

# 24<sup>th</sup> Estates and Trusts Summit – DAY TWO



CO-CHAIRS: **Nimali Gamage**, *Goddard Gamage LLP*

**Alyson Sweetlove**, *George Street Law Group LLP*

**October 21, 2021**

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

**Total CPD Hours = 5 h Substantive + 1 h Professionalism <sup>P</sup>  
+ 30 m EDI Professionalism <sup>e</sup>**

**Webcast  
Law Society of Ontario  
Toronto ON**

**SKU CLE21-0100801**

## **Agenda**

### **DAY TWO:**

**9:00 a.m. – 9:05 a.m.**

**Welcome**

*Nimali Gamage, Goddard Gamage LLP*

*Alyson Sweetlove, George Street Law Group LLP*

**9:05 a.m. – 9:45 a.m.**

**COVID-19 Practice Update (20 m )**

Jordan Atin, C.S., TEP, *Hull & Hull LLP*

Grace McSorley, Deputy Ombudsperson  
*Ombudsperson for Banking Services and Investments*

Catherine Olsiak, *SimpsonWigle Law LLP*

**9:45 a.m. – 9:55 a.m.**

**Question and Answer Session**

**9:55 a.m. – 10:15 a.m.**

**A Judge's Advice for Estate Solicitors – Common but Costly Errors that Can Be Avoided at the Drafting Stage (10 m )**

The Honourable Bernadette Dietrich  
*Superior Court of Justice*

**10:15 a.m. – 10:20 a.m.**

**Question and Answer Session**

**10:20 a.m. – 10:35 a.m.**

**Break**

**10:35 a.m. – 10:50 a.m.**

***Succession Law Reform Act Changes***

Cecile Ko Brock, *McCarthy Tétrault LLP*

**10:50 a.m. – 10:55 a.m.**

**Question and Answer Session**

**10:55 a.m. – 11:35 a.m.**

**The New Small Estates Rules**

Barry Corbin, C.S., *Corbin Estates Law Professional Corporation*

Susan Easterbrook, C.S., TEP, *Susan Easterbrook Professional Corporation*

Jane Martin, *Wilson Vukelich LLP*

<b>11:35 a.m. – 11:45 a.m.</b>	<b>Question and Answer Session</b>
<b>11:45 a.m. – 12:10 p.m.</b>	<b>ODSP Issues in Estate Administration and Personal Injury Related Guardianship</b>  Brittany Gillingham, <i>McKellar Structured Settlements Inc.</i>  Craig Ross, <i>Pallett Valo LLP</i>
<b>12:10 p.m. – 12:15 p.m.</b>	<b>Question and Answer Session</b>
<b>12:15 p.m. – 1:15 p.m.</b>	<b>Lunch Break</b>
<b>1:15 p.m. – 1:45 p.m.</b>	<b>LGBT Estate Planning (30 m )</b>  Heather Hay, Co-ordinator, <i>Elder Abuse Prevention Muskoka</i>  Darren Lund, TEP, <i>Miller Thomson LLP</i>
<b>1:45 p.m. – 1:55 p.m.</b>	<b>Question and Answer Session</b>
<b>1:55 p.m. – 2:25 p.m.</b>	<b>Giving Advice to Attorneys for Property and Personal Care about their Role and Dealing with Family Members of Incapable Person (30 m )</b>  Jordan Korn, <i>Goddard Gamage LLP</i>  Kavina Nagrani, <i>NIKA LAW LLP</i>
<b>2:25 p.m. – 2:35 p.m.</b>	<b>Question and Answer Session</b>
<b>2:35 p.m. – 2:55 p.m.</b>	<b>Break</b>

<b>2:55 p.m. – 3:15 p.m.</b>	<b>Case Law Update</b>  <i>Alexandra Mayeski, Goddard Gamage LLP</i>
<b>3:15 p.m. – 3:20 p.m.</b>	<b>Question and Answer Session</b>
<b>3:20 p.m. – 3:45 p.m.</b>	<b>Pour Over Clauses</b>  <i>Eric Hoffstein, TEP, Folger, Rubinoff LLP</i>  <i>Nicole Woodward, Miller Thomson LLP</i>
<b>3:45 p.m. – 3:50 p.m.</b>	<b>Question and Answer Session</b>
<b>3:50 p.m. – 4:20 p.m.</b>	<b>Exercising a Guardianship Clause</b>  <i>Vicky Ringuette, Vicky M. Ringuette Barrister &amp; Solicitor</i>  <i>Susannah Roth, TEP, O’Sullivan Estate Lawyers LLP</i>
<b>4:20 p.m. – 4:30 p.m.</b>	<b>Question and Answer Session</b>
<b>4:30 p.m.</b>	<b>End of Day Two</b>