

Professionalism & Ethical Issues for Tax Lawyers

Taxation Law



In person Live Online

Date: Thursday, December 3, 2026 | 9:00 am to 12:00 pm

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

Program Chairs: **Michael Ding**, WeirFoulds LLP
Renee Van, Scotiabank



This program contains
2h 0m of Professionalism Content
1h 0m of EDI 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 **Third Annual Ethics Day**. Following the program, join us for a special Inter-Sections Mix and Mingle to expand your referral network and build connections with lawyers practising 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.

9:00am Welcome and Opening Remarks

9:05am **Privilege and Confidentiality in CRA Audits**

Michael Ding, WeirFoulds LLP (Moderator)

Nicole Lynx, Thorsteinssons LLP

Valentine Gurfinkel, WeirFoulds LLP

This panel will examine the privilege and confidentiality issues that arise during Canada Revenue Agency (CRA) audits. Speakers will discuss how to identify common privilege risks as they emerge, the challenges associated with communications involving accountants and other third-party advisers, and practical strategies for responding to CRA requests for information while preserving applicable protections. The discussion will also consider recent tax jurisprudence and its implications for privilege in the audit context.

9:50am Networking Break

10:05am **Career Change as Its Own Chapter, A Natural Part of Success**

Renee Van, Scotiabank (Moderator)

Joseph (Joe) Eid, TD Wealth

Nakul Kohli, Balance Law PC

Brittany Finn, KPMG Canada

This session will discuss change as part of a successful career. Speakers will discuss how the reassessment of one's career path can be an important step toward clarity on career satisfaction. The discussion will also touch on broadening what "success" can look like by embracing new sectors or roles as a marker of growth.

10:50am Networking Break

11:00am **Joint EDI Session**

Organized by the other section. Topic related to serving neurodivergent clients.

12:00pm Program Concludes

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