



New York State Bar and Ontario Bar Associations

present



Ontario – New York Legal Summit

1 Legal System + 2 Jurisdictions = Infinite Opportunity

March 28, 2012 will be held at the:
Ontario Bar Association, 20 Toronto Street, 2nd Floor
Toronto, Canada

March 29, 2012 will be held at the:
Adam's Mark Hotel, 120 Church Street
Buffalo, New York



ONTARIO
BAR ASSOCIATION
A Branch of the
Canadian Bar Association

L'ASSOCIATION DU
BARREAU DE L'ONTARIO
Une division de l'Association
du Barreau canadien



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Connors & Vilardo, LLP, Buffalo

Paul R. Sweeny
President
Ontario Bar Association
Evans Sweeny Bordin LLP, Hamilton

Participating Bar Associations:



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March 28/29, 2012 Program

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March 28/29, 2012 Program

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Toronto

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INTRODUCTION

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Buffalo, New York

President, Ontario Bar Association

Paul R. Sweeny

President, Ontario Bar Association
Evans Sweeny Bordin LLP, Hamilton

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SCHEDULE OF EVENTS

Wednesday, March 28 — Toronto, Ontario

8:30–9:00 a.m. **Registration**
Coffee and Refreshments

Wednesday Program Tracks

9:10–10:30 a.m. **Track One – Corporate Program 1**

**Cross-Border Issues for Canadian/
U.S. Broker-Dealers and Advisers**

Co-Moderators

Rebecca Cowdery

Borden Ladner Gervais
Toronto

Andrew J. Shipe

Arnold & Porter
Washington

Panelists

Sandra Blake

Ontario Securities Commission
Ontario

Ian Russell

Investment Industry Association of
Canada, Ontario

**Regulators and Trade Association
Executives**

Track Two – Litigation/Arbitration Program 2

**Cross-Border Class Actions:
From the CBA and ABA Judicial
Protocols to Legislative
Amendments and Other Issues**

Moderator

Sylvie Rodrigue

Norton Rose OR LLP
Toronto

Panelists

Hon. Warren K. Winkler

Chief Justice of Ontario

Kirk Baert

Koskie Minsky LLP
Toronto

Steve J. Tenai

Norton Rose OR LLP
Toronto

Irwin Warren

Weil Gotshal & Manges LLP
New York City

Track Three – General Program 3

**Marketing in Cyberspace: Legal
Protection in an Age of Social
Media**

Co-Moderators

Terrence McAlliser

Ohlandt Greeley Ruggiero & Perle
Stamford, CT

Brian Wynn

Gardiner Roberts
Toronto

Panelists

Sarah Robertson

Dorsey & Whitney
New York and Toronto

10:30–10:45 a.m. **Coffee Break and Refreshments** — Sponsored by Watson, Farley and Williams

10:45–12:05 p.m. **Program 4**

**Distressed Mergers and
Acquisitions, and Financial
Restructurings**

Co-Moderators

Chris Besant

Baker & McKenzie
Toronto

Garry Graber

Hodgson Russ LLP
New York

Panelists

Carmen Lonstein

Baker & McKenzie
New York/Chicago

Gregory Prince

PricewaterhouseCoopers LLP
Toronto

Patrick Shea

Gowlings LLP
Toronto

Mohsin Meghji

Capital Partners
New York

Program 5

**Litigation in the Context of
Corporate Takeovers**

Co-Moderators

Ronald Podolny

McCarthy Tétrault LLP
Toronto

Katherine Rhodes

Milbank, Tweed, Hadley & McCloy
LLP, New York City

Panelists

Professor Jeffrey Gordon

Columbia Law School
New York City

Ian Michael

McCarthy Tétrault LLP
Toronto

William Savitt

Wachtell, Lipton, Rosen & Katz
New York City

Alan J. Stone

Milbank, Tweed, Hadley & McCloy
LLP, New York City

Ed Waitzer

Stikeman Elliott LLP
Toronto

Program 6

**Both Sides Now – An In-depth
Examination of Selected Topics
in Canada and US Immigration**

Co-Moderators

Claire Razzolini

Gibney, Anthony & Flaherty LLP
New York City

Bill MacGregor

Gowling, Lafleur & Henderson LLP
Waterloo Region

Panelists

Eileen Martin

Hodgson Russ LLP
Buffalo

Jonathan Leebosh

Egan LLP
Vancouver

SCHEDULE OF EVENTS

12:05– 1:35 p.m. **Lunch** – Ontario Bar Association

1:35–2:55 p.m. **Program 7**
Doing Private Equity Deals in 2012 – Identifying and Resolving Top Legal Issues
Co-Moderators
Bruce Chapple
McMillan LLP
Toronto
John Koepfel
Nixon Peabody LLP
Buffalo
Panelists
Craig Korte
Lazard Middle Market
Chicago
Anthony Sigel
Kilmer Capital Partners Limited
Toronto

Program 8
Customs Stations on the Life Sciences Information Highway: Trans-Border Privacy and Data Protection
Co-Moderators
Kenneth N. Rashbaum
Rashbaum Associates, LLC
New York City
Jennifer D. Suess
Johnson & Johnson Inc.
Toronto
Panelists
Dara Lambie
Blake, Cassels & Graydon LLP
Toronto
Thomas H. McDonough
Teva USA
Dera Nevin
McCarthy Tetrault, Toronto
Dr. Khaled El Emam
Privacy Analytics, Ottawa
Esther Widowski
Widowski Law Group, LLP
New York

Program 9
Cross-Border Estate Planning for U.S. and Canadian Persons
Co-Moderators
Lori Duffy
WeirFoulds LLP
Toronto
Kevin K. Gluc
Hodgson Russ LLP
Buffalo
Panelists
Gwen Benjamin
Wilson, Vukelich LLP
Markham, Ontario
Glenn Fox
Alston & Bird LLP
New York City

2:55–3:15 p.m. **Coffee Break and Refreshments**

3:15–5:00 p.m. **Plenary Session – “Professionalism and Access to Justice”**

The Plenary Session will be a presentation on issues affecting access to justice.

Presenters:

Honourable Warren K. Winkler, Chief Justice of Ontario

Honorable Jonathan Lippman, Chief Judge of the State of New York

Laurie Pawlitzka, Treasurer of the Law Society of Upper Canada

5:00–7:00 p.m. **Cocktail Reception at the Ontario Bar Association**

7:15 p.m. **Bus Transfer to the Adam’s Mark, Buffalo for Day 2**
If there is sufficient need, a bus transfer will be available.

Please Note: A Passport, Nexus or enhanced driver’s license is required to cross the border.



Law Society of Upper Canada CPD Information:
4.75 Substantive Hours
1.75 Professionalism Hours
6.5 New Member Hours

This program has been accredited by the Law Society for 1.75 Professionalism Hours
This program has been accredited by the Law Society for 6.5 New Member CPD Hours

This program is pending approval for New York MCLE credit

SCHEDULE OF EVENTS

Thursday, March 29 — Buffalo, New York

8:30–9:00 a.m. **Registration**
Coffee and Refreshments

Thursday Program Tracks

9:10–10:30 a.m. **Track One – Corporate Program 10**

Issues in Cross-Border Financing Transactions

Co-Moderators

Deborah Doxey

Phillips Lytle LLP
Buffalo

Lisa Mantello

Goodmans LLP
Toronto

Panelists

David Nadler

Goodmans LLP
Toronto

Le Nguyen

Fraser Milner Casgrain LLP
Toronto

Victoria Saxon

Hodgson Russ LLP
Buffalo

Alexandra E.J. Townson

Phillips Lytle LLP
Buffalo

Track Two – Litigation/Arbitration Program 11

Hidden Differences Affecting Mediation and Arbitration of Cross-Border Commercial Disputes

Co-Moderators

Harold A. Kurland

Ward Greenberg Heller & Reidy LLP
Rochester

Barry Leon

Perley-Robertson, Hill & McDougall LLP
Ottawa

Panelists

Krista Gottlieb

Mattar, D’Agostino & Gottlieb, LLP
Buffalo

Steven P. Younger

Patterson, Belknap, Web & Tyler, LLP
New York City

David McCutcheon

Fraser Milner Casgrain LLP
Toronto

Track Three – General Program 12

Primer on Critical Employment Law Issues on Both Sides of the Border: What Every Employer (and their Counsel) Need to Know

Co-Moderators

Erin Kuzz

Sherrard Kuzz, LLP
Toronto

Ginger D. Schroder

Schroder Joseph & Associates, LLP
Buffalo

Panelists

Louis DiLorenzo

Bond Schoeneck and King, PLLC
New York City

Anne-Marie T. Naccarato

Cassels, Brock & Blackwell, LLP
Toronto

10:30–10:45 a.m. **Coffee Break and Refreshments**

10:45–12:05 p.m. **Program 13**

Making a Run for the Border: Alternative Strategies to Getting Your Goods or Services to Market

Co-Moderators

David W. Oppenheim

Kaufmann Gildin Robbins & Oppenheim LLP
New York City

Panelists

Andre R. Jaglom

Tannenbaum Helpern Syracuse & Hirschtritt LLP
New York City

Colleen Spring Zimmerman

Fogler & Rubinoff LLP
Toronto

Larry Weinberg

Cassels, Brock & Blackwell LLP
Toronto

Program 14

Unique Cross-Border Issues for Health & Consumer Products

Co-Moderators

Bethany Hills

Hodgson Russ LLP
Albany

Emily Larose

Cassels, Brock & Blackwell LLP
Toronto

Panelists

Michael Maxwell

Hodgson Russ LLP
Buffalo

Glenn Zakib

Cassels, Brock & Blackwell LLP
Toronto

Program 15

Issues in Cross-Border Support Cases – Jurisdiction, Entitlement and Quantum

Co-Moderators

Nancy J. Iadaluca

Family Law P.C.
Toronto

Barbara Piazza

Rosenthal, Siegel & Muenkel, LLP
Buffalo

Panelists

Hon. John Aman

Child Support Magistrate
Erie County

Jacqueline I. Meyer

Hodgson Russ LLP
New York City

Sharon Shore

Epstein Cole, LLP
Toronto

12:05–1:35 p.m. **Lunch** – Adam’s Mark Hotel, Buffalo

SCHEDULE OF EVENTS

1:35–2:55 p.m.

Program 16

Cross-Border Tax Issues

Co-Moderators

Pietra Lettieri

Harris Beach PLLC

Buffalo

Timothy Wach

Gowling Lafleur Henderson LLP

Toronto

Panelists

Anthony P. Marshall

Harris Beach PLLC

Buffalo

Randy Schwartz

Baker & McKenzie LLP

Toronto

Brian D. Segal

Baker & McKenzie LLP

Toronto

Jim Wilson

Gowling Lafleur Henderson LLP

Toronto

Program 17

Conflicts of Law in Motor Vehicle Accidents and Protecting Trade Secrets in Cross Border Discovery

Co-Moderators

Heather Devine

Gowling, Lafleur & Henderson LLP

Toronto

Lucille A. Fontana

Clark, Gagliardi & Miller, P.C.

White Plains, NY

Panelists

Hon. Thomas M. VanStrydonck

New York State Supreme Court

Rochester

Thomas Bender

Bender & Bender, Buffalo

Harold W. D. Cares

Miller Thomson LLP, Toronto

Nigel Gilby

Lerners LLP, London, Ontario

Anthony Piazza

Hiscock & Barclay LLP, Rochester

Alan Winchester

Harris Beach PLLC, New York City

Program 18

Charities Law the Tricky Legal Environment of Crossing Borders

Co-Moderators

Terrance S. Carter

Carter's

Toronto

Thomas E. Schofield

Magavern Magavern Grimm LLP

Buffalo

Panelists

Frederick G. Attea

Phillips Lytle, LLP

Buffalo

Elena Hoffstein

Fasken Martineau Dumoulin LLP

Toronto

2:55–3:15 p.m.

Coffee Break and Refreshments

3:15–5:00 p.m.

Plenary Session – “The Border — The Opportunity — and You”

A discussion about how you and your firm can take advantage of cross-border legal opportunities.

Moderator: **Andrew D. Otis**, Curtis, Mallet-Prevost, Colt & Mosle LLP

Presenters:

Marta Moszczenska, Consul General of Canada

Christopher J. Cummings, Paul, Weiss, Rifkind, Wharton & Garrison LLP, Toronto

James P. Duffy, III, Manhasset

Jon-David Giacomelli, Cambridge LLP, Burlington

Lauren D. Rachlin, Hodgson Russ LLP, Buffalo

W. Brian Rose, Stikeman Elliott LLP, Toronto

5:00–5:15 p.m.

Concluding remarks



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This program is pending approval for New York MCLE credit

PROGRAM DETAILS

Registration Fees: **\$250** One Day Attendance
\$400 Attendance for both days

Hotel Accommodations:

If you are in need of hotel accommodations in either location, a room block has been reserved for our participants.

In Toronto:

Le Meridien King Edward

\$169.00 single or double occupancy plus applicable taxes

To make a reservation at this hotel, please call 1-800-325-3535 and state you are with the New York State Bar Association room block. Make your reservations by February 24 to obtain the rate on our room block.

Or go to <http://www.starwoodmeeting.com/StarGroupsWeb/res?id=1201312165&key=3CA63>

In Buffalo:

Adam's Mark Hotel

\$92.00 single, double triple or quadruple occupancy plus applicable taxes

To make a reservation at this hotel, please call 1-716-845-5100 and state you are with the NYSBA OBA Legal Summit room block. Make your reservations by March 5 to obtain the rate on our room block.

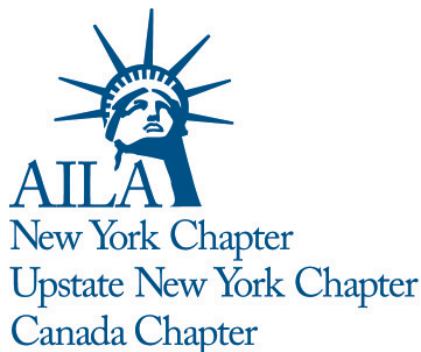
If you have questions or need assistance, please contact Tiffany Bardwell at tbardwell@nysba.org.

We anticipate a very heavy demand for this historic program. Early registration is suggested.

To register for this highly acclaimed program, go to www.nysba.org/OBANYLegalSummit

PARTICIPATING ORGANIZATIONS

The New York State Bar Association and the Ontario Bar Association thank the Law Society of Upper Canada for its participation and support.



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