



THE ANNOTATED WILL 2019

Chairs: **Susannah Roth**
O'Sullivan Estate Lawyers LLP

Mary Alice Thompson
Cunningham, Swan LLP

Presenters: **Darren Lund**
Fasken

Jane Martin
Dickson Appell LLP

January 16, 2019
9:00 a.m. to 12:00 p.m.

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

Law Society of Ontario
130 Queen Street West
Toronto, ON

SKU CLE19-00101



Agenda

9:00 a.m. – 9:05 a.m.

Welcome and Opening Remarks

Susannah Roth, O'Sullivan Estate Lawyers LLP

Mary Alice Thompson, Cunningham, Swan LLP

- 9:05 a.m. – 9:25 a.m.** **The Architecture and Terminology of a Will**
Mary Alice Thompson, *Cunningham, Swan LLP*
- 9:25 a.m. – 9:30 a.m.** **Question and Answer Period**
- 9:30 a.m. – 9:55 a.m.** **Managing the Client Relationship (25 minutes) ^P**
Darren Lund, *Fasken*
Jane Martin, *Dickson Appell LLP*
Susannah Roth, *O’Sullivan Estate Lawyers LLP*
Mary Alice Thompson, *Cunningham, Swan LLP*
- 9:55 a.m. – 10:00 a.m.** **Question and Answer Period**
- 10:00 a.m. – 10:20 a.m.** **Spousal Trusts**
Darren Lund, *Fasken*
- 10:20 a.m. – 10:25 a.m.** **Question and Answer Period**
- 10:25 a.m. – 10:45 a.m.** **Coffee and Networking Break**
- 10:45 a.m. – 11:20 a.m.** **Multiple Wills – When and How Should They Be Used?**
Jane Martin, *Dickson Appell LLP*
Susannah Roth, *O’Sullivan Estate Lawyers LLP*
- 11:20 a.m. – 11:30 a.m.** **Question and Answer Period**

11:30 a.m. – 11:50 a.m.

Using Precedents (20 minutes) 

Darren Lund, *Fasken*

Jane Martin, *Dickson Appell LLP*

Susannah Roth, *O'Sullivan Estate Lawyers LLP*

Mary Alice Thompson, *Cunningham, Swan LLP*

11:50 a.m. – 12:00 p.m.

Question and Answer Period

12:00 p.m.

Program Ends