

The Six-Minute Estates Lawyer 2023



CHAIRS: **Andrea Hill, Turkstra Mazza LLP**

Ian Hull, C.S., Hull & Hull LLP

May 4, 2023

9:00 a.m. to 12:00 p.m.

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

Law Society of Ontario

SKU CLE23-0050300

9:00 a.m. – 9:05 a.m.

Welcome and Opening Remarks

Andrea Hill, Turkstra Mazza LLP

Ian M. Hull, C.S., Hull & Hull LLP

9:05 a.m. – 9:12 am.

Joint Accounts and Jointly Held Real Estate

Dagmara Wozniak, Siskinds LLP

9:12 a.m. – 9:19 a.m.

Using a Shorter Will – Less is More?

Jordan Atin, C.S., TEP, Atin Professional Corporation

9:19 a.m. – 9:27 a.m.	Appointing Litigation Guardians Sean Graham, <i>Graham Estate Law</i>
9:27 a.m. – 9:34 a.m.	Fiduciary Appointments – Working with Trust Companies Jenna Carvalho, MTI, TEP, <i>Guardian Estate Company</i>
9:34 a.m. – 9:42 a.m.	Question and Answer Session
9:42 a.m. – 9:49 a.m.	Fiduciaries Accessing Digital Assets Alexandra Manthorpe, <i>Cunningham Swan Carty Little & Bonham LLP</i>
9:49 a.m. – 9:56 a.m.	Land Titles Conversion Qualified / Estate Planning and Estate Administration Issues Ambie Edgar-Chana, TEP, <i>Edgar Chana Law</i>
9:56 a.m. – 10:03 a.m.	Estate & Trust Tax Law Developments 2023 Michael Morgan, <i>O'Connor MacLeod Hanna LLP</i>
10:03 a.m. – 10:10 a.m.	LAWPRO Practical Tips Chris Stankiewicz, Claims Counsel, <i>Lawyers' Professional Indemnity Company (LAWPRO®)</i> (6m )
10:10 a.m. – 10:17 a.m.	The Role of the Lawyer when Preparing a Will for a Vulnerable Client Justin de Vries, de VRIES LITIGATION LLP
10:17 a.m. – 10:25 a.m.	Question and Answer Session
10:25 a.m. – 10:45 a.m.	Break

- 10:45 a.m. – 10:52 a.m.** **Drafting Beneficiary Designations, Life Insurance and RSP's**
- Jennifer Stebbing C.S., TEP, *Stebbing Butcher Professional Corporation*
- 10:52 a.m. – 10:59 a.m.** **Tips on Taking Will Instructions and Reporting Letters to Clients**
(6m )
- Brendan Donovan, *Donovan Kochman LLP*
- 10:59 a.m. – 11:06 a.m.** **Disclaimer and Assignment**
- Caroline Abela, *WeirFoulds LLP*
- 11:06 a.m. – 11:13 a.m.** **Technology Tools in Estates & Trusts** (6m )
- Jonathan Keslassy, *Keslassy Freedman Gelfand LLP*
- 11:13 a.m. – 11:20 a.m.** **Question and Answer Session**
- 11:20 a.m. – 11:27 a.m.** **Mental Health Issues and Estates Practice** (6m )
- Suzana Popovic-Montag, TEP, *Hull & Hull LLP*
- 11:27 a.m. – 11:34 a.m.** **Proving Due Execution – Substantial Compliance Update**
- Kimberly Whaley, C.S., TEP, *WEL Partners*
- 11:34 a.m. – 11:41 a.m.** **Estate Mediation Preparation and Tools**
- Kristi Collins, *Collins Law*
- 11:41 a.m. – 11:48 a.m.** **Passing Accounts – Caselaw Update**
- Arieh Bloom, *Tupman & Bloom LLP*

11:48 a.m. – 11:55 a.m.

Estates and Trusts – Dealing with Complex Retainer Issues
(6m )

M. Jasmine Sweatman, C.S., TEP, *Sweatman Law Firm*

11:55 a.m. – 12:00 p.m.

Question and Answer Session

12:00 p.m.

Program Ends