

Practice Gems: Administration of Estates 2020

CO-CHAIRS: **Jag Gandhi, TEP, Miller Thomson LLP**

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

September 21, 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 CLE20-00906




Agenda

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


<i>Jag Gandhi, TEP, Miller Thomson LLP</i>

<i>Kimberly Whaley, C.S., TEP, WEL Partners</i> |
| 1:05 p.m. – 1:30 p.m. | The Estate Administration Checklist

<i>M. Jasmine Sweatman, C.S., J.D., TEP, EPC, CPCA</i>
<i>Sweatman Law Professional Corporation</i> |
| 1:30 p.m. – 1:35 p.m. | Questions and Answers |

- 1:35 p.m. – 1:50 p.m.** **Administration of an Estate where there are Mutual Wills or a Mutual Will Agreement**
- Sandra Monardo, *Goddard Gamage LLP*
- 1:50 p.m. – 2:05 p.m.** **A Case Law and Legal Update**
- Daniel Paperny *WEL Partners*
- Amelia Yiu, *Elm Law*
- 2:05 p.m. – 2:10 p.m.** **Questions and Answers**
- 2:10 p.m. – 2:25 p.m.** **Administration of an Estate where there Has Been an Alter Ego Trust and Planning by an Attorney under a Continuing Power of Attorney for Property**
- Carla Figliomeni, *KPMG Law 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. – 3:05 p.m.** **Administering Primary and Secondary Wills and Taxation of Estates Generally**
- Rahul Sharma, *Miller Thomson LLP*
- 3:05 p.m. – 3:20 p.m.** **Identifying Administration Problems and Steps to Follow to Resolve Them Title (15 m )**
- Sean Lawler, *Shibley Righton LLP*
- 3:20 p.m. – 3:25 p.m.** **Question and Answer Session**

3:25 p.m. – 3:40 p.m.

Dealing with the Discharge of a Solicitor's Duty in the Context of an Administration – Protecting your File. Defensive Practice Tips to Avoid Liability (15 m )

Dawn Phillips-Brown, *Madorin, Snyder LLP*

3:40 p.m. – 3:55 p.m.

The Administration of an Estate where there Is a Secret Trust

Alison Minard, *McCarthy Tétrault LLP*

3:55 p.m. – 4:00 p.m.

Question and Answer Session

4:00 p.m.

Program Ends