ONTARIO BAR ASSOCIATION
A Branch of the Canadian Bar Association

OBA | Professional Development

Tax Lawyers:
Professional Responsibility and Ethics Series

Live   Webcast

Date: Monday, October 7, 2013 | 9:00 am to 12:30 pm

Location: Twenty Toronto Street Conferences and Events
(OBA Conference Centre)
20 Toronto Street, 2nd Floor, Toronto

Approved For LawPRO Risk Management Credit

CPD

0.5 Substantive Hours
3.0 Professionalism Hours

Program Chair: Aaron Grinhaus, Grinhaus Law Firm

Tax lawyers face unique professional responsibility and ethics issues in their practice as well as the daunting spectre of liability, particularly in a self-assessment tax system. Practitioners at all levels of experience will gain a greater appreciation and understanding of the unique practice issues tax lawyers face in these engaging, moderated discussions with senior and intermediate practitioners.

Register now to participate in these lively discussions. We look forward to seeing you at the program!

8:30 am Registration and Coffee

9:00 am Welcome and Opening Remarks

9:05 am **Tax Planning: When it is Proper and When it is Not?**

- The demarcation of tax avoidance and tax evasion
- Professional issues relating to tax filing positions
- Dealing with risk aggressive clients and their expectations

Alan M. Schwartz, QC, Fasken Martineau DuMoulin LLP

9:50 am **Moderated Panel Discussion on Ethical Dilemmas in Tax Planning**

Identify the practical, ethical and professional issues that arise in tax planning and the differentiation of legitimate advice and improper tax avoidance and criminal tax evasion. Discuss these thorny issues with your colleagues to determine how you would and should handle these sensitive situations. Key discussion topics on ethical and professional duties will include:

- The role of a lawyer as tax advisor
- What is avoidance? What is evasion?
- Aggressive tax planning
- Filing positions
- Reasonable belief versus reasonable chance of success

Brian R. Carr, KPMG Law LLP
Alan M. Schwartz, QC, Fasken Martineau DuMoulin LLP
Jeffrey Trossman, Blake, Cassels & Graydon LLP

10:30 am Networking Break

10:45 am **Who's Your Client? Interactive Role Playing Session**

Through role-playing scenarios, you will be presented with various sticky situations in which you must identify your client. This fun session will help you to be prepared to identify and handle the ethical issues that surround this identification process. Specifically, you will walk away with best practices for:

- Identifying who is your client, and who is not
- Retainer letters
- Effective disclosures

Jim Seckinger, Professor, Notre Dame Law School
John J. Tobin, Torys LLP
Lucinda Main, Heenan Blaikie LLP

12:15 pm Question and Answer Session

12:25 pm Closing Remarks

12:30 pm Program Concludes

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org