

Final
September 27, 2018



21ST ANNUAL

Estates and Trusts Summit – DAY TWO

Chairs: **Nimali Gamage**
Goddard Gamage LLP

Alexandra Mayeski
Mayeski Mathers LLP

October 11, 2018

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

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

**Metro Toronto Convention Centre
Rooms 205 and 206 (North Building)
255 Front Street West
Toronto, ON**



CLE18-0100401

Agenda



DAY TWO:

9:00 a.m. – 9:10 a.m. Welcome and Opening Remarks

Nimali Gamage, Goddard Gamage LLP

Alexandra Mayeski, Mayeski Mathers LLP

- 9:10 a.m. – 9:30 a.m.** **Will Interpretation Issues for Solicitors (10 Minutes ^P)**
Eric Hoffstein, TEP, *Fogler, Rubinoff LLP*
- 9:30 a.m. – 9:35 a.m.** **Question and Answer Session**
- 9:35 a.m. – 9:55 a.m.** **Estates and Trusts Case Law Update**
Angela Casey, *Casey & Moss LLP*
- 9:55 a.m. – 10:15 a.m.** **Tax Law Update**
Robert Martini, *Wilson Vukelich LLP*
- 10:15 a.m. – 10:20 a.m.** **Question and Answer Session**
- 10:20 a.m. – 10:40 a.m.** **Coffee and Networking Break**
- 10:40 a.m. – 11:00 a.m.** **Lifetime Benefit Trusts versus Henson Trusts**
Heather Mountford, *Goddard Gamage LLP*
- 11:00 a.m. – 11:20 a.m.** **Dealing with the Complex Family in Estate Planning**
Ambie Edgar-Chana, *Edgar Chana Law*
- 11:20 a.m. – 11:30 a.m.** **Question and Answer Session**
- 11:30 a.m. – 11:55 p.m.** **US Tax Law Update**
Britta McKenna, *Hodgson Russ LLP*

- 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. – 1:45 p.m. Estate Administration Challenges Including Real Estate, Cross-Border Issues and Intestacies**
(10 Minutes )
- Cate Grainger, *Harrison Pensa LLP*
- Susannah Roth, TEP, *O’Sullivan Estate Lawyers LLP*
- Reuben Rosenblatt, Q.C., LSM, *Minden Gross LLP*
- 1:45 p.m. – 1:55 p.m. Question and Answer Session**
- 1:55 p.m. – 2:35 p.m. The Financial Side of Estate Planning**
- Hilary Laidlaw, C.S., *McCarthy Tétrault LLP*
- Ron Malis, Financial Advisor, *Monarch Wealth Corporation*
- Alexandra (Ali) Spinner, CPA, CA, TEP, *Crowe Soberman LLP*
- 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. Addressing Discrimination and Harassment Issues in an Estate Planning Practice** (30 Minutes )
- Gillian Hnatiw, *Adair Goldbatt Bieber*
- Suzana Popovic-Montag, TEP, *Hull & Hull LLP*

3:30 p.m. – 3:35 p.m.

Question and Answer Session (5 Minutes **P**)

3:35 p.m. – 4:20 p.m.

Power of Attorney Professionalism Conundrums
(30 Minutes **P**)

Benjamin Arkin, *Arkin Estate Law Professional Corporation*

Anya-Deane Best, *O'Flynn Weese LLP*

Alexander Procope, *Perez Bryan Procope LLP*

4:20 p.m. – 4:30 p.m.

Question and Answer Session (5 Minutes **P**)

4:30 p.m.

End of Day Two