

Estate Accounting 2019

CO-CHAIRS: **Justin de Vries**, *de VRIES LITIGATION LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

January 16, 2019

1:00 p.m. to 4:00 p.m.

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

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

SKU CLE19-00102



Agenda


1:00 p.m. – 1:05 p.m.

Welcome and Opening Remarks

Justin de Vries, de VRIES LITIGATION LLP

Kathleen McDormand, Borden Ladner Gervais LLP

1:05 p.m. – 1:20 p.m.

**When Can a Trustee Claim, and Justify, a Special Fee?
(10 minutes )**

Lisa Toner, Sorbara, Schumacher, McCann LLP

1:20 p.m. – 1:35 p.m.

**Passing the Breach: Litigating Breach of Fiduciary Claims
in Applications to Pass Accounts**

Arieh Bloom, *Tupman & Bloom LLP*

1:35 p.m. – 1:50 p.m.

**Pre-taking Compensation in Guardianships and Estates:
Who, What, When and Why**

Pia Hundal, *Dentons Canada LLP*

1:50 p.m. – 1:55 p.m.

Question and Answer Period

1:55 p.m. – 2:10 p.m.

**What Does the Office of the Public Guardian & Trustee
Look for When Reviewing Accounts?**

Richard Coutinho, Senior Counsel, Office of the Public
Guardian & Trustee, *Ministry of the Attorney General*

2:10 p.m. – 2:25 p.m.

Practical and Ethical Issues: Some Practical Tips
(15 minutes 🕒)

Justin de Vries, *de VRIES LITIGATION LLP*

Kathleen McDormand, *Borden Ladner Gervais LLP*

2:25 p.m. – 2:30 p.m.

Question and Answer Period

2:30 p.m. – 2:50 p.m.

Coffee and Networking Break

2:50 p.m. – 3:05 p.m.

**What is the Duty to Account for Underlying Corporate
Transactions When an Estate Holds Corporate Assets?**

Matthew Furrow, *Goddard Gamage LLP*

3:05 p.m. – 3:20 p.m.

Court Update: Noteworthy Decisions in the 2018

Andrea Hill, *Gowling WLG (Canada) LLP*

3:20 p.m. – 3:25 p.m.	Question and Answer Period
3:25 p.m. – 3:40 p.m.	<p>What Types of Transactions Are Often Poorly Handled in Estate Accounts</p> <p>Christine Prins, CPA, CA, TEP, Licensed Public Accountant, <i>Parker Prins Lebano Chartered Professional Accountants Professional Corporation</i></p>
3:40 p.m. – 3:55 p.m.	<p>Should 2.5% Be Awarded on Large Receipts or Disbursements? (5 minutes Ⓟ)</p> <p>Debra Stephens, Firm Counsel to WEL Partners, <i>WEL Partners</i></p>
3:55 p.m. – 4:00 p.m.	Question and Answer Period
4:00 p.m.	Program Ends