

Estate Accounting 2020

CO-CHAIRS: **Justin de Vries**, *de VRIES LITIGATION LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

January 23, 2020

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

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

**Law Society of Ontario
Donald Lamont Learning Centre
130 Queen St. W.
Toronto, ON**

SKU CLE20-00104



Agenda

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|------------------------------|---|
| 1:00 p.m. – 1:05 p.m. | Welcome and Opening Remarks

<i>Justin de Vries, de VRIES LITIGATION LLP</i>

<i>Kathleen McDormand, Borden Ladner Gervais LLP</i> |
| 1:05 p.m. – 1:20 p.m. | Court Update: Noteworthy Accounting Decisions in 2019

<i>Andrea Hill, Turkstra Mazza Associates</i> |
| 1:20 p.m. – 1:35 p.m. | Remedies and Damages on
Contested Passings of Accounts


<i>Rick Bickhram, Bickhram Litigation Professional Corporation</i> |

- 1:35 p.m. – 1:40 p.m. Question and Answer Session**
- 1:40 p.m. – 2:00 p.m. Mediating Passings of Accounts – How to Frame, Advance and Settle Your Case**
- Moderator: Kathleen McDormand
- Panellists: Jennifer Jolly, Mackinnon & Phillips
Andrea McEwan, *Aird & Berlis LLP*
- 2:00 p.m. – 2:15 p.m. The Office of the Children’s Lawyer: Practice, Policies and Tips in Reviewing Accounts**
- Nina Gandhi, *Office of the Children’s Lawyer*
- 2:15 p.m. – 2:20 p.m. Question and Answer Session**
- 2:20 p.m. – 2:40 p.m. Coffee and Networking Break**
- 2:40 p.m. – 2:55 p.m. Insurance Coverage for Lawyers Acting as Trustees (10 m )**
- Juda Strawczynski, Director, practicePRO
Lawyers’ Professional Indemnity Company (LAWPRO)
- 2:55 p.m. – 3:10 p.m. Dealing with Difficult Beneficiaries: What to Do and How to Account for Your Time as Trustee? (15 m )**
- Gillian Fournie, *de VRIES LITIGATION LLP*
- 3:10 p.m. – 3:25 p.m. How and When Should Applications to Pass Accounts Be Converted into Actions**
- Eric Hoffstein, TEP, *Fogler Rubinoff LLP*

3:25 p.m. – 3:30 p.m.

Question and Answer Session

3:30 p.m. – 3:55 p.m.

**Lessons Learned – Trials and Tribulations in
Contested Passing of Accounts (5 m )**

The Honourable Laurence Pattillo, *Superior Court of Justice*

Justin de Vries, *de VRIES LITIGATION LLP*

Danielle Joel, C.S., *Borden Ladner Gervais LLP*

3:55 p.m. – 4:00 p.m.

Question and Answer Session

4:00 p.m.

Program Ends