

Corporate Reorganizations in Estate Planning: A Practical Guide

Business Law

Date: Thursday, March 26, 2026 | 9:00 am to 4:00 pm

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

Agenda:
8:30 am Registration
9:00 am Program Commences
4:00 pm Program Concludes



In person



Live Online



This program contains:

5h 0m of Substantive content

0 h 45m of Professionalism content

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

In working with an aging population, we are more often seeing small business corporations with the founding shareholders looking to retire and either pass on the Corporation to the next generation or to wind it up.

Using a practical case study approach, we will examine a corporation with multi-generational shareholders and directors who are related to each other and provide practical insights into:

- how to assist with the reorganization of the corporate structures as part of a broader estate and succession planning mandate
- consider options for how to reorganize the corporate structure
- look at the use of Family Trusts and dual Wills
- how the Corporate lawyer, Estate planners, accountant and tax advisors work together to facilitate intergenerational transfers of wealth and generally plan for the efficient and cost-effective management of affairs in the event of death.

Don't miss this opportunity to gain hands-on practical guidance from corporate and estate planners on managing corporate reorganizations undertaken as part of an overall estate plan.

Program Chairs: **Kathleen L. Robichaud**, Law Office of Kathleen Robichaud Professional Corporation
Mark E. Simon, McDonald, Simon, Stewart & Reidy LLP

9:00am	Welcome and Opening Remarks	2:30pm	Corporate or Secondary Wills
9:05am	Corporate Ownership Structure: Key Considerations and Planning Objectives		<ul style="list-style-type: none"> • purpose and structure, when is it appropriate and how it interacts with existing estate planning documents • tips on drafting and integrating these into the overall plan
	<ul style="list-style-type: none"> • checklist of issues to discuss with clients • role of the tax advisor, including how to obtain, interpret, and implement tax instructions • common structural tools such as amalgamations and holding companies • name change considerations 	3:10pm	Ethical Considerations
			<ul style="list-style-type: none"> • common challenges and management strategies • when it is appropriate to recommend independent legal advice or independent legal representation, including tips on preparing ILA and ILR certificates.
10:20am	Networking Break	3:50pm	Closing Remarks
10:35am	Practical and Operational Considerations	4:00pm	Program Concludes
	<ul style="list-style-type: none"> • managing existing debts and working with lenders and banks during reorg process • assignment and transition of key agreements, including employment contracts, software licences, land registrations, mortgages, insurance policies, etc. • practical implications of introducing new entity for client, including best practices for communicating post-amalgamation changes 		
11:50am	Networking Lunch		
1:00pm	Setting up the Family Trust		
	<ul style="list-style-type: none"> • key terms to be included as well as checklist of intake questions to help guide client discussions • which assets are appropriate to include, and which are not • how to amend family trust, including CRA guidance and risks associated with amendments that could result in a trust being challenged 		
2:15pm	Networking Break		

REGISTER NOW

300-20 Toronto St. Toronto, ON M5C 2B8 | Toll Free: 1-800-668-8900 | Tel: 416-869-1047 | Fax: 416-642-0424