




ESTATE ACCOUNTING 2018

Chairs: **Justin de Vries**
de VRIES LITIGATION LLP

Kathleen McDormand
Borden Ladner Gervais LLP

January 15, 2018
1:00 p.m. to 4:00 p.m.
Total CPD Hours = 2 h Substantive + 1 h Professionalism 

Donald Lamont Learning Centre
Law Society of Ontario
130 Queen Street West
Toronto, ON

CLE18-0010401



Agenda




1:00 p.m. – 1:05 p.m. **Welcome and Opening Remarks (5 minutes )**



Justin de Vries, *de VRIES LITIGATION LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

1:05 p.m. – 1:20 p.m. **What Your Accountant Needs to Prepare Proper Accounts (10 minutes )**

Carla Preece, *Court Format Accounts*

1:20 p.m. – 1:35 p.m.	Common Pitfalls in Preparing Accounts and How to Avoid Them (5 minutes ) Corina Weigl, <i>Fasken Martineau DuMoulin LLP</i>
1:35 p.m. – 1:50 p.m.	Mediating Contested Passing of Accounts (10 minutes ) Ross Earnshaw, <i>Gowling WLG (Canada) LLP</i>
1:50 p.m. – 1:55 p.m.	Question and Answer Period
1:55 p.m. – 2:10 p.m.	Digital Assets in Passing of Accounts Applications Diane Vieira, <i>de VRIES LITIGATION LLP</i>
2:10 p.m. – 2:25 p.m.	What Does the Office of the Children’s Lawyer Look for When Reviewing Accounts? Katherine Antonacopoulos, 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>
2:25 p.m. – 2:30 p.m.	Question and Answer Period
2:30 p.m. – 2:45 p.m.	Coffee and Networking Break
2:45 p.m. – 3:00 p.m.	Trends in Passing of Accounts: What Are the Courts Saying, Including on Compensation? (5 minutes ) Lisa Toner, <i>Sorbara, Schumacher, McCann LLP</i>

3:00 p.m. – 3:15 p.m.	Experts in Contested Passings of Accounts – The Ethics Issues Arising in the Context of Communicating with Experts (15 minutes ) Caroline Abela, <i>WeirFoulds LLP</i>
3:15 p.m. – 3:20 p.m.	Question and Answer Period
3:20 p.m. – 3:35 p.m.	Orders for Direction in Contested Passings of Accounts - What Do You Need, What Should You Avoid? Andrew Felker, C.S., <i>Walker Head Lawyers</i>
3:35 p.m. – 3:50 p.m.	The Even Hand Rule - An Overview and History Elizabeth Bozek, Estate & Trust Consultant, <i>The Bank of Nova Scotia Trust Company, Scotia Wealth Management</i>
3:50 p.m. – 4:00 p.m.	Practical and Ethical Issues: Some Practical Tips (10 minutes ) Justin de Vries, <i>de VRIES LITIGATION LLP</i> Kathleen McDormand, <i>Borden Ladner Gervais LLP</i>
4:00 p.m.	Program Ends