




THE SIX-MINUTE Estates Lawyer 2018

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

Marcia Green
Nelligan O'Brien Payne LLP

May 3, 2018
9:00 a.m. to 12:00 p.m.
Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism 

University of Toronto Conference Centre
Giovanni Room, 2nd Floor
89 Chestnut Street
Toronto, ON

CLE18-0050201



Agenda

9:00 a.m. – 9:05 a.m. **Welcome and Opening Remarks**

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

Marcia Green, Nelligan O'Brien Payne LLP

9:05 a.m. – 9:12 a.m.	Predatory Marriages Kimberly Whaley, C.S., TEP, <i>WEL Partners</i>
9:12 a.m. – 9:19 a.m.	Tips for Gifts to Charities in Wills and Dealing with Charities in an Estate Administration Mary-Alice Thompson, C.S., TEP, <i>Cunningham Swan LLP</i>
9:19 a.m. – 9:26 a.m.	Common Issues on Applications for Certificates of Appointment and Recent Developments Satie Seeraj, Registrar and Supervisor of Court Operations, <i>Ontario Superior Court of Justice</i> , Bankruptcy/Commercial, Estates and Assessments
9:26 a.m. – 9:33 a.m.	Cross Border Tax Update Paul Taylor, <i>Borden Ladner Gervais LLP</i>
9:33 a.m. – 9:40 a.m.	Question and Answer Session
9:40 a.m. – 9:47 a.m.	Increasing the Odds of a Successful Mediation Clare Burns, <i>WeirFoulds LLP</i>
9:47 a.m. – 9:54 a.m.	Hotchpot Clauses Debra Stephens, Firm Counsel to WEL Partners, <i>WEL Partners</i>
9:54 a.m. – 10:01 a.m.	Life Insurance and RRSP Beneficiary Designations for Minor Children 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.	Evolution of Orders Appointing Estate Trustee During Litigation (ETDL) – What Should be Covered? Suzana Popovic-Montag, TEP, <i>Hull & Hull LLP</i>
10:10 a.m. – 10:17 a.m.	Interim Orders for Dependant Support Carol Craig, <i>Nelligan O’Brien Payne LLP</i> (via audio conference)
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.	Estates – Privilege and the Duty of Confidentiality (7 minutes ) Justin de Vries, <i>de VRIES LITIGATION LLP</i>
10:52 a.m. – 10:59 a.m.	Costs and the Impact of Proportionality Considerations Jordan Atin, C.S., TEP, <i>Atin Professional Corporation</i>
10:59 a.m. – 11:06 a.m.	Conflicts Involving the Role of Estate Trustee and Estate Solicitor Brendan Donovan, <i>Wagner Sidlofsky LLP</i>
11:06 a.m. – 11:14 a.m.	Accommodating Clients with Disabilities (8 minutes ) Alexander Procope, <i>Perez Bryan Procope LLP</i>
11:14 a.m. – 11:20 a.m.	Question and Answer Session

11:20 a.m. – 11:27 a.m.	Disputes over Remains Jason Ward, <i>Wards Lawyers</i> ^{PC}
11:27 a.m. – 11:34 a.m.	Canadian Tax Law Update Michael Morgan, <i>Ross & McBride LLP</i>
11:34 a.m. – 11:41 a.m.	Deathbed Retainers (7 minutes ) Alexandra Mayeski, <i>Mayeski Mathers LLP</i>
11:41 a.m. – 11:48 a.m.	Pros and Cons of Using a Qualifying Spousal Trust, Alter Ego Trusts and Joint Spousal Trusts Kathleen Robichaud, <i>Law Office of Kathleen Robichaud</i> (via audio conference)
11:48 a.m. – 11:56 a.m.	Estates and Trusts Hotspots (8 minutes ) Daniel Pinnington, President & Chief Executive Officer, <i>Lawyers' Professional Indemnity Company (LAWPRO®)</i>
11:56 a.m. – 12:00 p.m.	Question and Answer Session
12:00 p.m.	Program Ends