



# The Institute of Law Clerks of Ontario ANNUAL CONFERENCE

*Let's Make Waves!*

MAY 14-16, 2025 | HALIFAX, NS



# OUR SPONSORS

Wednesday  
Networking Reception

[ MinuteBox ]

Thursday  
Dinner



Friday  
Networking Reception

COX & PALMER

Breakfast



Lunch

MCINNES  
COOPER

MLT AIKINS  
WESTERN CANADA'S LAW FIRM

Afternoon Break



Photographer



Hotel Key Cards



WiFi

BOYNECLARKE LLP

Conference Bags

[ MinuteBox ]

Lanyards



Breakout Sessions



Stikeman Elliott



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# OUR EXHIBITORS



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# SUMMARY AGENDA

## Wednesday, May 14

**Registration Opens** 5:00pm - Nova Scotia Foyer

**Welcome Reception** 6:00pm - 8:00pm - Sable

## Thursday, May 15

**Registration** 7:30am - 9:00am - Nova Scotia Foyer

**Breakfast & Exhibitor Hall** 8:00am - 9:00am - Nova Scotia Ballroom

**Keynote Speaker: Tyler Harden** 9:00am - 10:30am - Halifax Ballroom

**Breakout Sessions** 11:00am - 12:15pm - Various

**Lunch & Exhibitor Hall** 12:15pm - 1:30pm - Nova Scotia Ballroom

**Breakout Sessions** 1:30pm - 2:45pm - Various

**Breakout Sessions** 3:15pm - 4:30pm - Various

**Cocktail Reception** 5:00pm - 6:30pm - Stewart McKelvey Office

**Dinner** 6:30pm - 10:00pm - Alexander Keith's Brewing

## Friday, May 16

**Registration** 7:30am - 9:00am - Nova Scotia Foyer

**Breakfast & Exhibitor Hall** 8:00am - 9:00am - Nova Scotia Ballroom

**Keynote Speaker: Tareq Hadhad** 9:00am - 10:30am - Halifax Ballroom

**Breakout Sessions** 11:00am - 12:15pm - Various

**Lunch & Exhibitor Hall** 12:15pm - 1:30pm - Nova Scotia Ballroom

**Breakout Sessions** 1:30pm - 2:45pm - Various

**Breakout Sessions** 3:15pm - 4:30pm - Various

**Networking Reception** 7:00pm - 10:00pm - Bitter End Martini Bar





# SOCIAL EVENTS

## Wednesday, May 14

### Welcome Reception

6:00pm - 8:00pm - Sable Room  
Marriott Halifax Harbourfront

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**[ MinuteBox ]**

## Thursday, May 15

### Cocktail Reception

5:00pm - 6:30pm  
Stewart McKelvey Office  
6<sup>th</sup> Floor – 1741 Lower Water Street

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### Dinner and Entertainment

6:30pm - 10:00pm  
Alexander Keith's Brewery  
1496 Lower Water St #312

## Friday, May 16

### Networking Reception

7:00pm - 10:00pm  
The Bitter End Martini Bar  
1572 Argyle St

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# CONFERENCE CHAIR



## ROSE KOTTIS

Vice President, Conference Chair and  
Public Relations Chair

**The Institute of Law Clerks of Ontario**

Senior Coordinator, Paraprofessional  
Services – Specialized Business Group  
**Borden Ladner Gervais LLP**

Rose works with paralegals and law clerks nationally to support the Specialized Business Services Group, ensuring our clients receive exceptional service.

She co-ordinates career management, capacity management, performance management and talent development for BLG's Tax, Financial Services and Corporate Real Estate paraprofessionals.

Rose is responsible for implementing new technology, programs, policies and procedures to promote consistent law clerk and paralegal services. She also analyzes group processes to maximize efficiency and increase productivity.

Rose has extensive experience in the area of estates law and is a Certified Expert in Estates Law, recognized by the Institute of Law Clerks of Ontario.



# KEYNOTE SPEAKER

## DAY 1

9:00 AM - 10:30 AM



### TYLER HAYDEN

Hall of Fame  
Speaker and Best  
Selling Author

#### LIVIN' LIFE LARGE:

Simple Actions  
Create Success

Join us on a Content Rich, Humourous, Adventure with Canada's answer to alternative energy Tyler Hayden CSP. Tyler will share some insights from his best selling book *Livin' Life Large: Simple Actions that Create Success*. You will feel like you too are swimming with Great White Sharks in Australia and Jumping off Cliffs in the Swiss Alps all the while rolling in the aisles with laughter as you learn techniques for better work life integration, connection with colleagues, and of course fun.

Tyler will remind us several simple management approaches including thing like, "Energy goes where attention goes," in which he will actively show us how to focus our teams energy and harness our best leadership skills to effectively engage in a diverse and growing workforce.

This presentation is about creating long-term life integration by living "every single moment of every single day." In doing so we are able to effectively and efficiently balance the rigours that work and life throw our way. We explore this by learning about how to support each other, set goals/intentions, relationship building, recognizing opportunities, and so much more.



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# BREAKOUT SESSION

## DAY 1

11:00 AM - 12:15 PM



**Daniel Levine**  
CEO  
*MinuteBox*

### Embracing AI in Law: A Beginner's Guide to Transformative Legal Technology

Explore the transformative potential of Artificial Intelligence (AI) in the legal profession. This session is designed for legal professionals who have little to no experience with AI technology. We'll demystify AI, explain its basic concepts, and demonstrate its practical applications within the legal field. Learn how AI can enhance legal research, improve document management, streamline case analysis, and boost overall productivity.



**Steven Pulver**  
CCO  
*MinuteBox*  
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Legal professionals that attend this talk will leave equipped with the knowledge and tools needed to integrate AI into their practice. Join us to discover how embracing AI can lead to more efficient, accurate, and innovative legal services.

### **Don't put all your Hagues in one basket: Navigating the service of legal documents abroad**

Get ready for an in-depth exploration of the electrifying Hague Convention of 15 November 1965 on the Service Abroad of Judicial and Extrajudicial Documents in Civil or Commercial Matters, and how it plays a crucial role in international family law cases. We'll break down the practical steps you need to take to use the Convention effectively, tackle common challenges like timelines, and discuss what to do when the Convention doesn't quite deliver. Plus, we'll take a closer look at alternative service methods in countries that aren't signatories to the Convention, and what these choices could mean for your client's legal costs. This presentation is guaranteed to be adventure-filled with anecdotes from services and attempted services in India, Botswana, Egypt and others!



**Ashley Donald**  
Lawyer  
*Tandem Law*

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# BREAKOUT SESSION

11:00 AM - 12:15 PM

## DAY 1



### Rajen Akalu

Barrister &  
Solicitor  
*Akalu Law  
Professional  
Corporation*

### Privacy Law in a Changing World

In an era of rapid digital transformation, privacy law in Canada continues to evolve to address emerging risks, regulatory changes, and public concerns. This session will provide a comprehensive overview of Canada's key privacy legislation, including the Personal Information Protection and Electronic Documents Act (PIPEDA), provincial privacy laws, and the proposed Consumer Privacy Protection Act (CPPA).

Attendees will gain insights into compliance obligations, recent enforcement actions, and best practices for handling personal data. The session will also explore the impact of international regulations (such as the GDPR) on Canadian businesses, the role of privacy regulators, and key legal considerations for organizations operating in an increasingly data-driven world.

Whether you are a legal professional, compliance officer, or business leader, this session will equip you with the knowledge needed to navigate Canada's privacy landscape effectively and prepare for future regulatory developments.

11:00 AM - 12:15 PM



### Jennifer Connell

Senior Product  
Manager  
*Teraview*

### Mastering OnLand and Teraview: Expert Tips and What's New

Join experts from Teranet to unlock practical tips and tools to maximize your use of OnLand and Teraview, essential platforms for law clerks working in real estate, corporate law, litigation, and more. We will also introduce the redesigned Map Search, highlighting its latest enhancements and newest features. Learn how to effectively navigate the updated Map Search and make the most of the new improvements. Don't miss this opportunity to elevate your skills!



### Diane Statevski

Senior Product  
Manager  
*OnLand*

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# BREAKOUT SESSION

## DAY 1

1:30 PM - 2:45 PM

### Identifying Fraud in Real Estate Transactions



#### Ravinder Rai

Senior Legal Counsel  
*First Canadian Title*

Hosted by Ravinder Rai, Senior Legal Counsel at FCT, you will gain key insights into the world of fraud in real estate transactions, its perpetrators and its victims. With real-life commercial and residential fraud examples, Ravinder will teach you how to spot the red flags and employ simple strategies to minimize risk for you, your firm and your clients. Topics will include synthetic identification fraud, wire fraud, hijacking corporations and more.

1:30 PM - 2:45 PM

### Time & Workflow Best Practices



#### Dawn Cottreau

Director, Strategy  
& Innovation  
*Stewart McKelvey*

This session will cover recommended best practices for managing your time, email and workflow, including practical tips for configuring your Outlook to maximize efficiency.



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# BREAKOUT SESSION

## DAY 1

1:30 PM - 2:45 PM



**Rolлие Thompson**  
Partner  
*Epstein Cole LLP*

### How Guidelines Work: Child Support and Spousal Support

Ever wonder where the child support table amounts came from? The ins and outs of the Child Support Guidelines? How the Spousal Support Advisory Guidelines were created? How they work in typical cases? All the questions you ever had about support in family law answered!

3:15 PM - 4:30 PM



**Karen Tuschak**  
Founder and CEO  
*Spider Silk Innovative  
Solutions Inc.*

### Leading Without a Title: Influence, Inspire, Empower

Join us for an inspiring and interactive training program designed to elevate your leadership capabilities and refine your communication skills. This dynamic session will provide you with essential tools and actionable insights to thrive in your role and lead with confidence, integrity, trust, and resilience—regardless of your title.



**Nicole Burch**  
Head of Business,  
Corporate  
*Appara.*

Engage in meaningful discussions as we create a supportive space to share real-world challenges and successes, learning from one another's leadership experiences. With the demands of today's multi-generational and hybrid work environments, effective communication has never been more critical. This program will help you navigate these challenges with practical strategies you can apply immediately.

Prepare to be inspired and motivated as we explore key leadership concepts together.



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# BREAKOUT SESSION

## DAY 1

3:15 PM - 4:30 PM



**Charles Reagh**

Partner  
*Stewart McKelvey*

### **Nova Scotia Companies in 2025**

This session focuses on understanding the uses and recent changes in the mechanics of Nova Scotia companies.



**Wanda Doiron**

Manager, Business  
Paralegals, NL & NS  
*Stewart McKelvey*

3:15 PM - 4:30 PM

### **Family Law and the LGBTQ community: History and Interpretation**

A discussion about the history and interpretation of LGBTQ issues in family law and child protection matters



**Marc Charrier**

Barrister and  
Solicitor



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# BREAKOUT SESSION

## DAY 1

3:15 PM - 4:30 PM



**Margaret  
Tsetsakos**

Director, Legal  
Operations  
*Rogers  
Communications*

### **Part 1: Working with your Client as you Navigate the What, Where and Who in E-Discovery**

Focusing on getting started and understanding the data environment from a law firm and in-house point of view, this session will equip you with the knowledge and resources to help navigate the complexity of data collection today:

In this session we will discuss:

- Important questions to ask prior to collection
- Developing a collection strategy
- Identifying key custodians and data sources
- Understanding the retention policies and the litigation hold



**Sarah Trask**

Manager, Advocacy  
Paralegals  
*Stewart McKelvey*

## DAY 1

### **Cocktail Reception**

5:00pm - 6:30pm

Stewart McKelvey Office

6<sup>th</sup> Floor – 1741 Lower Water Street

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### **Dinner and Entertainment**

6:30pm - 10:00pm

Alexander Keith's Brewery

1496 Lower Water St #312



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# KEYNOTE SPEAKER

## DAY 2

9:00 AM - 10:30 AM



### TAREQ HADHAD

CEO and Founder,  
Peace by  
Chocolate

#### ONE PEACE WON'T HURT

Building a Cause  
through  
Entrepreneurship  
and Community

With customers from across Canada and Internationally, Peace By Chocolate is the result of people and passions coming together to advocate for a cause: peace.

From owning a successful middle eastern chocolate factory in Syria to losing everything to war and conflict, Tareq shares the back story of his father's love of chocolate and all that was lost when the family fled to Lebanon.

When the family lands in Canada they have only themselves to build on. With the support of their community (Antigonish, Nova Scotia), Isam, Tareq's father, and Tareq began making chocolate in their tiny kitchen. An entrepreneurial spirit brought them to their local farmers market and customers were soon flocking to their small table to purchase their delicious treats.

"People, they loved our chocolate before they even tried it. They loved our story, the cause it represented, and the hope it gave us all,"

We will hear how the family reacted and struggled to make the most out of this once in a lifetime opportunity.

Tareq will delve into the challenges that come with rapid growth, in expanding to new markets and gaining national distribution while staying true to the peace based cause that started it all.



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# BREAKOUT SESSION

## DAY 2

11:00 AM - 12:15 PM



**Ron Badr**

Director, Business  
Development  
*Estatesearch*

### **Missing Billions – Canada's Unclaimed Assets, Risk and Best Practice For Estate Practitioners**

There is estimated to be over \$4 billion in unclaimed assets across Canada, sitting in banks, trust funds, insurance policies, bonds, securities, and pensions.

This issue significantly impacts the estates sector, as unclaimed assets increase the risk of executors overlooking important estate components during administration.

Our Unclaimed Assets Knowledge Session dives deeper into this topic, exploring how to tackle the challenge effectively.

#### **Learning objectives:**

- You will learn the value of the missed billions – how much money is unclaimed in Canada.
- We will explore a variety of different financial institutions, and the unclaimed funds held within them.
- We will explain how all this money has accumulated and why it is unclaimed.
- The Federal and Provincial landscapes and how unclaimed assets are dealt with.
- You will understand the implications for Executors and Beneficiaries.
- We will discuss how to conduct best practice and due diligence when locating and identifying assets we'll also explore our solution to the ever-growing problem.



**Michael Malloy**

Director, Business  
Development  
*Estatesearch*



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# BREAKOUT SESSIONS

11:00 AM - 12:15 PM



**Tiffany Pereira**

VP, Customer  
Success  
Minutebox

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**[ MinuteBox ]**

## **Empowering Women and Allies in Law: Confronting Imposter Syndrome and Strengthening Resilience**

Open to all, this session invites women and their allies to explore the unique challenges faced by women in the legal profession, particularly around Imposter Syndrome and self-doubt. Our speaker will share her insights, personal experiences, and actionable strategies to help attendees recognize and address these challenges.

Together, we will uncover the roots of Imposter Syndrome, examine its impact on career growth, and share practical tools to cultivate a stronger, more resilient mindset. This session will also emphasize the importance of mentorship, allyship, and creating supportive professional environments that empower women and foster inclusivity.

Whether you're a legal professional navigating Imposter Syndrome, a leader striving to empower your team, or an ally committed to building an equitable workplace, this session offers valuable insights and strategies to promote confidence, resilience, and inclusivity in the legal profession.

11:00 AM - 12:15 PM



**Lisa Matchim**

Real Estate  
Law Clerk  
Stikeman Elliott

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## **O'Canada – Commercial Real Estate from Coast to Coast**

More commercial real estate transactions now involve multiple properties in other provinces across Canada. Whether it is a share purchase transaction, an asset purchase transaction or even a name change that needs to be recorded in other provinces, the differences in what is required can be a challenge to navigate if you are the person appointed in the project management role for the transaction. We will discuss some of the differences between what we do in Ontario and what will be needed in the other provinces.



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# BREAKOUT SESSIONS

11:00 AM - 12:15 PM



## P. Robert Arkin

Partner  
Cox & Palmer

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### A Comprehensive Review of Dividends

Topics will include the history and origin of dividends and their role in modern-day corporate governance and finance. We'll explore the various types, such as cash dividends, stock/share dividends, and dividends-in-kind, along with their respective implications. The discussion will also cover key compliance requirements, including solvency, income, and profit tests, as well as the importance of appropriate documentation. Participants will gain insights into critical considerations like record dates, timing of distributions, waivers of dividends, and the intricacies of formulaic and retroactive dividends. Additionally, we'll address issues surrounding stated and paid-up capital, as well as creditor claims against directors and dividend recipients, including tax-related claims under the Income Tax Act and the Excise Tax Act.

1:30 PM - 2:45 PM



## Meagan Jennings

Senior Associate  
BLG

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### Will Challenges: How Can We Help?

This session will discuss the procedural steps that take place in a Will Challenge, and the different forms and steps that clerks can take in order to assist their team in moving the litigation forward from the outset to the conclusion of a file. Further, we will discuss the recent estate decisions released pertaining to Will Challenge and provide an update on the status of the law in this area.



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# BREAKOUT SESSIONS

1:30 PM - 2:45 PM



**Kathleen Leighton**

Senior Strategy  
and Innovation  
Lawyer

*Stewart McKelvey*

## Introduction to AI: Understanding Its Potential and Applications in the Legal Industry

As artificial intelligence continues to shape industries across the globe, the legal field is no exception. This session provides an accessible introduction to AI, demystifying its core concepts and exploring how it can be leveraged in a law firm setting. Attendees will gain a clear understanding of what AI is and how it can enhance efficiency and improve client services. From document review and contract analysis to legal research and predictive analytics, this session will highlight practical AI applications tailored to the needs of legal professionals, while also exploring the potential risks and ethical considerations of its use in legal practice. Whether you're new to AI or curious about its potential, this session will equip you with the foundational knowledge to begin integrating AI into your legal practice.



1:30 PM - 2:45 PM



**Kim Miyanishi**

Senior Law Clerk  
*Epstein Cole LLP*

## WHAT DO YOU DO WHEN... Tips and Tricks to Help Family Law Clerks

Ever found yourself in a situation with a client or lawyer where you wished you had insight into how other family law clerks would handle it? If so, this session is for you! Join Marina and Kim, law clerks from Epstein Cole LLP, one of the top family law firms, for an engaging, interactive discussion where they'll tackle real-life scenarios and share strategies to help you manage tricky situations and streamline your work.



**Marina Pavicevic**

Senior Law Clerk  
*Epstein Cole LLP*



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# BREAKOUT SESSIONS

## DAY 2

3:15 PM - 4:30 PM



### Municipal Real Estate Round Table Forum

Bring your Real Estate Questions!

**Lana Papp**  
Municipal Law Clerk  
*City of Hamilton*



**Barbara Barclay**  
Municipal Law Clerk  
*Region of Peel*

3:15 PM - 4:30 PM



### Kristopher Rodrigues

Securities Law Clerk  
*Stikeman Elliott LLP*

### Private Placements and Offering Non-Resident Funds and Investment Advice into Canada

This session will cover, from a law clerk's perspective, the process, analysis, reporting and work involved in assisting an issuer in conducting a private placement into Canada. Topics will include private placement materials and disclosures, prospectus exemptions, registration and registration exemptions, and post-closing requirements.

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# BREAKOUT SESSIONS

3: 15 PM - 4:30 PM



**Margaret  
Tsetsakos**

Director, Legal  
Operations  
*Rogers  
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## Part 2: Surviving the Collection Process

In the earlier session we talked about working with your client as you navigate what, where and who. We touched on collection and important questions to ask and developing a collection strategy. Now, let's take a deeper dive into COLLECTIONS. Organizing and managing your collections to get you to the next step.

In this session we will discuss:

- Data sources and creating a data map
- Collection methodologies
- Best Practices
- Checklists and Tracking

3: 15 PM - 4:30 PM



**Michelle Crabb**

Manager, Corporate  
Support Services  
*Davies*

## Navigating Canadian Corporate Compliance: Insights from Private Practice and In-House Perspectives

Corporate compliance in Canada is a dynamic and evolving field, requiring businesses to navigate legal frameworks and various regulatory requirements. In this session, we will explore latest trends, challenges, and best practices in corporate compliance from both private practice and in-house perspectives.



**Sharon D'Souza**

Law Clerk  
*Primerica*



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# BREAKOUT SESSIONS

## DAY 2

### Networking Reception

7:00pm - 10:00pm

The Bitter End Martini Bar

1572 Argyle St

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