

## Your First Estate Litigation File

Trusts and Estates Law and Young Lawyers Division



In person



Online

**Date:** Tuesday, May 13, 2025 | 9:00 am to 12:00 pm

**Location:** OBA Conference Centre  
20 Toronto Street, 2nd Floor, Toronto

**Program Chairs:** **Rebecca Kennedy**, Adair Goldblatt Bieber LLP  
**Ashley Seely**, Arkin Furrow Estate Law LLP  
**Angela Ogang**, AngeLAW



**Substantive Hours:** This program contains up to **2h 30m**.  
**Professionalism Hours:** This program contains up to **0h 30m**.  
*The OBA has been approved as an Accredited Provider of Professionalism Content by the Law Society of Ontario*

Get up to speed on the fundamentals of estate litigation and gather helpful strategies to enhance your practice. Hear about the common claims in estate litigation, applications for directions, and passing of accounts. Learn how to manage challenges to wills, respond to claims by spouses and dependents, and navigate guardianship applications.

Leave this program equipped with key insights to help you handle your next estate litigation file with confidence. Register now to secure your spot!

8:30 am	Registration and Coffee		
9:00 am	Welcome and Opening Remarks		<ul style="list-style-type: none"><li>Common Law rights, equitable claims and remedies</li></ul>
9:05 am	<b>Common Will Challenges</b> <b>Jessica Karjanmaa, Tupman &amp; Bloom LLP</b> <ul style="list-style-type: none"><li>Due execution: key requirements</li><li>Common grounds for challenging a will – undue influence, capacity issues, and more</li><li>Who can make claims against an estate?</li></ul>	10:35 am	Networking Break
		10:50 am	<b>Passing of Accounts</b> <b>Matthew Rendely, Loopstra Nixon LLP</b> <ul style="list-style-type: none"><li>Unraveling presumptions of resulting trust and advancement</li><li>Formal vs informal</li><li>Who can compel a passing of accounts?</li><li>Who must account?</li></ul>
9:35 am	<b>Applications for Directions</b> <b>Tanisha Tulloch, Torkin Manes LLP</b> <ul style="list-style-type: none"><li>Key differences: Application vs Action</li><li>What orders are typically sought?</li><li>How can they assist?</li><li>Effectively using scheduling appointments</li><li>Understanding settlement documents, orders and releases</li></ul>	11:20 am	<b>Navigating Guardianship Applications</b> <b>Jacob Kaufman, Donovan Kochman LLP</b> <ul style="list-style-type: none"><li>Essential Application requirements</li><li>Requesting and contesting capacity assessments</li><li>What is the role of Section 3 counsel?</li><li>Clarifying a guardian’s obligations under the <i>Substitute Decisions Act</i></li><li>Considerations for clients with special circumstances</li><li>Cultural competency</li></ul>
10:05 am	<b>Making Sense of Claims by Spouses and Dependants</b> <b>Sydney Osmar, Hull &amp; Hull LLP</b> <ul style="list-style-type: none"><li>Dependants’ support claims under the <i>Succession Law Reform Act</i></li><li>Elections under the <i>Family Law Act</i></li></ul>	11:50 am	Q&A and Concluding Remarks
		12:00 pm	Program Concludes (Networking Lunch to follow)