



The Institute
of Law Clerks
of Ontario

2018

28TH ANNUAL CONFERENCE

Delta Ottawa City Centre
Ottawa, Ontario
May 2 to May 5, 2018



The Institute of Law Clerks of Ontario would like to thank the following

PLATINUM



GOLD



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SILVER



GOLF





50th Anniversary

ILCO is honoured to have you help us celebrate
our 50th Anniversary.

PAST PRESIDENTS

- 1968 – 1972 V.J. Bristow
- 1972 – 1974 David B. Boakes
- 1974 – 1977 V.J. Bristow
- 1977 – 1978 W.H. Taylor & V.J. Bristow
- 1978 – 1979 V.J. Bristow
- 1979 – 1982 V.L. Bailey
- 1982 – 1984 Elizabeth A. Gillis
- 1984 – 1985 Susan E. Brown
- 1985 – 1987 Wanda Polman
- 1987 – 1988 Adeline Y. Harrison
- 1988 – 1989 Adeline Y. Harrison & Linda McCormick
- 1989 – 1991 Linda McCormick
- 1991 – 1993 Sylvia Morris
- 1993 – 1995 Aili Kung
- 1995 – 1996 Lynn Sweeney
- 1996 – 1998 Giselle Piper
- 1998 – 1999 Brenda R. Miller
- 1999 – 2009 Giselle Piper
- 2009 – 2012 Lisa Matchim
- 2012 – 2015 Rose Kottis
- 2015 – Present Lisa Matchim

ILCO was incorporated in May 1968 for the purpose of providing an organized network for the promotion of unity, cooperation and mutual assistance among law clerks in Ontario. ILCO strives to advance and protect the status and interests of the profession. In addition, it is the mandate of ILCO to provide and promote general and legal education to its members for the purpose of increasing their knowledge, efficiency and professional ability.

*Change is the law of life.
And those who look only to the past or present
are certain to miss the future.
- John F. Kennedy*

HERE'S TO 50 MORE!

EVENT PROGRAM

WEDNESDAY
MAY 2, 2018

12:00 pm
Tee-Off
Time

19th ANNUAL GOLF TOURNAMENT

Marshes Golf Club

Calling all golfers and those who wish to be introduced to the wonderful game of golf! ILCO's 19th annual golf tournament is being held at The Marshes Golf Club in Ottawa and is a great way to gear up for the conference with colleagues, conference exhibitors and sponsors, family and friends. This remarkable course is situated in the west end of Ottawa just 25 minutes from downtown. The Marshes offers both a full 18 hole course ("Marshes") as well as a 9 hole executive par three course ("Marchwood").

This year's tournament offers the choice of playing either 9 holes on Marshes or 9 holes on Marchwood including a ½ hour clinic lesson.

A 12:00 pm start time will allow plenty of time after the game to relax and enjoy drinks and hors d'oeuvres with your fellow golfers before returning to the Delta Ottawa City Centre Hotel in time for the pre-conference reception.

Sponsored by:

RICOH
imagine. change.

After
3:00 pm

HOTEL CHECK-IN

Delta Ottawa City Centre

5:00 pm to
6:30 pm

CONFERENCE REGISTRATION

Delta Ottawa City Centre

6:00 pm to
8:00 pm

PRE-CONFERENCE MEET & GREET RECEPTION

Location: Delta Ottawa City Centre – Panorama Room, Penthouse Level

Connect with friends – old and new – as we kick off our 28th Annual Conference. Food & refreshments will be served.

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Ottawa Tourism

EVENT PROGRAM

THURSDAY
MAY 3, 2018

7:30 am to
8:45 am

BREAKFAST

Sponsored by:

stewart title[®]

7:45 am to
8:45 am

CONFERENCE REGISTRATION

[Delta Ottawa City Centre](#)

8:45 am to
9:30 am

WELCOME & OPENING REMARKS

[Deputy Mayor Bob Monette](#)

9:30 am to
10:30 am

Changing My Mind

[Margaret Trudeau - Celebrated Canadian | Mental Health Advocate](#)

KEYNOTE
SPEAKER

Canadians fell in love with Pierre Elliott Trudeau's beautiful bride when he brought her to the world stage as the youngest First Lady in the history of the country. Yet, as time went by, Margaret was unprepared for public life, and plagued by mood swings. After three sons with Pierre, the marriage ended. She then remarried and had two more children. But the tragic loss of her son, Michel, in a skiing accident and the passing of Pierre Trudeau a few years later, were too much to bear, and she became severely ill. Today, Margaret has rebuilt her life once again. Now, she brings her formidable life story to the stage in her quest to help others, sharing her message of resilience with the goal of helping to inspire others and to erase the stigma surrounding mental health issues.

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The PROUD

10:30 am to
11:15 am

COFFEE BREAK and EXHIBITOR HALL

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DO PROCESS
SOFTWARE



Changing of the Guard
Ottawa Tourism

EVENT PROGRAM

THURSDAY
MAY 3, 2018

11:15 am to
12:30 pm

Employment Contracts 101

[Melanie Polowin - Gowling WLG](#)

This presentation will take us back to basics to answer the questions: (i) what are employment contracts made of in Canada?; (ii) why does it matter? and (iii) what should(n't) employers do to implement effective, enforceable and useful employment contracts?

Sponsored by:



11:15 am to
12:30 pm

Effective Witness Interview Techniques

[Crystal Schulz - Kelly Santini LLP](#)

The 1 hour long seminar will be at a high level for experienced law clerks and will cover such things as effective interviewing techniques and preparing witness statements.

Sponsored by:



11:15 am to
12:30 pm

Taking Brands Global: Strategies for Managing Worldwide Trademark Portfolios

[Shelley Jones - Director of Stakeholder Relations, Intellectual Property Institute of Canada \(IPIC\)](#)

Intellectual property (IP) rights are essential for innovative companies seeking to expand their brands internationally. This session provides key insights into strategies for successfully securing and protecting trademarks in a globally competitive marketplace. The presentation will also examine the importance of choosing a strong trademark as well as aligning domestic and worldwide filing programs with enforcement objectives.

Sponsored by:



11:15 am to
12:30 pm

Deconstructing a Corporate Transaction

[Iwona Albrecht - Partner at Soloway Wright LLP](#)

This presentation will show the steps in the corporate transaction and various tasks and roles for clerks and lawyers within the transaction environment.

Sponsored by:



12:30 pm to
1:45 pm

LUNCH

12:50 pm to
1:30 pm

Demos hosted by:

Stewart Title

Ricoh Canada Inc.

Grab your lunch and enjoy your meal while viewing one of the exhibitor demos showcased above.

Sponsored by:



EVENT PROGRAM

THURSDAY
MAY 3, 2018

1:45 pm to
3:00 pm

Dueling Powers of Attorney for Property: A Cautionary Tale!

[Carol Willes - BMO Wealth Management](#)

A review, using a case study, of the dangers of granting multiple, specific Powers of Attorney, especially when different attorneys are named to act under each document. We will explore the effect this has on an individual's general Power of Attorney as well as how the rights and obligations of the general attorney are impacted. The topic will examine circumstances and situations that may give rise to competing grants of power and help practitioners spot them before they create inadvertent problems for clients. It will also highlight how a competing grant might be used by unscrupulous individuals to take advantage of a grantor's situation to inappropriately access assets. Finally, the discussion will wrap up with some best practices for lawyers and their staff members to help clients prevent dueling powers from arising in the management of their assets.

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 NORTON ROSE FULBRIGHT

1:45 pm to
3:00 pm

The e-Discovery Roller Coaster

[Cheryl Curran - Borden Ladner Gervais, LLP](#)

When it comes to e-Discovery there is a right way, a wrong way and a lot of in-between. In this session you will hear real-world experiences about e-Discovery hiccups, and what we've learned from them. This session will also feature the latest technology trends being applied to large-scale reviews today.

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 BLG
Borden Ladner Gervais

1:45 pm to
3:00 pm

Competition Law Primer

[Megan MacDonald - Stikeman Elliott LLP](#)

What's new in Competition Law in Canada? Are you up to speed on your rights and obligations in an era of big data, mega-mergers and increasingly pervasive social media platforms? As Canada's Competition Bureau gets set to welcome a new agency head and usher in a new era in competition law regulation, come learn what you need to know – from the nuts and bolts of Competition Law enforcement in Canada to the latest thinking in mergers, competitor communications and misleading advertising.

Sponsored by:

 Stikeman Elliott

1:45 pm to
3:00 pm

A Review of Recent Case Law from the Supreme Court of Canada in the Area of Commercial Law

[Alexandre Fallon - Osler, Hoskin & Harcourt, LLP](#)

1:45 pm to
3:00 pm

Pure Dirt Law

[Jeffrey W. Lem - Director of Titles for the Province of Ontario](#)

3:00 pm to
3:45 pm

COFFEE BREAK and EXHIBITOR HALL

Sponsored by:

 TERANET®

3:20pm to
3:35pm -

Exhibitor Draws – You must be in attendance to win!

EVENT PROGRAM

THURSDAY
MAY 3, 2018

3:45 pm to
5:00 pm

Best Practices in Leveraging Technology in the Corporate Services Field

Natalie Munroe - Osler, Hoskin & Harcourt LLP

This session will include an overview of the current state of the legal industry and best practices for leveraging technology for corporate services. Implementing a new technology can be daunting and challenging. The session will also provide guidance on how to manage the implementation of new technology.

3:45 pm to
5:00 pm

Where Real Estate and Other Areas of Law Collide

Jason Peyman - Mann Lawyers, LLP

All of us have our areas of expertise that we are comfortable with but there are always scenarios where an aspect of a file touches upon another area of law. In real estate, this happens quite frequently, whether it is an asset purchase by a corporation that involves real property, a separation agreement that requires the transfer of a matrimonial home, or a will that provides for how an interest in the family cottage is being handled. This presentation will look at the interaction between real estate and different areas of the law, such as family, wills and estates, corporate, and general litigation, and how this can impact you.

3:45 pm to
5:00 pm

Navigating Through a Family Law File

Judy Overgaard - Victor Ages Vallance LLP

Family law is never boring. Join Judy Overgaard for a discussion as to the primary issues facing clients in family law, the various avenues available to bring a family law file to resolution and for a discussion regarding practice management issues including managing difficult clients and the collection of client accounts.

3:45 pm to
5:00 pm

Common Mistakes and Unusual Issues in “Probate” Applications.

Laura Kerr - Low Murchison Radnoff LLP

A review of frequent issues and situations encountered in the process of preparing of an application for a Certificate of Appointment of Estate Trustee. Topics discussed may also include the preparation of Notice of Application to the beneficiaries, determination of the value of the Estate, determination of the beneficiaries of an Estate, and who needs to be served notice.

6:00 pm to
8:00 pm

THOMSON REUTER'S ANNUAL COCKTAIL RECEPTION

Delta Ottawa City Centre – Panorama Room, Penthouse Level

Sponsored by:



EVENT PROGRAM

FRIDAY
MAY 4, 2018

7:30 am to
9:00 am

BREAKFAST

Sponsored by:



9:00 am to
10:30 am

Crash Course in Communications - Understanding Media, Social Media and Communications in 2018

Karen Gordon - Gordon Strategy Inc.

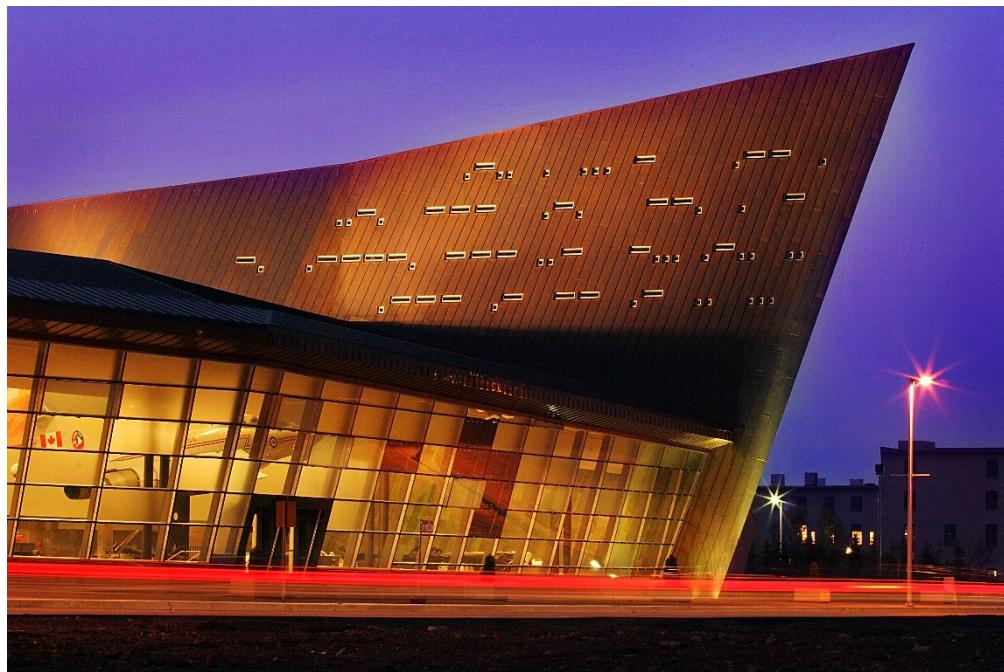
KEYNOTE
SPEAKER

Most of us have hit "reply all" by accident, at least once, and found ourselves scrambling to try and recall the message. Some of us have had a social media post that might have been best left unsaid or have been told by our kids that "if you tag them again they are going to block you on Instagram". Welcome to communications in 2018 where nothing online or in email is private. This presentation will look at media, social media and communications in a modern professional and personal world and how best to maximize what you say, how you say it and when you say it.

10:30 am to
11:15 am

COFFEE BREAK and EXHIBITOR HALL

Sponsored by:



Canadian War Museum

EVENT PROGRAM

FRIDAY
MAY 4, 2018

11:15 am to
12:30 pm

When Law Clerks are Witnesses

[Justice McGee](#)

The tendering of affidavits deposed by law office staff has broad implications for the staff member, the solicitor and the client. What evidence can be given, how one avoids hearsay, how to handle cross examination on an affidavit; and when the proffering of an affidavit might disqualify a law firm from acting further are all questions that will be explored in this session.

11:15 am to
12:30 pm

Was it a Loan? Was it a Gift? The Impact on Families of Common Estate Planning Work-Arounds

[Pamela L. Cross - Borden Ladner Gervais LLP](#)

In an attempt to reduce taxes and estate administration costs, many parents look for other ways of passing assets to their heirs. Beneficiary designations and joint ownership arrangements can give rise to unintended consequences, and unfortunately often lead to family in-fighting and, in some cases, litigation. This session will outline some of the most commonly encountered issues and how to avoid them.

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11:15 am to
12:30 pm

Solicitor Client Assessments – Helpful Hints to Prepare for the Hearing

[Lucy Bender - Regional Hearings Officer, East Region, Ministry of the Attorney General](#)

This session will provide an overview of the assessment process. The focus will be on the major steps, timelines and what is involved in the preparation of an assessment of costs and practice tips in preparing the materials for the hearing.

11:15 am to
12:30 pm

60 Tips in 60 Minutes

[Dan Pinnington - Lawyers' Professional Indemnity Company \(LAWPRO®\)](#)

[Rita Asangarani - MacKay and Asangarani LLP](#)

This fast-paced session will cover a wide variety of practical tips and tricks for doing more with technology. There will be something for everyone in this session. Topics will include useful and entertaining websites, smartphone tips, Windows tricks, social media tips, keyboard shortcuts, mouse tricks, productivity tips, security, privacy advice and more.

Sponsored by:



12:30 pm to
1:45 pm

LUNCH

12:50 pm to
1:30 pm

Demos hosted by:

MedChart

Thomson Reuters

Grab your lunch and enjoy your meal while viewing one of the exhibitor demos showcased above.

Sponsored by:



The PROUD

EVENT PROGRAM

FRIDAY
MAY 4, 2018

1:45 pm to
3:00 pm

Trademarks 2.0

Eric Macramalla - Gowling WLG

In this session, Eric Macramalla will address the many issues that can arise from misappropriation of intellectual property on the Internet. Eric will address enforcement of copyright and trademark rights over the Internet, shutting down websites, addressing unauthorized Facebook and Twitter handles, securing the transfer of unauthorized domain names, and dealing with problematic social media postings. Eric will also provide tips on how to be proactive, in securing intellectual property rights on the Internet.

Sponsored by:



1:45 pm to
3:00 pm

Survival Guide to Fighting Fraud

Jon Castellano – FCT

Barry Mackillop - FINTRACS

To achieve the ultimate knockout in the fight against fraud, it is imperative to understand the options available to you in protecting yourself, your company, and your client's interests. Fraud impacts everyone, so we should all take a closer look at recent fraud statistics, red flags and share best practices. As a well-informed, well-protected united front, fraud does not stand a chance.

Sponsored by:



1:45 pm to
3:00 pm

"The French Connection"

Donna Robinson - Tierney Stauffer LLP

What happens when an out of province driver has an accident in Quebec? Learn what benefits non-residents of Quebec are entitled to and what you need to consider to help your client make an informed choice when electing benefits.

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1:45 pm to
3:00 pm

Asset and Share Transactions – Due Diligence Considerations

Gabriel Brodeur - Stewart McKelvey

A review of key due diligence considerations in asset and share transactions, in the context of private companies. The presentation will explore areas such as searches, encumbrances, contract and minute book reviews.

Sponsored by:



3:00 pm to
3:45 pm

COFFEE BREAK, EXHIBITOR HALL

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3:20 pm to
3:35 pm

Exhibitor Draws – You must be in attendance to win

EVENT PROGRAM

FRIDAY
MAY 4, 2018

3:45 pm to
5:00 pm

Recent Changes to the Taxation of Private Companies

Gregory Sanders - Perley-Robertson, Hill & McDougall LLP/s.r.l.

Gregory Sanders will review the changes originally announced in 2017 by the federal government to address issues identified by the government related to the use of corporations for income splitting among family members and the taxation of passive income earned by private corporations. The session will include a review of draft legislation and its impact on reporting and tracking of various tax accounts such as capital dividend accounts ("CDA"), refundable dividend tax on hand ("RDTOH") and general rate income pools ("GRIP"). If time permits, he will also review the impact of the changes to section 55 and intercompany dividends that arise in restructurings ("safe income").

3:45 pm to
5:00 pm

What's New at the OSC?

Michelle Vaillancourt - Senior Litigation Counsel, Enforcement Branch - Ontario Securities Commission

Ontario Securities law imposes numerous obligations on participants in the capital markets. This session will provide an overview of those obligations and highlight specific obligations by reference to recent cases decided by the Ontario Securities Commission (the "OSC"). Michelle will also take you through some recent initiatives by the OSC, including No Contest Settlements and the OSC's Whistleblower Program.

3:45 pm to
5:00 pm

"LIKE" #WHATWASITHINKING

Martin Thompson - McMillan LLP
Kyle Lambert - McMillan LLP

Effective Use of Social Media in Employment Litigation

6:00 pm to
12:00 am

CANADIAN WAR MUSEUM

Join us for great food and even better company with music, drinks and dinner at The Canadian War Museum and celebrate ILCO's 50th Anniversary!

The Canadian War Museum is Canada's national museum of military history and one of the world's most respected museums for the study and understanding of armed conflict. The Museum traces its origins back to 1880, when it consisted primarily of a collection of militia artifacts. The Museum opened at its new location on the LeBreton Flats site in downtown Ottawa on May 8, 2005. Its opening not only marked the 60th anniversary of the end of the Second World War in Europe (V-E Day) but also the 125th anniversary of the Museum itself. Since its opening in 2005, the Museum has welcomed approximately 500,000 visitors every year.

We are delighted to celebrate ILCO's 50th anniversary at this prodigious venue surrounded by Canadian militia artifacts.

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**PERLEY-ROBERTSON,
HILL & McDougall LLP/s.r.l.**

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EVENT PROGRAM

SATURDAY
MAY 5, 2018

8:00 am to
9:30 am

BREAKFAST

Sponsored by:



9:30 am to
10:30 am

THE KNOWING-DOING G.A.P.- How to Cross the Intention Bridge between Talk & Action

Gair Maxwell

Gair Maxwell reveals secrets that inspire people and organizations to close THE KNOWING-DOING G.A.P. between good intentions and ACTION! Based on a global experiment, Gair reveals why THE KNOWING-DOING G.A.P. exists. And more importantly, how to close it with a dramatic shift in thinking that will inspire growth, action and passion for your company, association and personal life!

10:30 am to
11:00 am

COFFEE BREAK

11:00 pm to
12:00 pm

GRAND PRIZE DRAWS!

Join us for a special 50th Anniversary Draw. Prizes include:

- 2019 Conference Registration Pass
- 55" Flat Screen TV
- Shredder
- And more...

Must be present to win.

CLOSING REMARKS and NETWORKING OPPORTUNITY



Ottawa Tourism

SPECIAL EVENTS

Wednesday, May 2, 2018

19th ANNUAL GOLF TOURNAMENT

LOCATION: The Marshes Golf Club

TEE-OFF TIME: 12:00 pm



Wednesday, May 2, 2018

PRE-CONFERENCE MEET & GREET RECEPTION

LOCATION: Delta Ottawa City Centre – Panorama Room, Penthouse Level

TIME: 6:00 pm -8:00 pm



Thursday, May 3, 2018

THOMSON REUTER'S ANNUAL COCKTAIL RECEPTION

LOCATION: Delta Ottawa City Centre – Panorama Room, Penthouse Level

TIME: 6:00 pm – 8:00 pm



Friday, May 4, 2018

ILCO DINNER & CELEBRATION

LOCATION: Canadian War Museum, 1 Vimy Pl, Ottawa

TIME: 6:00 pm – 12:00 am



ACCOMMODATION

The **Delta Ottawa City Centre** hotel is holding blocks of rooms for Conference. The following room type and rate is available:

Room Type:	Single or Double occupancy rate per night*
Traditional Room	\$209.00
Deluxe	\$229.00
Club	\$269.00

*plus taxes and other applicable fees or charges. Complimentary internet is available in guestrooms.

To reserve your room, please call 1-888-890-3222 or e-mail dot.reservations.sm@del tahotels.com and ask for the Institute of Law Clerks of Ontario room block.

TRANSPORTATION

TRAVEL – AIR

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 flight arrangements through the online booking at www.aircanada.com using account code **9CVAQZA1**. The discounted rates are for the travel period Wednesday, April 25, 2018 to Saturday, May 12, 2018.

West Jet

WestJet is offering *10% off Econo* and *15% off Plus* base fares at the time of booking (excluding web and promotional fares). The Conference code is **T0CDBWN** and must be quoted at time of booking. For details on how to complete a booking with this discount code, visit www.westjet.com/convention-discount.

TRANSPORTATION

TRAVEL – AIR (CON'T)

Porter Airlines

Porter Airlines is proud to offer a 10% discount on available base fares (with the exception of the lowest class fare during a public seat sale) for travel to and from the ILCO Conference 2018. The discounted fares are available for booking from September 14, 2017 to May 8, 2018 and available for travel:

Location		Dates of Travel	
From: Anywhere in Canada or US	To: Ottawa	From: 29/04/2018	To: 05/05/2018
From: Ottawa	To: Anywhere in Canada or US	From: 02/05/2018	To: 08/05/2018

Please book online at <https://flyporter.com/Flight?culture=en-CA&promocode=ILCO18> or through your travel agent using promo code **ILCO18**.

TRAVEL – TRAIN

VIA Rail Canada is pleased to offer ground transportation. The following are the details pertaining to your conference fare:

Valid:	April 29th 2018 to May 7th 2018
Territory:	From all stations throughout the VIA system to Ottawa, Ontario and return.
Restrictions:	Fare applies to a maximum of two passengers per booking. One complimentary stopover is allowed at no additional charge.
	For travel on all fare plans in Business class, the first stopover is allowed at no additional charge, provided that this stopover takes place in Toronto, Montréal or Ottawa only.
Discount:	10% off the best available fare in Economy, Economy Plus, Business, Business Plus, Sleeper class. "Subject to the conditions and restrictions of the fare plan to which the additional discount is being applied."
Exception:	Discount does not apply in any Escape fares and Prestige Class.
Identification:	Participants must reference the events VIA convention discount code: 13591 .
Online booking tips:	Passenger information screen, select "Convention fare" from the "Discount Type" drop-down menu, and enter the discount code for your convention or event in the "Discount code" field. The conference fare will be shown on the next page.

Thank you to the SPONSORS of this year's conference



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**Blaney
McMurtry LLP**

BLG
Borden Ladner Gervais

 **FCT**

HEURISTICA
DISCOVERY COUNSEL

NORTON ROSE FULBRIGHT

KELLY SANTINI LLP/SRL
lawyers | avocats



**PERLEY-ROBERTSON,
HILL & McDougall LLP/s.r.l.**

**Soloway
Wright** | lawyers

Stikeman Elliott

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INTELLECTUAL PROPERTY INSTITUTE OF CANADA
INSTITUT DE LA PROPRIÉTÉ INTELLECTUELLE DU CANADA



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THE INSTITUTE OF LAW CLERKS OF ONTARIO
wishes to express a special thanks to
the members of the 2018 Conference Committee
and their firms/companies for their continuing support
throughout the year.

Rose Kottis, Borden Ladner Gervais LLP (Co-Chair)
Margaret Tsetsakos, Rogers Communications (Co-Chair)
Sue Burkhardt, Gowling WLG
Ian Curry, Toronto Blue Jays Baseball Club
Karen Daly, The Institute of Law Clerks of Ontario
Wanda Doiron, Stewart McKelvey
Zadiha Iqbal, Greater Toronto Airports Authority
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