

Sept 25, 2019

22ND Estates and Trusts Summit – DAY ONE

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

Douglas Skinner, *Harrison Pensa LLP*

October 16, 2019

9:00 a.m. to 4:30 p.m.

Total CPD Hours = 5 h Substantive + 1 h 30 m Professionalism ^P

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen Street West
Toronto, ON**



SKU CLE19-0101000

Agenda

DAY ONE:

9:00 a.m. – 9:05 a.m.

Welcome

Clare Burns, WeirFoulds LLP

Douglas Skinner, Harrison Pensa LLP

9:05 a.m. – 9:45 a.m.

Issues Related to Disability

(40 minutes ^P)

The Honourable Fred Myers, Superior Court of Justice

*Nicholas Hedley, Deputy Director
The Office of the Children's Lawyer*

Heather Hogan, Counsel, Litigation Branch,
Office of the Public Guardian and Trustee,
Ministry of the Attorney General

Alexander Procope, *Perez Bryan Procope LLP*

9:45 a.m. – 9:50 a.m.

Question and Answer Session

9:35 a.m. – 9:55 a.m.

What You Need to Know about Predatory Marriages

Kimberly Whaley, C.S., TEP, *WEL Partners*

9:55 a.m. – 10:15 a.m.

Recent Case Law Update

Kelly Charlebois, *Miller Thomson LLP*

Melanie Yach, *Aird & Berlis LLP*

10:15 a.m. – 10:20 a.m.

Question and Answer Session

10:20 a.m. – 10:40 a.m.

Coffee and Networking Break

10:40 a.m. – 11:25 a.m.

**Experts Panel: What We Wish Lawyers Would Do When
They Retain Us**

Diane Kruger, *Forensic Examiners Inc.*

Prem Lobo, CPA, CA, CBV, CFE, CPA (Illinois), CFF
Cohen Hamilton Steger & Co. Inc.

Kenneth Shulman, MD, Professor, Department of
Psychiatry, *Sunnybrook Health Sciences Centre, University
of Toronto*

11:25 a.m. – 11:30 a.m.

Question and Answer Session

- 11:30 a.m. – 11:55 a.m.** **How to Calculate and Prove Future Care Costs - Guardianships and Part V *SLRA* claims**
- Anne Posno, Lenczner Slaght*
- 11:55 a.m. – 12:00 p.m.** **Question and Answer Session**
- 12:00 p.m. – 1:00 p.m.** **Lunch Provided**
- 1:00 p.m. – 1:30 p.m.** **Using Technology in the Courtroom — Dropboxes, Zipfiles, Hotlinks etc. (30 minutes ^P)**
- Jordan Atin, C.S., Counsel, Hull & Hull LLP*
- Phil Brown, Counsel, Practice Management, Practice Supports and Resources, Law Society of Ontario*
- 1:30 p.m. – 1:50 p.m.** **Evidence in the Social Media Age**
- Benjamin Arkin, Arkin Furrow Estate Law LLP*
- 1:50 p.m. – 2:00 p.m.** **Question and Answer Session**
- 2:00 p.m. – 2:20 p.m.** **Recent Developments in Equity and the Law of Trusts in England and the ANZAC?**
- James Ball, Strosberg Sasso Sutts LLP*
- 2:20 p.m. – 2:40 p.m.** **Statutes that Are Little Used but Important to Remember**
- Carol Craig, Nelligan O'Brien Payne LLP*
- 2:40 p.m. – 2:45 p.m.** **Question and Answer Session**

2:45 p.m. – 3:00 p.m.	Coffee and Networking Break
3:00 p.m. – 3:20 p.m.	<p>What Can Make Guardianships/POAs Difficult to Implement? What Can Be Done to Facilitate Implementation?</p> <p>Saman Ullmann, Executive Trust Officer, <i>TD Waterhouse Private Trust</i></p> <p>Judith Wahl, <i>Wahl Elder Law</i></p>
3:20 p.m. – 3:40 p.m.	<p>Costs: Making Your Argument Easier (20 minutes P)</p> <p>Sean Sullivan, Gowling WLG</p> <p>Caroline Abela, <i>WeirFoulds LLP</i></p>
3:40 p.m. – 3:45 p.m.	Question and Answer Session
3:45 p.m. – 4:25 p.m.	<p>Tax for Litigators: An Update on What to Worry About When Settling</p> <p>Marie-Eve Heming, <i>Thorsteinssons LLP</i></p> <p>James Murdoch, <i>Thorsteinssons LLP</i></p> <p>Anjali Navkar, High Net Worth Group, <i>PWC</i></p> <p>Angela Ross, High Net Worth Group, <i>PWC</i></p>
4:25 p.m. – 4:30 p.m.	Question and Answer Session
4:30 p.m.	End of Day One