

Practice Gems: Probate Essentials 2022



CO-CHAIRS: **Angela Fallow, TEP**, *Fallow Estates Law*

Craig Ross, *Pallett Valo LLP*

September 22, 2022

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

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

**Webcast
Law Society of Ontario
Toronto ON**

SKU CLE22-00906

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Angela Fallow, TEP, Fallow Estates Law



Craig Ross, Pallett Valo LLP

9:05 a.m. – 9:20 a.m.

**Resealing and Obtaining Ancillary Grants in Foreign
Jurisdictions for Ontario Estates**

Rahul Sharma, Miller Thomson LLP

9:20 a.m. – 9:25 a.m.	Question and Answer Session
9:25 a.m. – 9:45 a.m.	Avoiding Application Filing Mistakes with New Forms Alicia Asimoudis, Court and Client Representative, Estates Office, <i>Government of Ontario</i> (Hamilton) David Henderson, <i>Agro Zaffiro LLP</i>
9:45 a.m. – 9:55 a.m.	Question and Answer Session
9:55 a.m. – 10:10 a.m.	When and How to Use “Heir-at-law” Applications and 3-Year Vesting of Real Estate Burgandy Dunn, <i>Viridius Lex</i>
10:10 a.m. – 10:15 a.m.	Question and Answer Session
10:15 a.m. – 10:35 a.m.	Break
10:35 a.m. – 10:55 a.m.	When to Use Rule 14.05 Applications to Appoint Estate Trustees Instead of Rule 74 Manpreet Kaur, <i>Pallett Valo LLP</i>
10:55 a.m. – 11:00 a.m.	Question and Answer Session
11:00 a.m. – 11:20 a.m.	Ask a Banker - Estate Accounts, Discretion for Non-Probate, Timelines, etc. Ian Lebane, C.S., TEP, Vice President, <i>TD Wealth</i>

11:20 a.m. – 11:30 a.m.	Question and Answer Session
11:30 a.m. – 11:55 a.m.	Avoiding Communication Issues with Clients, Beneficiaries and Other Counsel. (25 m ) <i>Andrea Hill, Turkstra Mazza Associates</i> <i>Alexandra Manthorpe, Cunningham Swan Lawyers LLP</i>
11:55 a.m. – 12:00 p.m.	Question and Answer Session (5 m )
12:00 p.m.	Program Ends