

March 25, 2026

The Six-Minute Estates Lawyer 2026



CO-CHAIRS: **Andrea Hill**, *TMA Law*

Ian Hull, C.S., TEP, LSM, *Hull & Hull LLP*

April 15, 2026

9:00 a.m. to 12:00 p.m.

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

Webcast Only
Law Society of Ontario

SKU CLE26-00402

Agenda

9:00 a.m. – 9:05 a.m.

Welcome



Andrea Hill, TMA Law

Ian Hull, C.S., TEP, LSM, Hull & Hull LLP

9:05 a.m. – 9:12 a.m.

Long-Term Common-Law Relationships and Estate Distribution

Marni Pernica, TEP, Aird & Berlis LLP

- 9:12 a.m. – 9:19 a.m.** **Financial Interest and Standing in Estates Litigation**
Kimberly Whaley, C.S., TEP, *WEL Partners*
- 9:19 a.m. – 9:27 a.m.** **Navigating Limitation Periods in Estates**
Angelique Moss, *Casey & Moss LLP*
- 9:27 a.m. – 9:35 a.m.** **Mental Health Issues and Estates Practice (8 m )**
Jonathan Keslassy, *Keslassy Freedman Gelfand LLP*
- 9:35 a.m. – 9:42 a.m.** **Question and Answer Session**
- 9:42 a.m. – 9:49 a.m.** **S. 159 of the *Income Tax Act* and Estate Distributions**
Suzana Popovic-Montag, TEP, *Hull & Hull LLP*
- 9:49 a.m. – 9:56 a.m.** **Best Practices for Taking Will Instructions from Vulnerable Clients and Clear Client Reporting (7 m )**
Kathleen McDormand, *Borden Ladner Gervais LLP*
- 9:56 a.m. – 10:03 a.m.** **Drafting/Planning for Beneficiaries with a Disability**
Alexandra Manthorpe, *Cunningham, Swan, Carty, Little & Bonham LLP*
- 10:03 a.m. – 10:11 a.m.** **Technology Tools in Estates & Trusts (8 m )**
M. Jasmine Sweatman, C.S., TEP, *Sweatman Law Professional Corporation*
- 10:11 a.m. – 10:18 a.m.** **Update on Minimum Threshold Cases**
Clare Burns, TEP, *WeirFoulds LLP*

- 10:18 a.m. – 10:25 a.m. Question and Answer Session**
- 10:25 a.m. – 10:45 a.m. Break**
- 10:45 a.m. – 10:52 a.m. Dealing with Insolvent Estates**
Jeffrey Larry, Paliare Roland Rosenberg Rothstein LLP
- 10:52 a.m. – 10:59 a.m. Charities in an Estate Administration and Drafting Considerations**
Ambie Edgar-Chana, TEP, Edgar Chana Law Professional Corporation
- 10:59 a.m. – 11:06 a.m. Cross-Border Chaos: What Happens When You Own Assets in Two Countries?**
Jennifer Stebbing C.S., TEP, Stebbing Butcher Professional Corporation
- 11:06 a.m. – 11:13 a.m. Joint Bank Accounts in Estate Planning: Risks, Benefits, and Recent Legal Developments**
A. Sean Graham, Graham Estate Law
- 11:13 a.m. – 11:20 a.m. Question and Answer Session**
- 11:20 a.m. – 11:27 a.m. Guardianship and the Least Invasive Path**
Brendon Pooran, PooranLaw Professional Corporation
- 11:27 a.m. – 11:34 a.m. Dealing with Unconventional Assets in Estates**
Fhara Pottinger, Waddington & Pottinger Law LLP

11:34 a.m. – 11:41 a.m.

The Case for Concise Wills: Balancing Clarity and Completeness in 2026

Jordan Atin, C.S., TEP, Atin Professional Corporation

11:41 a.m. – 11:48 a.m.

Red Flags in Client Interviews: Identifying Signs of Elder Abuse (7m )

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

11:48 a.m. – 11:55 a.m.

Estates Disputes and Blended Families

Rick Bickhram, Bickhram Litigation

11:55 a.m. – 12:00 p.m.

Question and Answer Session

12:00 p.m.

Program Ends