

25th Estates and Trusts Summit – DAY TWO



CO-CHAIRS: **Nimali Gamage**, *Goddard Gamage LLP*

Cate Grainger, *Harrison Pensa LLP*

October 20, 2022

9:00 a.m. to 4:30 p.m.

**Total CPD Hours = 5 h Substantive + 45 m Professionalism ^P
+ 45 m EDI Professionalism ^e**

Webcast

Law Society of Ontario

Toronto ON

SKU CLE22-0100801

Agenda

DAY TWO:

9:00 a.m. – 9:05 a.m.

Welcome



Nimali Gamage, *Goddard Gamage LLP*

Cate Grainger, *Harrison Pensa LLP*

9:05 a.m. – 9:25 a.m.

A view from the Bench (20 m ^P)

The Honourable Bernadette Dietrich
Superior Court of Justice

9:25 a.m. – 9:30 a.m.	Question and Answer Session
9:30 a.m. – 10:00 a.m.	Caselaw Update and Other Developments from 2022 Benjamin Arkin, Arkin Furrow Estate Law LLP Ambie Edgar-Chana, <i>Edgar Chana Law Professional Corporation</i>
10:00 a.m. – 10:10 a.m.	Question and Answer Session
10:10 a.m. – 10:30 a.m.	Break
10:30 a.m. – 11:15 a.m.	Proactive Elder Law in a Wills and POA Practice (25 m ) Marshall Swadron, <i>Swadron Associates</i> Laura Tamblyn Watts, President & CEO, <i>CanAge</i> Judith Wahl, <i>Wahl Elder Law</i>
11:15 a.m. – 11:20 a.m.	Question and Answer Session
11:20 a.m. – 12:05 p.m.	Cultural and Jurisdictional Considerations in Estate Planning (45 m ) Mustafa Jilani, <i>Harrison Pensa LLP</i> Alex Procope, <i>Perez Bryan Procope LLP</i> Nicole Richmond, Barrister and Solicitor
12:05 p.m.– 12:10 p.m.	Question and Answer Session
12:10 p.m. – 1:10 p.m.	Lunch Break

- 1:10 p.m. – 1:55 p.m.** **ODSP and Disability Issues in Estate Planning, Estate Administration and Litigation**
- Alexandra Manthorpe, *Cunningham Swan Carty Little & Bonham LLP*
- Brittany Miller, *Goddard Gamage LLP*
- 1:55 p.m. – 2:05 p.m.** **Question and Answer Session**
- 2:05 p.m. – 2:25 p.m.** **The Issue of Issue: Adoptions, Grandchildren, Children Posthumously Conceived, Surrogacy and the Impact on Wills and POAs.**
- Jordan Atin, C.S., TEP, *Hull & Hull LLP*
- 2:25 p.m. – 2:30 p.m.** **Question and Answer Session**
- 2:30 p.m. – 2:50 p.m.** **Break**
- 2:50 p.m. – 3:30 p.m.** **Real Estate Primer for Estate and Guardianship Lawyers**
- Darren Lund, TEP, *Miller Thomson LLP*
- Tannis Waugh, C.S., *Waugh & Co Professional Corporation*
- 3:30 p.m. – 3:40 p.m.** **Question and Answer Session**
- 3:40 p.m. – 4:20 p.m.** **Dealing with Tricky Assets (Multi-Jurisdictional and Digital Assets)**
- Laura Cardiff, *Casey and Moss LLP*
- Laura Geddes, *Siskinds LLP*
- Daniel Paperny, *WEL Partners*
- 4:20 p.m. – 4:30 p.m.** **Question and Answer Session**
- 4:30 p.m.** **End of Day Two**