



The Institute of Law Clerks of Ontario **ANNUAL CONFERENCE**



NOVEMBER 1 - 3, 2023 | FAIRMONT CHATEAU LAURIER | OTTAWA

Capitalize
YOUR SUCCESS

OUR SPONSORS

NETWORKING RECEPTION



KEYNOTE SPEAKER



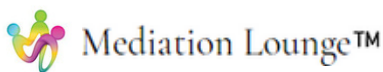
HOTEL KEY CARDS



BREAK



WORKSHOP SPONSORS



OUR EXHIBITORS



Closer



RAIGRANT
INSURANCE BROKERS



Lawyer Conveyance System



FCT



Branch
office services



FIRST BASE SOLUTIONS
GEOSPATIAL EXPERTS



stewart
TITLE



Appara



TERANET

RELIABLE DATA +
INSIGHTFUL SOLUTIONS

SUMMARY AGENDA

WEDNESDAY, NOVEMBER 1

REGISTRATION OPENS

5:00PM - FRENCH CORRIDOR

WELCOME RECEPTION

6:00PM - 8:00PM - EXHIBITOR HALL

THURSDAY, NOVEMBER 2

REGISTRATION

7:30AM - FRENCH CORRIDOR

BREAKFAST & EXHIBITOR HALL

8:00AM - 9:00AM - LAURIER ROOM & BALLROOM

KEYNOTE SPEAKER: SARAH WELLS

9:00AM - 10:30AM - ADAM ROOM

BREAKOUT SESSIONS

11:00AM - 12:15PM - VARIOUS

LUNCH & EXHIBITOR HALL

12:15PM - 1:45PM - LAURIER ROOM & BALLROOM

BREAKOUT SESSIONS

1:45PM - 3:00PM - VARIOUS

BREAKOUT SESSIONS

3:30PM - 4:45PM - VARIOUS

COCKTAIL RECEPTION & DINNER

6:00PM - 9:00PM - CANADIAN MUSEUM OF HISTORY



SUMMARY AGENDA

FRIDAY, NOVEMBER 3

REGISTRATION

7:30AM, FRENCH CORRIDOR

BREAKFAST & EXHIBITOR HALL

8:00AM - 9:00AM, LAURIER ROOM & BALLROOM

KEYNOTE SPEAKER: THE FLIPSIDE

9:00AM - 10:30AM, ADAM ROOM

BREAKOUT SESSIONS

11:00AM - 12:15PM, VARIOUS

LUNCH & EXHIBITOR HALL

12:15PM - 1:45PM, LAURIER ROOM & BALLROOM

BREAKOUT SESSIONS

1:45PM - 3:00PM, VARIOUS

BREAKOUT SESSIONS

3:30PM - 4:45PM, VARIOUS



KEYNOTE SPEAKERS

SARAH WELLS | DAY 1 THE PURSUIT OF EXCELLENCE

True success knows no bounds nor definitive endpoint. Therefore, excellence is not a destination but rather a mindset that emphasizes action over mere outcome. In this inspiring and thought-provoking keynote from Olympian Sarah Wells, prepare to be equipped with actionable insights and tools that will help you find significance in the obstacles you face and create a path to personal and professional excellence.



THE FLIPSIDE | DAY 2 DREAM DEEP, PERFORM STRONG: OPTIMIZING SLEEP SUPERPOWERS

Don't overlook the power of sleep in your success story. In the always busy corporate landscape, sleep is often undervalued despite being an invaluable asset in our "health toolbox." This session will dive into the scientific foundations of sleep and you will discover eight essential habits that enhance the quality of your rest. By implementing these habits, you'll experience a significant boost in performance, nurture your overall well-being, and fortify your long-term health. Embrace the potential of sleep for a remarkable transformation in your professional journey!



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BREAKOUT SESSION SPEAKERS

THURSDAY, NOVEMBER 2



11:00AM - 12:15PM

WHAT'S IN A TITLE? EXPLORING TITLE SEARCHING IN ONTARIO

In this session, Merredith MacLeannan will review the different types of title in Ontario, provide some tips to make your title searching more efficient, and bring out her inner Captain Jack Sparrow discussing how dead men can't sign deeds

MEREDITH MACLENNAN
PARTNER, MEROVITZ
POTECHIN LLP

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11:00AM - 12:15PM

IDENTIFYING ESTATE PLANNING OPPORTUNITIES FOR OUR CLIENTS

A discussion and presentation on how law clerks, especially those working outside the estate planning area of practice, can better understand and help to identify estate planning opportunities for our clients in all areas of practice.

DOUGLAS D. BUCHMAYER
PARTNER, GOWLING WLG
(CANADA) LLP

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11:00AM - 12:15PM

EMPLOYMENT CONTRACTS 101

The presentation will give non-practitioners and practitioners a key overview of important clauses in an Ontario employment contract. It will go over, what the clauses intention is, why they are necessary, and key pitfalls to avoid when drafting. It will also review new case law from the last two years and consequences of not drafting in accordance with the jurisprudence.

TRAVIS UJJAINWALLA
LAWYER, MANN LAWYERS

BREAKOUT SESSION SPEAKERS

THURSDAY, NOVEMBER 2



11:00AM - 12:15PM

EFFICIENT USE OF CLERK RESOURCES: HOW CLERKS CAN PLAY A MASSIVE ROLE IN MAJOR ARBITRATIONS

MARIE-EVE JEAN

ASSOCIATE, LITIGATION & DISPUTE
RESOLUTION | EMPLOYMENT &
LABOUR RELATIONS, MCMILLAN



1:45PM - 3:00PM

THE PURSUIT OF EXCELLENCE

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SARAH WELLS

SPEAKER, OLYMPIAN,
FOUNDER



1:45PM - 3:00PM

EDISCOVERY PROJECT MANAGEMENT

eDiscovery files can seem overwhelming. There are important decisions to be made at each stage of the EDM. Understanding what to ask for and making the best decisions at the outset can help you and your legal teams avoid a multitude of pitfalls. Join me as I discuss the key things to do from collection all the way through to trial

CHERYL CURRAN

DIRECTOR, EDISCOVERY
BLG BEYOND

BREAKOUT SESSION SPEAKERS

THURSDAY, NOVEMBER 2



KATE WRIGHT
PARTNER
MANN LAWYERS

1:45PM - 3:00PM

CASE LAW RE DISCLOSURE OF DIGITAL ASSETS



DIRK BOUWER
PARTNER, PERLEY-ROBERTSON
HILL & MCDUGALL LLP

1:45PM - 3:00PM

PPSA

PPSA as it pertains to how to search and read searches and the elements of financing statements, registration and associated issued including priorities

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



VIRGINIA HARWOOD
INDEPENDENT FREELANCER

3:30PM - 4:45PM

PARTNERING FOR SUCCESS: MENTORSHIP FOR LAW CLERKS

In this session, we will explore the concept of mentoring through a traditional lens while also introducing the concept of mentoring constellations. Additionally, Virginia will share her experiences and best practices in developing a mentorship program; and, through qualitative research methodology, discuss how the mentors and mentees perceived their experiences in the program.

BREAKOUT SESSION SPEAKERS

THURSDAY, NOVEMBER 2



3:30PM - 4:45PM

BILL OF COSTS OR COSTS OUTLINE - WHAT'S THE DIFFERENCE? PART 1

Costs analysis. Conversion of client ledger to excel.
Review and organize dockets into phases of litigation.

LORI MARKUS

SENIOR LITIGATION LAW CLERK,
INSTITUTE OF LAW CLERKS OF ONTARIO



3:30PM - 4:45PM

ESTATE CHALLENGES WITH HUMAN REPRODUCTIVE TECHNOLOGY

This session will explain the treatment of human reproductive material and technology in the context of an estate. Specifically, we will explore what this material is, who owns it, how it can be used and by whom after the death of a donor. Challenges arise when stakeholders have conflicting interests in the deceased's reproductive material and any resulting children. Carol will walk through these conflicts, possible resolutions for clients and best practices for planning.

CAROL WILLES

DIRECTOR, ESTATE
PLANNING, BMO
PRIVATE WEALTH



3:30PM - 4:45PM

CURRENT TRENDS IN M&A

In this session, we will provide an update on current case law relating to M&A transactions and other recent regulatory changes that may impact M&A. Additionally, Christine will highlight other current trends we are seeing in Canadian M&A transactions.

CHRISTINE POUND

PARTNER
STEWART MCKELVEY

BREAKOUT SESSION SPEAKERS

FRIDAY, NOVEMBER 3



11:00AM - 12:15PM

BILL OF COSTS OR COSTS OUTLINE - WHAT'S THE DIFFERENCE? PART 2

Import Data from Part 1 into Word documents – Bill of Costs and Costs Outline.

LORI MARKUS

SENIOR LITIGATION LAW CLERK,
INSTITUTE OF LAW CLERKS OF ONTARIO



11:00AM - 12:15PM

IDENTIFYING, REGISTERING AND PROTECTING INTELLECTUAL PROPERTY ASSETS

RYAN SHEAHAN

COUNSEL,
STIKEMAN ELLIOTT



11:00AM - 12:15PM

HST AND REAL ESTATE TRANSACTIONS: MIXED-USE PROPERTIES

Residential real property transactions trigger special HST rules, and these rules get complicated where real property has both residential and non-residential elements. The format of this session will focus on workshopping hypothetical scenarios to issue spot HST issues, and identifying how to address them in agreements and closing documents.

BRAEK URQUHART

SENIOR MANAGER, DELOITTE

BREAKOUT SESSION SPEAKERS

FRIDAY, NOVEMBER 3



11:00AM - 12:15PM

BUSINESS SUCCESSION PLANNING – DEATH OF A SHAREHOLDER

CHARLOTTE MCCURDY

PARTNER, PERLEY-ROBERTSON,
HILL & MCDUGALL LLP

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



1:45PM - 3:00PM

VALUING A SPOUSE'S INTEREST IN A DISCRETIONARY TRUST FOR THE PURPOSES OF EQUALIZATION

There has been a shift in approach adopted by the Ontario jurisprudence when valuing a spouse's interest in discretionary trust for the purposes of equalization. This presentation focuses on the original test used by the court, what the more recent approach is, and how this can information family lawyers and estate planners when best determining how to protect their client's interests in discretionary trusts and prevent imputation of income claims arising upon a breakdown of a relationship

EMILY O'KEEFE

LAWYER, MCLEOD GREEN
DEWAR & ASSOCIATES LLP

1:45PM - 3:00PM

THE LAW CLERKS ROLE IN ESTATE TRUSTEE DURING LITIGATION MANDATES - ASSISTING IN THE INVESTIGATION

This session will explain the treatment of human reproductive material and technology in the context of an estate. Specifically, we will explore what this material is, who owns it, how it can be used and by whom after the death of a donor. Challenges arise when stakeholders have conflicting interests in the deceased's reproductive material and any resulting children. Carol will walk through these conflicts, possible resolutions for clients and best practices for planning.



ZIAD YEHA

PARTNER, BORDEN
LADNER GERVAIS LLP

BREAKOUT SESSION SPEAKERS

FRIDAY, NOVEMBER 3



LORENZO BONERA
ASSOCIATE,
GOWLING WLG

1:45PM - 3:00PM

DOS AND DON'TS OF CLIENT IDENTITY VERIFICATION: THE END OF THE TEMPORARY COVID-19 EMERGENCY MEASURES AND THE REQUIREMENTS COMING INTO EFFECT ON JANUARY 1, 2024

The Law Society of Ontario is introducing changes to the requirements for virtually verifying the identity of clients. These changes are intended to address the rising concerns over identity fraud, money laundering and mortgage fraud. The new requirements are effective January 1, 2024. In this session, we will provide an overview of the current obligations of licensees for client identification and verification, and review the upcoming changes. We will also discuss what these changes entail for legal professionals, and explore practical ways to comply with the new requirements.



LISA TRADER
SENIOR CORPORATE LAW CLERK,
LABARGE WEINSTEIN LLP

1:45PM - 3:00PM

ISC REGISTERS

Now that Ontario and Quebec have both introduced this concept, along with Corporations Canada, a refresher on what is required for the Register would be helpful, how to determine who is an ISC – what to do if a discretionary trust is an ISC – what information can be shared with best practices.



3:30PM - 4:45PM

BRING YOUR MUNICIPAL REAL ESTATE QUESTIONS MUNICIPAL ROUND TABLE FORUM

MODERATED BY LANA PAPP
INSTITUTE OF LAW CLERKS
OF ONTARIO

BREAKOUT SESSION SPEAKERS

FRIDAY, NOVEMBER 3



DEMITRY OMRIN
PRINCIPAL, THE REAL
ESTATE CONSULTING
GROUP OF CANADA LTD.

3:30PM - 4:45PM

FAMILY MEDIATION OF FINANCIAL ISSUES

This session will delve into the subject matter of the most common and financially impactful property and support claims. It will start with a foundational overview of real estate asset valuation. Practitioners will gain the requisite knowledge to review and assess appraisal reports. The program will then shift into the main talking points of valuations that form part a Family Mediation and legal pleadings for litigation related files. The remaining portion of the presentation will speak to various spousal/child support scenarios and address how to correctly calculate lump sum spousal support among other topics of importance.

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Mediation Lounge™



BRIAN KELLS
ASSOCIATE, PERLEY-
ROBERTSON, HILL &
MCDUGALL LLP

3:30PM - 4:45PM

WHAT IS THE EXEMPT SECURITIES MARKET?

Considerations for your client, including convertible debt and the differences in the kinds of instruments, how each are authorized, when shares are issued, secured vs unsecured instruments

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



WILL BOYER
PARTNER, GOWLING WLG

3:30PM - 4:45PM

NORWICH ORDERS

The Institute of Law Clerks of Ontario ANNUAL CONFERENCE



On behalf of the Board of Directors at The Institute of Law Clerks of Ontario, we would like to extend our gratitude for your participation in our Annual Conference "Capitalize your Success".

We look forward to seeing you in Ottawa!