



October 6, 2017

20TH ANNUAL

Estates and Trusts Summit – DAY ONE

Chairs: **Paul Dancause**
Barrister & Solicitor

Archie Rabinowitz, C.S.
Gowling WLG (Canada) LLP

October 16, 2017

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

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

Sheraton Centre Toronto Hotel
123 Queen Street West
Toronto, ON

CLE17-0110100



Agenda


DAY ONE:

9:00 a.m. – 9:05 a.m.


Welcome

Paul Dancause, Barrister & Solicitor

Archie Rabinowitz, C.S., *Gowling WLG (Canada) LLP*

9:05 a.m. – 9:25 a.m.	The Role of Counsel before the Court The Honourable Susan Woodley <i>Superior Court of Justice</i>
9:25 a.m. – 9:45 a.m.	The Court's Rectification Power in Contracts, Trusts, and Wills: Is There a Difference? David Freedman C.S., TEP Faculty of Law, <i>Queen's University</i>
9:45 a.m. – 10:05 a.m.	Constitutional Issues Related to Succession and Inheritance Law under the <i>Indian Act</i> Lionel Tupman, <i>WEL Partners</i>
10:05 a.m. – 10:25 a.m.	Consent and Capacity Litigation (10 Minutes ) Nimali Gamage, <i>Goddard Gamage LLP</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.	Developments in Family Law Estate Litigation Jennifer Jolly, <i>Law Office of Jennifer E. Jolly</i>
11:15 a.m. – 11:35 a.m.	Locus of Title in an Unadministered Estate and The Law of Assent Albert Oosterhoff Professor Emeritus, <i>Western University</i> & Counsel, <i>WEL Partners</i>

11:35 a.m. – 12:15 p.m.	Primer on Standardized Cognitive Functioning Testing Ian Hull, C.S., <i>Hull & Hull LLP</i> Dr. Adrian Owen, Canada Excellence Research Chair in Cognitive Imaging and Neuroscience <i>Western University</i> Dr. Kenneth Shulman, Professor, Department of Psychiatry, <i>Sunnybrook Health Sciences Centre, University of Toronto</i> Kimberly Whaley, C.S., TEP <i>WEL Partners</i>
12:15 a.m. – 12:25 a.m.	Question and Answer Session
12:25 p.m. – 1:25 p.m.	Lunch Provided
1:25 p.m. – 1:45 p.m.	RESP and the Prospect of Litigation Barry Corbin, C.S. <i>Corbin Estates Law Professional Corporation</i> Charles Wagner, <i>Wagner Sidlofsky LLP</i>
1:45 p.m. – 2:05 p.m.	Costs in Estate Litigation Robin Spurr, <i>Schnurr Kirsh Oelbaum Tator LLP</i>
2:05 p.m. – 2:25 p.m.	Tax Litigation in Estates Matters (10 Minutes ) Clare Burns, <i>WeirFoulds LLP</i>
2:25 p.m. – 2:30 p.m.	Question and Answer Session

2:30 p.m. – 3:00 p.m.	How to Win an Undue Influence Case Caroline Abela, <i>WeirFoulds LLP</i> Rick Bickhram <i>Bickhram Litigation Professional Corporation</i> Howard Black, <i>Minden Gross LLP</i> Justin de Vries, <i>de VRIES LITIGATION LLP</i>
3:00 p.m. – 3:05 p.m.	Question and Answer Session
3:05 p.m. – 3:20 p.m.	Coffee and Networking Break
3:20 p.m. – 3:40 p.m.	<i>Succession Law Reform Act</i> Claims and Minors Samantha Preshner, Counsel, Property Rights Office of the Children's Lawyer, <i>Ministry of the Attorney General</i> Susan Stamm, Counsel, Property Rights Office of the Children's Lawyer, <i>Ministry of the Attorney General</i>
3:40 p.m. – 4:20 p.m.	Professionalism Issues in Estates Litigation (40 Minutes ) Tony Lalonde, Director, Scotia Wealth Management <i>Scotiabank</i> David Lobl, <i>Gowling WLG (Canada) LLP</i> Shawn Richard, <i>Leninski Law</i>
4:20 p.m. – 4:30 p.m.	Question and Answer Session
4:30pm	End of Day One