

December 7, 2025

The Annotated Will 2026



CO-CHAIRS: **Laura Geddes, TEP**, *Harrison Pensa LLP*

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

January 21, 2026

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

Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism ^P

Webcast
Law Society of Ontario

SKU CLE26-00102

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

9:05 a.m. – 9:30 a.m.

Common Drafting Errors

Laura Geddes, TEP, *Harrison Pensa LLP*

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

Darren Lund, TEP, *Fasken Martineau DuMoulin LLP*

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

9:30 a.m. – 9:35 a.m.

Question and Answer Session

9:35 a.m. – 9:50 a.m.

AI Use in Drafting (15 m)

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

9:50 a.m. – 9:55 a.m.

Question and Answer Session

9:55 a.m. – 10:15 a.m.

Dealing with Minors in the Will (10 m)

Ian Lebane, C.S., TEP, Vice President,
Tax and Estate Planner, *TD Wealth*

10:15 a.m. – 10:20 a.m.

Question and Answer Session

10:20 a.m. – 10:40 a.m.

Break

10:40 a.m. – 10:55 a.m.

**Trustee Compensation/Trustee Indemnity
Clauses/Trustee Accounting Clauses (5 m)**

Laura Geddes, TEP, *Harrison Pensa LLP*

10:55 a.m. – 11:05 a.m.	Question and Answer Session
11:05 a.m. – 11:20 a.m.	Trustee Succession/Replacement Darren Lund, TEP, <i>Fasken Martineau DuMoulin LLP</i>
11:20 a.m. – 11:30 a.m.	Question and Answer Session
11:30 a.m. – 11:50 a.m.	Residue Clauses – Tips and Traps Laura Geddes, TEP, <i>Harrison Pensa LLP</i> Ian Lebane, C.S., TEP, Vice President, Tax and Estate Planner, <i>TD Wealth</i> Darren Lund, TEP, <i>Fasken Martineau DuMoulin LLP</i> Kavina Nagrani, C.S., TEP, <i>NIKA LAW LLP</i>
11:50 a.m. – 12:00 p.m.	Question and Answer Session
12:00 p.m.	Program Ends