



19TH ANNUAL ESTATES AND TRUSTS SUMMIT – DAY ONE

Chairs: **Paul Dancause**
Barrister & Solicitor

Archie Rabinowitz, C.S.
Dentons Canada LLP

November 3, 2016
9:00 a.m. to 4:30 p.m.

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

Donald Lamont Learning Centre
The Law Society of Upper Canada
130 Queen Street West
Toronto, ON

SKU CLE16-0100800



Agenda


DAY ONE:


9:00 a.m. – 9:05 a.m.


Welcome

Paul Dancause, Barrister & Solicitor

Archie Rabinowitz, C.S., *Dentons Canada LLP*

9:05 a.m. – 9:25 a.m.	Judge for a Year: Things I Wish I Had Known When in Practice (20 Minutes ) The Honourable Justice Liza Sheard <i>Superior Court of Justice</i>
9:25 a.m. – 9:45 a.m.	Accountants: Access to Working Papers, Duty of Confidentiality, No Accountant-Client Privilege Norm Emblem, <i>Dentons Canada LLP</i>
9:45 a.m. – 10:05 a.m.	Ontario Disability Support Program Issues In Estate and Guardianship Litigation Nimali Gamage, <i>Goddard, Gamage, Stephens LLP</i>
10:05 a.m. – 10:25 a.m.	Discrete Functions of Courts of Probate and Construction Professor Emeritus Albert Oosterhoff <i>WEL Partners</i>
10:25 a.m. – 10:35 a.m.	Question and Answer Session
10:35 a.m. – 10:55 a.m.	Coffee and Networking Break
10:55 a.m. – 11:15 a.m.	Making and Attacking Estate Trustee Compensation Agreements Between the Testator and Drafting Solicitor Professor David Freedman, C.S., TEP <i>Hull & Hull LLP</i>

11:15 a.m. – 11:55 a.m.	<p>Understanding and Refining the Legal Test For Testamentary Capacity – A Medical/Legal Perspective (20 Minutes )</p> <p>Ian Hull, C.S., <i>Hull & Hull LLP</i></p> <p>Dr. Kenneth Shulman, Professor, Department of Psychiatry, <i>Sunnybrook Health Sciences Centre, University of Toronto</i></p>
11:55 a.m. – 12:15 p.m.	<p>Using Neuroscience to Help Your Clients In an Estate Mediation</p> <p>Wendy Griesdorf, C.S., <i>Griesdorf & Counsel Estate Litigation and Mediation PC</i></p>
12:15 a.m. – 12:25 a.m.	Question and Answer Session
12:25 p.m. – 1:25 p.m.	Lunch will be provided
1:25 p.m. – 1:45 p.m.	<p>Solicitor’s Negligence: Estates and Trust Context</p> <p>Kimberly Whaley, C.S., TEP, <i>WEL Partners</i></p>
1:45 p.m. – 2:05 p.m.	<p>Catch’em When You Can – Mistakes in Estate Litigation</p> <p>Jordan Atin C.S., TEP, Barrister & Solicitor</p>
2:05 p.m. – 2:25 p.m.	<p>Five Eccentric But Important Cases</p> <p>John Poyser, TEP, <i>Tradition Law LLP estates & trusts</i></p>

2:25 p.m. – 2:45 p.m.	Dependents’ Relief Angela Casey, <i>Casey & Moss LLP</i> Angelique Moss, <i>Casey & Moss LLP</i>
2:45 p.m. – 2:55 p.m.	Question and Answer Session
2:55 p.m. – 3:10 p.m.	Coffee and Networking Break
3:10 p.m. – 3:20 p.m.	Property Guardianships: Problems and Solutions Richard Ashok Coutinho <i>Office of the Public Guardian and Trustee</i>
3:20 p.m. – 3:40 p.m.	Capacity Assessments in Guardianships (20 Minutes ) Dr. Marilyn Price, <i>Law and Psychiatry Service,</i> <i>Massachusetts General Hospital</i>
3:40 p.m. – 4:00 p.m.	Interpretation Issues for Wills Marcia Green, <i>Nelligan O’Brien Payne LLP</i>
4:00 p.m. – 4:20 p.m.	Limitation Periods in Estate Matters Daniel Zacks, <i>Clyde & Co. Canada LLP</i>
4:20 p.m. – 4:30 p.m.	Question and Answer Session
4:30 p.m.	End of Day One