

Assessments of Accounts: Understanding the Process & Procedure

Civil Litigation



In-Person



Webcast

Date: Tuesday, June 6, 2017 | 9:00 am to 11:30 am
Location: Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd Floor, Toronto
Program Chair: Sahar Cadili, Lawrence, Lawrence, Stevenson LLP



This program is eligible for up to 2.5 Substantive Hours

Every lawyer is bound to have their account assessed at some point in their career. The assessment process can be daunting, frustrating and time consuming. Join us to hear from a stellar faculty on solicitor-client assessments about:

- The importance of retainer agreements and what terms they should contain
- The client's right to assess
- What constitutes special circumstances under the *Solicitors Act*
- The right of third parties to assess
- What happens at an assessment hearing and how to defend your account
- Costs on assessments

Register now for this highly practical and informative program.

8:30 am Registration and Coffee

9:00 am Welcome and Opening Remarks

9:05 am **The Client's Right to Assess**

Mark Orkin, Q.C.

- Jurisdiction of the court
- Limitation period issues
- "Special circumstances" under the *Solicitors Act*

9:30 am **Retainer Agreements**

Ed Upenieks, Lawrence, Lawrence, Stevenson LLP

- The importance of retainer agreements
- What terms should be in a retainer agreement
- Contingency fee agreements
- Charging premiums
- Right of third parties to assess

9:55 am **The Assessment Process**

Lucy Bender, Regional Hearings Officer

- What happens at the preliminary appointment
- What happens at the Assessment Hearing
- Factors to consider in determining fee

10:25 am **Networking Break**

10:40 am **Treatment of Disbursements, Costs and Statistics**

Charlotte Chiba, Assessment Officer, Toronto

- How are disbursements assessed
- Costs on an assessment
- Statistics from the assessment office
- Mediation through the assessment office
- Recent developments

11:05 am **Assessments in Family Law Context**

Steven Benmor, Benmor Family Law Group

- Special considerations in family law
- Fee arrangements in family law matters
- Retainer agreements in family law matters

11:25 am **Questions and Answers**

11:30 am **Program Concludes**

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org