

Estate Accounting and Passing of Accounts 2021



CO-CHAIRS: **Justin de Vries**, *de VRIES LITIGATION LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

January 26, 2021

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

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

Law Society of Ontario

SKU CLE21-00106



Agenda

1:00 p.m. – 1:05 p.m.

Welcome and Opening Remarks

Justin de Vries, de VRIES LITIGATION LLP

Kathleen McDormand, Borden Ladner Gervais LLP

- 1:05 p.m. – 1:20 p.m.** **Passing the Accounts of Guardians and Attorneys:
Common Mistakes** (15 m )
- Richard Coutinho, Client Lawyer, Office of the Public
Guardian and Trustee, *Ministry of the Attorney General*
- 1:20 p.m. – 1:35 p.m.** **Compensation: How to Improve the Chance of Succeeding
in your Compensation Claim** (15 m )
- Raymond Murray, *Nelligan O'Brien Payne LLP*
- 1:35 p.m. – 1:40 p.m.** **Question and Answer Session**
- 1:40 p.m. – 1:55 p.m.** **Estate Accounts: How to Deal with Gaps in Accounting**
- Corina Weigl, *Fasken Martineau DuMoulin LLP*
- 1:55 p.m. – 2:10 p.m.** **Complex Passing of Accounts: How to Handle Multiple
Years and Complex Passings**
- Melanie Yach, *Aird & Berlis LLP*
- 2:10 p.m. – 2:15 p.m.** **Question and Answer Session**
- 2:15 p.m. – 2:35 p.m.** **Coffee and Networking Break**
- 2:35 p.m. – 2:50 p.m.** **Notice of Objections: How to Effectively Frame Objections
and When to Withdraw Them**
- The Honourable Sally Gomery, *Superior Court of Justice*
- Kathleen McDormand, *Borden Ladner Gervais LLP*

2:50 p.m. – 2:55 p.m.	Question and Answer Session
2:55 p.m. – 3:10 p.m.	When and Why to Convert a Passing of Accounts into an Action Brendan Donovan, <i>Donovan Kochman LLP</i> Kathleen McDormand, <i>Borden Ladner Gervais LLP</i>
3:10 p.m. – 3:15 p.m.	Question and Answer Session
3:15 p.m. – 3:30 p.m.	Notable Cases in Estate Accounting and Passing of Accounts Noah Weisberg, <i>Keslassy Freedman Gelfand LLP</i>
3:30 p.m. – 3:35 p.m.	Question and Answer Session
3:35 p.m. – 3:55 p.m.	Making Submissions to the Court The Honourable Fred Myers, <i>Superior Court of Justice</i> Kelly Charlebois, <i>Miller Thomson LLP</i> Justin de Vries, <i>de VRIES LITIGATION LLP</i>
3:55 p.m. – 4:00 p.m.	Question and Answer Session
4:00 p.m.	Program Ends