

# Practice Gems: Probate Essentials 2023



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

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

**September 26, 2023**

**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 CLE23-00905**

## **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.**

**Multiple Wills: What Are Courts Looking for/Asking for?**

*Marni Pernica, Aird & Berlis LLP*

*Paul Taylor, Borden Ladner Gervais LLP*

<b>9:30 a.m. – 9:35 a.m.</b>	<b>Question and Answer Session</b>
<b>9:35 a.m. – 9:55 a.m.</b>	<b>Orders for Assistance (Rule 74.15) – How and When Do You Use Them?</b>  <i>Alexandra Mayeski, MayLex Litigation</i>
<b>9:55 a.m. – 10:15 a.m.</b>	<b>Valuing Assets – What’s in, What’s not, What Time Matters, What Records Do You Keep, How to Use Estimates, etc.</b>  <i>Alexandra Manthorpe, Cunningham, Swan, Carty, Little &amp; Bonham LLP</i>
<b>10:15 a.m. – 10:20 a.m.</b>	<b>Question and Answer Session</b>
<b>10:20 a.m. – 10:40 a.m.</b>	<b>Break</b>
<b>10:40 a.m. – 11:00 a.m.</b>	<b>Revisiting the New Small Estates Rules: When Are They Useful?</b>  <i>Aaron Edgar, Edgar Chana Law</i>
<b>11:00 a.m. – 11:20 a.m.</b>	<b>Real Estate Issues in Probate</b>  <i>Sara Beheshti, Sara Beheshti Professional Corporation</i>
<b>11:20 a.m. – 11:25 a.m.</b>	<b>Question and Answer Session</b>
<b>11:25 a.m. – 11:55 a.m.</b>	<b>Best Practices in Fact Finding, Drafting Retainer/Scope of Work Agreements with Someone Else (30 m )</b>  <i>Lucy Main, WeirFoulds LLP</i>  <i>Brendon Pooran, PooranLaw Professional Corporation</i>

**11:55 a.m. – 12:00 p.m.      Question and Answer Session**

**12:00 p.m.                      Program Ends**