Ontario Bar Association's
INSTITUTE

Trusts and Estates Section

Death and Aging:
Key Strategies and Updates for Planning, Administration and Litigation Counsel

Professionalism Hours: This program contains **1h 0m**
Substantive Hours: This program is eligible for up to **2h 0m**

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Upper Canada.

Date: **Thursday, February 9, 2017** | 1:30 pm – 4:30 pm

Location: **Twenty Toronto Street Conferences and Events**
20 Toronto Street, 2nd Floor, Toronto, ON M5C 2B8

Program Chairs: **Amanda Stacey**, Miller Thomson LLP
Kathryn Balter, Goddard Gamage Stephens LLP

Join us to delve into the nuanced issues encountered by estates and trusts practitioners at any level of practice, whether your practice focuses on planning, administration or litigation. Gather helpful strategies and expert insights from senior practitioners, as well as recent case updates to keep you on top of current developments in the field.

1:30 pm Welcome and Opening Remarks

1:35 pm **What's New in Estates Law?**

Felice Kirsh, Schnurr Kirsh Schnurr Oelbaum Tator LLP
Do not miss this essential update on recent cases and legislative developments over the past year to ensure that you are up to speed on all things estates and trusts.

2:00 pm **Administration of Intestate Estates: Who has an interest and how do you prove it?**

Monique Charlebois, Barrister & Solicitor

- Unexpected spouse(s) - was the deceased really divorced?
- Making sense of section 47 of the *SLRA* and the 'Table of Consanguinity'
- Applying to act as estate trustee, and when the OPGT needs to be involved
- Critical search tips in heirship references

2:25 pm **Networking Break**

2:40 pm **What is the Role of Section 3 Counsel?**

Moderator: Dermot Moore, Office of the Public Guardian and Trustee
Jan Goddard, Goddard Gamage Stephens LLP
Marshall Swadron, Swadron Associates
Ian Wright, Scott Petrie LLP (London)
Acting as section 3 counsel is no easy task. Get the practical insights you need to confidently navigate the practice issues faced by section 3 counsel, including:

- What can (and can't) section 3 counsel do?
- How do you get paid? Retainers, legal aid coverage and other money issues
- What if your client can't give instructions?
- How do you introduce evidence as section 3 counsel?

3:25 pm **Recent Tax Issues Estate Planners Need to Know**

Ed Esposto, Aird & Berlis LLP

- Unraveling the latest tax changes applicable to an estate planning practice
- Recent amendments to the principal residence deduction and its use in trust planning

3:45 pm **Estates Across Cultural Lines: A Multicultural Canadian Perspective**

Rachel Blumenfeld, Miller Thomson LLP
Elizabeth Julien-Wilson, Julien-Wilson Family Law Professional Corporation
Paul Taylor, Borden Ladner Gervais LLP (Ottawa)
Our world is shrinking, and our clients are increasingly coming from diverse communities and cultures. Hear from our seasoned panel as they share their experiences and valuable strategies for successful client relationships and mandates in our wonderfully multi-cultural Canadian landscape.

4:25 pm **Questions and Concluding Remarks**

4:30pm **Program Concludes**