October 19, 2016

19^{TH} ANNUAL
ESTATES AND TRUSTS SUMMIT – DAY TWO

Chair: **Sheila Crummey, C.S.**
Miller Thomson LLP

Thomas Grozinger, C.S., TEP
RBC Wealth Management, Estate & Trust Services

November 4, 2016
9:00 a.m. to 4:30 p.m.
Total CPD Hours = 5 h 30 m Substantive + 1 h Professionalism P

Donald Lamont Learning Centre
The Law Society of Upper Canada
130 Queen Street West
Toronto, ON

CLE16-0100801

Approved For LawPRO Risk Management Credit

Agenda

DAY TWO:

9:00 a.m. – 9:10 a.m. **Welcome and Opening Remarks**

Sheila Crummey, C.S., *Miller Thomson LLP*

Thomas Grozinger, C.S., TEP
RBC Wealth Management, Estate & Trust Services

9:10 a.m. – 9:30 a.m.	**Update on Family Law Cases/Legislation** Heather Hansen, C.S., *Martha McCarthy & Company*
9:30 a.m. – 9:50 a.m.	**Update on Charity Law** Terrance Carter, *Carters Professional Corporation*
9:50 a.m. – 10:10 a.m.	**Executor/Trustee de son tort:** **Recognizing and Avoiding the Traps of** **Unintended Fiduciary Obligations** Eric Hoffstein, TEP, *Minden Gross LLP*
10:10 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. – 11:10 a.m.	**How to Characterize Corporate Distributions** **For Trust Accounting Purposes** Timothy Youdan, *Davies Ward Phillips & Vineberg LLP*
11:10 a.m. – 11:30 a.m.	**Bitten by Boilerplate: Reviewing Precedents for** **Will and Trust Drafting** Mary-Alice Thompson, C.S., TEP *Cunningham, Swan, Carty, Little & Bonham LLP*
11:30 a.m. – 11:55 a.m.	**When Is a Gift a Gift – Joint Accounts** Ann Elise Alexander, C.S., Senior Counsel *Canadian Imperial Bank of Commerce* Amanda Stacey, *Miller Thomson LLP*

11:55 a.m. – 12:15 p.m.	**Limitations on the Powers of The Power of Attorney for Property – Re: Gifting and Estate Planning** Cate Grainger, *Harrison Pensa LLP*
12:15 p.m. – 12:25 p.m.	**Question and Answer Session**
12:25 p.m. – 1:25 p.m.	**Lunch on Your Own**
1:25 p.m. – 1:45 p.m.	**Tax Law Update** Sheila Crummey, C.S., *Miller Thomson LLP*
1:45 p.m. – 2:10 p.m.	**Estate and Trust Case Law Update** Thomas Grozinger, C.S., TEP *RBC Wealth Management, Estate & Trust Services*
2:10 p.m. – 2:30 p.m.	**Insurance Update** Robin Goodman, TEP, Vice President, Insurance, Trust and Estate Planning Services, *RBC Wealth Management Financial Services Inc.*
2:30 p.m. – 2:40 p.m.	**Question and Answer Session**
2:40 p.m. – 3:00 p.m.	**Coffee and Networking Break**
3:00 p.m.– 3:25 p.m.	**How to Change Trustee** Jordan Atin, C.S., *Atin Professional Corporation*

3:25 p.m. – 3:30 p.m. **Question and Answer Session**

3:30 p.m. – 4:20 p.m. **Estate & End of Life Planning – Legal, Medical, and Ethical Considerations** **(50 Minutes P)**

Sally Bean, Director, Ethics Centre and Policy Advisor
Sunnybrook Health Sciences Centre

Jan Goddard, *Goddard, Gamage, Stephenson LLP*

Dr. Michel Silberfeld, Geriatric Psychiatrist

4:20 p.m. – 4:30 p.m. **Question and Answer Session** **(10 Minutes P)**

4:30 p.m. **End of Day Two**