

Practice Gems: Probate Essentials 2022



CO-CHAIRS: **Angela Fallow, TEP**, *Fallow Estates Law*

Craig Ross, *Pallett Valo LLP*

September 22, 2022

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

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

**Webcast
Law Society of Ontario
Toronto ON**

SKU CLE22-00906

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Angela Fallow, TEP, Fallow Estates Law

Craig Ross, Pallett Valo LLP

9:05 a.m. – 9:20 a.m.

**Resealing and Obtaining Ancillary Grants in Foreign
Jurisdictions for Ontario Estates**

Rahul Sharma, Miller Thomson LLP

- 9:20 a.m. – 9:25 a.m. Question and Answer Session**
- 9:25 a.m. – 9:45 a.m. Avoiding Application Filing Mistakes with New Forms**
- Alicia Asimoudis, Court and Client Representative,
Estates Office, *Government of Ontario* (Hamilton)
- David Henderson, *Agro Zaffiro LLP*
- 9:45 a.m. – 9:55 a.m. Question and Answer Session**
- 9:55 a.m. – 10:10 a.m. When and How to Use “Heir-at-law” Applications and
3-Year Vesting of Real Estate**
- Burgandy Dunn, *Viridius Lex*
- 10:10 a.m. – 10:15 a.m. Question and Answer Session**
- 10:15 a.m. – 10:35 a.m. Break**
- 10:35 a.m. – 10:55 a.m. When to Use Rule 14.05 Applications to Appoint Estate
Trustees Instead of Rule 74**
- Manpreet Kaur, *Pallett Valo LLP*
- 10:55 a.m. – 11:00 a.m. Question and Answer Session**
- 11:00 a.m. – 11:20 a.m. Ask a Banker - Estate Accounts, Discretion for Non-
Probate, Timelines, etc.**
- Ian Lebane, C.S., TEP, Vice President, *TD Wealth*

- 11:20 a.m. – 11:30 a.m.** **Question and Answer Session**
- 11:30 a.m. – 11:55 a.m.** **Avoiding Communication Issues with Clients,
Beneficiaries and Other Counsel. (25 m P)**
- Andrea Hill, *Turkstra Mazza Associates*
- Alexandra Manthorpe, *Cunningham Swan Lawyers LLP*
- 11:55 a.m. – 12:00 p.m.** **Question and Answer Session (5 m P)**
- 12:00 p.m.** **Program Ends**