

Practice Gems: Administration of Estates 2022



Co-Chairs: **Pamela Liang, TEP, *Wilson Vukelich LLP***

Susannah Roth, TEP, *O'Sullivan Estate Lawyers*

September 22, 2022

1:00 p.m. to 4:00 p.m.

Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism ^P

**Webcast
Law Society of Ontario
Toronto ON**

SKU CLE22-00907


Agenda

1:00 p.m. – 1:05 p.m.

Welcome

Pamela Liang, TEP, Wilson Vukelich LLP

Susannah Roth, TEP, O'Sullivan Estate Lawyers

1:05 p.m. – 1:30 p.m.	Administering Professional Practices Nuwanthi Dias, <i>Nelligan O'Brien Payne LLP</i> Maria Velichko, <i>Wilson Vukelich LLP</i>
1:30 p.m. – 1:35 p.m.	Questions and Answers
1:35 p.m. – 1:55 p.m.	Dealing with Unusual Assets Kathryn Balter, <i>Fogler Rubinoff LLP</i>
1:55 p.m. – 2:20 p.m.	Business Corporations (post-mortem tax planning, cleaning up minute books, etc.) Andreea Muth, <i>Pallett Valo LLP</i> Jillian Swartz, <i>Allen McDonald and Swartz LLP</i>
2:20 p.m. – 2:30 p.m.	Questions and Answers
2:30 p.m. – 2:50 p.m.	Break
2:50 p.m. – 3:05 p.m.	Accounting to Beneficiaries and Getting Releases Kavina Nagrani, C.S., TEP, <i>NIKA LAW LLP</i>
3:05p.m. – 3:35 p.m.	Solicitor Negligence Issues (30 min ) (Client conflict and retainer issues topic) Rebecca Fisch, <i>RSF Law</i> Dawn Phillips-Brown, <i>Madorin, Snyder LLP</i>

Juda Strawczynski, Director, *practicePRO*, Lawyers'
Professional Indemnity Company (*LawPRO*®)

3:35 p.m. – 3:40 p.m. Question and Answer Session

3:40 p.m. – 3:55 p.m. Case Law Update

Daniel Stober, *Torkin Manes LLP*

3:55 p.m. – 4:00 p.m. Question and Answer Session

4:00 p.m. Program Ends