

Your First Estate Administration

Trusts and Estates Law / Young Lawyers Division



Live In Person Live Online

Date: Tuesday, December 2, 2025 | 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, our expert faculty will share practical advice 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 refresh your knowledge or expand your practice, this program is a can’t-miss opportunity to add to your legal toolkit.

Program Chairs: **Emily Okeefe**, McLeod Green Dewar LLP
 Ashley Seely, Robinsons Law

9:00 am Welcome and Opening Remarks	11:05 am Networking Break
9:05 am Legislative Landscape Brittany Miller , Goddard Gamage LLP <ul style="list-style-type: none">Relevant legislation that governs estates administrationEstates Manual: what is it and how is It helpful	11:20 am Addressing Family Law Considerations Kristine J. Anderson , Fern Law LLP Kiran Arora , Arora Lunau LLP <ul style="list-style-type: none">Election of Net Family Property equalization on the death of a spouseRights to the matrimonial homeSupport obligations for children, spouses, and other dependents
9:35 am Mastering Initial Client Meetings Emily Hubling , Fasken Martineau DuMoulin LLP <ul style="list-style-type: none">Preparing for the meetingWho is the client?Confirming the scope of the retainerDealing with multiple estate trusteesNavigating limitation periodsKey documents to review – wills, deeds, and financial statements	11:50 am Handling Estate Assets, Debts, and Expenses Michelle Choi , Walker Head Lawyers (Pickering) Cassandra Martino , Friedman Estate Litigation (Barrie) <ul style="list-style-type: none">Procedures for dealing with real propertyDealing with bank accounts, shares, and investmentsManaging digital assetsAdvertising for creditorsSecured and unsecured debtsEstate Trustee Compensation
10:05 am Preparing Probate Applications Arielle Di Iulio , Mills & Mills LLP Diana Tebby , Mann Lawyers (Ottawa) <ul style="list-style-type: none">Determining if probate is requiredNuts and Bolts of the Probate Application<ul style="list-style-type: none">Required formsConsiderations for intestaciesDealing with estates with multiple willsDispensing with a bondDeferring payment of the estate administration tax	12:20 pm Closing the Administration of the Estate Cecile Ko Brock , McCarthy Tétrault LLP Jessica Feldman , Bales Beall LLP <ul style="list-style-type: none">When is an interim distribution appropriate?Who needs to approve estate accounting?Format of informal/formal accountingReleases from beneficiariesTerminal Tax Return and Clearance CertificateCommon “post-closing” issues and how to prevent them
10:40 am Filing Your Probate Application: Getting it Approved Erin Rankin Nash , Ferguson Patterson Professional Corporation (London) <ul style="list-style-type: none">Common roadblocks and how to overcome themThe Certificate of Appointment of Estate TrusteeHow to deal with rejected applications	12:55 pm Questions & Answers 1:00 pm Program Concludes

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Questions? pd@oba.org

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