

Practice Gems: Administration of Estates 2023



CO-CHAIRS: **Pamela Liang, TEP**, *Wilson Vukelich LLP*

Susannah Roth, TEP,
RBC Wealth Management, Royal Trust

September 26, 2023

1:00 p.m. to 4:00 p.m.

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

Webcast
Law Society of Ontario

SKU CLE23-00906

Agenda

1:00 p.m. – 1:05 p.m.

Welcome

Pamela Liang, TEP, Wilson Vukelich LLP

*Susannah Roth, TEP,
RBC Wealth Management, Royal Trust*

1:05 p.m. – 1:25 p.m.

Case Law Update

Jacob Kaufman, Donovan Kochman LLP

- 1:25 p.m. – 1:30 p.m. Question and Answer Session**
- 1:30 p.m. – 2:00 p.m. Solicitor’s Negligence (30 m ^P)**
- Jordan Oelbaum, Schnurr Kirsh Oelbaum Tator LLP*
- Chris Stankiewicz, Claims Counsel,
Lawyers’ Professional Indemnity Company (LAWPRO)*
- 2:00 p.m. – 2:05 p.m. Question and Answer Session**
- 2:05 p.m. – 2:20 p.m. Tax Issue Spotting**
- Sunita Doobay, TEP, Blaney McMurtry LLP*
- 2:20 p.m. – 2:25 p.m. Question and Answer Session**
- 2:25 p.m. – 2:45 p.m. Break**
- 2:45 p.m. – 3:15 p.m. Spousal and Dependents’ Claims**
- Nav Shokar, Keyser Mason Ball LLP*
- Amelia Yiu, TEP, Elm Law Professional Corporation*
- 3:15 p.m. – 3:20 p.m. Question and Answer Session**
- 3:20 p.m. – 3:35 p.m. Administering Estates with Henson Trusts and Special Needs Beneficiaries**
- Marshall Swadron,
Swadron Associates, Barristers & Solicitors*
- 3:35 p.m. – 3:40 p.m. Question and Answer Session**

3:40 p.m. – 3:55 p.m.

Dealing with Poorly Drafted Wills or Mistakes in Wills

Jenny Bogod, Rosen Sack LLP

3:55 p.m. – 4:00 p.m.

Question and Answer Session

4:00 p.m.

Program Ends