

# Practice Gems: Probate Essentials 2024



CO-CHAIRS: **Ambie Edgar-Chana, TEP**, *Edgar Chana Law*

**Craig Ross**, *Pallett Valo LLP*

**September 24, 2024**

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

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

**Webcast  
Law Society of Ontario**

**SKU CLE24-00905**


## **Agenda**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

*Ambie Edgar-Chana, TEP, Edgar Chana Law*

*Craig Ross, Pallett Valo LLP*

- 9:05 a.m. – 9:30 a.m.**      **Ancillary Probate and Administration for Foreign Estates with Ontario Assets**
- Jennifer Corak *WeirFoulds LLP*
- 9:30 a.m. – 9:35 a.m.**      **Question and Answer Session**
- 9:35 a.m. – 9:55 a.m.**      **Is It a Will or Is the Estate Intestate?**
- Jordan Atin, C.S., TEP, *Atin Professional Corporation*
- Frederick Glady, *GladyLaw*
- 9:55 a.m. – 10:00 a.m.**      **Question and Answer Session**
- 10:00 a.m. – 10:25 a.m.**      **Ancillary Probate and Administration for Ontario Estates with Foreign Assets**
- Jessica Feldman Chittley, *Bales Beall LLP*
- Nozomi (Zoe) Smith, TEP, CEA, *Nakano Smith Law Group*
- 10:25 a.m. – 10:30 a.m.**      **Question and Answer Session**
- 10:30 a.m. – 10:50 a.m.**      **Break**
- 10:50 a.m. – 11:20 a.m.**      **Probate Tax Audit – What You Should Know (30 m **)
- Rebecca Fisch, *RSF Law*
- Brad Hughes, Senior Program Auditor, *Ministry of Finance*
- 11:20 a.m. – 11:30 a.m.**      **Question and Answer Session**

**11:30 a.m. – 11:55 a.m.**

**Probate Issues in Non-Urban Areas**

Diane Kennedy Squires, *Smith Valeriotte Law Firm LLP*

Nathan Martin, *Smith Valeriotte Law Firm LLP*

**11:55 a.m. – 12:00 p.m.**

**Question and Answer Session**

**12:00 p.m.**

**Program Ends**