CPA ONTARIO

Certificate in Estate and Trust Administration and Taxes

Certificate Description

This certificate program is designed for professionals who are seeking proficiency in estate and trust administration, estate accounting and trust tax reporting. This comprehensive program builds from a tax and estate planning scenario to the execution of a will, estate administration, tax filing and reporting to the stakeholders and courts. Participants will learn by interacting with an actual case and preparing documentation that would typically be available for submission to legal, regulatory and taxation authorities. Many of the tools outlined and skills developed are applicable to any fiduciary engagement.

Post course participants will understand the traditional estate accounting sections and reporting, how to deal with unique transactions, estate administration efficiency opportunities and trust tax return preparation and death of a taxpayer filing. Participants will learn how to navigate an estate administration and recognize pitfalls associated with estate accounting. They will review trust reporting requirements and enhance their trust tax reporting acumen.

Expect to leave this program with the confidence to assist anyone acting as an executor, estate trustee, attorney under power of attorney for property and fiduciary related engagements.

16 PD Hours

ESTATE & TRUST ADMINISTRATION AND TAXES
CERTIFICATE PROGRAM
CPA ONTARIO

Who Will Benefit

Attendees should have an understanding of a what a fiduciary does and nominal understanding of the trust and estate planning process. It would be helpful if they have some insight on some of the planning and associated consequences of Death of a Taxpayer. Examples of professions and individuals who would benefit from this certificate include:

- CPA Firm Owner
- Vice President, Finance
- Director of Finance
- Senior Tax Manager
- Insolvency Trustee
- Senior Accountant
- Tax Consultant
- Anyone being asked to be an executor of an estate

Schedule

Class 1 | October 6, 2026
9:00 AM – 1:00 PM EDT

Class 2 | October 13, 2026
9:00 AM – 1:00 PM EDT

Class 3 | October 20, 2026
9:00 AM – 1:00 PM EDT

Class 3 | October 20, 2026
9:00 AM – 1:00 PM EDT

You must attend at least 80% of live sessions to earn your PD hours and Digital Badge.

Key Takeaways

Upon completion of this bundle, you will:

- Understand the estate administration process, fiduciary responsibilities and pitfall avoidance.
- Review the components and preparation of Estate Accounting ("Passing of Accounts") Reports.
- Consider nuanced scenarios such as:
    - Unique Estate Distributions
    - Digital Assets
    - Legal and Family Law Claims Against an Estate
    - Post Mortem Tax Planning
    - Minor Beneficiaries
    - Estate is a Beneficiary
- Examine Death of a Taxpayer Tax Planning and administration efficiency opportunities.
- Prepare and file Testamentary trust T3 tax and information returns.

Meet Your Instructors

Michael Kulbak, CPA, CMA is Managing Principal of Kulbak Trust Solutions a fiduciary firm that provides Professional Executor, Power of Attorney and Trustee Services. His areas of specialization include estate and trust planning, tax, administration and compliance. Michael has been a CFO, Trustee, Director, Officer, Treasurer and executive responsible for financial stewardship for a number of organizations and trusts. In these roles he was accountable for safeguarding assets, financial decision-making, tax planning, regulatory and statutory reporting.

Anna Mouland is the co-founder and CEO of Bequest.com, a fast-growing B2B legal-tech platform that helps trust-and-estate professionals automate everything from drafting to fiduciary accounting. The idea took shape at a hackathon she and her co-founder entered while she was studying Computer Science and Philosophy at McGill University. Since launching, the company has expanded from its Canadian roots into California and has become the first true end-to-end solution in the space.

Have Questions? Speak to an Advisor.

To speak to one of our advisors, please fill out this form.