

22ND Estates and Trusts Summit – DAY TWO

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

Alexandra Mayeski, *Hicks Morley Hamilton Stewart Storie LLP*

October 17, 2019

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

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

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen Street West
Toronto, ON**

SKU CLE19-0101001



Agenda

DAY TWO:

9:00 a.m. – 9:10 a.m.

Welcome and Opening Remarks

Nimali Gamage, Goddard Gamage LLP

Alexandra Mayeski, Hicks Morley Hamilton Stewart Storie LLP

9:10 a.m. – 9:30 a.m.

Estates and Trusts Case Law Update

Justin de Vries, de VRIES LITIGATION LLP

- 9:30 a.m. – 9:35 a.m.** **Question and Answer Session**
- 9:35 a.m. – 9:55 a.m.** **Setting Up and Managing “In Trust” Crowd-Funding Accounts After a Tragedy**
Jan Goddard, Goddard Gamage LLP
- 9:55 a.m. – 10:15 a.m.** **Scary Situations for the Estate Solicitor from the Perspective of an Estates Judge (20 minutes )**
The Honourable Bernadette Dietrich, Superior Court of Justice
- 10:15 a.m. – 10:25 a.m.** **Question and Answer Session**
- 10:25 a.m. – 10:45 a.m.** **Coffee and Networking Break**
- 10:45 a.m. – 11:05 a.m.** **Tips for Drafting Specific POA and Will Clauses to Avoid Family Conflict**
Brian Cohen, Gowlings WLG (Canada) LLP
- 11:05 a.m. – 11:25 a.m.** **Convergence of Undue Influence and Capacity on Drafting**
Cate Grainger, Harrison Pensa LLP
- 11:25 a.m. – 11:35 a.m.** **Question and Answer Session**
- 11:35 a.m. – 11:55 p.m.** **US Tax Law Update**
Britta McKenna, Hodgson Russ LLP (Buffalo)

- 11:55 p.m. – 12:00 p.m. Question and Answer Session**
- 12:00 p.m. – 1:00 p.m. Lunch Provided**
- 1:00 p.m. – 1:40 p.m. Estate Administration Tools for the Estate Trustee
(40 minutes 🕒)**
- Patrick Hartford, CEO & Founder, *NoticeConnect*
- Ian Hull, CS, *Hull & Hull LLP*
- Alyson Sweetlove, *George Street Law Firm*
- 1:40 p.m. – 1:55 p.m. Question and Answer Session**
- 1:55 p.m. – 2:15 p.m. Avoiding Conflicts of Interest in Estate Administration
(20 minutes 🕒)**
- Tanisha Tulloch, *Torkin Manes LLP*
- 2:15 p.m. – 2:35 p.m. Use of RDSPs in Estate Planning**
- Peter Lillico, *Lillico Bazuk Galloway Halka*
- 2:35 p.m. – 2:40 p.m. Question and Answer Session**
- 2:40 p.m. – 3:00 p.m. Coffee and Networking Break**
- 3:00 p.m. – 3:30 p.m. Issues to Consider when Advocating for People in
Institutional Settings**
- Mary Jane Dykeman, *Dykeman & O'Brien LLP*
- Jane E. Meadus, *Advocacy Centre for the Elderly*

3:30 p.m. – 3:35 p.m.

Question and Answer Session

3:35 p.m. – 4:20 p.m.

What to Do When the Client Has No One to Appoint as the Substitute Decision Maker or Estate Trustee
(10 minutes 🕒)

Thomas Grozinger, CS, Principal Trust Specialist,
Professional Practice Group, *RBC Royal Trust* (Ottawa)

Susan Sack, *Rosen Sack LLP*

Lisa Wilder, *Office of the Public Guardian and Trustee*

4:20 p.m. – 4:30 p.m.

Question and Answer Session

4:30 p.m.

End of Day Two