

OSGOODEPD'S 9TH ANNUAL RECENT DEVELOPMENTS AND COMPLEX ISSUES IN PROPERTY & EQUALIZATION



Get **critical insight** from leading family law experts and judges.

This is the essential program for in-depth and practical guidance on the most pressing property and equalization issues, including:

- The year in review: the most significant cases you need to know about, and why
- How-to's for navigating locked-in accounts
- Business valuations in 2020: What's new? What's tricky?
- Valuing a discretionary trust interest
- Unwrapping parental gifts

PLUS: Don't Miss *COVID-19 Critical and Emerging Issues* - Experienced counsel will provide practical guidance on the impact of COVID-19 for you and your clients.

Register today at:

osgoodepd.ca/property

Program Chairs

William H. Abbott
MacDonald & Partners LLP

George Karahotzitis
Thomson Rogers

Date and Time

April 30, 2020
9:00 a.m. – 4:00 p.m. EDT
By Webcast

Online Replay: May 29, 2020

OSGOODEPD'S 9TH ANNUAL Recent Developments and Complex Issues in Property & Equalization

In the high-stakes game of property and equalization, counsel need to know what they are doing. Mistakes at any stage of the proceedings can be critical – and costly.

This annual *OsgoodePD* program – designed and delivered by the leading family law experts – is not a quick summary of the year in review. In one intensive day, you will benefit from expert in-depth analysis of the critical issues currently confronting the family law bar, together with practical guidance on how to deal with them.

Topics Include

- Tricky family trust issues
- Valuation of contingent costs of disposition and other contingent liabilities
- Family law practice perils & pitfalls (and how to avoid them)
- Strategies for enforcing and challenging a loan
- LIRAs, LIFs and LRIFs: What are they? Can the funds be unlocked?

Who Should Attend

- Family lawyers
- General practitioners whose practice includes family law
- Law clerks

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Agenda

8:30 a.m.

Registration Opens

9:00 a.m.

Welcome from the Chairs

William Abbott

MacDonald & Partners LLP

George Karahotzitis

Thomson Rogers

9:10 a.m.

Critical Case Law Update

Aaron Franks

Epstein Cole LLP

Gary Joseph

MacDonald & Partners LLP

The law around property & equalization issues continues to develop at a rapid pace. In this opening session, our experts will provide an in-depth review of some of the most important cases of the past year, and discuss their likely impact.

10:10 a.m.

Unwrapping Parental Gifts (and Loans)

Stephen Codas

Epstein Cole LLP

As the generational transfer of wealth continues to evolve, so do the ever-complex issues around parental gifts and loans and their impact upon family law claims. Drill down on the key issues, including:

- When is a loan a gift and a gift a loan?
- Does a mortgage really provide protection anymore?
- Strategies and best practices to enforce and challenge a loan

10:55 a.m.

Refreshment Break

11:10 a.m.

After the Love Has Gone and the Lump Sum Transferred: Navigating Locked-In Accounts

Julie K. Hannaford

J K Hannaford Barristers

Kim Ozubko

Miller Thomson LLP

LIRAs, LIFs and LRIFs: What are they? Can the funds be unlocked? Get answers to questions about locked-in accounts and other mysteries of the universe commonly asked by spouses in receipt of lump sum transfers.

12:00 p.m.

Lunch and Keynote Address

Family Law Practice Perils + Pitfalls (and How to Avoid Them)

Yvonne Bernstein

Litigation Director and Counsel, LawPRO

1:15 p.m.

Business Valuations in 2020: A Critical Update

Andrew Freedman,
CPA, CA-IFA, CBV, ASA

Managing Director, Duff & Phelps
Canada Limited

Charu Ruparelia

J K Hannaford Barristers

- Adoption of fair value: when and why
- Disclosure required for marriage contracts
- Funding an equalization payment
- Valuation of excluded property – proving the deduction
- Applying the market valuation approach to private companies
- Tax driven reorganizations on (and its effect on) family law valuations

2:15 p.m.

Refreshment Break

2:30 p.m.

Family Trusts in Family Law

Barry Corbin

Corbin Estates Law Professional
Corporation

Lorne H. Wolfson

Torkin Manes LLP

- Valuing a discretionary trust interest
- Imputing income to beneficiaries
- Net family property freezes – do they work?

3:15 p.m.

COVID-19 Critical and Emerging Issues for the Family Law Bar

Erin Crawford

Grant Crawford & Watson LLP

Julie K. Hannaford

J K Hannaford Barristers

Maxine M. Kerr

Barrister & Solicitor

Lorne H. Wolfson

Torkin Manes LLP

Join experienced family law counsel as they grapple with the implications of the COVID-19 challenges. What do you need to be advising your clients now to protect their interests going forward?

4:00 p.m.

Program Concludes



“Struck the right note for senior counsel and those less familiar with family law concepts. Complex issues well explained and clarified.”

Elisabeth Sachs
Elisabeth Sachs Law Office

Chairs

William Abbott
MacDonald & Partners LLP

George Karahotzitis
Thomson Rogers

Faculty Includes

Yvonne Bernstein
Litigation Director and
Counsel, LawPRO

Julie K. Hannaford
J K Hannaford Barristers

Stephen Codas
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Gary Joseph
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Phelps Canada Limited

Lorne H. Wolfson
Torkin Manes LLP

Registration Details

Fee per Delegate

\$545 plus HST

Newly licensed (2017 – 2020): \$272.50 plus HST

Fees include attendance and program materials. Group discounts are available. Visit www.osgoodepd.ca/group-discounts for details. Please inquire about financial assistance.

Program Changes

We will make every effort to present the program as advertised, but it may be necessary to change the date, location, speakers or content with little or no notice. In the event of program cancellation, York University's and Osgoode Hall Law School's liability is limited to reimbursement of paid fees.

Cancellations and Substitutions

Substitution of registrants is permitted at any time. If you are unable to find a substitute, a full refund is available if a cancellation request is received in writing 14 days prior to the program date. If a cancellation request is made with less than 14 days notice, a \$75 administration fee will apply. No other refund is available.



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