

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



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

**Raymond Murray, Nelligan O'Brien Payne LLP**

**October 20, 2021**

**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 CLE21-0100800**

## **Agenda**

### **DAY ONE:**

**9:00 a.m. – 9:05 a.m.**

**Welcome and Opening Remarks**

*Clare Burns, WeirFoulds LLP*

*Raymond Murray, Nelligan O'Brien Payne LLP*

- 9:05 a.m. – 9:35 a.m.**      **Judges Panel (15 m P)**
- The Honourable Barbara Conway, *Superior Court of Justice*
- The Honourable Sally Gomery, *Superior Court of Justice*
- The Honourable Calum MacLeod, *Superior Court of Justice*
- 9:35 a.m. – 9:40 a.m.**      **Question and Answer Session**
- 9:40 a.m. – 10:15 a.m.**      **Expert Panel (15 m P)**
- Steven Hacker, CPA, CA, CBV, CFF, Valuation and Litigation Support, *MNP*
- Samiah Ibrahim, Forensic Document Examiner, *Forensink Corp*
- Brandon Lewis, CPA, CA, CBV, CFF  
*White & Lewis*
- 10:15 a.m. – 10:25 a.m.**      **Question and Answer Session**
- 10:25 a.m. – 10:45 a.m.**      **Break**
- 10:45 a.m. – 11:20 a.m.**      **Tax Update**
- Sébastien Desmarais, TEP, Tax and Estate Planner  
*TD Wealth Advisory Services*
- Ian Pryor, *Pryor Tax Law*
- 11:20 a.m. – 11:25 a.m.**      **Question and Answer Session**
- 11:25 a.m. – 11:45 a.m.**      **De-escalating Cemetery Litigation (10 m P)**
- Michael Swindley, *Templeman LLP*

<b>11:45 a.m. – 11:50 a.m.</b>	<b>Question and Answer Session</b>
<b>11:50 a.m. – 12:05 p.m.</b>	<b>Gifts: The Law Taketh Away</b>  Brendan Donovan, <i>Donovan Kochman LLP</i>
<b>12:05 p.m. – 12:10 p.m.</b>	<b>Question and Answer Session</b>
<b>12:10 p.m. – 1:10 p.m.</b>	<b>Lunch Break</b>
<b>1:10 p.m. – 1:40 p.m.</b>	<b>Mental Health after the Pandemic (30 m P)</b>  Doron Gold, Staff Clinician, <i>Homewood Health Inc.</i>
<b>1:40 p.m. – 1:45 p.m.</b>	<b>Question and Answer Session</b>
<b>1:45 p.m. – 2:10 p.m.</b>	<b>Potpourri of Procedural Issues</b>  M. Kathleen Kinch, <i>Kinch Eddie Litigation Professional Corporation</i>  Amelia Yiu, <i>Elm Law Professional Corporation</i>
<b>2:10 p.m. – 2:20 p.m.</b>	<b>Question and Answer Session</b>
<b>2:20 p.m. – 2:35 p.m.</b>	<b>Break</b>
<b>2:35 p.m. – 3:05 p.m.</b>	<b>Changes to the <i>Succession Law Reform Act</i>: Focus on Substantial Compliance (10 m P)</b>  Bianca La Neve, <i>WeirFoulds LLP</i>  Anne Posno, <i>Lenczner Slaght Royce Smith Griffin LLP</i>

- 3:05 p.m. – 3:10 p.m.**      **Question and Answer Session**
- 3:10 p.m. – 3:25 p.m.**      **Litigating Intangible Rights: Reputation, Digital Assets, Endorsement Rights, Influencers**  
*Justin de Vries, de VRIES LITIGATION LLP*
- 3:25 p.m. – 3:30 p.m.**      **Question and Answer Session**
- 3:30 p.m. – 3:50 p.m.**      **What Can You Arbitrate and When?**  
*Andrea McEwan, Aird & Berlis LLP*  
*Susan Stamm, Counsel, Property Rights, Office of the Children’s Lawyer, Ministry of the Attorney General*
- 3:50 p.m. – 3:55 p.m.**      **Question and Answer Session**
- 3:55 p.m. – 4:25 p.m.**      **Unusual Ways to Attack the Validity of Wills (10 m )**  
*Kathleen McDormand, Borden Ladner Gervais LLP*  
*John Poyser, TEP, WEL Partners*
- 4:25 p.m. – 4:30 p.m.**      **Question and Answer Session**
- 4:30 p.m.**      **End of Day One**