



21ST ANNUAL

Estates and Trusts Summit – DAY ONE

Chairs: **Clare Burns**
WeirFoulds LLP

Douglas Skinner
Harrison Pensa LLP

October 10, 2018
9:00 a.m. to 4:30 p.m.

Total CPD Hours = 5 h Substantive + 1 h 30 m Professionalism **P**

Metro Toronto Convention Centre
Rooms 205 and 206 (North Building)
255 Front Street West
Toronto, ON



CLE18-0100400

Agenda

DAY ONE:

9:00 a.m. – 9:05 a.m.

Welcome

Clare Burns, *WeirFoulds LLP*

Douglas Skinner, *Harrison Pensa LLP*

- 9:05 a.m. – 9:30 a.m.** **Settlements Involving Minors and Incompetent Adults**
(15 Minutes )
- Erica Baron, *McCarthy Tétrault LLP*
- Susan Stamm, Counsel, Property Rights
The Office of the Children’s Lawyer
- 9:30 a.m. – 9:35 a.m.** **Question and Answer Session**
- 9:35 a.m. – 9:55 a.m.** **Passing of Accounts Relating to Guardianships**
- Jan Goddard, *Goddard Gamage LLP*
- 9:55 a.m. – 10:15 a.m.** **Motions for Directions with Respect to Will Challenges**
- Lou-Anne Farrell, *FP Law*
- 10:15 a.m. – 10:20 a.m.** **Question and Answer Session**
- 10:20 a.m. – 10:40 a.m.** **Coffee and Networking Break**
- 10:40 a.m. – 11:00 a.m.** **Undue Influence in *Inter Vivos* Transactions**
- Kimberly Whaley, C.S., LL.M., TEP, *WEL Partners*
- 11:00 a.m. – 11:20 a.m.** **Elder Financial Abuse** (10 Minutes )
- Laura Tamblyn Watts, Chief Public Policy Officer, Law
Policy and Research, *CARP (Canadian Association of
Retired Persons)*
- 11:20 a.m. – 11:25 a.m.** **Question and Answer Session**

- 11:25 a.m. – 11:55 a.m.** **What Can Parenting Co-Ordination Teach Us About De-Escalating Intergenerational Family Conflicts (30 Minutes ^P)**
- Resa Eisen, *Marathon Mediation*
- Jane Martin, *Dickson Appell*
- 11:55 a.m. – 12:00 p.m.** **Question and Answer Session (5 Minutes ^P)**
- 12:00 p.m. – 1:00 p.m.** **Lunch Provided**
- 1:00 p.m. – 1:30 p.m.** **Debate – Be It Resolved that Retrospective Capacity Assessments Are Not Worth the Paper They Are Written On**
- Karon Bales, C.S., *Bales Beall LLP*
- Archie Rabinowitz, C.S., *Gowling WLG (Canada) LLP*
- 1:30 p.m. – 1:40 p.m.** **Question and Answer Session**
- 1:40 p.m. – 2:00 p.m.** **Inter-jurisdictional Issues in Estate Litigation**
- Pia Hundal, *Dentons*
- 2:00 p.m. – 2:20 p.m.** **Release Issues / Indemnity Clauses**
- Ewa Krajewska, *Borden Ladner Gervais LLP*
- 2:20 p.m. – 2:40 p.m.** **Mareva Injunctions and Orders Freezing Estate Assets – What’s the Difference and What Will the Court Order**
- Justin de Vries, *de VRIES LITIGATION LLP*
- 2:40 p.m. – 2:50 p.m.** **Question and Answer Session**

- 2:50 p.m. – 3:10 p.m.** **Coffee and Networking Break**
- 3:10 p.m. – 3:35 p.m.** **Ethical Issues in Trust and Estate Litigation (25 Minutes ^P)**
- Rick Bickhram, *Bickhram Litigation*
- Bianca La Neve, *WeirFoulds LLP*
- 3:35 p.m. – 3:40 p.m.** **Question and Answer Session (5 Minutes ^P)**
- 3:40 p.m. – 4:20 p.m.** **Real Estate Issues in Estate Litigation**
- Prem Lobo, CPA, CA, CBV, CFE, CPA (Illinois), CFF,
Chartered Business Valuator,
Cohen Hamilton Steger & Co. Inc.
- Dagmara Wozniak, *Siskinds LLP*
- 4:20 p.m. – 4:30 p.m.** **Question and Answer Session**
- 4:30 p.m.** **End of Day One**