

Practice Gems: Probate Essentials 2023



CO-CHAIRS: **Ambie Edgar-Chana, TEP, *Edgar Chana Law***

Craig Ross, *Pallett Valo LLP*

September 26, 2023

9:00 a.m. to 12:00 p.m.

Total CPD Hours = 2 h 30 m Substantive + 30 m Professionalism ^P

Webcast

Law Society of Ontario

SKU CLE23-00905

Agenda

9:00 a.m. – 9:05 a.m.

Welcome

Ambie Edgar-Chana, TEP, Edgar Chana Law

Craig Ross, Pallett Valo LLP

9:05 a.m. – 9:30 a.m.

Multiple Wills: What Are Courts Looking for/Asking for?

Marni Pernica, Aird & Berlis LLP

Paul Taylor, Borden Ladner Gervais LLP

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| 9:30 a.m. – 9:35 a.m. | Question and Answer Session |
| 9:35 a.m. – 9:55 a.m. | Orders for Assistance (Rule 74.15) – How and When Do You Use Them? <i>Alexandra Mayeski, MayLex Litigation</i> |
| 9:55 a.m. – 10:15 a.m. | Valuing Assets – What’s in, What’s not, What Time Matters, What Records Do You Keep, How to Use Estimates, etc. <i>Alexandra Manthorpe, Cunningham, Swan, Carty, Little & Bonham LLP</i> |
| 10:15 a.m. – 10:20 a.m. | Question and Answer Session |
| 10:20 a.m. – 10:40 a.m. | Break |
| 10:40 a.m. – 11:00 a.m. | Revisiting the New Small Estates Rules: When Are They Useful? <i>Aaron Edgar, Edgar Chana Law</i> |
| 11:00 a.m. – 11:20 a.m. | Real Estate Issues in Probates <i>Sara Beheshti, Sara Beheshti Professional Corporation</i> |
| 11:20 a.m. – 11:25 a.m. | Question and Answer Session |
| 11:25 a.m. – 11:55 a.m. | Best Practices in Fact Finding, Drafting Retainer/Scope of Work Agreements with Someone Else (30 m ) <i>Lucy Main, WeirFoulds LLP</i> <i>Brandon Pooran, PooranLaw Professional Corporation</i> |

11:55 a.m. – 12:00 p.m. Question and Answer Session

12:00 p.m. Program Ends