

Professionalism and Ethical Issues for Tax Lawyers

Taxation Law Section

Date: Thursday, December 4, 2025 | 9:00 am to 12:00 pm

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

Program Chairs: Darren Joblonkay, Davies Ward Phillips & Vineberg LLP
Renee Van, KPMG Canada



This program contains:
1h 15m of EDI Professionalism content
1h 45m of Professionalism content

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

Join us for this popular annual program targeted specifically at tax practitioners to get helpful insights and advice on the critical ethical and professionalism issues facing you in your practice.

Our top-notch faculty will equip you with the knowledge and strategies you need to confidently navigate tricky ethical challenges, and take active steps towards building a more inclusive profession.

Plus, get all the professionalism and EDI hours you need in one valuable event.

This program is part of the OBA’s second **Ethics Day**. Following the program, join us for a special **Intersections Mix and Mingle** to expand your referral network and build connections with lawyers practicing across a number of legal areas, including business law, tax law, municipal law and litigation. Take advantage of this opportunity to grow your relationships with your fellow lawyers and maximize the benefit of your OBA community.

9:00 am	Welcome and Opening Remarks
9:05am	<div>AI in Tax Practice: Professional and Ethical Considerations Joe Marando, Fasken Martineau DuMoulin LLP Kevin Yip, Fasken Martineau DuMoulin LLP</div> <ul style="list-style-type: none">Understanding the limits of AI-generated tax analysis and the practitioner’s duty of oversightAddressing bias, accountability, and transparencyResponsible AI adoption in the tax law profession
9:55am	<div>Avoiding the Pitfalls in Practice Management Ray Leclair, LAWPRO</div> <ul style="list-style-type: none">Issues that frequently lead to client complaintsPractical strategies for avoiding these pitfallsBest practices and proactive risk management
10:30am	<div>By the Numbers: EDI in Tax Law Genna Wood, Thorsteinssons LLP</div> <ul style="list-style-type: none">Current data and trends on EDI in the tax law professionUnderstanding key EDI concepts and their practical implications for tax professionalsProfessional and ethical obligations
10:50 am	Networking Break
11:05 am	<div>Question the Impression to Break Free from Bias Michelle Grocholsky, Founder and CEO, Empowered EDI</div> <ul style="list-style-type: none">Learn how to pause your first impressions and ask better questions to challenge bias in real time
12:00 pm	Program Concludes/Reception

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