

Practice Gems: Administration of Estates 2025



CO-CHAIRS: **Kathryn Balter**, *Fogler, Rubinoff LLP*

Pamela Liang, TEP, *Wilson Vukelich LLP*

September 26, 2025

1:00 p.m. to 4:00 p.m.

Total CPD Hours = 2 h 15 m Substantive + 45 m Professionalism ^P

**Webcast
Law Society of Ontario**

SKU CLE25-00904

Agenda

1:00 p.m. – 1:05 p.m.

Welcome

Kathryn Balter, Fogler, Rubinoff LLP

Pamela Liang, TEP, Wilson Vukelich LLP

1:05 p.m. – 1:40 p.m.

Managing Liability when Advising Executors (35 m ^P)

Michael Ding, WeirFoulds LLP

Sean Lawler, Lawler Advocacy Professional Corporation

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

1:40 p.m. – 1:50 p.m.

Questions and Answers (10 m )

1:50 p.m. – 2:15 p.m.

Joint Asset Administration Pitfalls

Pritika Deepak, TEP, *Fasken Martineau DuMoulin LLP*

Jessica Houle, *Pryor Tax Law*

2:15 p.m. – 2:20 p.m.

Questions and Answers

2:20 p.m. – 2:40 p.m.

Break

2:40 p.m. – 3:20 p.m.

Dealing with Financial Institutions

Rebecca Fisch, *RSF Law*

Robin Spurr, Senior Counsel, Estates and Trusts, *CIBC*

Jeanine Tang, TEP, Senior Counsel, *TD Bank Group*

3:20 p.m. – 3:30 p.m.

Questions and Answers

3:30 p.m. – 3:55 p.m.

Multijurisdictional Issues

Daniel Stober, TEP, *Torkin Manes LLP*

Samantha Wu, *Cassels Brock & Blackwell LLP*

3:55 p.m. – 4:00 p.m.

Question and Answer Session

4:00 p.m.

Program Ends