

Professionalism and Ethical Issues for Tax Lawyers

Taxation Law

Date: Monday, December 10, 2018 | 9:00am – 12:30pm

Location: Twenty Toronto Street Conferences and Events
20 Toronto Street, 2nd Floor, Toronto

Program Chairs: **Jeremie Beitel**, TaxChambers LLP
John Grant, Miller Thomson LLP



In-Person



Webcast



This program contains 0.5 Equality, Diversity and Inclusion Hours

This program contains 3 Professionalism Hours

The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario

Join your colleagues and earn all of your Professionalism Hours at this popular annual program, including 30 minutes of credit for the new Equality, Diversity and Inclusion requirement. Keep up to date by hearing about changes to the *Rules of Professional Conduct* that could impact you and gain insights into the latest case law developments on important ethical issues. Learn how to build and sustain inclusive work environments, one relationship at a time. Finally, get tips on dealing with tax planning errors in light of the recent jurisprudence narrowing the availability of rectification and rescission. Register now to participate in this engaging discussion.

9:00am Welcome and Opening Remarks

9:05 am **Changes to the Rules of Professional Conduct**

Lorraine Edinboro, Department of Justice

Robert Kepes, Morris Kepes Winter LLP

What are some of the recent changes to the *Rules of Professional Conduct* that impact your practice? Discussion topics will include a practical review of the application of the rules to common practice issues.

10:00 am **Professionalism Case Law Update**

Brandon Siegal, Siegal Tax Law Professional Corporation

Hear the latest case law and analysis on professionalism-related topics facing you. The presentation will include discussion of common interest privilege after the Federal Court of Appeals decision in *IGillis Inc. v. MNR*.

10:55 am Networking Break

11:10 am **Diversity in Tax**

Alexandra Brown, Blake, Cassels & Graydon LLP

Learn how to build and sustain inclusive work environments, one relationship at a time. The presentation will discuss the importance of an inclusive work environment to your organization, how to define roles and potential barriers to effective policies.

11:45 am **Rectification and Rescission: Fixing Mistakes after Fairmont**

Alan Schwartz Q.C., Fasken Martineau DuMoulin LLP

The recent decisions in *Canada Life Insurance Company of Canada v. AGC* and *Fairmont Hotels Inc. v. AGC* have significantly reduced the availability of rectification and rescission as solutions to tax planning errors. Counsel, as professional advisors, must be attuned to the liability concerns. Learn the impact of these decisions on your practice.

12:20 pm Questions and Concluding Remarks

12:30 pm Program Concludes

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org

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