

Professionalism and Ethical Issues for Tax Lawyers

Tax Law Section



Webcast

Date: December 16, 2021 | 9:00am – 12:00pm

Location: Zoom webinar only

Agenda: 9:00am Program Begins
12:00pm Program Ends



This program contains:
2 hr 0m of Professionalism Content
1h 0m of EDI Professionalism Content

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

Join us for this popular annual program targeted specifically at tax practitioners to get helpful insights and advice on the critical ethical and professionalism issues you face.

Hear best practices for delegating and supervising others, as well as managing clients who insist on risky tax planning. Our expert faculty will also share valuable perspectives on equity and diversity in the tax law area.

Program Chairs: **Selena Ing**, EY Law LLP
Jesse Waslowski, Aird & Berlis LLP

9:00 am	Welcome and Opening Remarks
9:05 am	Effective Delegation and Supervision Techniques Andrew Bernstein , Torys LLP Juda Strawczynski , LawPro <ul style="list-style-type: none"> • Best practices and tips for the delegator and delegate • Signs of effective vs. poor delegation • Avoiding liability and meeting your professionalism obligations when delegating and supervising
10:05 am	How to Manage Clients Insisting on Proceeding with GAAR-able or Other Risky Tax Planning Molly Luu , Miller Thomson LLP <ul style="list-style-type: none"> • Best practices for managing clients in these tricky circumstances • How to protect yourself
10:40am	Questions
10:45 am	Break

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org

- 10:55 am **Key Advice to Remember when Working with Indigenous Clients**
Kimberly Thomas, Affiliated Independent Counsel, Aird & Berlis LLP
Gather valuable insights on how you can better serve Indigenous clients in your tax law practice.
- 11:15 am **EDI Considerations in Tax Treaty Negotiations**
Stephanie Smith, Senior Director, Tax Treaties, Finance Canada
- Women negotiators negotiating with countries where it is unusual for women to be negotiators.
 - Cultural and linguistic elements of communication
 - EDI impacts and considerations for Canadians
 - Ensuring sustainability by making deals that are good for both sides
- 11:35am **Gender and Taxation: How Tax Expenditures Disproportionately Impact Women**
Professor Claire Young, Peter A. Allard School of Law, University of British Columbia
Hear from Professor Young as she explains how women are disadvantaged by various tax expenditures and what changes could be made.
- 11:55 am Questions and Closing Remarks
- 12:00pm Program Concludes

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