

## Complex Issues in Estate Administration

*Trusts and Estates Law*



In person



Live Online

**Date:** Wednesday, April 01, 2026 | 9:00 am to 12:00 pm

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

**Program Chair:** **Monique J. Charlebois**, Barrister & Solicitor, MJC Legal Professional Corporation



**Substantive Hours:** This program contains up to **2 hours and 15 minutes**.

**Professionalism Hours:** This program contains up to **30 minutes**.

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

Estate administration rarely proceeds without complication. Join us to examine some of the most challenging and emerging issues facing estate professionals, with a focus on identifying risk early and navigating problems effectively when they arise. We'll unravel:

- Exposure to U.S. tax filing and reporting obligations—even for Canadian residents who do not own U.S. real estate—and practical considerations when administering assets held abroad
- Evolving and sensitive areas such as genetic materials and posthumous conception, including planning strategies to avoid disputes and guidance on resolving conflicts if they arise
- Absentee proceedings, Declarations of Death, and Benjamin Orders, with reference to recent case law and the executor's duty to make reasonable efforts to locate heirs
- How to manage estates involving incapable beneficiaries who lack substitute decision-makers, including recent changes to Rule 7 and the approval of settlements involving incapable persons.

Designed specifically for trusts and estates practitioners, you'll get practical guidance on navigating complexity with confidence and diligence. Register now!

9:00 am	Welcome and Opening Remarks		about practical tools for dealing with missing persons, including:
9:05 am	<p><b>Estate Administration Across Jurisdictions</b> <b>Blair Botsford</b>, Botsford Law</p> <p>Estates with assets in multiple countries raise complex legal and tax issues. Get practical advice to help you identify and navigate the key considerations, including:</p> <ul style="list-style-type: none"> <li>• Importance of residency, citizenship, and domicile</li> <li>• The situs of assets and governing law</li> <li>• Impact of forced heirship and dependants' relief</li> <li>• Cross-border tax considerations</li> </ul>	10:20 am	Health Break
9:30 am	<p><b>Canada-US Cross-Border Update</b> <b>David J. Luzon Esq.</b>, Barclay Damon LLP</p> <p>Gather practical strategies for structuring trusts, incapacity planning, and managing cross-border probate and inheritance matters, including insights on:</p> <ul style="list-style-type: none"> <li>• Tax treaty implications</li> <li>• Residency and domicile issues</li> <li>• Reporting obligations and enforcement trends</li> <li>• Planning for clients and families with dual or multiple citizenship.</li> </ul>	10:35 am	<p><b>Changes to Rule 7 and How to Handle Court Approvals of Settlements Involving Incapable Persons</b> <b>Angela Casey</b>, Casey &amp; Moss LLP</p> <p>Get up-to-speed on the recent changes to Rule 7 and their impact on settlements involving minors and incapable persons. We'll unpack key procedural requirements and practical advice for navigating court approval processes efficiently.</p>
9:55 am	<p><b>Tools for Absentee Administration</b> <b>Tristen Audet</b>, KMB Law LLP</p> <p>When a beneficiary or interested party cannot be located, estate administration can stall. Hear</p>	11:00 am	<p><b>Genetic Materials, Assisted Reproduction and Posthumous Conception</b> <b>Darren Lund</b>, Fasken Martineau DuMoulin LLP</p> <p>Ensure you're equipped to handle the complexity of estate planning related to assisted reproduction and posthumous conception. Review important planning considerations to help avoid disputes and explore legal options for resolving conflicts when they arise.</p>
		11:25 am	<p><b>Putting It All Together and Looking to the Future</b> <b>All Speakers</b></p>

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Questions? [pd@oba.org](mailto:pd@oba.org)

Reflect on the central themes from the program as our panelists share practical insights, discuss emerging issues, and consider future developments shaping trusts and estates practice

11:55 am Questions and Closing Remarks

12:00 pm Program Concludes