

Professionalism and Ethical Issues for Tax Lawyers

Tax Law Section



In person



Webcast

Date: December 8th 2022 | 9:00am – 12:00pm

Location: Hybrid Zoom and in person

Agenda:

8:30 am	In-Person Registration
9:00 am	Program Begins
12:00 pm	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. This year, get an in-depth look at the new rules on notifiable and reportable transactions and the professional obligations and ethical issues that arise in the management of these transactions. Our stellar faculty will also address EDI issues related to tax law and provide strategies on how to address them to build a more inclusive profession for tax lawyers and clients.

Program Chairs: **Shama Rafiq**, Rafiq Law
Bhuvana Rai, Mors & Tribute P. C.

9:00 am Welcome and Opening Remarks

NOTIFIABLE AND REPORTABLE TRANSACTIONS

9:05 am Insights and Obligations under Rule 237.4 of the CRA

H. Michael Dolson, Felesky Flynn LLP
Joan Jung, Minden Gross LLP

- New rules under s.237.4 of the *Income Tax Act*
- Target transactions: what to look out for?
- Your obligations as tax lawyers under the new rule

10:00 am Professionalism and Ethical Obligations: Managing Tricky Transactions and interactions

Juda Strawczynski, LawPRO
Mark Tonkovich, Blake, Cassels & Graydon LLP

- Solicitor-client privilege concerns
- Liability and other LawPRO considerations

10:40 am Questions

10:45 am Break

EDI AND TAX LAW

10:55 am EDI and in In-House Tax Roles
Roxanne Wong, RBC

11:25 pm Reducing Risk Using Cultural Competency
Juda Strawczynski, LawPRO

- Connection between cultural competency and claims
- Using EDI to mitigate risk

11:55 am Questions and Concluding Remarks

12:00pm Program Concludes

Member	Student	Non-Member
\$228*	\$89*	\$335*

*Plus applicable taxes

PROGRAM REGISTRATION IS ONLINE www.oba.org/pd

Questions? pd@oba.org