

## 11th Annual Professionalism Issues for Business Lawyers

**Date:** Tuesday, December 5, 2023 | 9:00 am to 12:30 pm

**Location:** Webinar

**Program Chairs:** **Margaret Robbins**, Lenczner Slaght  
**Susan Kushneryk**, Kushneryk Morgan LLP



Webcast



**Professionalism Hours:** This program contains **2h 30m**  
**1h 0m of Equality, and Inclusion Professionalism Content**

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

What are the most pressing professionalism issues facing business lawyers today? Join your colleagues as our expert panelists delve into emerging trends, key cases and developments on important ethical and practice management issues, and the resulting impacts for your practice. Bring yourself up to speed on key ethical issues, and gain all of your professionalism hours for the year at this popular annual program, specifically suited to your role as a business lawyer.

9:00 am Welcome and Opening Remarks from the Program Chairs

9:05 am **AI and the Business Lawyer**

This panel will examine the potential professionalism pitfalls that must be considered when a company or a firm adopts AI technology, including confidentiality concerns, and also the opportunity AI presents to help lawyers meet their obligations to provide efficient and convenient legal services. Specifically, we will consider lawyers' obligations to adopt new technology and adapt their practices.

**David Mousavi**, NRT Technology Corp.

**Edona Vila**, Borden Ladner Gervais LLP

9:45 am **Modern Contract Formation and the Risks of Casual Communications**

Modern technology, including emails, text messages and the rise of Zoom meetings, has created a culture of casual correspondence between clients as well as lawyers. As a result, there has been an increasing number of cases where the Court has considered casual contract formation including by emoji and email without form signed contracts. Considering effective communication in both direct negotiations and when advising clients, this panel will consider the impact of casual discussions including potential unfairness posed by casual communications and the risk that terms are not properly understood and accepted when they are not formalized.

**Brendan Morrison**, Lenczner Slaght

**Ryan Morris**, Blake, Cassels & Graydon LLP

10:25 am Break

10:40 am **Advising Clients on Achieving ESG Goals**

This panel will provide an update on the latest developments in respect of ESG requirements and thoughts about how to advise our clients, not just on meeting various reporting requirements, but also on achieving ESG goals in their companies. While there has been a lot of focus on the Environmental and Governance elements of ESG, there is increasing attention being paid to the Social element, and specifically companies' efforts to meet EDI goals. In considering the latest developments in ESG requirements, this panel will focus on the significant developments with respect to EDI goals in particular.

**Sandeep Joshi**, Kushneryk Morgan LLP

**Anton Tabuns**, BMO Financial Group

11:25 am **Achieving EDI – how do you measure success**

This panel will consider the metrics used to identify risk areas, set goals for initiatives, assign accountability, and measure the impact or success of EDI initiatives that have been implemented.

**Charlene Theodore**, McCarthy Tétrault LLP

11:55 am **Client ID and Verification Rules coming into effect on Jan. 1, 2024**

Ensure you are up-to-date on the changes and make sure that you and your practice are ready to meet the updated professional obligations.

**Ray Leclair**, LawPRO

12:20 pm Questions and Closing Remarks

12:30 pm Program Concludes

**PROGRAM REGISTRATION IS ONLINE** [www.oba.org/pd](http://www.oba.org/pd)

**Questions?** [pd@oba.org](mailto:pd@oba.org)