

March 31, 2026

The Annotated Shareholder Agreement 2026



CO-CHAIRS: **Taisha Lewis Trotman**, *Taisha Lewis Professional Corporation*

Andreea Muth, *Pallett Valo LLP*

Duncan Snyder, *Gowling WLG (Canada) LLP*

Courtney Wilson, *Stikeman Elliott LLP*

June 9, 2026

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

Total CPD Hours = 2 h 40 m Substantive + 20 m Professionalism P

Webcast Only

Law Society of Ontario

SKU CLE26-00604

Agenda

9:00 a.m. – 9:05 a.m.


Welcome

Courtney Wilson, Stikeman Elliott LLP

9:05 a.m. – 9:35 a.m.

Key Provisions for Family Businesses and Succession Planning

Andreea Muth, Pallett Valo LLP

9:35 a.m. – 9:40 a.m.	Question and Answer Session
9:40 a.m. – 10:10 a.m.	Key Provisions for Owner-Operators Taisha Lewis Trotman, <i>Taisha Lewis Professional Corporation</i>
10:10 a.m. – 10:15 a.m.	Question and Answer Session
10:15 a.m. – 10:35 a.m.	Break
10:35 a.m. – 10:55 a.m.	Key Provisions for Sell-Side Private Equity Courtney Wilson, <i>Stikeman Elliott LLP</i>
10:55 a.m. – 11:00 a.m.	Question and Answer Session
11:00 a.m. – 11:30 a.m.	Key Provisions for Passive Investors Duncan Snyder, <i>Gowling WLG (Canada) LLP</i>
11:30 a.m. – 11:35 a.m.	Question and Answer Session
11:35 a.m. – 11:55 a.m.	Key Ethical and Professionalism Considerations (20 m ) Taisha Lewis Trotman, <i>Taisha Lewis Professional Corporation</i>
11:55 a.m. – 12:00 p.m.	Question and Answer Session
12:00 p.m.	Program Ends