

ESTATES&TRUSTSSOURCE™

QUICK REFERENCE CARD

WestlaweCarswell

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.

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www.westlawecarswell.com

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 ESTATES&TRUSTSSOURCE home page. The page is divided into several sections. On the left, there are navigation tabs for 'Lawsource', 'Familysource', 'Estates&TrustsSource', 'Criminalsource', 'Litigator', 'IPsource', 'Insolvency&Sec', and 'Securities&Fin'. Below these are sections for 'Custom Search Templates', 'Browse Tables of Contents', and 'Related Links'. The main content area features a 'Newsletter' section, 'Latest Developments' with links to 'Estates&Trusts Courts of Appeal Cases', 'Atlantic Canada', 'ConfLaw', 'Westlaw', and 'Latest SCC Cases'. There are also sections for 'Estate Administration' and 'Estate Litigation', each with search filters for 'Jurisdiction', 'Checklists', 'Form', and 'Search Practice Manuals'. At the bottom, there is a 'Find/KeyCite a Document' section with search criteria for 'Name', 'Jurisdiction', 'Section', 'Document Number', and 'Citation'. The page is annotated with red circles and numbers 1 through 9, pointing to various features: 1 points to the 'ConfLaw' link; 2 points to the 'Estate Administration' search filters; 3 points to the 'Custom Search Templates' section; 4 points to the 'Browse Tables of Contents' section; 5 points to the 'Find/KeyCite a Document' search filters; 6 points to the 'Related Links' section; 7 points to the 'About Estates&TrustsSource' section; 8 points to the 'Estates&TrustsSource' navigation tab; and 9 points to the 'Sign off' link in the top right corner.

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 access to the material estates and trusts practitioners use 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 note up cases and legislation by name/title or any document by citation.

6 **Related Links:** Link directly to TaxnetPRO or U.S. Estate Material. U.S. materials are available either by separate subscription or pay-per-view.

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

8 **Navigation bar:** Navigate to another Source service by clicking its tab.

9 **Sign off:** Click Sign off to exit Estates&TrustsSource.

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 wish.
4. Click **Go**.

Use Build-a-Will to review 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 Guide 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 blue hypertext links.
3. Click the hypertext link to retrieve the form you want.
4. Within the Link Viewer, 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, click the **Tools** menu and **Unprotect Document** to unprotect the document.

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 in 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 wish.
4. Click **Go**.

05 HOW CAN 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 in 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 wish.
4. Click **Go**.

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

1. Click [Commentary/Practice Manuals](#) in the **Custom Search Template** section in the left frame of 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 to select it and **Control+Click** each additional publication afterwards.)
3. Enter your search terms in 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 wish.
5. Click **Go**.

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

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

Click [WeirFoulds Estates&Trusts Newsletter](#) 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. This newsletter is issued 10 times per year.

Click a link in the [Latest Developments](#) section to retrieve appeal cases for a specific jurisdiction posted in the last 90 days. 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. Click the + button next to the Appendix heading.
3. Click the [Will instructions checklist](#) hypertext link.
4. Within the Link Viewer, 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. Within the Link Viewer, 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, click the **Tools** menu and **Unprotect Document** to unprotect the document.

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 wish to expand in the Table of Contents. Continue clicking the + button until you reach blue hypertext links. Click a link to retrieve the document. Within the Link Viewer, 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, click the **Tools** menu and **Unprotect Document** to unprotect the document.

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 Guide found on the Build-a-Will Help page.

11 HOW CAN I FIND OR KEYCITE (NOTE UP) A CASE OR STATUTORY PROVISION BY NAME?

1. Click the **Find** or **KeyCite** radio button located in the **Find/KeyCite a Document** section of the Home page.
 2. Enter the case name and select a jurisdiction in the **Cases** section OR enter the legislative title, section number and select a jurisdiction in the **Legislation** section.
 3. Click **Go**.
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12 HOW CAN I FIND OR KEYCITE (NOTE UP) A CASE OR STATUTORY PROVISION BY CITATION?

1. Click the **Find** or **KeyCite** radio button located in the **Find/KeyCite a Document** section of the Home page.
2. Enter the citation in the **Or, any document by citation** section.
3. Click **Go**.

13 HOW DO I PRINT, E-MAIL, FAX, DOWNLOAD OR SAVE ON WestlawCarswell?

WestlawCarswell offers a variety of document delivery options. Simply click the appropriate button located in the upper right corner of the right frame.



Click **QUICK PRINT** to print the current document quickly using your default format preferences.

Click **PRINT** to print your current document along with other related information at the same time; or the Result List displayed in the left frame. You may change your default formatting/print settings here.

Click **E-MAIL** to e-mail your current document along with other related information at the same time or the Result List displayed in the left frame.

Click **DOWNLOAD** to download the document displayed in the right frame along with other related information at the same time or the Result List displayed in the left frame.

Click **OTHER** to fax or save a document or Result List.

Click **FIND&PRINT** to retrieve and print multiple documents. Enter up to 20 citations at a time and have them printed or downloaded together.

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?

For technical or reference support or to inquire about training, contact Carswell at:

Toll-Free:	1.800.387.5164
In Toronto:	416.609.3800
Online:	www.carswell.com/email

WestlaweCarswell

www.westlawecarswell.com

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