

26th Estates and Trusts Summit – DAY ONE



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

Kathleen McDormand, *Borden Ladner Gervais LLP*

October 18, 2023

9:00 a.m. to 4:30 p.m.

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

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

SKU CLE23-0100700

Agenda

DAY ONE:

9:00 a.m. – 9:05 a.m.

Welcome and Opening Remarks

Clare Burns, WeirFoulds LLP

Kathleen McDormand, Borden Ladner Gervais LLP

9:05 a.m. – 9:35 a.m.

Vicarious Trauma (Compassion Fatigue) (30 m ^P)

The Honourable Justice Patrice Band, Ontario Court of Justice

9:35 a.m. – 9:45 a.m.	Question and Answer Session (10 m )
9:45 a.m. – 9:55 a.m.	Banks' Duty to Warn Clients about Potential Fraud <i>Alex Smith, Henein Hutchison Robitaille LLP</i>
9:55 a.m. – 10:00 a.m.	Question and Answer Session
10:00 a.m. – 10:20 a.m.	Tax Issues: Non-resident Beneficiaries <i>Brian Cohen, Gowling WLG (Canada) LLP</i> <i>Sébastien Desmarais, Tax and Estate Planner, TD Wealth Advisory Services</i>
10:20 a.m. – 10:25 a.m.	Question and Answer Session
10:25 a.m. – 10:45 a.m.	Break
10:45 a.m.– 11:45 a.m.	Snapshot session: <i>Lou-Anne Farrell, Harrison Pensa LLP</i> <i>Gilian Fournie, de VRIES LITIGATION LLP</i> <i>Andrea McEwan, WeirFoulds LLP</i> <i>Matthew Rendely, Loopstra Nixon LLP</i>
11:45 a.m. – 12:00 p.m.	Question and Answer Session
12:00 p.m. – 1:00 p.m.	Lunch Break
1:00 p.m. – 1:35 p.m.	Disclosure Orders and Orders for Directions

Alexandra Mayeski, *MayLex Litigation P.C.*

Tanisha Tulloch, *Torkin Manes LLP*

David Wagner, TEP, *Wagner Sidlofsky LLP*

1:35 p.m. – 1:45 p.m. Question and Answer Session

1:45 p.m. – 2:05 p.m. Disclaimers and Renunciations

Kavina Nagrani, C.S., TEP, *NIKA LAW LLP*

2:05 p.m. – 2:10 p.m. Question and Answer Session

2:10 p.m. – 2:25 p.m. Family Law Update

Kristine Anderson, *Fern Law*

2:25 p.m. – 2:30 p.m. Question and Answer Session

2:30 p.m. – 2:50 p.m. Break

**2:50 p.m. – 3:15 p.m. Approval of Settlements, A Word from the New PGT and
the Children’s Lawyer**

Dianne Carter, *Office of the Children’s Lawyer*

Sidney Peters, *Public Guardian & Trustee*

3:15 p.m. – 3:20 p.m. Question and Answer Session


3:20 p.m. – 3:35 p.m. POA Litigation

Brendan Donovan, *Donovan Kochman LLP*

3:35 p.m. – 3:40 p.m.

Question and Answer Session

3:40 p.m. – 4:00 p.m.

Representations to the Court; How to Deal with Self-Represented Litigants, Interactions with Opposing Counsel, Objections, Using Analogies or Quotations (20 m )

Kelly Charlebois, *Miller Thomson LLP*

David Lobl, *Gowling WLG (Canada) LLP*

4:00 p.m. – 4:05 p.m.

Question and Answer Session (5m )

4:05 p.m. – 4:25 p.m.

Fireside Chat with a Superior Court Judge (20 m )

The Honourable Justice Fred Myers, *Superior Court of Justice*

4:25 p.m. – 4:30 p.m.

Question and Answer Session (5m )

4:30 p.m.

End of Day One