

27th Estates and Trusts Summit – DAY TWO

CO-CHAIRS: **Nimali Gamage**, *Goddard Gamage LLP*

Cate Grainger, *Harrison Pensa LLP*

October 23, 2024

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

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

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

SKU CLE24-0101001

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Nimali Gamage, Goddard Gamage LLP

Cate Grainger, Harrison Pensa LLP

9:05 a.m. – 9:35 a.m.

Caselaw Update and Other Developments

Brian Gillingham, Cunningham, Swan LLP

Jordan Korn, Goddard Gamage LLP

9:35 a.m. – 9:40 a.m.

Question and Answer Session

- 9:40 a.m. – 10:15 a.m.** **Tax Issues – Trust Reporting Rules and Planning in Light of New Federal Budget**
- Brian Cohen, *Gowling WLG (Canada) LLP*
- Joan Jung, *Miller Thomson LLP*
- 10:15 a.m. – 10:25 a.m.** **Question and Answer Session**
- 10:25 a.m. – 10:45 a.m.** **Break**
- 10:45 a.m. – 11:25 a.m.** **What Does an Estate Trustee or Guardian Do with Complex Assets?**
- Monique Charlebois, *MJC Legal Professional Corporation*
- Andrea Harper, Deputy Legal Director, *Office of the Public Guardian and Trustee*
- Jandy John, Director, Business Development & Initiatives, *Concentra Trust*
- 11:25 a.m.– 11:30 a.m.** **Question and Answer Session**
- 11:30 a.m.– 12:00 p.m.** **Perils of Joint Ownership**
- Natalia Angelini, *Hull & Hull LLP*
- Robin Ellis, *Miller Thomson LLP*
- 12:00 p.m. – 12:05 p.m.** **Question and Answer Session**
- 12:05 p.m. – 1:05 p.m.** **Lunch Break**

- 1:05 p.m. – 1:40 p.m.** **Intersection of Family and Estates Law For Divorcing or Divorced Parents with a Disabled Child**
- Kristine Anderson, *Fern Law*
- Carolyn Shelley, *Cunningham, Swan LLP*
- 1:40 p.m. – 1:45 p.m.** **Question and Answer Session**
- 1:45 p.m. – 2:30 p.m.** **Complexity in an Estates Practice in Modern Times**
(30 m )
- Laura Geddes, *Siskinds LLP*
- Darren Lund, *Fasken Martineau DuMoulin LLP*
- Jessica Williams, *Harrison Pensa LLP*
- 2:30 p.m. – 2:40 p.m.** **Question and Answer Session**
- 2:40 p.m. – 3:00 p.m.** **Break**
- 3:00 p.m. – 3:45 p.m.** **Complex Capacity Issues Regarding Granting and Acting Under Powers of Attorney** (30 m )
- Nima Hojjati, *WEL Partners*
- Coco Johnson, Therapist and Capacity Assessor
- Alyson Sweetlove, *George Street Law Group LLP*
- 3:45 p.m. – 3:55 p.m.** **Question and Answer Session**

3:55 p.m. – 4:25 p.m.

Retainer Letters in Unusual or Complex Estate Matters
(30 m )

Marni Pernica, *Aird & Berlis LLP*

Anneke Russell, *SMM Law PC*

4:25 p.m. – 4:30 p.m.

Question and Answer Session

4:30 p.m.

End of Day Two