



The Law Society of
Upper Canada | Barreau
du Haut-Canada



WILLS AND ESTATES Practice Basics 2017

Biographical Summaries for Program Faculty

[In Alphabetical Order]



Jordan M. Atin

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Jordan is a Certified Specialist in Estates and Trusts Law and an Adjunct Professor of Law at Osgoode Hall Law School in Toronto, Canada.

Lexpert rates Jordan as one of its top recommended estate lawyers in Canada as well as being rated as a Best Lawyer in Canada.

In addition to his planning and administration practice, Jordan is Counsel to Hull & Hull LLP and a senior mediator with Hull Estate Mediation Inc.

He is a Past Chair of the Ontario Bar Association - Trust and Estates Section and a full member of the Society of Trusts and Estate Practitioners (STEP). Jordan was the inaugural winner of the OBA's *Hoffstein Prize* in recognition of his contributions and achievements in the area of wills, trusts and estates.

Jordan Atin is the founder of IWEE - the Institute for Wills and Estate Education. IWEE (www.iwee.ca) provides monthly small group intensive workshops for estate professionals.

He is a frequent presenter and Chair at STEP, Osgoode Hall Law School, Metropolitan Toronto Lawyers' Association, Ontario Bar Association and Law Society programs on estate matters. Jordan is a contributing author to the well-known text "*Estate Litigation*" and his articles are referred to in many of Canada's leading estates texts including "*Widdifield on Executors and Trustees*", "*Feeney's Canadian Law of Wills*", "*Drafting Wills in Ontario*" and "*Oosterhoff on Wills and Succession*".

Jordan's book for non-lawyers, *The Family War - Winning the Inheritance Battle*, has been featured on CanadaAM, BNN and in dozens of Canadian and US newspapers.

Ed Esposto, LL.B.

Ed is a lawyer at Aird & Berlis LLP. He has over 25 years of experience with a practice focused exclusively on the issues related to wealth management of individuals with specialization in estate and trust planning, wills and powers of attorney and related tax planning.

Ed assists many high net worth Canadian families to plan around the competing goals of estate planning, tax minimization and optimization, private corporate structure and governance, planning and succession, estate administration, philanthropy and charitable foundation management. A significant portion of the advice Ed gives clients relates to asset protection (including considerations of Family Law Act concerns) and wealth preservation. His work often involves drafting sophisticated estate plans that have regard to ever-changing Income Tax Act provisions, Estate Administration Tax ("probate fee") minimization, personal family dynamics and succession planning. Ed advises clients on the use of *inter vivos* and testamentary family trusts to achieve the clients' objectives and implements such strategies on their behalf. As part of his work, Ed will often become a trusted family advisor and as such has frequently been asked by clients to act as executor of estates, trustee of *inter vivos* and testamentary trusts, director of private family charitable foundations, director of private corporations and member of family investment committees.

Beyond his client work, Ed is professionally committed to the advancement of legal education both at an academic and professional level. As such, Ed is the author of many articles related to trusts, estate and tax planning for individuals and is a frequent speaker at professional development conferences. His participation in the area of professional education include the following:

- Adjunct Professor, Law of Trusts, Osgoode Hall Law School at York University, 2007- present.
- Instructor, Law Society of Upper Canada, Annotated Will, 2007-2015
- Instructor, Law Society of Upper Canada, Wills and Estates Practice Essentials, 2012- present.
- Instructor, Canadian Bar Association, Wills Estates and Trusts Fundamentals workshop, 2015-present.
- Instructor, Law Society of Upper Canada, New Lawyer Practice Series: Wills and Estates Law
- Instructor, Osgoode Hall Law School, York University, Intensive Wills and Estates Workshop, 2007-2014
- Instructor, Osgoode Hall Law School, York University, Overview of the Law Of Trusts, Part-Time LLM in Trusts Law, 2007

Ed is also a member or executive participant in a number of professional organizations including:

- Member of the Society of Trust and Estate Practitioners (STEP).
- Member of the Canadian Tax Foundation;
- Member and Chair of the Ontario Bar Association Estates and Trusts Section (2007-2012).

Ed also volunteers his time assisting a number of charitable causes including:

- Member of the Investment Committee of the Toronto General and Western Hospital Foundation.
- Member of the Board of Directors of the National Ballet of Canada Foundation, current.
- Past Member of the Queen's University Council.

Mary-Alice Thompson, TEP, C.S.



Mary-Alice Thompson is a Partner with Cunningham Swan, Lawyers in Kingston. She is designated as a Certified Specialist (Estates & Trusts Law) by the Law Society of Upper Canada and she is a member of the Society of Trust and Estate Practitioners. Since being called to the Ontario bar in 1994, Mary-Alice has worked for a trust company, with a major Toronto law firm, and in her own practice, before joining Cunningham Swan in 2010. She has taught at the University of Alberta, Queen's University Law School, and St. Lawrence College, and for the LSUC Bar Admission Course. She was the founding Chair of the Frontenac Law Association Estates & Trusts Group, and is former President of the Estate Planning Council of Eastern Ontario. A new edition of her book on will drafting, *Drafting Wills in Canada: A Lawyer's Practical Guide* (LexisNexis, 2016), with Brian Gillingham and Robyn Solnik, was published in November 2016. Mary-Alice has lectured and written on a number of topics in estates and trusts law for the Law Society of Upper Canada, the Ontario Bar Association, and the Frontenac Law Association, among others. She particularly enjoys the strange and wonderful quirks of estates law!