

Mastering Money in Your Practice



June 10, 2026

12:00 p.m. to 1:50 p.m.

Total CPD Hours = 1 h 45 m Professionalism ^P

Law Society of Ontario

SKU CLE26-00607

Agenda

12:00 p.m. – 12:05 p.m.

Welcome

Dwight Williams, Counsel, Practice Review, *Law Society of Ontario*

12:05 p.m. – 12:20 p.m.

Talking to Clients About Money

Margaux Peck, Counsel, Practice Review,
Law Society of Ontario

12:20 p.m. – 12:50 p.m.

Financial Record Keeping Essentials

(Originally presented at Preparing for a Practice Review for Paralegals on April 4, 2024)

Lidia Angelovski, CPA, CMA, Auditor, Spot Audit,
Law Society of Ontario

12:50 p.m. – 1:02 p.m.

Trust Record Keeping Exercise

Animated video excerpt from Foundations of Sole Practice course

1:02 p.m. – 1:50 p.m.

How to Work with Your Accountant to Manage Income Tax Implications for Your Firm

(Originally presented at 19th Solo and Small Firm Conference: The How-To Toolkit on June 19, 2025)

Robert Gauvreau, *Gauvreau Accounting Tax Law Advisory*

Anna Naud, *True North Law Professional Corporation*

1:50 p.m.

Program Ends