

# Wills and Estates Refresher 2023



CHAIR: **Ed Esposto**, TEP, *Aird & Berlis LLP*

**March 30, 2023**

**9:00 a.m. to 12:30 p.m.**



**CPD Hours = 2 h + 30 m Substantive + 1 h Professionalism <sup>P</sup>**

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

**SKU CLE23-00305**

## Agenda

- |                                |  |
|--------------------------------|--|
| <b>9:00 a.m. – 9:05 a.m.</b>   | <b>Welcome and Opening Remarks</b><br><br><i>Ed Esposto, TEP, Aird &amp; Berlis LLP</i>  |
| <b>9:05 a.m. – 10:00 a.m.</b>  | <b>File Management and Client Communication (35 m <sup>P</sup>)</b><br><br><i>Corina Weigl, TEP, Fasken Martineau DuMoulin LLP</i> |
| <b>10:00 a.m. – 10:10 a.m.</b> | <b>Question and Answer Session</b>   |

- 10:10 a.m. – 10:25 a.m.**      **Break**
- 10:25 a.m. – 11:20 a.m.**      **Drafting Considerations, Best Practices, and New Developments (10 m )**
- Amanda Stacey, Miller Thomson LLP*
- 11:20 a.m. – 12:15 p.m.**      **Final Steps: Executing the Will, Reporting, and Handling Challenging Situations (15 m )**
- Ed Esposito, TEP, Aird & Berlis LLP*
- 12:15 p.m. – 12:30 p.m.**      **Question and Answer Session**
- 12:30 p.m.**                      **Program Ends**