

# Practice Gems: Administration of Estates 2024

September 24, 2024

SKU CLE24-00906

## Table of Contents

**TAB 1      LawPRO Wills and Estates Claims Fact Sheet .....1 - 1 to 1 - 2**

Submitted by:

Christopher Stankiewicz, Senior Claims Counsel,  
*Lawyers' Professional Indemnity Company (LAWPRO®)*

**Availability of insurance coverage for lawyers acting as  
executor or trustee ..... 1 - 3 to 1 - 5**

Shawn Erker, Legal Writer and Content Manager,  
*Lawyers' Professional Indemnity Company (LAWPRO®)*

Submitted by:

Christopher Stankiewicz, Senior Claims Counsel,  
*Lawyers' Professional Indemnity Company (LAWPRO®)*

**Tips from Defence Counsel – How to Build a Strong File .....1 - 6 to 1 - 6**

Dawn Phillips-Brown, *Bennett Grant LLP*

**TAB 2      Administering Small Estates/Trusts  
(Difficulties that Arise, Insolvency, Advising Executors) ..... 2 - 1 to 2 - 10**

Ryan MacNeil, *Cunningham, Swan, Carty, Little & Bonham LLP*

Matthew Bota, *Harrison Pensa LLP*

**TAB 3 Mistakes of Incorporation by Reference in Wills.....3 - 1 to 3 - 7**

Co-authored by:

Katy Basi, TEP, *Basi Law Professional Corporation*

Mustafa Jilani, Senior Will & Estate Advisor  
*RBC Wealth Management, Royal Trust*

*With special thanks to Susannah Roth, TEP  
RBC Wealth Management, Royal Trust*

**TAB 4 Comparison: *Indian Act* versus *Succession Law Reform Act*  
(Chart).....4 - 1 to 4 - 2**

Nicole Woodward, *Miller Thomson LLP*

Nicole Richmond, Barrister & Solicitor

**TAB 5 Order for Directions – Estates List Proceedings  
The Appointment of Section 3 Counsel (Sample Terms) .....5 - 1 to 5 - 9**

**Order Giving Directions - Estates List Proceedings  
Power of Attorney/Guardianship Matters (Sample Terms) ... 5 - 10 to 5 - 25**

**Order for Directions – Estates List Proceedings  
Will Challenge (Sample Terms)..... 5 - 26 to 5 - 39**

**Order for Directions – Estates List Proceedings  
Dependant’s Support (Sample Terms) ..... 5 - 40 to 5 - 54**

**Order for Directions – Estates List Proceedings  
Passings of Accounts (Sample Terms) ..... 5 - 55 to 5 - 64**

Shawn Richard, TEP, *A. Shawn Richard Family and Estate Law*

Dagmara Wozniak, *Siskinds LLP*

**TAB 6            2024: Case Law Update (PowerPoint) ..... 6 - 1 to 6 - 42**

Presented and co-authored by:  
Jennifer Corak, *WeirFoulds LLP*

Co-authored by:  
Carissa DeMarinis, *WeirFoulds LLP*