

The Annotated Alter Ego Trust and Discretionary Trust 2026



CO-CHAIRS: **M. Elena Hoffstein**, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

March 5, 2026

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

Total CPD Hours = 2 h 15 m Substantive + 45 m Professionalism ^P

Webcast
Law Society of Ontario

SKU CLE26-00304

Agenda

1:00 p.m. – 1:05 p.m.

Welcome

M. Elena Hoffstein, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

1:05 p.m. – 1:35 p.m.

Overview of Tax Issues Related to Trusts (5 m ^P)

Matthew Getzler, *Torkin Manes LLP*

M. Elena Hoffstein, *Miller Thomson LLP*

Joan Jung, *Miller Thomson LLP*

1:35 p.m. – 1:40 p.m.	Question and Answer Session
1:40 p.m. – 2:25 p.m.	Discussion of the Annotated Discretionary Trust M. Elena Hoffstein, <i>Miller Thomson LLP</i> Joan Jung, <i>Miller Thomson LLP</i>
2:25 p.m. – 2:30 p.m.	Question and Answer Session
2:30 p.m. – 2:50 p.m.	Break
2:50 p.m. – 3:15 p.m.	Discussion of the Annotated Alter Ego Trust David Stevens, <i>Gowling WLG (Canada) LLP</i>
3:15 p.m. – 3:20 p.m.	Question and Answer Session
3:20 p.m. – 3:55 p.m.	Panel Discussion: Using Precedents, Errors Setting Up Trusts, Client Retainers, Reporting Letters, Etc. (35 m ) Matthew Getzler, <i>Torkin Manes LLP</i> M. Elena Hoffstein, <i>Miller Thomson LLP</i> Joan Jung, <i>Miller Thomson LLP</i> David Stevens, <i>Gowling WLG (Canada) LLP</i>
3:55 p.m. – 4:00 p.m.	Question and Answer Session (5 m )
4:00 p.m.	Program Ends