

May 20, 2022

THE SIX-MINUTE ESTATES LAWYER 2022



CO- CHAIRS: **Andrea Hill, Turkstra Mazza Associates**

Ian Hull, C.S., Hull & Hull LLP

May 25, 2022

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

Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism ^P

**Law Society of Ontario
Toronto, ON**

SKU CLE22-00508

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Andrea Hill, Turkstra Mazza Associates

Ian Hull, C.S., Hull & Hull LLP

9:05 a.m. – 9:12 am.

Joint Asset Planning

Clare Burns, WeirFoulds LLP

- 9:12 a.m. – 9:19 a.m.** **Estate Administration Tax Update and Practice Tips**^P
Jordan Atin, C.S., TEP, Atin Professional Corporation
- 9:19 a.m. – 9:27 a.m.** **Dispositions and Disputes over Remains**
Pamela Liang, Wilson Vukelich LLP
- 9:27 a.m. – 9:34 a.m.** **Tips on Taking Will Instructions and Reporting Letters to Clients**^P
Kathleen McDormand, Borden Ladner Gervais LLP
- 9:34 a.m. – 9:42 a.m.** **Question and Answer Session (1 m)**^P
- 9:42 a.m. – 9:49 a.m.** **Gifts Mortis Causa**
Dagmara Wozniak, Siskinds LLP
- 9:49 a.m. – 9:56 a.m.** **Voluntary Disclosure in Estate Matters**
Valentine Gurfinkel, BDO Law LLP
- 9:56 a.m. – 10:03 a.m.** **Drafting / Planning for Disabled Beneficiaries**^P
Alexandra Manthorpe, Cunningham Swan Carty Little & Bonham LLP
- 10:03 a.m. – 10:10 a.m.** **Guardianship and the Least Invasive Path**
Brendon Pooran, Pooran Law Professional Corporation
- 10:10 a.m. – 10:17 a.m.** **Managing Deathbed Retainers**
Justin de Vries, de VRIES LITIGATION LLP
- 10:17 a.m. – 10:25 a.m.** **Question and Answer Session (1m)**^P

10:25 a.m. – 10:45 a.m.	Break
10:45 a.m. – 10:52 a.m.	Limitation Periods in Estates and Passing of Accounts Proceedings Jennifer Stebbing, C.S., Miller Thomson LLP
10:52 a.m. – 10:59 a.m.	Corroboration Evidence in Estate Matters Brendan Donovan, <i>Donovan Kochman LLP</i>
10:59 a.m. – 11:06 a.m.	Security for Costs Motions in Estate Matters Bianca La Neve, <i>WeirFoulds LLP</i>
11:06 a.m. – 11:13 a.m.	New Forms and the Compliance Requirements for the Validity of Wills Jonathan Keslassy, <i>Keslassy Freedman Gelfand LLP</i>
11:13 a.m. – 11:20 a.m.	Question and Answer Session (1m ^P)
11:20 a.m. – 11:27 a.m.	Rules of Conduct and Conflict Issues for Solicitors ^P Suzana Popovic-Montag, TEP, <i>Hull & Hull LLP</i>
11:27 a.m. – 11:34 a.m.	Proving Due Execution Kimberly Whaley, C.S., TEP, <i>WEL Partners</i>
11:34 a.m. – 11:41 a.m.	Dealing with Insolvent Estates Elikem Deley, <i>Sorbara, Schumacher, McCann LLP</i>

11:41 a.m. – 11:48 a.m.

Estates and Family Law Cross-Over Issues and Recent Developments

Arieh Bloom, Tupman & Bloom LLP

11:48 a.m. – 11:55 a.m.

Charities in an Estate Administration and Drafting Considerations

*Jasmine Sweatman, C.S., J.D., TEP, ERC, CPCA
Sweatman Law Firm*

11:55 a.m. – 12:00 p.m.

Question and Answer Session (1m )

12:00 p.m.

Program Ends