ONTARIO BAR ASSOCIATION
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OBA | Professional Development

Your First Estate Administration

Trusts and Estates Law / Young Lawyers Division

Webcast

Date:	Wednesday, June 16, 2021 | 9:00 am to 12:00 pm
Location:	Webinar
Agenda:	9:00 am Webinar Commences 12:00 pm Webinar Concludes

Professionalism Hours: This program contains a total of 1 hour
Substantive Hours: This program contains 1 hour and 45 minutes
The OBA has been approved as an Accredited Provider of Professionalism Content by The Law Society of Ontario.

The administration of an estate requires proper knowledge of various areas of law. View this program to obtain the key information and understanding you need from areas such as family law, real estate, and components of tax law, such as estate administration tax and income tax. Learn the practical tools to take you successfully through an estate administration, on topics such as: information gathering, applications for a Certificate of Appointment of Estate Trustee, family law issues relating to an estate administration, estate assets, debts, and administering and closing an estate. Whether you are a solicitor who will be assisting clients with applications for a Certificate of Appointment of Estate Trustee or the administration of estates, or an experienced practitioner wishing to brush up on these matters, this program is essential!

Program Chairs:
Emily Hubling, Fasken Martineau DuMoulin LLP
Zara Wong, Casey & Moss LLP

9:00 am Welcome and Opening Remarks

9:05 am **Initial Client Meetings**
Kellie Seaman, Senior Claims Counsel, Lawyers' Professional Indemnity Company (LawPro)
- Preparing for the meeting
- Who is the client?
- Confirming the scope of the retainer
- Dealing with multiple estate trustees
- Key documents – wills, deeds, and financial statements

9:35 am **Is Probate Required?**
Matthias Duensing, Duensing Law
Andrea Tratnik, Beard Winter LLP
- The Certificate of Appointment of Estate Trustee
- Considerations for intestacies
- Dealing with estates with multiple wills
- Assets that do not need to be probated
- Deferring payment of the estate administration tax
- Key legislative developments re: small estates

10:05 am Health Break

10:25 am **Family Law Issues**
Holly V.A. Cunliffe, Aird & Berlis LLP
Deepa Tailor, Tailor Law Professional Corporation
- Equalization of Net Family Property on the death of a spouse
- Rights to the matrimonial home
- Spousal/Child support obligations and support for other dependents
- What happens to a will's validity when a testator re-marries?

10:55 am **Estate Assets, Debts, and Expenses**
Cassandra Ball, Eisen Law
Michael Rosen, Borden Ladner Gervais LLP
- Procedures for dealing with real property
- Dealing with bank accounts, shares and investments
- Digital assets
- Advertising for creditors
- Secured and unsecured debts
- Estate Trustee Compensation

11:25 am **Closing the Administration of the Estate**
Raquel Kaplan Goldberg, Kronis, Rotsztain, Margles, Cappel LLP
Meghan O'Neil, Mills & Mills LLP
- When is an interim distribution appropriate?
- Who needs to approve estate accounting?
- Format of informal/formal accounting
- Releases from beneficiaries
- Terminal Tax Return and Clearance Certificate

12:00 pm Program Concludes