

September 21, 2024

# Navigating Practice Challenges with Clients' Capacity



CO-CHAIRS: **Kelley Bryan**, *Perez Bryan Procope LLP*

**Renée Vinett, C.S.**, *Howie, Sacks & Henry LLP*

**October 21, 2024**

**9:00 a.m. – 12:00 p.m.**

**Total CPD Hours = 3 h Professionalism <sup>P</sup>**

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

**SKU CLE24-01009**

## **Agenda**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

*Kelley Bryan, Perez Bryan Procope LLP*

*Renée Vinett, C.S., Howie, Sacks & Henry LLP*

**9:05 a.m. – 9:30 a.m.**

**Meeting and Identifying the Client, Retainers, and Conflicts**

Kristin Bailey, Counsel, Practice Management, Practice Supports and Resources, *Law Society of Ontario*

Brendon Pooran, *PooranLaw Professional Corporation*

**9:30 a.m. – 9:35 a.m.**

**Question and Answer Session**

**9:35 a.m. – 9:55 a.m.**

**How to Spot a Capacity Concern**

Meghan Hull Jacquin, *Howie, Sacks & Henry LLP*

Jane Meadus, *Advocacy Centre for the Elderly*

**9:55 a.m. – 10:00 a.m.**

**Question and Answer Session**

**10:00 a.m. – 10:30 a.m.**

**Communicating with and Getting Instructions from Clients with Diminished Mental Capacity**

Dean Embry, *Embry Dann LLP*

Shawn Richard, TEP, A. *Shawn Richard Family and Estate Law*

**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. – 11:25 a.m.**

**Capacity Assessments and How to Select/Appoint a Representative**

Brittany Miller, *Goddard Gamage LLP*

Dr. Sara Mitchell, MD, FRCPC, MPH, *Sunnybrook Health Sciences Centre*

- 11:25 a.m. – 11:30 a.m.**      **Question and Answer Session**
- 11:30 a.m. – 11:42 a.m.**      **Practice Tips for Barristers when Working with Clients with Diminished Mental Capacity**
- Patricia Brown, *Patricia Brown Barrister & Solicitor*
- 11:42 a.m. – 11:55 a.m.**      **Practice Tips for Solicitors when Working with Clients with Diminished Mental Capacity**
- Karon Bales, C.S., TEP, *Bales Beall LLP*
- 11:55 a.m. – 12:00 p.m.**      **Question and Answer Session**
- 12:00 p.m.**                      **Program Ends**