



THE ANNOTATED Financial Statement for Family Law Lawyers

Chairs:

Steve Ranot, CPA, CA-IFA, CBV
Marmer Penner Inc.

Oren Weinberg
Boulby, Weinberg LLP

June 19, 2017

9:00 a.m. – 12:30 p.m.

Total CPD Hours = 3 h Substantive + 30 m Professionalism 

Law Society of Upper Canada
130 Queen St. West
Toronto, ON

SKU: CLE17-0060701



Agenda

9:00 a.m. – 9:10 a.m.

Welcome and Opening Remarks

Oren Weinberg, Boulby, Weinberg LLP

Steve Ranot, CPA, CA-IFA, CBV, Marmer Penner Inc.

9:10 a.m. – 9:50 a.m. Determining Income, Monies Received and Benefits and Expenses (10 minutes P)

Oren Weinberg, *Boulby, Weinberg LLP*

Steve Ranot, CPA, CA-IFA, CBV, *Marmer Penner Inc.*

9:50 a.m. – 10:20 a.m. Assets (10 minutes P)

Vivian Alterman, MBA, CPA, CA, CBV, *ap Valuations Limited*

Lisa Kadoory, *Kain & Ball Professional Corporation*

10:20 a.m. – 10:30 a.m. Question and Answer

10:30a.m. – 10:45 a.m. Coffee and Networking Break

10:45 a.m. – 11:15 a.m. Liabilities

Georgina Carson, *MacDonald & Partners LLP*

Steve Ranot, CPA, CA-IFA, CBV, *Marmer Penner Inc*

11:15 a.m. – 11:45 a.m. Date of Marriage Assets and Liabilities and Excluded Property

Kim Kieller, *Dooley Lucenti LLP*

Alla Levit, CA, CPA, CBV, IFA, *Levit Valuations Inc.*

11:45 a.m. – 12:20 p.m.

**Perspectives from the Bench and an Arbitrator
(10 minutes 🕒)**

Moderators:

Oren Weinberg, *Boulby, Weinberg LLP*

Steve Ranot, CPA, CA-IFA, CBV, *Marmer Penner Inc.*

Panelists:

Alfred Mamo, LSM, C.S., *McKenzie Lake Lawyers LLP*

The Honourable Justice Susanne Goodman, *Superior Court of Justice*

12:20 p.m. – 12:30 p.m.

Question and Answer

12:30 p.m.

Program Ends