Professionalism and Ethical Issues for Tax Lawyers

Taxation Law

Date: Thursday, December 8, 2016 | 9:00am to 12:15pm
Location: Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd Floor, Toronto

Program Chairs: John Bassindale, Millar Kreklewetz LLP
John Sorensen, Gowling WLG (Canada)

Join your colleagues and earn all of your Professionalism Hours at our popular annual program. Hear about the unique ethical issues faced by tax practitioners, including how to approach issues surrounding tax avoidance and practical tips to avoid insurance claims. Additionally, ensure you have the tools to approach tricky client identification issues when dealing with organizational clients with our hands-on “Know Your Client” session.

Register now to participate in this engaging discussion.

8:30 am Registration and Coffee
9:00 am Welcome and Opening Remarks
9:05 am Ethics and Professional Issues in Tax Planning
   Dr. Colin Campbell, Professor,
   Western University Faculty of Law
   - Constraints on the professional and associated risk
   - Civil penalties
   - Duty and standard of care, including third parties
   - Challenges with factual assumptions
   - Professional standards / regulatory governance

9:45 am Panel Discussion: Ethics and Professional Issues in Tax Planning
   Alan Schwartz, Fasken Martineau DuMoulin LLP
   K.A. Siobhan Monaghan, KPMG Law LLP
   Mitchell Sherman, Goodmans LLP

10:25 am Networking Break
10:35 am Know Your Client: Interactive Role Playing Session
   Lucy Main, Beard Winter LLP
   John Tobin, Torys LLP
   Through role-playing scenarios, you will be presented with various sticky situations in which you must identify your client. This interactive session will help you identify and handle the ethical issues that surround this identification process. You will walk away with best practices for:
   - Identifying who is your client, and who is not
   - Retainer letters
   - Effective disclosures

11:35 am Reducing Your Risk of Negligence Claims
   Ray Leclair, LawPRO
   John Sorensen, Gowling WLG (Canada)
   Christa Akey, Department of Justice
   - Common claims involving tax lawyers
   - Rectification and Rescission practicalities and procedures

12:10 am Q&A and Closing Remarks
12:15 pm Program Concludes

Program Registration is Online www.oba.org/pd
Questions? pd@oba.org