Professionalism and Ethical Issues for Trust and Estates Practitioners

Trusts and Estates Law

In person | Live Online

Date: Thursday, December 03, 2026| 9:00 am to 12:00 pm

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

Program Chairs: **Mitchell J. Rattner,** Schnurr Kirsh Oelbaum Tator LLP

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 our expert faculty for guidance on handling the ethical and professionalism issues impacting your Trust and Estates practice. Gain strategies to confidently navigate complex matters and take active steps towards building a more inclusive profession. Plus, get all the professionalism and EDI hours you need in one valuable event. Register now to secure your spot!

This program is part of the OBA's Third Annual Ethics Day. After the program, join us for a special Inter-sections Mix and Mingle to expand your referral network and connect with lawyers across practice areas, including business law, tax law, municipal law, insurance law, and civil litigation. Take advantage of this opportunity to build relationships with colleagues and make the most of your OBA community.

9:00 am Welcome and Opening Remarks

9:05 am **Issues Surrounding Declining Client Capacity in Litigation**
Lisa Fenech, Schnurr Kirsh Oelbaum Tator LLP
Learn how to spot capacity concerns early and protect your client's interests and your own professional obligations as a matter proceeds.

9:30 am **Ethics and Professionalism in Planning**
Daniel Stober, Torkin Manes LLP
Explore the ethical duties and professionalism challenges that arise when advising clients on estate and trust planning.

9:55 am **Pierringer and Side Agreements in Estate Litigation**
Matthew Rendely, Loopstra Nixon LLP
Understand how to use partial settlement and side agreements in estate disputes, and the professional responsibility issues they raise.

10:20 am **Civility and Good Conduct**
Angela Casey, Casey & Moss LLP
Get practical guidance on maintaining civility and professional conduct with opposing counsel, parties, and the court.

10:45 am Health Break

11:00 pm **Plenary: Building a Neuroinclusive Legal Practice**
Kathleen Robichaud (Moderator), Law Office of Kathleen Robichaud, OBA Access to Justice Committee
Kelly Caldwell, Southren Group Inc.
Christine Roth, Barrister & Solicitor, OBA Access to Justice Committee
Brian Studniberg, Henein Hutchison Robitaille LLP
Gain concrete strategies for adapting intake and communication to better serve neurodiverse clients and supporting colleagues.

12:00 pm Program Concludes