

TAKE IT TO THE TOP ILCO'S 23RD ANNUAL CONFERENCE

BLUE MOUNTAIN CONFERENCE CENTRE BLUE MOUNTAINS, ONTARIO MAY 8 - 11, 2013



The Institute of Law Clerks of Ontario thanks the following Platinum and Silver Sponsors of this year's conference:

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SCHEDULE OF EVENTS

		MAY 8, 2013
10:00 am to 5:00 pm	GOLF TOURNAMENT Monterra Golf Club, Blue Mountains	SPONSORED BY
	First Tee Time Starts at 10:00 am	
	Start this year's Conference at the golf course! We are kicking off the Conference with our 14 th annual golf tournament on a beautiful course nestled at the bottom of Blue Mountain. A fun event to network and enjoy the camaraderie! For first time golfers, it is a great way to be introduced to the game of golf with a stress free 'best ball' format. Come join us!	RICOH
After 3:00 pm	HOTEL CHECK IN Blue Mountain Resort	
5:00 pm to 6:30 pm	CONFERENCE REGISTRATION Blue Mountain Conference Centre	
6:00 pm to 8:00 pm	PRE-CONFERENCE MEET & GREET RECEPTION	SPONSORED BY
	Blue Mountain Conference Centre	
	Reconnect with friends – old and new – as we kick off Conference 2013. Food and refreshments to be served.	

THURSDAY MAY 9, 2013

7:30 am to 8:45 am	BREAKFAST	SPONSORED BY
7:45 am to 8:45 am	REGISTRATION	
8:45 am to 9:00 am	OPENING REMARKS	
9:00 am to 9:15 am	WELCOME Alvin Weatherall – Vice President, Mountain Operations and Risk Management	
9:15 am to 10:30 am Opening Keynote Speaker	HOW TO RESTORE YOUR HEALTH AND REDUCE STRESS Dr. Natasha Turner Dr. Turner addresses the two most common hormonal imbalances today: excess insulin and high cortisol. Why these two? Although both insulin and cortisol play an essential role in healthy body function, an excess of either hormone can be destructive to your metabolism, body composition and overall wellness. Together, they have become recognized as the root cause of unhealthy aging, often leading to digestive disorders, anxiety, fatigue, weight gain, cravings, abdominal fat, irritability, insomnia, headaches and even depression. In this engaging lecture, Dr. Turner uncovers a 30-day plan so you can reduce and reverse abdominal fat, high blood pressure, high blood sugar, systemic inflammation and cholesterol levels.	SPONSORED BY
10:30 am to 11:30 am	COFFEE BREAK and VISIT EXHIBITORS Don't miss our new "One Minute Spotlight"!	SPONSORED BY

4

All sessions and meals take place at THURSDAY Blue Mountain Conference Centre MAY 9, 2013 11:30 am to THE TAX COURT – "THE BEST COURT SPONSORED BY 12:30 pm **IN THE LAND**" The Honourable Eugene Rossiter – Associate Chief Justice 🗖 DURHAM COLLEGE - Tax Court Canada Winston Churchill once said, "there is no such thing as a good tax" but The Honourable Eugene P. Rossiter, Associate Chief Justice of the Tax Court of Canada, claims the Tax Court is the best court in the land. This session will provide an informative, yet entertaining overview of the role of the Tax Court in Canada. During this presentation, we will learn why the Tax Court exists, how it operates and more importantly, how to prove a case there. SOCIAL MEDIA - MARKETING AT YOUR 11:30 am to SPONSORED BY 12:30 pm **FINGERTIPS** Vivian Manning – Barriston LLP Social media has allowed an individual or business to communicate with people on a scale beyond what was formerly considered a target market. By using networking platforms readily available, including blogs and social media tools such as LinkedIn, Facebook and Twitter, we can engage with potential clients while increasing search engine optimization or ranking. Vivian's presentation will explain the potential impact these media can have in marketing and promotion. 11:30 am to FAMILY MEDIATION – CHANGING THE SPONSORED BY 12:30 pm **MINDSET; CHANGING THE PROCESS** TITUTE OF Douglas Manning – Barriston LLP Mediation in Family Law has become prevalent, allowing parties more control and involvement throughout the process. When properly prepared, parties can avoid the adversarial approach of litigation and focus instead on an outcome everyone can live with. This session will outline the essentials of preparing a persuasively organized Mediation Brief and presentation with an emphasis on the client's objectives. **CHARITABLE GIFTS BY WILL** 11:30 am to SPONSORED BY 12:30 pm Elena Hoffstein – Fasken Martineau DuMoulin LLP This session will address the benefits of making charitable gifts by will. It will Fasken Martineau clarify what constitutes a Gift by Will under the Income Tax Act and what factors would cause a gift not to be a gift by will and explore the alternatives and the tax consequences of each alternative. The session will also explore the relevance of these rules to donors, charities and their advisors including those who assist in administering an estate and reviewing wills. This session will also be of interest to those of you who may be involved with charities.

THURSDAY MAY 9, 2013

I 2:30 pm to I :45 pm	LUNCH	SPONSORED BY
1:45 pm to 2:45 pm	A LAW CLERK'S ROLE IN LARGE COMMERCIAL BEAL ESTATE TRANSACTIONS Stella Di Cresce – Osler, Hoskin Harcourt LLP This session will provide a practical understanding of a law clerk's role and responsibility in closing commercial real estate transactions. This session will cover: • Reviewing a sample closing agenda; • Taking a leadership role in organizing the transaction process; • Preparing draft documentation; and • Dealing with undertakings and other post-closing matters.	SPONSORED BY
1:45 pm to 2:45 pm	THE DEVIL IN THE DETAILS: HOW A MINUTE BOOK REVIEW ASSISTS THE DILIGENCE PROCESS WITH RESPECT TO A CORPORATE M&A OR FINANCE TRANSACTION Casey Howell – Stikeman Elliott LLP A minute book review is an important diligence exercise which assists a purchaser or financier of a business in understanding the nuts and bolts of the target company. This session will provide an understanding of what senior lawyers and clients will be looking for in a review, and how the review should be tailored depending on the nature of the M&A or financing transaction.	SPONSORED BY
1:45 pm to 2:45 pm	LEADERSHIP AND MENTORING FOR LAW CLERKS (PART I) Victoria Snook – Fasken Martineau DuMoulin LLP Dawn Cottreau – Stewart McKelvey This two part interactive workshop is designed for intermediate and senior law clerks who want to take their career to the next level. Fort 1 of this workshop will explore the concept of leadership. We will discuss the traits that make strong leaders and why everyone has it in them to be a leader. Attendees will have an opportunity to share examples of great leaders they have known. Learn how to unleash your inner leadership potential and take your career to the next level. At the conclusion of this session, attendees will be able to: I dentify the reasons why leadership skills are important to their career I dentify resources available to assist in developing leadership skills	SPONSORED BY

All sessions and meals take place at Blue Mountain Conference Centre		THURSDAY MAY 9, 2013
1:45 pm to 2:45 pm	FINANCIAL STATEMENTS DONE PROPERLY JUNC AND AND AND AND AND AND AND AND AND AND	SPONSORED BY
2:45 pm to 3:45 pm	COFFEE BREAK and EXHIBITOR HALL Don't miss out on the Thursday Exhibitor Draws – you need to be in attendance to win!	SPONSORED BY
3:45 pm to 4:45 pm	GUARDIANSHIP APPLICATIONS Jan Goddard – Jan Goddard & Associates Guardianship is a growing area of practice, as our population ages and the court becomes more vigilant about the management of personal injury settlements. In this interactive program, you will learn what guardianship is all about, hear about how the essential documents needed for a guardianship application under the Substitute Decisions Act, develop an understanding of the process and get some tips on how to get the application right.	SPONSORED BY GODDARD GAMAGE STEPHENS
3:45 pm to 4:45 pm	THE PLANNING ACT Neil Shapiro – Stikeman Elliott LLP A brief refresher on the key portions/provisions of the <i>Planning Act</i> and a review/discussion of examples of <i>Planning Act</i> issues that have come up in recent transactions.	SPONSORED BY
3:45 pm to 4:45 pm	LEADERSHIP AND MENTORING FOR LAW CLERKS (PART 2) Victoria Snook – Fasken Martineau DuMoulin LLP Dawn Cottreau – Stewart McKelvey Part 2 will build on the knowledge gained in Part 1 and will provide attendees with tools to develop their mentoring skills. Attendees will gain an understanding of mentor and mentee responsibilities and will be provided with tips and tricks to help them be successful in a mentor role. The concepts involved in setting up a mentoring program will be discussed and attendees will have opportunities o share their thoughts on mentoring and mentoring programs. At the conclusion of this session, attendees will be able to: 4. dentify the concepts involved in mentoring programs 4. dentify the responsibilities of mentors and mentees 4. Make a plan to facilitate their own mentoring relationships 	SPONSORED BY

THURSDAY MAY 9, 2013

FRIDAY

MAY 10, 2013

3:45 pm to 4:45 pm	DISCOVERY PLANS Moderator: Anna Traer – Davies Ward Phillips & Vineberg LLP	sponsored by
	Panelists: Lorraine Klemens – Bennett Jones LLP Deborah Miller – Cassels Brock & Blackwell LLP Betty Montoni – Lenczner Slaght Royce Smith & Griffin LLP	Slaght
	An open e-discovery panel discussion on developing discovery plans. A detailed discussion about the rules, case law, process, required communications, including Meet and Confers, and what should and should not be included in the Discovery Plans.	
6:00 pm to 11:00 pm	THURSDAY NIGHT EVENT Join us for a sit down dinner and live entertainment with special guests taking you down memory lane	SPONSORED BY

All sessions and meals take place at Blue Mountain Conference Centre

7:30 am to 8:45 am	BREAKFAST	SPONSORED BY
9:00 am to 10:15 am	IT'S ALL ABOUT ATTITUDE! Chris Cummins	SPONSORED BY
Keynote Speaker	You have it within you to 'Take it to the Top' and to enjoy the process. You change external circumstances by changing your internal thinking. In fact, what you think about changes how you feel, which changes how you act, which changes your outcome. Take this exhilarating journey with Chris that educates with expert storytelling, dramatic personal stories, and intelligent humour leaving you with the tools for living the "When you Believe, You Achieve" lifestyle and to start your "Take it to the Top" journey.	OF ONTARIO

FRIDAY

MAY 10 2013

All sessions and meals take place at Blue Mountain Conference Centre

		MAY 10, 2013
10:15 am to 11:00 am	COFFEE BREAK and EXHIBITOR HALL	SPONSORED BY
I I:00 am to I 2:00 pm	ESTATE PLANNING & ADMINISTRATION FOR PERSONS WITH DISABILITIES – MORE THAN JUST A HENSON TRUST Darren Lund – Borden Ladner Gervais LLP	SPONSORED BY
	Proper estate planning is necessary to protect a disabled beneficiary, in particular where the disabled beneficiary receives benefits from the Ontario Disability Support Program. While the "Henson Trust" has become a well-known tool for protecting ODSP benefits, there are other planning opportunities available, both to maximize the usefulness of trusts and also to mitigate the problems that may arise where a person dies and no planning has been implemented. This presentation will address the following issues:	Borden Ladner Gervais
	 Basics of the Ontario Disability Support Program The Henson Trust: Characteristics, Uses, and Limitations Use of Trusts other than the Henson Trust Maximizing the Usefulness of Trusts Registered Disability Savings Plans Disability Related Items or Services under ODSP 	
I I:00 am to I 2:00 pm	ANTI-SPAM COMPLIANCE Kelly Harris – Heenan Blaikie LLP John Salloum – Heenan Blaikie LLP	SPONSORED BY
	Join us for a practical walkthrough of Canada's Anti-Spam Legislation (CASL), including overviews of: • The types of messages impacted by CASL • Do you need consent, what type, and how can you get it? • An overview of required anti-spam disclosures • Tips and tricks for marketing-friendly compliance	Heenan Blaikie
I I:00 am to I 2:00 pm	ALL THINGS REAL ESTATE Danny Grandilli – McCarthy Tétrault LLP	SPONSORED BY Chicago Title Insurance Company Canada

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All sessions and meals take place at Blue Mountain Conference Centre		FRIDAY MAY 10, 2013
1:15 pm to 2:15 pm	ONTARIO CONSUMER PROTECTION ACT Dan Edmondstone – McMillan LLP	SPONSORED BY
	 Issues relating to consumer contracts. A risk assessment. Rights under the Consumer Protection Act Remote, direct, internet agreements and the differences between each Cooling off periods Changes to your agreement and the notice requirements Remedies available to consumers 	DO PROCESS
1:15 pm to 2:15 pm	MERGERS AND ACQUISITIONS – BEHIND THE CLOSING AGENDA Ron Smith – Grant Thornton LLP	sponsored by
	Whether a purchase or sale transaction involves the acquisition of a large national company or a one store franchise, the issues surrounding closing such transactions can be extremely varied. Is one party unrepresented? What level of due diligence is required? What indemnifications should be sought? What can be an undertaking post-closing and what must be a condition of closing? These are merely a few of the questions and considerations that flow from the development of the transaction and, when answered, form the basis of the pre-closing covenants. Through an interactive presentation and open forum discussion this program will explore a variety of pre-closing covenants and their origin, use and implications, and how these covenants tie into the closing agenda and closing issues.	OF ONTARIO
2:15 pm to 2:45 pm	COFFEE BREAK and EXHIBITOR HALL	SPONSORED BY
2:45 pm to 3:45 pm	DEMONSTRATIVE EVIDENCE IN COURT Matthew Gottlieb – Lax O'Sullivan Scott Lisus LLP This session will discuss the ups and downs of using demonstrative evidence in Court - including what works, what doesn't, how to get the most of what you have and how to best prepare for Court.	SPONSORED BY

FRIDAY MAY 10, 2013

2:45 pm to 3:45 pm	CRACKING THE NEST EGG: PENSION VALUATION AND DIVISION ON MARRIAGE BREAKDOWN Anne Slivinskas – Ontario Teachers' Pension Plan Ontario's legislature has made numerous amendments to the Pension Benefits Act and the Family Law Act that address the valuation and division of pensions upon the termination of a marriage or common law relationship. This session will provide an overview of the new rules, a step by step guide on how to complete the prescribed forms which were revised effective January 1, 2013 as well as drafting tips for pension assignment provisions in separation agreements.	SPONSORED BY
2:45 pm to 3:45 pm	THE NUTS & BOLTS OF THE NOT-FOR-PROFIT CORPORATIONS ACT, 2010 (ONTARIO) AND CANADA NOT-FOR-PROFIT CORPORATIONS ACT, DESSONS LEARNEDDick Pasquino – Borden Ladner Gervais LLPThis session will provide an overview of the key changes under the new Not-for-Profit Corporations Act, 2010, which is expected to be proclaimed into force on July 1, 2013 and will identify the key issues to consider in connection with transitioning existing Ontario non-share capital corporations to the NFPCA. This session will also highlight key learnings and best practices for federal non-share capital corporations existing under the Canada Not-for-Profit Corporations Act.	SPONSORED BY
2:45 pm to 3:45 pm	DISPENSION OF THE SECOND PROVIDE AND	SPONSORED BY
3:45 pm to 4:30 pm	EXHIBITOR DRAWS Don't miss out on the Friday Exhibitor Draws – you need to be in attendance to win!	
5:00 pm to 6:30 pm	COCKTAIL RECEPTION	SPONSORED BY

SATURDAY MAY 11, 2013

7:30 am to 9:00 am	BREAKFAST	SPONSORED BY
9:00 am to 10:00 am	TITLE INSURANCE AND REAL ESTATE: William D. McCullough – McCarthy Tétrault In this session, there will be an examination of certain key differences and similarities between residential and commercial title insurance policies, with a related discussion of the different levels of due diligence required of law firms as between the two types of policies. As well, in order to appreciate the role that title insurance can play for clients, we will consider several practical fact situations in which title issues have arisen for insured clients, with a discussion of the ways in which title insurers have responded to claims. Title fraud is always a concern, and so there will be an update on current ways in which title insurers are working to combat and reduce such fraud.	SPONSORED BY
9:00 am to 10:00 am	EVERYTHING YOU WANTED TO KNOW ABOUT FRANCHISE DISCLOSURE, BUT VERNE ALL AND	SPONSORED BY
9:00 am to 10:00 am	CLOUD COMPUTING: AN INTRODUCTION James Kosa – Deeth Williams Wall We've all heard the term "Cloud" computing, but what does it really mean? This session will offer a primer on cloud computing, and specifically discuss: • What the "cloud" is; • What some of the legal concerns with cloud-based services are; and • How the use of the cloud may impact your legal practice.	SPONSORED BY

9:00 am to 10:00 am	THE NEXT STEP FOR LAW CLERKS: THE PREPARATION OF THE EXPERT WITNESS FOR CROSS-EXAMINATION Richard Shekter – Shekter Dychtenberg LLP	SPONSORED BY
	A leading civil, criminal, and administrative tribunal trial lawyer will provide guidance and a road map for law clerks and other legal professionals who desire to learn the skills and techniques necessary to be successful in preparing yourself, or your instructing lawyer, to conduct cross-examinations of the Expert Witness at trials or hearings. Mr. Shekter will also provide a paper in addition to his PowerPoint presentation for Conference attendees to assist in understanding this technical area of trial work. This is an excellent opportunity to learn and grow if your work involves any kind of civil litigation, criminal litigation or tribunal matters where Expert Witnesses may be called upon to provide testimony. With his unusual practice mix, and his proven success as a litigator, Mr. Shekter brings a unique perspective to the field of cross-examination of these challenging witnesses. His presentation will also have resonance to cross-examinations generally.	CLERKS OF ONTARIO
10:00 am to 10:30 am	COFFEE BREAK	SPONSORED BY
10:30 am to 11:30 am	A PASSION FOR HEALTHY LONGEVITY Rose Reisman	SPONSORED BY
Closing Keynote Speaker	As a health and wellness expert, Rose Reisman describes strategies on how to live a longer and healthier life. Her focus is on preventing chronic diseases, such as diabetes type 2, obesity, heart and stroke disease, osteoporosis and certain cancers related to diet. Rose teaches you how to eat properly with a balanced diet, never having to diet. She compares Canada's Food Guide with the Mediterranean Diet, discusses the glycemic index, volumetrics and balance between carbs, protein and fat. With her latest book "Choose It and Lose It", she explains how it's possible to make healthier choices at restaurants and fast food chains but still have a delicious meal. She also touches on ethnic cuisine. Exercise is part two of the equation of living a healthier life. Rose gives tips on how to include exercise in your life and how it affects your total body and mental health.	OF ONTARIO
:30 am to :45 am	CLOSING REMARKS and FAREWELL	

SATURDAY

MAY 11, 2013

SPECIAL EVENTS

WEDNESDAY, MAY 8, 2013

GOLF TOURNAMENT

Monterra Golf Club

10:00 am Tee Off

Come join us for the $14^{\rm th}$ annual golf tournament – a fun event to network and enjoy the camaraderie.

See enclosed flyer and registration form for full details about participating.

WEDNESDAY, MAY 8, 2013

PRE-CONFERENCE MEET & GREET RECEPTION

Blue Mountain Conference Centre Georgian Bay Ballroom (3rd Floor)

6:00 pm – 8:00 pm

Come and join us for a casual evening of networking at the pre-conference meet & greet.

THURSDAY, MAY 9, 2013

STEWART MCKELVEY PRESENTS

a sit down dinner and live entertainment with special guests taking you down memory lane.

Blue Mountain Conference Centre Georgian Bay Ballroom (3rd Floor)

6:00 pm – 11:00 pm

FRIDAY, MAY 10, 2013

THOMSON REUTERS - COCKTAIL RECEPTION

Blue Mountain Conference Centre

5:00 pm – 6:30 pm

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REGISTRATION FEES AND DEADLINES

Membership Status	Register by March 15	After March 15
ILCO Member	\$475.00* + HST = \$536.75	\$575.00* + HST = \$649.75
Non-Member	\$650.00* + HST = \$734.50	\$750.00* + HST = \$847.50

*Registration fees include: pre-conference reception; breakfast (3); morning and afternoon coffee breaks (5); lunch (2); Thursday night event and Friday evening's cocktail reception. There is an additional fee for participation in the golf tournament. The Conference ends after the closing keynote speaker on Saturday, May 11th.

- Please make cheque payable to The Institute of Law Clerks of Ontario and mail to 20 Adelaide Street East, Suite 502, Toronto, ON, M5C 2T6 or fax with VISA information to 416-214-6255.
- Cancellations prior to April 27, 2013 are subject to a \$25.00 administration fee. **No Refunds after April 27, 2013**

Dress is business casual for the entire Conference.

ACCOMMODATIONS AT BLUE MOUNTAIN RESORT BLUE MOUNTAINS, ONTARIO

Please contact Blue Mountain Resort directly at **1-877-445-0231** to book your room by April 8, 2013, using group code **GRP102448**. After this date, guestrooms will be released automatically and reservations made after this date will be based on availability only.

Should you have a room-mate that requires separate billing, please fill out individual on-line registrations, AND please ensure your room-mate(s) name is CLEARLY indicated when requested to ensure you are partnered up together.

If you have any questions or concerns regarding the reservation process please contact the Information and Reservation Department at **mail@bluemountain.ca** or **877-445-0231**.

TRANSPORTATION FOR ILCO CONFERENCE 2013

AIRLINES

Air Canada

Air Canada is offering a 10% discount on their best available regular fare at the time of booking (excluding web and promotional fares). Attendees must make their travel arrangements through the online booking at **Air Canada** quoting promotion code number **FX6MFAV1**. To book a flight with the promotion code, access **www.aircanada.com** and enter the promotion code in the search panel. The discounted rates are available for travel from **May 1 to May 18, 2013**.

Porter

Porter is offering a 20% discount on their best available regular fare at the time of booking (excluding web and promotional fares). Attendees must make their travel arrangements through the online booking at **www.flyporter.com** or by calling **1-888-493-7853** quoting account code **ILCO13**. The discounted rates are available for travel from **November 22, 2012 to May 14, 2013** and bookings will be available starting on January 1, 2013.

West Jet

WestJet is offering a 10% discount on their best available regular fare at the time of booking (excluding web and promotional fares). The discount is only available by contacting WestJet's Group agents via WestJet's Convention line at **1-877-952-4696**. The Conference code is **CC7678** and must be quoted at time of booking. The discounted rates are available for travel up to **3 days prior and 3 days after** ILCO's Conference. For more information regarding booking a flight with WestJet please refer to the WestJet Conference / Convention Promise or contact **1-877-952-4696**. The email or fax registration forms must be used to book with West Jet.

CAR RENTAL

Avis

Avis Car Rental is a preferred car rental of the ILCO's 23nd Annual Conference in Blue Mountains, Ontario. Attendees must make their travel arrangements through the Avis Car Rental and quote Avis Worldwide Discount number **L008255** at time of booking. For more information regarding booking a car rental with Avis Car Rental please contact Avis at **1-800-962-1434** or make reservations by using the following link: **www.avis.ca**

BUS

Greyhound

For more information regarding travel with Greyhound, please call **1-800-661-8747**.

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Driving Directions

Driving directions are available at the Blue Mountain website at: http://conferences.bluemountain.ca/directions.htm

Thank you to the SPONSORS of this year's conference

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18

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We encourage attendees to circulate among the exhibitors' booths. All registrations will receive an Exhibitors' Hall Passport in their conference materials. Collect stamps from 10 different exhibitors and be eligible to win some great prizes.

Exhibitor draws will take place on Thursday, May 9 at 2:45 pm and Friday, May 10 at 3:45 pm in the Exhibitor Hall.

You must be in attendance in order to be eligible to win.

The Conference Committee and Board of Directors are not eligible to participate in the draws.

The Institute of Law Clerks of Ontario wishes to express a special thanks to the members of the 2013 Conference Committee and their firms for their continuing support throughout the year.

The Institute of Law Clerks of Ontario gratefully acknowledges the assistance of C.O.R.E. in the assembly and mailing of the conference brochure.

2013 Conference Committee

Bev Burhoe, Stewart McKelvey Brendan Cosgrove, Thomson Reuters Monique Jacob, ADP Canada Co. Andrew James, The Institute of Law Clerks of Ontario Nancy Johnstone, Dickson MacGregor Appell LLP Elsie Karulas, Grant Thornton LLP (Co-Chair) Rose Kottis, Borden Ladner Gervais LLP Maddie Lepore, PepsiCo Foods Canada (Co-Chair) Leslie Reynolds, The Institute of Law Clerks of Ontario Kris Rodrigues, Stikeman Elliott LLP Evelyn Thompson, Barriston LLP Anna Traer, Davies Ward Phillips & Vineberg LLP



Margaret Tsetsakos, Rogers Communications Inc.

ILCO'S 23RD CONFERENCE

BLUE MOUNTAIN CONFERENCE CENTRE BLUE MOUNTAINS, ONTARIO MAY 8 - 11, 2013