

October 15, 2025

28th Estates and Trusts Summit – DAY ONE



CO-CHAIRS: **Clare Burns**, *WeirFoulds LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

October 22, 2025
9:00 a.m. to 4:30 p.m.

**Total CPD Hours = 4 h 30 m Substantive + 1 h 30 m Professionalism ^P
+ 30 m EDI Professionalism ^E**

Law Society of Ontario
Donald Lamont Learning Centre
Toronto, ON

SKU CLE25-01007

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Clare Burns, WeirFoulds LLP

Kathleen McDormand, Borden Ladner Gervais LLP

9:05 a.m. – 9:45 a.m.

The New Rules

The Honourable Justice Bernadette Dietrich
Ontario Superior Court of Justice

Alex Smith, *Henein Hutchison Robitaille LLP*

Jonah Waxman, *WeirFoulds LLP*

9:45 a.m. – 9:55 a.m.

Question and Answer Session

9:55 a.m. – 10:15 a.m.

Tax Panel: Death of a Business Owner and the Tax Implications

Brian Cohen, *Gowling WLG (Canada) LLP*

Sébastien Desmarais, Tax and Estate Planner
TD Wealth Advisory Services

10:15 a.m. – 10:20 a.m.

Question and Answer Session

10:20 a.m. – 10:40 a.m.

Break

10:40 a.m.– 11:10 a.m.

Mental Health Issues in Estates Practice (30 m )

Dr. Sara Mitchell, MD FRCPC MPH, Neurologist
Sunnybrook Health Sciences Centre

Doreen So, *Hull & Hull LLP*

11:10 a.m. – 11:20 a.m.

Question and Answer Session

- 11:20 a.m. – 12:00 p.m.** **POA Litigation Issues**
- Bryan Gilmartin, *WEL Partners*
- Andrea Hill, *TMA Law*
- Alexander Procope, *Perez Procope Leinveer LLP*
- 12:00 p.m. – 12:10 p.m.** **Question and Answer Session**
- 12:10 p.m. – 1:10 p.m.** **Lunch Break**
- 1:10 p.m. – 1:45 p.m.** **Update on Joint Accounts and Discretionary Trusts (20 m )**
- Tanya Bartucz, Barrister & Solicitor
- Brendan Donovan, *Donovan Kochman LLP*
- Brittany Miller, *Goddard Gamage LLP*
- 1:45 p.m. – 2:00 p.m.** **Question and Answer Session**
- 2:00 p.m. – 2:30 p.m.** **Importance of Initial Client Reporting Letter (30 m )**
- Raymond Murray, *Mann Lawyers*
- Anne Posno, *Lax O’Sullivan Lisus Gottlieb LLP*
- 2:30 p.m. – 2:35 p.m.** **Question and Answer Session**
- 2:35 p.m. – 2:45 p.m.** **Update from the Office of the Children’s Lawyer**
- Jillian Evans, Counsel
Office of the Children’s Lawyer

2:45 p.m. – 3:05 p.m.	Break
3:05 p.m. – 3:45 p.m.	<p>How to Deal with High Conflict Families in Guardianship Disputes (40 m ^P)</p> <p>Resa Eisen, <i>Marathon Mediation</i></p> <p>Julie Guindon, <i>Guindon Law LLP</i></p> <p>Meghan Lawson, <i>Murray Lawson LLP</i></p>
3:45 p.m. – 3:50 p.m.	Question and Answer Session
3:50 p.m. – 4:20 p.m.	<p>Estate Litigation Issues relating to MAID and Suicide</p> <p>Ben Arkin, <i>Arkin Furrow Estate Law</i></p> <p>Lou-Anne Farrell, <i>Harrison Pensa LLP</i></p> <p>David Wagner, TEP, <i>Wagner Sidlofsky LLP</i></p>
4:20 p.m. – 4:30 p.m.	Question and Answer Session
4:30 p.m.	End of Day One