

Private Mortgages Update for Real Estate Lawyers: Rule Changes, Conflicts of Interest, and Best Practices



CHAIR: **Matthew Wilson, C.S., Siskinds LLP**


SPEAKERS:

Charley Kozdas, CPA, CGA, CFF, CFE, BAccS, Auditor, Spot Audit,
Law Society of Ontario

Raymond Leclair, Vice-President, Public Affairs, *Lawyers'*
Professional Indemnity Company (LAWPRO®)

Matthew Wilson, C.S., *Siskinds LLP*

Pre-Recorded
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Total CPD Hours = 1 h Professionalism 

Law Society of Ontario

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Agenda

5 minutes

Welcome and Opening Remarks from the Chair

Matthew Wilson, C.S., *Siskinds LLP*

5 minutes

Who is a “Lender Client”? – An Introduction to the Revised Rules of Professional Conduct

Matthew Wilson, C.S., *Siskinds LLP*

15 minutes

Can I Act for Lender and Borrower? – Understanding Mortgage Joint Retainers and the Conflict of Interest Rules

Raymond Leclair, Vice-President, Public Affairs, *Lawyers’ Professional Indemnity Company (LAWPRO®)*

Matthew Wilson, C.S., *Siskinds LLP*

10 minutes

Private Mortgage Record Keeping and Reporting Requirements: Forms 9D and 9E

Charley Kozdas, CPA, CGA, CFF, CFE, BAccS, Auditor, Spot Audit, *Law Society of Ontario*

5 minutes

Alternate Methods of Advancing Funds

Charley Kozdas, CPA, CGA, CFF, CFE, BAccS, Auditor, Spot Audit, *Law Society of Ontario*

5 minutes

How to Avoid a Claim in a Private Mortgage Transaction

Raymond Leclair, Vice-President, Public Affairs, *Lawyers’ Professional Indemnity Company (LAWPRO®)*

5 minutes

How Should a Private Mortgage be Discharged?

Matthew Wilson, C.S., *Siskinds LLP*

10 minutes

Pre-Planned Q & A

Program Ends