

26th Estates and Trusts Summit – DAY TWO



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

Cate Grainger, *Harrison Pensa LLP*

October 19, 2023

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

Total CPD Hours = 5 h Substantive + 1h 30 m Professionalism P

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON**

SKU CLE23-0100701

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**
Carol Craig, *Nelligan O'Brien Payne LLP*
Emily Hubling, *Fasken Martineau DuMoulin LLP*
- 10:00 a.m. – 10:05 a.m. Question and Answer Session**
- 10:05 a.m. – 10:25 a.m. Break**
- 10:25 a.m. – 11:00 a.m. Exploring the Intersection of Criminal and Estates Law – Murder, *Ex Turpi Causa*, Slayer Rule, Elder Abuse, Theft by POA**
Lakin Afolabi, Barrister & Solicitor
Fraser Kelly, Barrister & Solicitor
Kimberly Whaley, *Whaley Estate Litigation Partners*
- 11:00 a.m. – 11:10 a.m. Question and Answer Session**
- 11:10 a.m. – 11:40 a.m. A Tax Refresher – An Overview of How Estates Are Taxed on Death, Taxation of Trusts, Problems with Appointing US resident Executor, etc.**
Rahul Sharma, *Fasken Martineau DuMoulin LLP*
Julian Franch, *Minden Gross LLP*
- 11:40 a.m.– 11:50 a.m. Question and Answer Session**

- 11:50 a.m.– 12:20 p.m.** **Advising Attorneys: Issues of Capacity and Vulnerability**
Kathryn Balter, *Fogler Rubinoff LLP*
Laura Geddes, *Siskinds Law Firm*
- 12:20 p.m. – 12:30 p.m.** **Question and Answer Session**
- 12:30 p.m. – 1:30 p.m.** **Lunch Break**
- 1:30 p.m. – 2:00 p.m.** **Assessing Capacity and Guarding the Client from Undue Influence where there Are Indicators of Vulnerability**
Dr. Kenneth Shulman, Professor, Department of Psychiatry, *Sunnybrook Health Sciences Centre, University of Toronto*
Yasmin Vinograd, *Merovitz Potechin LLP*
- 2:00 p.m. – 2:10 p.m.** **Question and Answer Session**
- 2:10 p.m. – 2:40 p.m.** **How to Structure your Estate Planning Practice to Minimize Risk (30 m )**
Matthew Furrow, *Arkin Furrow Estate Law LLP*
Dawn Phillips-Brown, *Madorin, Snyder LLP*
Debra Stephens, *Tupman & Bloom LLP*
- 2:40 p.m. – 2:50 p.m.** **Question and Answer Session**
- 2:50 p.m. – 3:10 p.m.** **Break**

3:10 p.m. – 3:35 p.m.

Bonds in Guardianships and Estates: When Are they Required, How to Dispense With them, What Information Is Required, What Is the Cost?

Gemma Charlton, *Harrison Pensa LLP*

Laroux Peoples, *WeirFoulds LLP*

3:35 p.m. – 3:40 p.m.

Question and Answer Session

3:40 p.m. – 4:20 p.m.

Technology, AI, and Estates Practice: The Promises and Perils (40 m )

Jordan Atin, *Hull & Hull LLP*

Amy Salyzyn, Associate Professor, Faculty of Law,
University of Ottawa

4:20 p.m. – 4:30 p.m.

Question and Answer Session

4:30 p.m.

End of Day Two