

# 25<sup>th</sup> Estates and Trusts Summit – DAY ONE



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

**Kathleen McDormand**, *Borden Ladner Gervais LLP*

**October 19, 2022**

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

**Total CPD Hours = 5 h Substantive + 1 h 30 m Professionalism <sup>P</sup>**

**Webcast**

**Law Society of Ontario**

**Toronto ON**

**SKU CLE22-0100800**

**Agenda**

**DAY ONE:**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

*Clare Burns, WeirFoulds LLP*

*Kathleen McDormand, Borden Ladner Gervais LLP*

**9:05 a.m. – 9:35 a.m.**

**Tax Issues: on Settlement, Treatment of Registered Plan Assets on Death (RESP/RDSP)**

*Sébastien Desmarais, Tax and Estate Planner*

*TD Wealth Advisory Services*

Paul Taylor, *Borden Ladner Gervais LLP*

**9:35 a.m. – 9:45 a.m.**

**Question and Answer Session**

**9:45 a.m. – 10:05 a.m.**

**The Good and the Bad of Virtual Mediation**

Lou-Anne Farrell, *Harrison Pensa LLP*

**10:05 a.m. – 10:10 a.m.**

**Question and Answer Session**

**10:10 a.m. – 10:30 a.m.**

**Best Practices for Capacity Assessments**

Jan Goddard, *Goddard Gamage LLP*

**10:30 a.m. – 10:35 a.m.**

**Question and Answer Session**

**10:35 a.m. – 10:55 a.m.**

**Break**

**10:55 a.m. – 11:30 a.m.**

**Contested Guardianships: What Evidence is Needed to Prove Incapacity?**

Mary Phan, *Office of the Public Guardian and Trustee*

Krystyne Rusek, *Pallett Valo LLP*

**11:30 a.m. – 11:40 a.m.**

**Question and Answer Session**

**11:40 a.m. – 11:55 a.m.**

**Update on Marriage Validity**

Kimberly Whaley, CS, TEP, *WEL Partners*

**11:55 a.m. – 12:00 p.m.**


**Question and Answer Session**

**12:00 p.m. – 1:00 p.m.**

**Lunch Break**

- 1:00 p.m. – 1:40 p.m.**      **Practical Approaches to Supporting Mental Health in the Professions (40 m <sup>P</sup>)**
- Ashleigh Frankel, *The WiseMind Co.*
- Suzana Popovic-Montag, TEP, *Hull & Hull LLP*
- Yasmin Vinograd, *Merovitz Potechin LLP*
- 1:40 p.m. – 1:50 p.m.**      **Question and Answer Session**
- 1:50 p.m. – 2:30 p.m.**      **Evidence Panel: Production Requests, Joint Assets, Medical Records, Estate Planning Files...**
- Josh Epstein, HBSc, CPA, CA, CFF, CFE, Senior Manager, Forensics and Litigation Support, *MNP*
- Anne Posno, *Lenczner Slaght Royce Smith Griffin LLP*
- 2:30 p.m. – 2:35 p.m.**      **Question and Answer Session**
- 2:35 p.m. – 2:55 p.m.**      **Break**
- 2:55 p.m. – 3:15 p.m.**      **Rectification as a Remedy – Recent SCC Case, Common Drafting Errors**
- Ewa Krajewska, *Henein Hutchison LLP*
- 3:15 p.m. – 3:20 p.m.**      **Question and Answer Session**
- 3:20 p.m. – 3:35 p.m.**      **Dealing with Difficult Assets**
- Brendan Donovan, *Donovan Kochman LLP*
- 3:35 p.m. – 3:40 p.m.**      **Question and Answer Session**

**3:40 p.m. – 4:20 p.m.**

**Judges' Panel: Best Practices in Estate Litigation**  
(40 m )

The Honourable Judy A. Fowler Byrne, *Superior Court of Justice*

The Honourable Cory Gilmore, *Superior Court of Justice*

The Honourable Susan Woodley, *Superior Court of Justice*

**4:20 p.m. – 4:30 p.m.**

**Question and Answer Session**

**4:30 p.m.**

**End of Day One**