

PRACTICE GEMS:

Administration of Estates 2019

CO-CHAIRS: **Timothy Grieve, TEP, Merovitz Potechin LLP**

Kimberly Whaley, C.S., TEP, WEL Partners

September 10, 2019

1:00 p.m. – 4:00 p.m.

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

**Law Society of Ontario
130 Queen St. W.
Toronto, ON**

SKU CLE19-00902



Agenda

1:00 p.m. – 1:05 p.m.

Welcome and Opening Remarks

Timothy Grieve, TEP, *Merovitz Potechin LLP*

Kimberly Whaley, C.S., TEP, *WEL Partners*

1:05 p.m. – 1:25 p.m.

Tax for Estate Administration Lawyers

Joan Jung, *Minden Gross LLP*

1:25 p.m. – 1:45 p.m.


**Reading, Deciphering and Administering the Will
and the Trust (10 m )**

Blair Botsford, *Blaney McMurtry LLP*

1:45 p.m. – 1:50 p.m.

Questions and Answers

1:50 p.m. – 2:10 p.m.

Duties of an Estate Trustee where a Dependant's Support Claim and *Family Law Act* Claim is a Live Issue (5 m )

Michael Marra, *WEL Partners*

2:10 p.m. – 2:25 p.m.

The Different Roles and Duties Involved in the Appointments of Estate Trustees versus Estate Trustees During Litigation

Doreen So, *Hull & Hull LLP*

2:25 p.m. – 2:30 p.m.

Questions and Answers

2:30 p.m. – 2:50 p.m.

Coffee and Networking Break

2:50 p.m. – 3:20 p.m.

Avoiding Claims (15 m )

Jordan Atin, C.S., TEP, *Hull & Hull LLP*

Raymond Leclair, Vice President, Public Affairs, *Lawyers' Professional Indemnity Company (LAWPRO®)*

Marshall Swadron, *Swadron Associates*

3:20 p.m. – 3:25 p.m.

Questions and Answers

3:25 p.m. – 3:55 p.m.

Panel Discussion: Current Updates

Ambie Edgar-Chana, *Edgar Chana Law Professional Corporation*

Laroux Peoples, *Peoples Law LLP*

Alexander Procope, *Perez Bryan Procope LLP*

3:55 p.m. – 4:00 p.m.

Question and Answer Session

4:00 p.m.

Program Ends