

# Practice Gems: Administration of Estates 2023



CO-CHAIRS: **Pamela Liang, TEP, *Wilson Vukelich LLP***

**Susannah Roth, TEP, Barrister and Solicitor**

**September 26, 2023**

**1:00 p.m. to 4:00 p.m.**

**Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism <sup>P</sup>**

**Webcast  
Law Society of Ontario**

**SKU CLE23-00906**

## **Agenda**

**1:00 p.m. – 1:05 p.m.**

**Welcome**

*Pamela Liang, TEP, *Wilson Vukelich LLP**

*Susannah Roth, TEP, Barrister and Solicitor*

**1:05 p.m. – 1:25 p.m.**

**Case Law Update**

*Jacob Kaufman, *Donovan Kochman LLP**

|                              |  |
|------------------------------|--|
| <b>1:25 p.m. – 1:30 p.m.</b> | <b>Questions and Answers</b>   |
| <b>1:30 p.m. – 2:00 p.m.</b> | <b>Solicitor’s Negligence (30 m <sup>P</sup>)</b><br><br>Jordan Oelbaum, <i>Schnurr Kirsh Oelbaum Tator LLP</i><br><br>Chris Stankiewicz, Claims Counsel,<br><i>Lawyers’ Professional Indemnity Company (LAWPRO)</i> |
| <b>2:00 p.m. – 2:05 p.m.</b> | <b>Questions and Answers</b>   |
| <b>2:05 p.m. – 2:20 p.m.</b> | <b>Tax Issue Spotting</b><br><br>Sunita Doobay, TEP, <i>Blaney McMurtry LLP</i>  |
| <b>2:20 p.m. – 2:25 p.m.</b> | <b>Questions and Answers</b>   |
| <b>2:25 p.m. – 2:45 p.m.</b> | <b>Break</b>   |
| <b>2:45 p.m. – 3:15 p.m.</b> | <b>Spousal and Dependents’ Claims</b><br><br>Nav Shokar, <i>Kaiser Mason Ball LLP</i><br><br>Amelia Yiu, TEP, <i>Elm Law Professional Corporation</i>  |
| <b>3:15 p.m. – 3:20 p.m.</b> | <b>Question and Answer Session</b>   |
| <b>3:20 p.m. – 3:35 p.m.</b> | <b>Administering Estates with Henson Trusts and Special Needs Beneficiaries</b><br><br>Marshall Swadron,<br><i>Swadron Associates, Barristers &amp; Solicitors</i>   |
| <b>3:35 p.m. – 3:40 p.m.</b> | <b>Question and Answer Session</b>   |

**3:40 p.m. – 3:55 p.m.            Dealing with Poorly Drafted Wills or Mistakes in Wills**

Jenny Bogod, *Rosen Sack LLP*

**3:55 p.m. – 4:00 p.m.            Question and Answer Session**

**4:00 p.m.                            Program Ends**