

CBA WILL, ESTATE AND TRUST FUNDAMENTALS FOR ESTATE PRACTITIONERS

OCTOBER 26-30 | TORONTO, ON

WEDNESDAY, OCTOBER 26

12:00 – 12:30 Registration

12:30 – 13:00 Welcome - Introduction to Concordance Tables and Inter-provincial issues

(0.5 hour - Substantive Content)

Speaker: Wendy Templeton (Basman Smith LLP)

13:00 – 13:30 Law of Wills *(0.5 hour - Substantive Content)*

Speaker: Hilary Laidlaw (McCarthy Tetrault LLP)

13:30 – 14:00 Law of Trusts *(0.5 hour - Substantive Content)*

Speaker: Adam Parachin (University of Western Ontario Law School)

14:00 – 15:00 Conflict of Laws *(1 hour - Substantive Content)*

Speaker: Margaret O'Sullivan (O'Sullivan Estate Lawyers)

15:00 – 15:15 Refreshment Break

Sponsored by:



15:15 – 16:15 Estate Administration *(1 hour - Substantive Content)*

Speaker: Mary Alice Thompson (Cunningham Swan Lawyers)

16:15 – 17:15 Concurrent Workshops

1- Common Errors in Will and Trust Drafting *(1 hour - Substantive Content)*

Room: Princess

Speaker: Shelley Waite (McLeod Law LLP)

2- Insolvent Estates *(1 hour - Substantive Content)*

Room: North York

Speaker: Robert Klotz (Klotz Associates)

3- Administering Estates with Unusual Assets *(1 hour - Substantive Content)*

Room: Valleybrook

Speaker: Mary Alice Thompson (Cunningham Swan Lawyers)

17:15 – 18:15 Concurrent Workshops (Repeat)

1- Common Errors in Will and Trust Drafting *(1 hour - Substantive Content)*

Room: Princess

Speaker: Shelley Waite (McLeod Law LLP)

2- Insolvent Estates *(1 hour - Substantive Content)*

Room: North York

Speaker: Robert Klotz (Klotz Associates)

3- Administering Estates with Unusual Assets *(1 hour - Substantive Content)*

Room: Valleybrook

Speaker: Mary Alice Thompson (Cunningham Swan Lawyers)

18:15 Networking and stand-up dinner (in hotel)

THURSDAY, OCTOBER 27

7:30 – 8:30 Breakfast

8:30 – 9:00 Taxation of Trusts *(0.5 hour - Substantive Content)*

Speaker: Paul Gibney (Thorsteinssons LLP)

9:00 – 9:30 Income Attribution Rules with Trusts *(0.5 hour - Substantive Content)*

Speaker: Robert Kepes (Morris Kepes Winters LLP)

9:30 – 10:00 Tax Planning with Trusts *(0.5 hour - Substantive Content)*

Speaker: Paul Gibney (Thorsteinssons LLP)

10:00 – 10:30 Estate Freezes *(0.5 hour - Substantive Content)*

Speaker: Maureen Berry (Goodmans LLP)

10:30 – 10:45 Refreshment Break

10:45 – 11:45 Concurrent Workshops

1- Attribution Rules and Family Trusts *(1 hour - Substantive Content)*

Room: Princess

Speakers: Diane Tsonos (Richter LLP)

Wendy Templeton (Basman Smith LLP)

2- Estate Freezes *(1 hour - Substantive Content)*

Room: North York

Speaker: Maureen Berry (Goodmans LLP)

11:45 – 12:45 Concurrent Workshops (Repeat)

1- Attribution Rules and Family Trusts *(1 hour - Substantive Content)*

Room: Princess

Speakers: Diane Tsonos (Richter LLP)

Wendy Templeton (Basman Smith LLP)

2- Estate Freezes *(1 hour - Substantive Content)*

Room: North York

Speaker: Maureen Berry (Goodmans LLP)

12:45 – 13:30 Lunch

13:30 – 14:00 Taxation on Death *(0.5 hour - Substantive Content)*

Speaker: Diane Tsonos (Richter LLP)

14:00 – 14:30 Estate Administration Taxation *(0.5 hour - Substantive Content)*

Speaker: Rhonda Rudick (Davies Ward Phillips & Vineberg LLP)

14:30 – 15:00 Post-Mortem Holdco Planning (0.5 hour - Substantive Content)

Speaker: Martin Rochweg (Miller Thomson LLP)

15:00 – 15:30 U.S. Estate Tax (0.5 hour - Substantive Content)

Speaker: Britta McKenna (Hodgson Russ LLP)

15:30 – 15:45 Refreshment Break

15:45 – 16:45 Concurrent Workshops

1- Post-Mortem Holdco Planning (1 hour - Substantive Content)

Room: Princess

Speaker: Rhonda Rudick (Davies Ward Phillips & Vineberg LLP)

2- US Estate Tax (1 hour - Substantive Content)

Room: North York

Speakers: Britta McKenna (Hodgson Russ LLP)

Wendy Templeton (Basman Smith LLP)

3- Terminal Return Case Study (1 hour - Substantive Content)

Room: Valleybrook

Speaker: Diane Tsonos (Richter LLP)

16:45 – 17:45 Concurrent Workshops (Repeat)

1- Post-Mortem Holdco Planning (1 hour - Substantive Content)

Room: Princess

Speaker: Rhonda Rudick (Davies Ward Phillips & Vineberg LLP)

2- US Estate Tax (1 hour - Substantive Content)

Room: North York

Speakers: Britta McKenna (Hodgson Russ LLP)

Wendy Templeton (Basman Smith LLP)

3- Terminal Return Case Study (1 hour - Substantive Content)

Room: Valleybrook

Speaker: Diane Tsonos (Richter LLP)

17:45 Banquet with The Honourable Marie Corbett, Q.C. , former justice of the Ontario Superior Court

FRIDAY, OCTOBER 28

7:30 – 8:30 Breakfast

8:30 – 9:30 Estate Planning (1 hour - Substantive Content)

Speakers: Corina Weigl (Faskens LLP)

9:30 – 10:30 Planning with Trusts (1 hour - Substantive Content)

Speaker: Ed Esposto (Blaney McMurtry LLP)

10:30 – 10:45 Refreshment Break

10:45 – 11:45 Concurrent Workshops

1- Probate Fee Planning (1 hour - Substantive Content)

Room: Princess

Speaker: Elizabeth Bozek (Scotia Wealth Management)

2- Best Practices for Estate Planning (1 hour - Substantive Content)

Room: North York

Speakers: Corina Weigl (Faskens LLP)
Ed Esposto (Blaney McMurtry LLP)

3- Drafting the Family Trust (1 hour - Substantive Content)

Room: Valleybrook

Speaker: Bernadette Dietrich (McCarthy Tetrault LLP)

11:45 – 12:45 Concurrent Workshops (Repeat)

1- Probate Fee Planning (1 hour - Substantive Content)

Room: Princess

Speaker: Elizabeth Bozek (Scotia Wealth Management)

2- Best Practices for Estate Planning (1 hour - Substantive Content)

Room: North York

Speakers: Corina Weigl (Faskens LLP)
Ed Esposto (Blaney McMurtry LLP)

3- Drafting the Family Trust (1 hour - Substantive Content)

Room: Valleybrook

Speaker: Bernadette Dietrich (McCarthy Tetrault LLP)

12:45 – 13:30 Lunch

13:30 – 14:30 Family Law Issues (1 hour - Substantive Content)

Speaker: Karon Bales (Bales Beall LLP)

14:30 – 15:30 Incapacity Issues (1 hour – Ethics/Professionalism/Practice Management Content)

Speaker: Nimali Gamage (Goddard Gamage Stephens LLP)

15:30 – 15:45 Refreshment Break

15:45 – 16:45 Concurrent Workshops

1- Trusts for Disabled and Dependent Children (1 hour - Substantive Content)

Room: Princess

Speaker: Paul Taylor (Borden Ladner Gervais LLP)

2- Second Marriage Planning (1 hour - Substantive Content)

Room: North York

Speaker: Jag Gandhi (Wilson Vukelich LLP)

3- Solicitor's Negligence (1 hour - Ethics/Professionalism/Practice Management Content)

Room: Valleybrook

Speakers: David Lobl (Dentons LLP)
Sean Lawler (Shibley Righton LLP)

16:45 – 17:45 Concurrent Workshops (Repeat)

1- Trusts for Disabled and Dependent Children (1 hour - Substantive Content)

Room: Princess

Speaker: Paul Taylor (Borden Ladner Gervais LLP)

- 2- Second Marriage Planning (1 hour - Substantive Content)**
Room: North York
Speaker: Jag Gandhi (Wilson Vukelich LLP)
- 3- Solicitor's Negligence (1 hour - Ethics/Professionalism/Practice Management Content)**
Room: Valleybrook
Speakers: David Lobl (Dentons LLP)
Sean Lawler (Shibley Righton LLP)

17:45 Networking Dinners at Various Local Restaurants

SATURDAY, OCTOBER 29

7:30 – 8:30 Breakfast

Sponsored by:



8:30 – 10:00 Litigation Overview (1.5 hour - Substantive Content)
Speakers: Fiona Hunter (Horne Coupar)
Tanya Butler (Cox & Palmer LLP)
Melanie Yach (Aird & Berlis LLP)

10:00 – 10:15 Refreshment Break

10:15 – 11:15 Concurrent Workshops

- 1- Will Challenges (1 hour - Substantive Content)**
Room: Princess
Speaker: Eric Hoffstein (Minden Gross LLP)
- 2- Dependant Support Claims (1 hour - Substantive Content)**
Room: North York
Speaker: Daniel Dochylo (Borden Ladner Gervais LLP)
- 3- Busting the Trust (1 hour - Substantive Content)**
Room: Valleybrook
Speaker: Kimberly Wallis (Sabey Rule LLP)

11:15 – 12:15 Concurrent Workshops (Repeat)

- 1- Will Challenges (1 hour - Substantive Content)**
Room: Princess
Speaker: Eric Hoffstein (Minden Gross LLP)
- 2- Dependant Support Claims (1 hour - Substantive Content)**
Room: North York
Speaker: Daniel Dochylo (Borden Ladner Gervais LLP)
- 3- Busting the Trust (1 hour - Substantive Content)**
Room: Valleybrook
Speaker: Kimberly Wallis (Sabey Rule LLP)

12:15 – 13:15 Lunch

13:15 – 14:15 Contested Passing of Accounts (1 hour - Substantive Content)
Speaker: Kim Whaley (Whaley Estate Litigation)

14:15 – 14:45 Advocacy (*0.5 hour - Substantive Content*)
Speaker: Clare Burns (WeirFoulds LLP)

14:45 – 15:15 Mediation (*0.5 hour - Substantive Content*)
Speakers: Ian Hull (Hull & Hull LLP)
Suzana Popovic-Montag (Hull & Hull LLP)

15:15 – 15:30 Refreshment Break

Sponsored by:



15:30 – 16:30 Concurrent Workshops

- 1- Construction and Interpretation of Wills** (*1 hour - Substantive Content*)
Room: North York
Speaker: Justin De Vries (De Vries Litigation LLP)
- 2- Passing of Accounts – Case Study** (*1 hour - Substantive Content*)
Room: Valleybrook
Speaker: Andrew Felker (Walker Head Lawyers)
- 3- Quantum Meruit / Unjust Enrichment Claims** (*1 hour - Substantive Content*)
Room: Princess
Speaker: Melanie Yach (Aird & Berlis LLP)

16:30 – 17:30 Concurrent Workshops (Repeat)

- 1- Construction and Interpretation of Wills** (*1 hour - Substantive Content*)
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- 3- Quantum Meruit / Unjust Enrichment Claims** (*1 hour - Substantive Content*)
Room: Princess
Speaker: Melanie Yach (Aird & Berlis LLP)

SUNDAY, OCTOBER 30

8:00 – 9:00 Breakfast

Sponsored by:



9:00 – 9:30 Overview of Quebec Trust and Estate Law (*0.5 hour - Substantive Content*)
Speaker: Marilyn Piccini-Roy (Robinson Sheppard Shapiro LLP)

9:30 – 12:00 Case Studies (*2.5 hours - Substantive Content*)
Speakers: Stanley Rule (Sabey Rule LLP)
Shelley Waite (McLeod Law LLP)
Marilyn Piccini-Roy (Robinson Sheppard Shapiro LLP)

Danielle Joel (Borden Ladner Gervais LLP)
Blair Botsford (Botsford Law)
Tanya Butler (Cox & Palmer)

12:00

Wrap-up

To obtain accreditation information for the entire conference in each Canadian jurisdiction, please visit the [conference webpage](#).