

CLE for Lawyers & Accountants

100 Questions about a Will Challenge

Tuesday, June 2, 2015

PRESENTERS



Charles Wagner

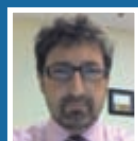
Wagner Sidlofsky LLP, Chair, Trusts & Estates group



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Hull & Hull LLP



Clare Burns
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John Clegg
Scotia Private Client Group



Brendan Donovan
Wagner Sidlofsky LLP



Heather Hogan
Whaley Estate Litigation



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Hull & Hull LLP



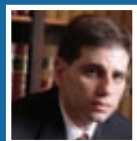
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Archie Rabinowitz
Dentons Canada LLP



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Affiliate scientist, Sunnybrook
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Whaley Estate Litigation

100 QUESTIONS ABOUT A WILL CHALLENGE

On June 2nd, 2015, B'nai Brith Canada's Estates & Trusts, Lawyers Division, will be



Jordan Atin

presenting its seminar entitled 100 Questions About a Will Challenge. We will be using a combination of a moot court and panel discussion as an innovative presentation method. Since 2006, B'nai Brith Canada's Estates and Trusts Group has been providing seminars for lawyers and accountants on issues of interest. Our seminars have qualified for CPD hours. The format of the seminar will be a moot trial. The facts are drawn from several actual cases to highlight issues of interest in will challenges.



David Lobl

In this hypothetical scenario, an illiterate elderly woman only speaks Russian and Yiddish makes a will. Her unemployed son persuades his mother to transfer her home to him and make a new will that disinherits his sister. At the time the will was made, the mother suffered from Alzheimer's. While under the care of her son, she drove her car into a pole resulting in irreversible brain damage. The Judge of the moot court will be Jordan Atin of Hull & Hull LLP. We will highlight issues including capacity, undue influence, solicitor's negligence and the feasibility of a will challenge while the testator is still alive. Whenever there is an issue of capacity, it is common to

have a retrospective capacity assessment done. In our case scenario, Dr. Ken Shulman of the Dept. Of Psychiatry, Sunnybrook Health Sciences Centre, did a retrospective capacity assessment.



Brendan Donovan

Brendon Donovan of Wagner Sidlofsky LLP will conduct the examination in chief and David Lobl of Dentons Canada will do the cross examination. This portion of the seminar has skilled estates litigators using a trial scenario to teach attendees about testamentary capacity, examination in chief and cross examination in an estate context. The event will take place on June 2nd, 2015 at Shaarei Shomayim-



Dr. Ken Shulman

Synagogue at 470 Glencairn Avenue, Toronto, Ontario M5N 1V8. Registration is at 7:30am and the moot court will begin at 8:00am. The event is open to lawyers and accountants. Those lawyers and/or accountants interested in attending may contact Elyse Gruenspan at B'nai Brith Canada at (416) 633-6224 or email at egruenspan@bnaibrith.ca. Charles B. Wagner, of Wagner Sidlofsky LLP, is a certified specialist in Estates & Trusts Law. He chairs the Estate and Trusts Group, Lawyers Division of B'nai Brith that created and runs this annual continuing legal education program for professionals dealing with estate and trust issues.

Sponsored By: B'nai Brith Canada, Bank of Nova Scotia Trust Company, Hull & Hull LLP, Wagner Sidlofsky LLP and Whaley Estate Litigation



WagnerSidlofsky
LLP



HULL & HULL LLP
Barristers and Solicitors
Trust Experience



Shaarei Shomayim Synagogue 470 Glencairn Ave., Toronto

Registration & Breakfast: 7:30 am Program: 8:00 am – 12:00 noon Cost \$100+tax
To register, please contact Elyse Gruenspan at 416-633-6224 x109 egruenspan@bnaibrith.ca
This program is eligible for substantive CPD hours required of Lawyers by the LSUC