

Your First Estate Administration

Trusts and Estates Law / Young Lawyers Division



Date:Thursday, September 14, 2023 | 9:00 am to 1:00 pm

Location:OBA Conference Centre, 20 Toronto St.



Agenda:

8:30 am Registration  
9:00 am Program Begins  
1:00 pm Program Concludes

Professionalism Hours:

This program contains a total of 0 h 45 min of Professionalism Hours

Substantive Hours:

This program contains 3 h 15 m of Substantive Hours

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

From the initial client meeting to the closing of the administration, don’t miss the opportunity to hear practical and valuable insights on the important steps, procedures, and considerations to complete an estate administration successfully.

Whether you are new to estates law or an experienced practitioner looking to expand your practice, this program is a can’t-miss opportunity to add to your legal toolkit.

Program Chairs:

Rebecca Suggitt, Casey & Moss LLP  
Zara Wong, Casey & Moss LLP

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|----------|---|----------|---|
| 9:00 am  | Welcome and Opening Remarks   | 11:05 am | Health Break  |
| 9:05 am  | <div>Legislative Overview<br/>Praniet Chopra, Donovan Kochman LLP<ul style="list-style-type: none"><li>Relevant legislation that governs estates administration</li><li>Estates Manual: what is it and how is it helpful</li></ul></div>  | 11:20 am | <div>Family Law Considerations<br/>Kristine J. Anderson, Fern Law LLP<br/>Kiran Arora, Arora Lunau LLP<ul style="list-style-type: none"><li>Equalization of Net Family Property on the death of a spouse</li><li>Rights to the matrimonial home</li><li>Support obligations for children, spouses, and other dependents</li></ul></div>   |
| 9:35 am  | <div>Initial Client Meetings<br/>Shruthi Raman, Synergys Law<br/>Michelle Wen Xiao Kang, Yang Wang Law Professional Corporation (Toronto)<ul style="list-style-type: none"><li>Preparing for the meeting</li><li>Who is the client?</li><li>Confirming the scope of the retainer</li><li>Dealing with multiple estate trustees</li><li>Limitation periods</li><li>Key documents – wills, deeds, and financial statements</li></ul></div>  | 11:50 am | <div>Estate Assets, Debts, and Expenses<br/>Michelle Choi, Walker Head Lawyers (Pickering)<br/>Cassandra Martino, Friedman Estate Litigation (Barrie)<ul style="list-style-type: none"><li>Procedures for dealing with real property</li><li>Dealing with bank accounts, shares, and investments</li><li>Digital assets</li><li>Advertising for creditors</li><li>Secured and unsecured debts</li><li>Estate Trustee Compensation</li></ul></div>   |
| 10:05 am | <div>Probate Applications: Preparation<br/>Garrett Horrocks, Mills &amp; Mills LLP<br/>Diana Tebby, Mann Lawyers (Ottawa)<ul style="list-style-type: none"><li>Is probate required?<ul style="list-style-type: none"><li>Assets that do not need to be probated</li></ul></li><li>Nuts and Bolts of a Probate Application<ul style="list-style-type: none"><li>New forms</li><li>Considerations for intestacies</li><li>Dealing with estates with multiple wills</li><li>Dealing with dispensing with a bond</li></ul></li><li>Deferring payment of the estate administration tax</li></ul></div> | 12:20 pm | <div>Closing the Administration of the Estate<br/>Cecile Ko Brock, McCarthy Tétrault LLP<br/>Ryan MacNeil, Cunningham Swan Little &amp; Bonham LLP (Kingston)<ul style="list-style-type: none"><li>When is an interim distribution appropriate?</li><li>Who needs to approve estate accounting?</li><li>Format of informal/formal accounting</li><li>Releases from beneficiaries</li><li>Terminal Tax Return and Clearance Certificate</li><li>Common “post-closing” issues and how to prevent them</li></ul></div> |
| 10:40 am | <div>Filing Your Probate Application: Getting it Approved<br/>Erin Rankin Nash, Ferguson Patterson Professional Corporation (London)<ul style="list-style-type: none"><li>Common roadblocks and how to overcome them</li><li>The Certificate of Appointment of Estate Trustee</li><li>How to deal with rejected applications</li></ul></div>  | 12:55 pm | Questions & Answers   |
|          |   | 1:00 pm  | Program Concludes   |

|           | CBA Member | CBA Student Member | Non-Member |
|-----------|------------|--------------------|------------|
| Webcast   | \$176*     | \$91*              | \$285*     |
| In person | \$176*     | \$91*              | \$285*     |