

# 27<sup>th</sup> Estates and Trusts Summit – DAY TWO



CO-CHAIRS: **Nimali Gamage**, *Goddard Gamage LLP*

**Cate Grainger**, *Harrison Pensa LLP*

**October 23, 2024**

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

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

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

**SKU CLE24-0101001**

## **Agenda**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

*Nimali Gamage, Goddard Gamage LLP*

*Cate Grainger, Harrison Pensa LLP*

**9:05 a.m. – 9:35 a.m.**



**Nimali**

**Caselaw Update and Other Developments**

*Brian Gillingham, Cunningham, Swan LLP*

*Jordan Korn, Goddard Gamage LLP*

<b>9:35 a.m. – 9:40 a.m.</b>	<b>Question and Answer Session</b>
<b>9:40 a.m. – 10:15 a.m.</b>	<b>Tax Issues – Trust Reporting Rules and Planning in Light of New Federal Budget</b>
Cate	Brian Cohen, <i>Gowling WLG (Canada) LLP</i>  Joan Jung, <i>Miller Thomson LLP</i>
<b>10:15 a.m. – 10:25 a.m.</b>	<b>Question and Answer Session</b>
<b>10:25 a.m. – 10:45 a.m.</b>	<b>Break</b>
<b>10:45 a.m. – 11:25 a.m.</b>	<b>What Does an Estate Trustee or Guardian Do with Complex Assets?</b> (i.e., evidence of crimes, illegal items, firearms, farms, recreational vehicles, etc.)
Nimali	Monique Charlebois, <i>MJC Legal Professional Corporation</i>  Andrea Harper, Deputy Legal Director, <i>Office of the Public Guardian and Trustee</i>  Jandy John, Director, Business Development & Initiatives, <i>Concentra Trust</i>
<b>11:25 a.m.– 11:30 a.m.</b>	<b>Question and Answer Session</b>
<b>11:30 a.m.– 12:00 p.m.</b>	<b>Perils of Joint Ownership</b>
Cate	Natalia Angelini, <i>Hull &amp; Hull LLP</i>  Robin Ellis, <i>Miller Thomson LLP</i>
<b>12:00 p.m. – 12:05 p.m.</b>	<b>Question and Answer Session</b>

<b>12:05 p.m. – 1:05 p.m.</b>	<b>Lunch Break</b>
<b>1:05 p.m. – 1:40 p.m.</b>	<b>Intersection of Family and Estates Law for Divorcing or Divorced Parents with a Disabled Child</b>
Nimali	Kristine Anderson, <i>Fern Law</i>
	Carolyn Shelley, <i>Cunningham, Swan LLP</i>
<b>1:40 p.m. – 1:45 p.m.</b>	<b>Question and Answer Session</b>
<b>1:45 p.m. – 2:30 p.m.</b>	<b>Complexity in an Estates Practice in Modern Times</b> (30 m  )
Cate	for blended families, globalization, gender fluidity, gender reassignment surgery wishes in POAPC; Complex execution of will/POA (nonverbal, no mobility, ALS), jurat.
	Laura Geddes, <i>Siskinds LLP</i>
	Darren Lund, <i>Fasken Martineau DuMoulin LLP</i>
	Jessica Williams, <i>Harrison Pensa LLP</i>
<b>2:30 p.m. – 2:40 p.m.</b>	<b>Question and Answer Session</b>
<b>2:40 p.m. – 3:00 p.m.</b>	<b>Break</b>
<b>3:00 p.m. – 3:45 p.m.</b>	<b>Complex Capacity Issues Regarding Granting and Acting Under Powers of Attorney</b> (30 m  )
Nimali	Nima Hojjati, <i>WEL Partners</i>
	Coco Johnson, Therapist and Capacity Assessor
	Alyson Sweetlove, <i>George Street Law Group LLP</i>

**3:45 p.m. – 3:55 p.m.**

**Question and Answer Session**

**3:55 p.m. – 4:25 p.m.**

**Retainer Letters in Unusual or Complex Estate Matters**  
(30 m )

Cate

Marni Pernica, *Aird & Berlis LLP*

Anneke Russell, *SMM Law PC*

**4:25 p.m. – 4:30 p.m.**

**Question and Answer Session**

**4:30 p.m.**

**End of Day Two**