

22nd Estates and Trusts Summit

DAY ONE

CO-CHAIRS: **Clare Burns**, *WeirFoulds LLP*

Douglas Skinner, *Harrison Pensa LLP*

October 16, 2019

9:00 a.m. to 4:30 p.m.

Total CPD Hours = 5 h Substantive + 1 h 30 m Professionalism ^P

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



SKU CLE19-0101000

Agenda

DAY ONE:

9:00 a.m. – 9:05 a.m.

Welcome

Clare Burns, WeirFoulds LLP

Douglas Skinner, Harrison Pensa LLP

9:05 a.m. – 9:45 a.m.

Issues Related to Disability (40 minutes ^P)

The Honourable Fred Myers, Superior Court of Justice

*Nicholas Hedley, Deputy Director
The Office of the Children's Lawyer*

Heather Hogan, Counsel, Litigation Branch,
Office of the Public Guardian and Trustee,
Ministry of the Attorney General

Alexander Procope, *Perez Bryan Procope LLP*

9:45 a.m. – 9:50 a.m.

Question and Answer Session

9:50 a.m. – 10:10 a.m.

What You Need to Know about Predatory Marriages

Kimberly Whaley, C.S., TEP, *WEL Partners*

10:10 a.m. – 10:30 a.m.

Recent Case Law Update

Kelly Charlebois, *Miller Thomson LLP*

Melanie Yach, *Aird & Berlis LLP*

10:30 a.m. – 10:35 a.m.

Question and Answer Session

10:35 a.m. – 10:55 a.m.

Coffee and Networking Break

10:55 a.m. – 11:40 a.m.

**Experts Panel: What We Wish Lawyers Would Do When
They Retain Us**


Diane Kruger, LLB, JD, MCSFS, *Forensic Examiners Inc.*

Prem Lobo, CPA, CA, CBV, CFE, CPA (Illinois), CFF
Cohen Hamilton Steger & Co. Inc.

Kenneth Shulman, MD, Professor, Department of
Psychiatry, *Sunnybrook Health Sciences Centre, University
of Toronto*

11:40 a.m. – 11:45 a.m.

Question and Answer Session

- 11:45 a.m. – 12:00 p.m.** **How to Calculate and Prove Future Care Costs - Guardianships and Part V SLRA claims**
- Anne Posno, Lenczner Slaght*
- Question and Answer Session**
- 12:00 p.m. – 1:00 p.m.** **Lunch Provided**
- 1:00 p.m. – 1:30 p.m.** **Using Technology in the Courtroom — Dropboxes, Zipfiles, Hotlinks etc. (30 minutes )**
- Jordan Atin, C.S., Counsel, Hull & Hull LLP*
- Phil Brown, Counsel, Practice Management, Practice Supports and Resources, Law Society of Ontario*
- 1:30 p.m. – 1:50 p.m.** **Evidence in the Social Media Age**
- Benjamin Arkin, Arkin Furrow Estate Law LLP*
- 1:50 p.m. – 2:00 p.m.** **Question and Answer Session**
- 2:00 p.m. – 2:20 p.m.** **Recent Developments in Equity and the Law of Trusts in England and the ANZAC?**
- James Ball, Strosberg Sasso Sutts LLP*
- 2:20 p.m. – 2:40 p.m.** **Statutes that Are Little Used but Important to Remember**
- Carol Craig, Nelligan O'Brien Payne LLP*
- 2:40 p.m. – 2:45 p.m.** **Question and Answer Session**
- 2:45 p.m. – 3:00 p.m.** **Coffee and Networking Break**

3:00 p.m. – 3:20 p.m.

What Can Make Guardianships/POAs Difficult to Implement? What Can Be Done to Facilitate Implementation?

Judith Wahl, *Wahl Elder Law*

3:20 p.m. – 3:40 p.m.

Costs: Making Your Argument Easier (20 minutes )

Caroline Abela, *WeirFoulds LLP*

Sean Sullivan, *Gowlings WLG (Canada) LLP*

3:40 p.m. – 3:45 p.m.

Question and Answer Session

3:45 p.m. – 4:25 p.m.

Tax for Litigators: An Update on What to Worry About When Settling

Marie-Eve Heming, *Thorsteinssons LLP*

James Murdoch, *Thorsteinssons LLP*

Anjali Navkar, High Net Worth Group, *PWC*

Angela Ross, High Net Worth Group, *PWC*

4:25 p.m. – 4:30 p.m.

Question and Answer Session

4:30 p.m.

End of Day One