

THE SIX-MINUTE Estates Lawyer 2019

CO-CHAIRS: **Ian Hull, C.S.**, *Hull & Hull LLP*

Lisa Toner, *Sorbara, Schumacher, McCann LLP*

April 29, 2019

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

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

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON**

SKU CLE19-00406

Agenda

9:00 a.m. – 9:05 a.m.

Welcome and Opening Remarks


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




Lisa Toner, Sorbara, Schumacher, McCann LLP


9:05 a.m. – 9:12 a.m.

**Rules of Conduct and Conflict Issues for Solicitors
(7 m )**

Suzana Popovic-Montag, TEP, Hull & Hull LLP

9:12 a.m. – 9:19 a.m.	Joint Asset Planning Clare Burns, <i>WeirFoulds LLP</i>
9:19 a.m. – 9:26 a.m.	Common Issues on Applications for Certificates of Appointment and Recent Developments Alison Minard, <i>McCarthy Tétrault LLP</i>
9:26 a.m. – 9:33 a.m.	Unjust Enrichment – Update on the Caselaw <i>Moore v. Sweet</i> Angelique Moss, <i>Casey & Moss LLP</i>
9:33 a.m. – 9:40 a.m.	Question and Answer Session (1 m 
9:40 a.m. – 9:47 a.m.	Tips and Tools to Enhance an Estate Mediation Kimberly Whaley, C.S., TEP, <i>WEL Partners</i>
9:47 a.m. – 9:54 a.m.	In Terrorem Clauses Holly LeValliant, <i>Eisen Law</i>
9:54 a.m. – 10:01 a.m.	Appointments of Litigation Guardians Susan Stamm, Counsel, Property Rights, Office of the Children's Lawyer, <i>Ministry of the Attorney General</i>
10:01 a.m. – 10:08 a.m.	Taxation of Trusts Update Kyle Lamothe, <i>Thorsteinssons LLP</i>
10:10 a.m. – 10:17 a.m.	Calculating Dependant Relief Claims for Support Carol Craig, <i>Nelligan O'Brien Payne LLP</i>

10:17 a.m. – 10:25 a.m.	Question and Answer Session
10:25 a.m. – 10:45 a.m.	Coffee and Networking Break
10:45 a.m. – 10:52 a.m.	Voluntary Disclosure in Estate Matters <i>Paul Taylor, Borden Ladner Gervais LLP</i>
10:52 a.m. – 10:59 a.m.	Drafting Planning for Disabled Beneficiaries (7 m ) <i>Jonathan Keslassy, Keslassy Freedman Gelfand LLP</i>
10:59 a.m. – 11:06 a.m.	Limitation Periods in Estates and Passing of Accounts Proceedings <i>Lisa Filgiano, Miller Thomson LLP</i>
11:06 a.m. – 11:14 a.m.	Estate Administration Tax Update and Practice Tips (7 m ) <i>Jordan Atin, C.S., TEP, Atin Professional Corporation</i>
11:14 a.m. – 11:20 a.m.	Question and Answer Session
11:20 a.m. – 11:27 a.m.	Tips on Taking Will Instructions and Reporting Letters to Clients (7 m ) <i>Jason Allan, Allan Law</i>
11:27 a.m. – 11:34 a.m.	Estates and Family Law Cross-Over Issues <i>Arieh Bloom, Tupman & Bloom LLP</i>

11:34 a.m. – 11:41 a.m.	Corroboration Evidence in Estate Matters Brendan Donovan, <i>Donovan Kochman LLP</i>
11:41 a.m. – 11:48 a.m.	Passing Accounts: Defining the Terms: Original Assets, Capital Receipts and Disbursements, Capital Revenue Receipts and Disbursements and Investment Accounts Kathleen Robichaud, <i>Law Office of Kathleen Robichaud</i>
11:48 a.m. – 11:56 a.m.	Dealing with Insolvent Estates Elikem Deley, <i>Sorbara, Schumacher, McCann LLP</i>
11:56 a.m. – 12:00 p.m.	Question and Answer Session (1 m )
12:00 p.m.	Program Ends