

# The Annotated Will 2025



Panelists: **Laura Geddes, TEP, Siskinds LLP**

**Ian Lebane, C.S., LLM, TEP, Vice President,  
Tax and Estate Planner, TD Wealth**

**Darren Lund, TEP, Fasken Martineau DuMoulin LLP**

**Kavina Nagrani C.S., TEP, NIKA LAW LLP**

**January 23, 2025**

**9:00 a.m. to 12:00 p.m.**

**Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism <sup>P</sup>**

**Law Society of Ontario**

**SKU CLE25-00103**

## **Agenda**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

Laura Geddes, TEP, *Siskinds LLP*

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

**9:05 a.m. – 9:30 a.m.**

**Top 10 Drafting Errors**

Laura Geddes, TEP, *Siskinds LLP*

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

Kavina Nagrani C.S., TEP, *NIKA LAW LLP*

Ian Lebane, C.S., LLM, TEP, Vice President, Tax and Estate Planner, *TD Wealth*

**9:30 a.m. – 9:35 a.m.**

**Question and Answer Period**

**9:35 a.m. – 9:50 a.m.**

**Retainers and Engagement Letters**  
(15 m  )

Kavina Nagrani C.S., TEP, *NIKA LAW LLP*

**9:50 a.m. – 10:10 a.m.**

**Trustee Provisions**

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

**10:10 a.m. – 10:15 a.m.**

**Question and Answer Period**

**10:15 a.m. – 10:35 a.m.**

**Break**

**10:35 a.m. – 10:55 a.m.**

**Personal Articles and Effects**

Laura Geddes, TEP, *Siskinds LLP*

**10:55 a.m. – 11:00 a.m.**

**Question and Answer Period**

**11:00 – 11:15 a.m.**

**Real Property Rights and Trusts**

Ian Lebane, C.S., LLM, TEP, Vice President, Tax and Estate Planner, *TD Wealth*

Kavina Nagrani C.S., TEP, *NIKA LAW LLP*

**11:15 a.m. – 11:30 a.m.**

**Charitable Gifting**

Laura Geddes, TEP, *Siskinds LLP*

**11:30 a.m. – 11:35 a.m.**

**Question and Answer Period**

**11:35 a.m. – 11:55 a.m.**

**Precedents (15 m  )**

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

**11:55 a.m. – 12:00 p.m.**

**Question and Answer Period**

**12:00 p.m.**

**Program Ends**