

September 30, 2025

28th Estates and Trusts Summit – DAY TWO



CO-CHAIRS: **Kathryn Balter**, *Fogler Rubinoff LLP*

Nimali Gamage, *Goddard Gamage LLP*

October 23, 2025
9:00 a.m. to 4:30 p.m.

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

Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON

SKU CLE25--0100701


Agenda


9:00 a.m. – 9:05 a.m.

Welcome

Kathryn Balter, Fogler Rubinoff LLP

Nimali Gamage, Goddard Gamage LLP

9:05 a.m. – 9:35 a.m.	Top 10 Tax Tips Rahul Sharma, <i>Fasken Martineau DuMoulin LLP</i> Alexandra Spinner, <i>Crowe Soberman</i>
9:35 a.m. – 9:40 a.m.	Question and Answer Session
9:40 a.m. – 10:10 a.m.	Case Law Update and Other Developments Laura Geddes, TEP, <i>Harrison Pensa LLP</i> Daniel Walker, <i>Bobila Walker Law PC</i>
10:10 a.m. – 10:20 a.m.	Question and Answer Session
10:20 a.m. – 10:40 a.m.	Break
10:40 a.m. – 11:10 a.m.	Planning and Administration for First Nations (30 m ) Nicole Richmond, Barrister & Solicitor Nicole Woodward, <i>Miller Thomson LLP</i>
11:10 a.m.– 11:20 a.m.	Question and Answer Session
11:20 a.m.– 12:00 p.m.	Protecting your Mental Health as an Estates Lawyer Tammy Anklewicz, <i>Fogler Rubinoff LLP</i> Jordana Bergman, RP, Founder and Clinical Director, <i>Eden Wellness</i> Arthur Fish, Mediator, <i>Arthur Fish Mediation</i> M. Elena Hoffstein, <i>Miller Thomson LLP</i>

12:00 p.m. – 12:05 p.m.	Question and Answer Session
12:05 a.m. – 1:05 p.m.	Lunch Break
1:05 p.m. – 1:35 p.m.	Setting Attorneys and Guardians up for Success (30 m ) Jan Goddard, <i>Goddard Gamage LLP</i> Jane Meadus, <i>Advocacy Centre for the Elderly</i> Marshall Swadron, <i>Swadron Associates</i>
1:35 p.m. – 1:40 p.m.	Question and Answer Session
1:40 p.m. – 2:05 p.m.	Cross-Border Issues Kevyn Nightingale, Leader of Cross-Border Tax Planning <i>Levy Salis</i> Christine Perry, <i>Davies Ward Phillips & Vineberg LLP</i>
2:05 p.m. – 2:10 p.m.	Question and Answer Session
2:10 p.m. – 2:40 p.m.	Capacity Issues in Estate Planning Gosha Sekhon, TEP, <i>Sekhon Legal Services</i> Karen Hagman, <i>Maylex Litigation PC</i>
2:40 p.m. – 2:50 p.m.	Question and Answer Session
2:50 p.m. – 3:10 p.m.	Break

3:10 p.m. – 3:50 p.m.

AI Use in Practice (30 m )

Phil Brown, Director, Practice Supports & Resources
Law Society of Ontario

Genevieve Giroday Warren, C.S., TEP
Giroday Law PC

Demetre Vasilounis, TEP, *Aird & Berlis LLP*

3:50 p.m. – 3:55 p.m.

Question and Answer Session

3:55 p.m. – 4:25 p.m.

Planning for Blended Families

Kristine Anderson, *Fern Law*

Meghan O’Neil, *O’Neil Estate Law*

4:25 p.m. – 4:30 p.m.

Question and Answer Session

4:30 p.m.

End of Day Two