



Meetings: Tuesday 12 Noon

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FEBRUARY IS PEACE BUILDING AND CONFLICT PREVENTION MONTH

Happy Birthday

Happy Anniversary

Upcoming Speakers:

Mar. 3	Jenny Schroeder Cythera House	Mar. 10	Aminah Work BC Centre	Mar. 17	BC MLA Lawrence Mok
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LAST WEEK'S MEETING

President **Alex Pope** presided

Guests

Kris Harrison

Program- Estate Planning in British Columbia

About our Speaker Timothy Watkins of MHWP Law

Tim is a graduate of the University of Victoria law school, and has been in practice since 1986. He practised law with Jim Norquist for many years, and for the past 14 years has been a partner with MHWP Law in Maple Ridge. Tim's preferred area of practice is now estate litigation. He has been the lawyer acting on a number of significant estate cases in the BC Supreme Court and Court of Appeal relating to the validity of Wills and other estate plans.



A brief summary of Tim's presentation

Estate planning is more than drafting a Will. It begins with a review of assets to determine which ones pass through the estate and which transfer outside the Will.

Assets That Bypass the Will

Although a Will is a key piece in estate planning, not all assets that you own at the time of your death will pass through your Will to your intended beneficiaries. For example, real estate and bank accounts that are owned jointly with another person, and Registered Retirement Savings Plans (RRSPs), Registered Retirement Income Funds (RRIFs), and Tax Free Saving Accounts (TFSAs) with a designated beneficiary, may all bypass the Will.

Certain assets pass automatically on death:

- Joint tenancy property (real estate, joint bank accounts).
- Registered accounts with designated beneficiaries (RRSPs, RRIFs, TFSAs).

Even where assets bypass the estate, issues can arise (e.g., tax liability on RRSPs, or whether a beneficiary holds funds personally or in trust). A Will remains critical to capture assets not otherwise disposed of.

Probate Minimization Strategies

A restricted will (or secondary/non-probate will) in BC is part of a dual-will strategy used to minimize probate fees and maintain privacy by dealing only with assets that do not require a court grant of probate, such as private company shares, personal effects, or certain loans. It requires a "General Will" (covering probate-required assets like real estate or bank accounts) and a "Restricted Will" (covering non-probate assets). Properly drafting these wills is critical to avoid one will inadvertently revoking the other or causing administrative confusion. Using this strategy can save significant fees for individuals with high-value private company shares.

Inter Vivos (Living) Trusts

- Assets transferred to trust during lifetime.
- Avoid probate and may reduce exposure to variation claims.
- Require specialized legal and tax advice.

Modern Wills under BC Law

Under the Wills, Estates and Succession Act (WESA), courts may validate documents that do not meet traditional formal requirements. Even unsigned, unwitnessed, handwritten, or electronic documents may be admitted as Wills if they reflect fixed and final testamentary intentions.

However:

- The original Will is still important.
- If the original cannot be found and was last in the deceased's possession, there is a legal presumption it was destroyed.
- Homemade or unclear Wills often lead to costly litigation.

Wills Variation Claims

In British Columbia, spouses and children may challenge a Will if it fails to make "adequate provision" for them. Courts assess:

- Legal obligations
- Moral obligations
- Contemporary societal norms

Common Litigation Triggers

- Second marriages or long-term common-law relationships.
- Failure to update a Will after entering a new relationship.
- Adult independent children who are disinherited.
- Estrangement (court examines who caused it).

Even platonic long-term roommates may qualify as "spouses" under the law.

Risk Areas

- Blended families: surviving spouse may later alter distribution to exclude stepchildren.
- Informal arrangements: parties may unintentionally create spousal rights.
- Joint tenancy planning: can expose property to creditor, divorce, tax, and control risks.

Risk Management Best Practices

- Update Wills after major life changes.
- Consider cohabitation or marriage agreements.
- Leave rational, documented reasons if reducing or excluding a child.
- Avoid token gifts; modest but meaningful provision is safer.
- Seek professional advice to prevent ambiguity and litigation.

Bottom Line

Estate planning in BC is asset-driven, legally complex, and highly litigation-sensitive. While probate avoidance strategies exist, improper or outdated planning frequently results in court disputes. Clear documentation, updated Wills, and professional advice are essential to protect both assets and intentions.

Club Business

February 26 - Public Hub at Jimmy Mac's in Langley.

Tumbler Ridge donation - Pres. Alex has been in touch with the Rotary club of Dawson Creek (the closest Rotary club to the town of Tumbler Ridge where the mass school shooting occurred) to inquire whether Rotary clubs are planning any donation. Further information will be forthcoming.

Hometown Heroes Awards Banquet - Wednesday May 20, 2026 - Ineke Boekhorst is now the chair of Meadow Ridge Hometown Heroes, which was established in 2006 by our members Gordon Robson and Mary Robson as an organization whose purpose is to identify and honour individuals involved in athletics in Maple Ridge and Pitt Meadows within School District 42, who were members of local youth sport organizations, and who went on to achieve an international level within their chosen sport.

Each year nominations are accepted, and those chosen are formally inducted at the annual fundraising dinner.

The Hometown Heroes Awards Banquet has been a yearly celebration, that will this year take place on Wednesday May 20, 2026, at Samuel Robertson Technical School.

Tickets are \$60 per person, and sponsors are required.

See Ineke if you can sponsor a ticket or two.

[Read below an excerpt taken from the website of the Hometown Heroes Program which talks about the History of this program that our Rotary Club has been involved in since the program's inception.]

Happy and Sad Dollars included:

Some happy bucks for the presentation by our speaker Tim Watkins.

And some more for our member Susan Pynn, who "slaved away" yesterday, making tons of sourdough bread which she gave to Brenda Jenkins to distribute, free, to hungry Rotary members who have never tasted Susan's sourdough before.

But also a few sad dollars were donated, in remembrance of the tale of how Barbara Pope killed her late Instant Pot, and a few happy bucks were also were donated for how our brave president Alex saved the day when he saw the smoke coming from the pot...and avoided a fire!



For those of us newbies who have never heard of an Instant Pot before (let alone for those of us who have never tried to "off" one of them), it says online that an "Instant Pot" is "a popular brand of versatile, electric, and programmable multi-cookers that combine several

kitchen appliances into one, primarily acting as an electric pressure cooker, slow cooker, rice cooker, steamer, sauté pan, and yogurt maker."

[Note: Although the "Instant Pot" is obviously very versatile and portable, newbies to its use should not confuse it with that other versatile and portable device called the Porta Potty!



Presidents Closing Quote

I was paying at McDonald's, and they ask if I wanted to give a dollar to charity. I said no, I give in other ways. Then they said, "You don't care about children's health?"

I said, "Look, I'm eating at McDonald's - I don't even care about my own health!"



Hometown Heroes Program History

In 1997 a TV sports reporter referred, in a broadcast, to the many international sports heroes who came from Maple Ridge. In the on-air banter with the host of the program, the two concluded, "It must be the water." The obvious lack of an answer led a couple of Rotarians (Gord & Mary Robson) to the conclusion that it wasn't the water. They determined it was the minor league sports organizations and school athletic programs which were responsible, and the thousands of volunteer hours of coaches, teachers and parents.

The combination of these forces was the reason for so many renowned athletes from Ridge Meadows. This led to the birth of the concept that a light should be shone on the successes of these athletes, and the challenge was to find a way to share the stories of their success with the youth of Ridge Meadows. If our youth could realize that; "Wow! He went to my school! He played on my team! She was in my league!" and "If I work hard enough, I can get there from here!" The criteria was set and is quite simple: Nominees have to have come from Maple Ridge or Pitt Meadows, attended school in the Ridge Meadows area and participated in minor youth sports either on school teams and/or minor league sports teams. If they went on to international success, they could be candidates for Hometown Heroes. In 1998 the first 12 Home Town Heroes were inducted. Today the roster of inductees stands at 50 and includes 15 Olympians or Paralympians.

Submitted by Laurie Anderson