS IN ESTATES&TRUSTSSOURCE?
- 02 ESTATES&TRUSTSSOURCE HOME PAGE
- 03 HOW CAN I FIND ESTATE PLANNING PRECEDENTS?
- 04 HOW DO I FIND STEP-BY-STEP GUIDES ON ESTATE ADMINISTRATION?
- 05 HOW DO I FIND COMMENTARY ON ESTATE LITIGATION?
- 06 HOW CAN I FIND OTHER EXPERT COMMENTARY IN ESTATES&TRUSTSSOURCE?
- 07 HOW CAN I KEEP CURRENT WITH ISSUES RELATED TO ESTATES AND TRUSTS?
- 08 HOW DO I FIND THE CHECKLIST I NEED?
- 09 HOW DO I FIND THE FORM I NEED?
- 10 HOW DO I CREATE CUSTOMIZED WILLS?
- 11 HOW DO I ACCESS CRA DOCUMENTS RELEVANT TO ESTATES AND TRUSTS ISSUES?
- 12 HOW CAN I FIND OR KEYCITE (NOTE UP) A CASE OR STATUTORY PROVISION BY NAME OR CITATION?
- 13 HOW DO I PRINT, EMAIL, DOWNLOAD, FAX OR SAVE IN ESTATES&TRUSTSSOURCE?
- 14 WHERE CAN I FIND HELP?

CUSTOMER LEARNING & SUPPORT TEAM

For technical or reference support or to inquire about training, contact Carswell at: Toll-Free: 1.800.387.5164 / In Toronto: 416.609.3800

www.westlawcanada.com



THOMSON REUTERS

01 WHAT INFORMATION IS IN ESTATES&TRUSTSSOURCE?

For information on content coverage and currency, please click the [What's in Estates&TrustsSource](#) and [Currency Notes](#) links in the **About Estates&TrustsSource** section in the left frame of the Home page.

02 ESTATES&TRUSTSSOURCE HOME PAGE

The screenshot shows the Westlaw Canada interface for the Estates&TrustsSource section. The navigation bar at the top includes links for LawSource, CriminalSource, FamilySource, InsolvencySource, SecuritiesSource, Litigator, and Estates&TrustsSource. The main content area is divided into several sections:

- 8** **Navigation Bar:** The top navigation bar, including the Westlaw Canada logo and various utility links like 'FIND & PRINT', 'KEYCITECANADA', 'DIRECTORY', 'SITE MAP', 'COURT DOCS', 'CONTACT US', 'HELP', and 'SIGN OUT'.
- 1** **Concordances:** A section titled 'Concordances' with a link to 'CBA National Concordance' and 'Rules Concordance'.
- 2** **Search and Checklists:** A search area with a search bar containing 'Histrop, Estate Planning Precedents' and several 'Jurisdiction:' dropdown menus with 'All' selected and 'Go' buttons.
- 3** **Custom Search Templates:** A list of search templates including 'Canadian Abridment Digests', 'Cases', 'Commentary/Practice Manuals', 'CRA Publications', 'Forms', 'Legislation', and 'All Estates&TrustsSource Content'.
- 4** **Browse Tables of Contents:** A section for browsing content, including links to 'Canadian Abridment Digests', 'Concordances', 'Commentary/Practice Manuals', 'CRA Publications', 'Legislation', and 'Directory'.
- 5** **Find/KeyCite a Document:** A search form with fields for 'Name', 'Jurisdiction', 'Case', 'Title', 'Section', 'Jurisdiction', 'Document Number', and 'Citation', each with a 'Go' button.
- 6** **Forms & Precedents Collection:** A section titled 'Forms & Precedents Collection' with a link to 'FormFinder'.
- 7** **About Estates&TrustsSource:** A section with links for 'What's in', 'Estates&TrustsSource', and 'Currency Notes'.
- 8** **Navigation Bar:** The bottom navigation bar with tabs for 'LawSource', 'CriminalSource', 'FamilySource', 'InsolvencySource', 'SecuritiesSource', 'Litigator', and 'Estates&TrustsSource'.

1 Currency Tools: Newsletter, Court of Appeal and SCC cases and new and amended CRA publications and Concordances provide one-click access to legislative, case law and tax policy developments.

5 Find/KeyCite a Document: Find or KeyCite (note up) cases and legislation by name/title or any document by citation.

2 Workflow-based Shortcuts: Provide quick points of access to the material used most often.

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.

3 Custom Search Templates: Allow practitioners to search specific content in the areas in which they are interested.

7 About Estates&TrustsSource: Review content coverage and currency.

4 Browse Tables of Contents: Find exactly what you need by browsing the Table of Contents.

8 Navigation bar: Home page Source tabs / Navigate bar.

03 HOW CAN I FIND ESTATE PLANNING PRECEDENTS?

Search **Histrop's Estate Planning Precedents**:

1. Click **Histrop, Estate Planning Precedents** in the **Estate Planning** section of the Home page.
2. Enter your search terms into the **Search full text for** box. Add Boolean connectors or use *The results must contain* drop-down list.
3. Fill in any fields (e.g. Heading, Case Name), if you want.
4. Click **Go**.

Use Build-a-Will to review Histrop's will clauses and create custom wills and templates. Click **Build-a-Will** in the **Estate Planning** section of the Home page to launch the Build-a-Will application. To use Build-a-Will, review the Quick Reference Card located on its Help page.

Browse **Histrop's Estate Planning Precedents Forms**:

1. Click **Fill-a-Form** in the **Estate Planning** section of the Home page.
2. Click the **+** button next to the heading you want to expand. Continue clicking the **+** button until you reach the blue hypertext links.
3. Click the link to retrieve the form you want.
4. Click **Click here for fillable form** to retrieve the form.

TIP: Use the tab key on your keyboard to jump to each fillable field. To edit the form after saving it in your application, you must unprotect the document: For Word 2003 users, click the Tools menu and then Unprotect. For Word 2007 users, click the Developer tab, and then click Protect Document. Next, click Restrict Formatting and Editing and then click Stop Protection.

04 HOW DO I FIND STEP-BY-STEP GUIDES ON ESTATE ADMINISTRATION?

1. Select a specific jurisdiction from the *Search Practice Manuals* drop-down list in the **Estate Administration** section of the Home page.
2. Enter your search terms into the **Search full text for** box. Add Boolean connectors or use *The results must contain* drop-down list.
3. Fill in any fields (e.g. Heading, Case Name), if you want.
4. Click **Go**.

05 HOW DO I FIND COMMENTARY ON ESTATE LITIGATION?

1. Click [Schnurr, Estate Litigation](#) in the **Estate Litigation** section of the Home page.
2. Enter your search terms into the **Search full text for** box. Add Boolean connectors or use *The results must contain* drop-down list.
3. Fill in any fields (e.g. Heading, Case Name), if you want.
4. Click **Go**.

06 HOW CAN I FIND OTHER EXPERT COMMENTARY IN ESTATES&TRUSTSSOURCE?

1. Click [Commentary/Practice Manuals](#) in the **Custom Search Templates** section on the Home page.
2. Select **Waters' Law of Trusts in Canada** and/or **Widdifield on Executors and Trustees** in the **Limit Search by Publication** selection box. (To select multiple publications, click the first publication and then **Ctrl+click** each additional publication after that.)
3. Enter your search terms into the **Search full text for** box. Add Boolean connectors or use *The results must contain* drop-down list.
4. Fill in any fields (e.g. Heading, Case Name), if you want.
5. Click **Go**.

TIP: In the Latest Developments section, click Featured Commentary to discover the full text publications included in Estates&TrustsSource.

07 HOW CAN I KEEP CURRENT WITH ISSUES RELATED TO ESTATES AND TRUSTS?

Review the Newsletter, latest Court of Appeal or Supreme Court cases and new or amended Canada Revenue Agency publications.

Click [WeirFoulds Estates&Trusts Newsletter](#) link in the **Newsletter** section of the Home page. The most current newsletter is retrieved into the right frame. Previous newsletters are located on the **Result List** tab in the left frame.

In the **Latest Developments** section of the Home page: Click a jurisdiction link to retrieve appeal cases posted in the last 90 days for that specific jurisdiction. Click [Latest SCC Cases](#) to retrieve a list of Supreme Court of Canada cases and news releases for the last four weeks. Click [Latest CRA Publications](#) to view the latest documents from CRA.

08 HOW DO I FIND THE CHECKLIST I NEED?

Estate Planning:

1. Click [Fill-a-Form](#) in the **Estate Planning** section of the Home page.
2. Expand the **Appendix** heading.
3. Click the [Will instructions checklist](#) link.
4. Click [Click here for fillable form](#) to retrieve the checklist.

Estate Administration:

1. Select a jurisdiction from the **Checklists** drop-down list in the **Estate Administration** section of the Home page.
2. Click **Go**.
3. Click the checklist you want to retrieve from the Table of Contents.
4. Click [Click here for fillable form](#) to retrieve the checklist.

TIP: Use the tab key on your keyboard to jump to each fillable field. To edit the form after saving it in your application, you must unprotect the document: For Word 2003 users, click the Tools menu and then Unprotect. For Word 2007 users, click the Developer tab, and then click Protect Document. Next, click Restrict Formatting and Editing and then click Stop Protection.

09 HOW DO I FIND THE FORM I NEED?

Estate Planning:

Click [Fill-a-Form](#) to retrieve the Histrop Estate Planning Precedents Table of Contents.

Estate Administration & Litigation:

Select a jurisdiction from the *Fill-a-Form* drop-down list and click **Go** to retrieve the Table of Contents showing statutory and authored forms.

Click the **+** button next to the heading you want to expand in the Table of Contents for Estate Planning or Estate Administration & Litigation. Continue clicking the **+** button until you reach the blue hypertext links. Click the link to retrieve the document. Click [Click here for fillable form](#) to retrieve the form.

TIP: Use the tab key on your keyboard to jump to each fillable field. To edit the form after saving it in your application, you must unprotect the document: For Word 2003 users, click the Tools menu and then Unprotect. For Word 2007 users, click the Developer tab, and then click Protect Document. Next, click Restrict Formatting and Editing and then click Stop Protection.

10 HOW DO I CREATE CUSTOMIZED WILLS?

Click **Build-a-Will** in the **Estate Planning** section of the Home page. Build-a-Will is a separate application. It opens a new window upon launch.

For detailed instructions on how to use Build-a-Will, refer to the Quick Reference Card found on the Build-a-Will Help page.

11 HOW DO I ACCESS CRA DOCUMENTS RELEVANT TO ESTATES AND TRUSTS ISSUES?

You can access CRA Interpretation Bulletins, Information Circulars, Advanced Tax Rulings and Views.

To view the latest documents:

1. Click **Latest CRA** Publications in the **Latest Developments** section of the Home page.
2. Click a document hypertext link to retrieve the full text.


To browse all documents:


1. Click **CRA Publications (Selected)** in the **Browse Table of Contents** section in the left frame.
 2. Click the **+** button to expand a heading.
 3. Click the hypertext link to retrieve the document.
 4. For easier viewing, click the **Maximize** button in the Link Viewer.
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12 HOW CAN I FIND OR KEYCITE (NOTE UP) A CASE OR STATUTORY PROVISION BY NAME OR CITATION?

1. Click the **Find** or **KeyCite** radio button located in the **Find/KeyCite a Document** section of the Home page.
2. **Case by name:** Enter the name of the case into the case Name field and select a jurisdiction from the drop-down list.
Legislation by title: Enter the statute, regulation or rule name into the **Title** field, section number into the **Section** field and select a jurisdiction from the drop-down list.
By citation: Enter the citation into the **Citation** field.
3. Click **Go**.

KeyCite® Canada: KeyCiting a document involves retrieving the appellate (full) history of a case, plus all citing references of a case, statute, regulation or rule, including judicial treatments and secondary sources. Documents receive one treatment flag/icon only and their definitions are as follows:

 A **red flag** warns that the case may not be good law; that the decision has been reversed, or has not been followed within the same jurisdiction or by the Supreme Court of Canada.

 A **yellow flag** warns that the decision has some negative history or treatment, but has not been reversed or overruled. It is also displayed if a treatment has been recently added, and has not yet been editorially analyzed.

H A **blue H** indicates that the decision has some direct history but it is not known to be negative.

C A **green C** indicates that the decision has no direct history, but there are treating cases or other citing references to the decision. *For statutes, regulations and rules* the green C indicates that there are cases or other citing references to the provision.


KeyCite Canada is accessible from:

- Links on the **Related Info** tab when viewing your results (Full History, Direct History (Graphical View) and Citing References).
- The Home page.
- The Westlaw Canada Navigation bar.

13 HOW DO I PRINT, EMAIL, DOWNLOAD, FAX OR SAVE IN ESTATES&TRUSTSSOURCE?

Click the appropriate button located in the upper right corner of the right frame.



Click  to print the current document only, using your default format preferences.

If you want to deliver your current document along with other related information at the same time or you want to change your default formatting settings, click **Print**, **Email** or **Download**.


Click **Other** to fax or save the current document.

Use **Find & Print** to retrieve up to 20 citations simultaneously for printing, emailing or downloading.

1. Click **Find & Print** on the Navigation bar located at the top of the screen.
2. Enter your citations into the box provided and select your results and delivery options.
3. Click **Send Request**.

TIP: To print part of a document, highlight the desired text. Then, using your browser, open the File menu and select Print. In the Print window, choose the Selection radio button and then click Print.

14 WHERE CAN I FIND HELP?

- Review online tutorials to quickly learn about specific functionality or content. Go to: www.westlawecarswell.com/support/emodules.htm
- Use online help or download reference materials from the **Help Centre** located in the **SITE MAP** on the Navigation Bar or go to: www.westlawecarswell.com/support/reference.htm
- Click the  icons for context-sensitive tips and examples.
- Contact our Reference Support or Technical Support Teams, 24 hours a day, 7 days a week, by phone: 1.800.387.5164 or 416.609.3800 or email: carswell.reference@thomsonreuters.com or carswell.techsupport@thomsonreuters.com
- Contact our Customer Learning Team to book a complimentary training session. Phone: 1.800.387.5164 or 416.609.3800 or email: carswell.learning@thomsonreuters.com

