

September 4, 2024

# Practice Gems: Administration of Estates 2024



CO-CHAIRS: **Pamela Liang, TEP**, *Wilson Vukelich LLP*

**Susannah Roth, TEP**, *RBC Wealth Management,  
Royal Trust*

**September 24, 2024**

**1:00 p.m. to 4:00 p.m.**

**Total CPD Hours = 2 h 15 m Substantive + 30 m Professionalism <sup>P</sup> + 15 m EDI  
Professionalism <sup>E</sup>**

**Webcast  
Law Society of Ontario**

**SKU CLE24-00906**

## **Agenda**

**1:00 p.m. – 1:05 p.m.**

**Welcome**

*Pamela Liang, TEP, Wilson Vukelich LLP*

*Susannah Roth, TEP, RBC Wealth Management, Royal  
Trust*

- 1:05 p.m. – 1:25 p.m.**      **Case Law Update**  
Jennifer Corak, TEP, *WeirFoulds LLP*
- 1:25 p.m. – 1:30 p.m.**      **Questions and Answers**
- 1:30 p.m. – 2:00 p.m.**      **Solicitor’s Negligence (30 m P)**  
Dawn Phillips-Brown, *Bennett Grant LLP*  
Christopher Stankiewicz, Senior Claims Counsel,  
*Lawyers’ Professional Indemnity Company (LAWPRO)*
- 2:00 p.m. – 2:05 p.m.**      **Questions and Answers**
- 2:05 p.m. – 2:25 p.m.**      **Administering Small Estates/Trusts**  
Matthew Bota, *Harrison Pensa LLP*  
Ryan MacNeil, *Cunningham, Swan, Carty, Little & Bonham  
LLP*
- 2:25 p.m. – 2:30 p.m.**      **Questions and Answers**
- 2:30 p.m. – 2:50 p.m.**      **Break**
- 2:50 p.m. – 3:15 p.m.**      **Mistakes of Incorporation by Reference in Wills**  
Katy Basi, TEP, *Basi Law Professional Corporation*  
Mustafa Jilani, Senior Will & Estate Advisor,  
*RBC Wealth Management, Royal Trust*
- 3:15 p.m. – 3:20 p.m.**      **Question and Answer Session**

**3:20 p.m. – 3:35 p.m.**

**Indigenous Estates (15 m )**

Nicole Richmond, Barrister & Solicitor

Nicole Woodward, *Miller Thomson LLP*

**3:35 p.m. – 3:40 p.m.**

**Question and Answer Session**

**3:40 p.m. – 3:55 p.m.**

**Order for Directions**

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

Dagmara Wozniak, C.S., *Siskinds LLP*

**3:55 p.m. – 4:00 p.m.**

**Question and Answer Session**

**4:00 p.m.**

**Program Ends**