THE SIX-MINUTE ESTATES LAWYER 2017

Chairs: Ian Hull, C.S., *Hull & Hull LLP*

Marcia Green, *Nelligan O'Brien Payne LLP*

May 8, 2017
9:00 a.m. to 12:00 p.m.
CPD Hours = 2 h 30 m Substantive + 30 m Professionalism P

The Law Society of Upper Canada
130 Queen Street West
Toronto, ON

SKU CLE17-00501

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Agenda

9:00 a.m. – 9:05 a.m.	**Welcome and Opening Remarks**	
	Ian Hull, C.S., *Hull & Hull LLP*	
	Marcia Green, *Nelligan O'Brien Payne LLP*	
9:05 a.m. – 9:12 a.m.	**Client Retainer Conflict Issues P**	
	Susan Easterbrook, C.S., MBA, TEP, Barrister and Solicitor	

9:12 a.m. – 9:19 a.m.	**Probate Filings: Common Mistakes** 🅟 Satie Seeraj, Deputy Registrar *Ontario Superior Court of Justice, Estates and Assessments*
9:19 a.m. – 9:27 a.m.	**EAT Filings: New from the Ministry of Revenue** Colleen Carson, Senior Manager, Advisory Specialist *Ministry of Finance* Brad Hughes, Audit Manager *Ministry of Finance*
9:27 a.m. – 9:34 a.m.	**Update on Cross-Border Planning Issues** Paul Taylor, *Borden Ladner Gervais LLP*
9:34 a.m. – 9:42 a.m.	**Go Ahead and Ask Us (Question and Answer Session)**
9:42 a.m. – 9:49 a.m.	**Joint Assets and Planning Considerations** Debra Stephens, *Whaley Estate Litigation Partners*
9:49 a.m. – 9:56 a.m.	**Drafting and Using Insurance Trusts** 🅟 Mary-Alice Thompson, C.S., TEP, *Cunningham, Swan, Carty, Little & Bonham LLP*
9:56 a.m. – 10:03 a.m.	**Overview of Beneficiary Designations** 🅟 Charles Wagner, C.S., *Wagner Sidlofsky LLP* Brendan Donovan, *Wagner Sidlofsky LLP*

10:03 a.m. – 10:10 a.m.	**Taking Will Instructions and Will Reporting to Client**
	Jordan Atin, C.S., TEP, *Atin Professional Corporation*
10:10 a.m. – 10:18 a.m.	**Question and Answer Period**
10:18 a.m. – 10:38 a.m.	**Coffee and Networking Break**
10:38 a.m. – 10:45 a.m.	**Recent Trends in Estate Related Negligence Claims**
	Deborah Petch, Senior Claims Counsel, *Lawyers' Professional Indemnity Company (LAWPRO)*
10:45 a.m. – 10:52 a.m.	**Drafting Tips for Primary and Secondary Wills**
	Kathleen Robichaud, *Law Office of Kathleen Robichaud*
10:52 a.m. – 11:00 a.m.	**The BMO Case – Discrimination in Wills Decision of the Court of Appeal**
	Alexandra Mayeski, *Mayeski Mathers LLP*
11:00 a.m. – 11:07 a.m.	**Trusts and Family Law**
	Clare Burns, *WeirFoulds LLP*
11:07 a.m. – 11:15 a.m.	**Go Ahead and Ask Us (Question and Answer Session)**
11:15 a.m. – 11:22 a.m.	**Tax Considerations and Common Pitfalls**
	Paul Gibney, *Thorsteinssons LLP Tax Lawyers*

11:22 a.m. – 11:29 a.m.	**Delineation of Roles Between Lawyers and Estate Trustee** Suzana Popovic-Montag, TEP, *Hull & Hull LLP*
11:29 a.m. – 11:36 a.m.	**Advising Clients Who Act as Attorney for Property or Personal Care** P Justin de Vries, *de Vries Litigation LLP*
11:36 a.m. – 11:43 a.m.	**Powers of Attorney Litigation** Kimberly Whaley, C.S., TEP, *Whaley Estate Litigation Partners*
11:43 a.m. – 11:50 a.m.	**Paying Money into Court for Minors** W. Ormond Murphy, *Tierney Stauffer LLP*
11:50 a.m. – 12:00 p.m.	**Go Ahead and Ask Us (Question and Answer Session)**
12:00 p.m.	**Program Ends**