## THE SIX-MINUTE ESTATES LAWYER 2022



CO- CHAIRS: Andrea Hill, Turkstra Mazza Associates

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

May 25, 2022 9:00 a.m. to 12:00 p.m. Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism

> Law Society of Ontario Toronto, ON

> > SKU CLE22-00508

## **Agenda**

9:00 a.m. – 9:05 a.m. Welcome

Andrea Hill, Turkstra Mazza Associates

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

9:05 a.m. – 9:12 am. Joint Asset Planning

Clare Burns, WeirFoulds LLP

| 9:12 a.m. – 9:19 a.m.   | Estate Administration Tax Update and Practice Tips  Jordan Atin, C.S., TEP, Atin Professional Corporation      |
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| 9:19 a.m. – 9:27 a.m.   | <b>Disputes over Remains</b> Pamela Liang, <i>Wilson Vukelich LLP</i>                                          |
| 9:27 a.m. – 9:34 a.m.   | Corroboration Evidence in Estate Matters Brendan Donovan, <i>Donovan Kochman LLP</i>                           |
| 9:34 a.m. – 9:42 a.m.   | Question and Answer Session (1 mP)                                                                             |
| 9:42 a.m. – 9:49 a.m.   | Gifts Mortis Causa  Dagmara Wozniak, Siskinds LLP                                                              |
| 9:49 a.m. – 9:56 a.m.   | Voluntary Disclosure in Estate Matters  Valentine Gurfinkel, BDO Law LLP                                       |
| 9:56 a.m. – 10:03 a.m.  | Drafting / Planning for Disabled Beneficiaries  Alexandra Manthorpe, Cunningham Swan Carty Little & Bonham LLP |
| 10:03 a.m. – 10:10 a.m. | Guardianship and the Least Invasive Path  Brendon Pooran, Pooran Law Professional Corporation                  |
| 10:10 a.m. – 10:17 a.m. | Managing Deathbed Retainers  Justin de Vries, de VRIES LITIGATION LLP                                          |
| 10:17 a.m. – 10:25 a.m. | Question and Answer Session (1m <sup>1</sup> )                                                                 |

| 10:25 a.m. – 10:45 a.m. | Break                                                                                                                 |
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| 10:45 a.m. – 10:52 a.m. | Limitation Periods in Estates and Passing of Accounts Proceedings  Jennifer Stebbing, C.S., Miller Thomson LLP        |
| 10:52 a.m. – 10:59 a.m. | Tips on Taking Will Instructions and Reporting Letters to Clients   Kathleen McDormand, Borden Ladner Gervais LLP     |
| 10:59 a.m. – 11:06 a.m. | Security for Costs Motions in Estate Matters  Bianca La Neve, WeirFoulds LLP                                          |
| 11:06 a.m. – 11:13 a.m. | New Forms and the Compliance Requirements for the Validity of Wills  Jonathan Keslassy, Keslassy Freedman Gelfand LLP |
| 11:13 a.m. – 11:20 a.m. | Question and Answer Session (1m P)                                                                                    |
| 11:20 a.m. – 11:27 a.m. | Rules of Conduct and Conflict Issues for Solicitors   Suzana Popovic-Montag, TEP, Hull & Hull LLP                     |
| 11:27 a.m. – 11:34 a.m. | Proving Due Execution  Kimberly Whaley, C.S., TEP, WEL Partners                                                       |
| 11:34 a.m. – 11:41 a.m. | <b>Dealing with Insolvent Estates</b> Elikem Deley, <i>Sorbara, Schumacher, McCann LLP</i>                            |

| 11:41 a.m. – 11:48 a.m. | Estates and Family Law Cross-Over Issues and Recent Developments  Arieh Bloom, Tupman & Bloom LLP |
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| 11:48 a.m. – 11:55 a.m. | Charities in an Estate Administration and Drafting Considerations                                 |
|                         | Jasmine Sweatman, C.S., J.D., TEP, ERC, CPCA<br>Sweatman Law Firm                                 |
| 11:55 a.m. – 12:00 p.m. | Question and Answer Session (1m P)                                                                |
| 12:00 p.m.              | Program Ends                                                                                      |