



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



20TH ANNUAL Estates and Trusts Summit

Speaker Biographies

DAY TWO
October 17, 2017



Benjamin Arkin is a litigator with a practice focusing on disputes involving wills, estates, trusts, capacity, guardianships, and powers of attorney. He has represented clients in mediation and in motions, applications, trials, and appeals at all levels of court in Ontario.

Ben is a member of the Ontario Bar Association Trusts and Estates Section Executive and the Estate Planning Council of Toronto. He is a regular chair and presenter at professional development programs for lawyers and other professionals on a wide range of topics.

Ben previously practiced family law and advises clients about the intersection between family law and estate law, including elections to equalize net family property on the death of a spouse, domestic agreements, spousal support, and child support.

Ben was called to the Bar of Ontario in 2006. He has a J.D. from the University of Toronto Faculty of Law and a B.Sc. (Hons.) in mechanical engineering from Queen's University.

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Jordan M. Atin

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HULL & HULL LLP

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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 an experienced estates mediator.

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.

TERRANCE S. CARTER, B.A., LL.B, TEP, TRADE-MARK AGENT



Terrance Carter, as the Managing Partner of Carters, practices in the area of charity and not-for-profit law, and has been recognized as a leading expert by *Lexpert* and *The Best Lawyers in Canada*. Mr. Carter is also a registered Trade-mark Agent and acts as legal counsel to the Toronto office of the national law firm Fasken Martineau DuMoulin LLP on charitable matters.

Mr. Carter is a co-author of *Corporate and Practic Manual for Charitable and Not-for-Profit Corporations* (Carswell), a co-editor of *Charities Legislation & Commentary*, 2017 Edition (LexisNexis Butterworths), a contributing author to *The Management of Nonprofit and Charitable Organizations in Canada* (2014 LexisNexis Butterworths), co-author of *Branding and Copyright for Charities and Non-Profit Organizations* (2014 LexisNexis Butterworths) and the *Primer for Directors of Not-for-Profit Corporations* (Industry Canada).

Mr. Carter is a member of the Government Relations Committee of the Canadian Association of Gift Planners (CAGP), the Association of Fundraising Professionals, a past member of the Technical Issues Working Group of Canada Revenue Agency's (CRA) Charities Directorate, a past member of the Imagine Canada Technical Advisory Committee, a past member of CRA's Charity Advisory Committee and the Uniform Law Conference of Canada Task Force on Uniform Fundraising Legislation, a Past Chair of the Charities and Not-for-Profit Law Section of the Canadian Bar Association (CBA) and a past Chair of the Charity and Not-for-Profit Law Section of the Ontario Bar Association (OBA), and was the 2002 recipient of the AMS - John Hodgson Award of the OBA for charity and not-for-profit law. He is also a member of the Intellectual Property Institute of Canada, the Association of Fundraising Professionals, and the American Bar Association Tax Exempt Section, and has participated in consultations with the Public Guardian and Trustee of Ontario, the Charities Directorate of CRA, Finance Canada, and was a member of the Anti-terrorism Committee and the Air India Inquiry Committee for the CBA.

Mr. Carter has written numerous articles and been a frequent speaker on legal issues involving charity and not-for-profit law for the Law Society of Upper Canada, the CBA, the OBA, the Association of Fundraising Professionals, the American Bar Association, the CAGP, the Canadian Tax Foundation, The Institute of Chartered Accountants, the CSAE, the New York University School of Law, the University of Ottawa Faculty of Common Law, Ryerson University, McMaster University, the University of Waterloo Master of Tax program, Queensland University of Technology (Brisbane, Australia), University of Manitoba Law School as well as the C.D. Howe Institute.

Mr. Carter is also the editor of, and a contributor to www.charitylaw.ca, www.churchlaw.ca, www.carters.ca, and www.antiterrorismlaw.ca, as well as Chair of the annual *Church & Charity Law*TM Seminar, and a founder and a past co-chair of the CBA National Charity Law Symposium.

PRACTICE AREAS: Charity and Not-for-Profit Law, Fundraising, Gift Planning, National and International Strategic Planning, Charity Tax and Trusts, Intellectual Property and Corporate and Commercial Law.

EDUCATION: B.A. (Joint Honours), and a McGill University Scholar, McGill, 1975
LL.B., Osgoode Hall Law School, 1978

CALL TO THE BAR: Ontario Bar, 1980

CONTACT INFO: Orangeville: (519) 942-0001 x 222, Fax: (519) 942-0300
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KATHERINE E. CAULEY

Partner, Estates & Trusts and Private Wealth Planning
Practices Leader

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Kathy is the leader of Hodgson Russ's Estates & Trusts Practice Group. She concentrates her practice in all aspects of tax and estate planning and administration, private foundations and charitable giving, trust administration, Canada/U.S. cross-border tax and estate planning, and business succession planning.

Honors

- Listed, *Best Lawyers in America* (Trusts and Estates) 2012 - 2018

News

Fifty-two Hodgson Russ Attorneys Named to 2018 Best Lawyers Listing, Five Included in "Lawyer of the Year" Categories
Press Release, August 15, 2017

2017 Best Lawyers Names Fifty-four Hodgson Russ Attorneys From Multiple Offices
News Release, August 18, 2016

Fifty-Five Hodgson Russ Attorneys Named to Best Lawyers 2016, Five Honored as Buffalo 'Lawyers of the Year'
Press Release, August 17, 2015

Presentations

Florida Residency Seminar Series 2017
January & February 2017

Florida Residency Seminar Series 2016
Boca Raton, Naples, & Palm Beach Florida, January & February 2016

Optimizing Your Cross-Border Business: Trends in Cross-Border Business Structuring and Operations
Oakville, ON, September 24, 2015

Publications

Hodgson Russ LLP's Report on the 2017-18 New York State Budget
Hodgson Russ Newsletter, April 12, 2017

Proposed Regulations May Substantially Reduce the Availability of Valuation Discounts for Interfamily Transfers of Business Interests
Estate Planning Alert, August 18, 2016

Caution Urged for Green Card Holders Leaving U.S.
Lawyers Weekly, May 23, 2014

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Suite 100
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22 Adelaide Street West
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Areas of Practice

Estates & Trusts
Private Wealth Planning
International Estates & Trusts
International Tax
Canada-U.S. Cross-Border
International-U.S. Cross-Border
State & Local Tax

Admissions

New York

Education

B.A., cum laude, Canisius College
J.D., magna cum laude, University at Buffalo School of Law



Shelia Crummev

Partner
Toronto

416.595.8507
scrummev@millerthomson.com

Industry Expertise

Charities and Not-for-Profit

Key Practice Expertise

Estate Administration and Post-Mortem Planning

Estate Planning, Succession Planning and Personal Tax

Incapacity and Elder Law

Private Client Services

Wills and Trusts

Year of Call

Ontario Bar, 1984

PROFILE

Shelia Crummev is a Partner in the Toronto office of Miller Thomson's Private Client Services Group.

A certified Specialist in Estates and Trusts Law by the Law Society of Upper Canada, her practice focuses on personal tax and estate planning, including cross-border Canada/U.S. estate planning, family business succession planning, and estate and trust administration.

Her years of experience as a senior tax manager at a national accounting firm have given her wide-ranging expertise in tax planning, particularly for business owners. Sheila is a trusted advisor to many business owners and their families, assisting them with inter-generational wealth transfer issues. She also advises individuals and trust companies who act as fiduciaries to minimize risk in acting as trustees of complex estates and trusts.

Her charities and not-for-profit practice involves providing advice to individuals on structuring tax effective philanthropy. She also advises public charitable and not-for-profit organizations and private family foundations on a range of issues including governance matters, regulatory compliance and risk management.

Sheila has been recognized as a leading trusts and estates lawyer by several legal publications, including the *Canadian Legal Expert® Directory*, *Best Lawyers* and *Expert Guides*.

EDUCATION

- LL.B., University of Ottawa, 1981
- B.A., University of Toronto, 1974

PROFESSIONAL ACHIEVEMENT

- Best Lawyers in Canada, Trusts and Estates, 2014, 2015
- Canadian Legal Expert® Directory, Charities and Not-for-Profit Law; Estate & Personal Tax Planning, 2013, 2014
- BV Distinguished Ranking, Martindale-Hubbell

MEMBERSHIPS

- Canadian Bar Association
- Ontario Bar Association
- Society of Trust and Estate Practitioners
- Canadian Tax Foundation

PUBLICATIONS

- Contributor, "Financial & Estate Planning for the Mature Client in Ontario," Butterworths, December 2013. Ongoing contributor since 1997
- Author, *Who Will Take Over the Business?: Succession Planning for the Canadian Business Family*, Published by John Wiley & Sons, Inc., September 2011
- "Power of Attorney: The Law that May Affect You", *Trusts, Estates and Succession Planning Bulletin*, April 2011
- "Why You Should Have a Will," *Trusts, Estates and Succession Planning Bulletin*, April 2011
- "Budget 2011 – Significant Tax Measures Affecting the Charitable Sector." *Tax Bulletin*, March 2011
- *Estates and Trusts Holding Shares of Private Corporations: Selected Issues*, December 2007, 26 E.T.P.J. 302 - 317

PRESENTATIONS

- Using a Private Company as Trustee in Ontario, STEP Canada 15th National Conference, June 10, 2013
- Unintentional Dispositions of Interests in Trusts, *The Six-Minute Estates Lawyer*, April 24, 2012
- Trust Residence - Post Garron, *The Six-Minute Estates Lawyer*, April 27, 2011
- Post-Mortem Tax Planning: Dealing With Private Company Interests (co-authored with Marina Panourgias), STEP Canada 13th National Conference, June 2, 2011
- Beneficiary Designations Issues With Respect to RRSPs, RRIFs, RESP's and TFSA's, *The Advanced Intensive Program in Wills, Estates and Trusts Osgoode Professional Development*, March 26, 2010
- Professional Corporations, 12th Annual Estates and Trusts Summit, November 12, 2009
- *Tax Issues in Estate Administration*, 10th Annual Estates & Trusts Summit, November 5, 2007

JUSTIN W. de VRIES

Justin is the Principal of de VRIES LITIGATION LLP. With offices in Toronto and Oakville, the firm specializes in estate, trust, and capacity litigation and administering complex estates. de VRIES LITIGATION LLP is recognized for its expertise and quality of work.

Justin has chaired and lectured at various continuing legal education programs regarding estate, trust and capacity matters. Justin has both mediated and arbitrated disputes and appeared before all levels of the Ontario Court, the Federal Court and litigated Supreme Court of Canada leave applications. His clients include individuals, private banking and wealth management groups, trust companies, estate trustees, as well as private trusts, charities, and foundations.

Justin has acted as a court appointed pre-trial judge, pro-bono disciplinary counsel for Law Society of Upper Canada, and is counsel to the Oakville Community Foundation and The Yonge Street Mission. Justin has been appointed as an estate trustee during litigation by the courts in complex estate litigation proceedings. He is the founder of the popular blog site "allaboutestates.ca", a collaborative, daily blog with a wide audience.

Justin is a member of the Society of Trust and Estate Practitioners (STEP), the Estate Planning Council of Toronto, the Estate Planners' Council of Halton, as well as The Advocates' Society. Justin has consistently been named one of the "Best Lawyers in Canada/Trusts & Estates". He has published articles in Estates & Trusts Pensions Journal, The Litigator, Toronto Law Journal, OBA's Deadbeat, Money & Family Law, Lawyers Weekly, and Gift Planning in Canada. Justin is also a contributor to the annual publication Key Developments in Estates and Trusts law in Ontario. He is recognized as a leader in the estates bar.

Justin can be reached at **416.640.2757 (Toronto)** or **905.844.0900 (Oakville)** or by email at **jdevries@devrieslitigation.com** or visit www.devrieslitigation.com.



Lori Duffy specializes in wills, trusts, estate planning and charities.

Head of the Estates, Trusts and Charities practice at WeirFoulds LLP, Lori helps clients with managing and transferring their assets through the use of business succession plans, trusts and wills. A significant part of her practice involves establishing charities and non-profit organizations. Lori also advises her clients on all areas of trusts, wills and estate administration, including work under the *Substitute Decisions Act*.

Lori is a proud recipient of a 2013 Lexpert® Zenith Award, Celebrating Women Leaders in the Legal

Profession. Her other accolades include being named by *Best Lawyers®* as one of the best lawyers in Canada in her practice area, and repeatedly recognized as a Leading Practitioner in Estate & Personal Tax Planning in the *Canadian Legal Lexpert® Directory*.

Lori is the Ontario Editor of the *Estate & Trust Reports* (Carswell). She also authors an electronic newsletter through Carswell publications called *WeirFoulds Estates & Trusts*. Lori was co-editor of the Ontario Bar Association Trusts and Estates section newsletter *Deadbeat* and was the editor of *Without Prejudice*, the Women's Law Association newsletter (1989-91). She is a member of the Society of Trust and Estate Practitioners (STEP). Lori is a Past President of the Canadian Association of Women Executives and Entrepreneurs; a former member of the Executive of the Women's Law Association of Ontario; and the former Vice-Chairperson of the Real Property Section of the Ontario Bar Association.

A frequent speaker and educator, Lori has been a seminar instructor at the Bar Admission Course, was an adjunct professor at the University of Toronto Law School and has lectured in many seminars for the Canadian Bar Association, the Law Society of Upper Canada, the Canadian Institute and the International Bar Association. She regularly addresses community groups.



Carla Figliomeni

Partner | Toronto

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Carla Figliomeni's practice focuses on trusts and estates and personal tax planning. Carla helps her clients to develop and implement cohesive tax and estate plans that reflect their financial objectives and their short- and long-term goals.

Carla advises clients on planning for family business succession, corporate reorganizations and amalgamations, and estate freezes, as well as maximizing capital gains exemptions, identifying income-splitting opportunities, and drafting wills and trusts with consideration to probate tax issues. In addition, Carla's practice encompasses domestic and cross-border estate planning, including Canada-U.S. planning and planning involving common law and civil law jurisdictions.

Carla obtained her Bachelor of Laws from the University of Ottawa, excelling specifically in the area of taxation. Carla was called to the Ontario bar in 2010. She completed her Master of Laws in Taxation from Osgoode Hall Law School in 2014, with a focus on various areas of domestic and international taxation, including the international taxation of electronic commerce.

Carla enjoys writing and speaking on a variety of topics. She is a contributing author to Miller Thomson's publication *Miller Thomson on Estate Planning*.

C. DAVID FREEDMAN

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David is both an academic and a practising lawyer. He teaches Wills & Estates, Trusts, Civil Procedure, and Estate Litigation in the Faculty of Law at Queen's University and has published in all these areas. He also created Canada's first student-staffed Elder Law Clinic in which law students deliver legal services to older adults on issues involving aging. David's practice is restricted to trusts, estates, and capacity litigation and mediation.

Recent Publications:

The Law of Civil Procedure: Cases, Materials & Commentary (Thomson Reuters) [Forthcoming]
'Drafting and Attacking Charging Clauses in a Will' (2017), 36 *Estates, Trusts & Pensions Journal* 160
Co-author, *Oosterhoff on Wills, 8th Edition* ("Dependants' Support" and "Substitute Decision-Making")
"Administration of Trusts" chapter in *The Law Of Trusts: A Contextual Approach*, 3rd Edition (Emond Montgomery)
"Probate Contests And The New Law Of Summary Judgment" (2014), 34 *Estates, Trusts & Pensions Journal* 199
"The 'Opinion, Advice, and Direction' of the Court: Principles, Procedures, and Judicial Blessings" (2013), 32 *Estates Trusts and Pensions Journal* 41



RBC ESTATE & TRUST SERVICES

K. THOMAS GROZINGER, LL.B

Principal Trust Specialist

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As Principal Trust Specialist for RBC Estate & Trust Services' Professional Practice Group, Tom provides ongoing legal and technical analysis for a national team of trust professionals within one of Canada's longest-standing financial institutions, responsible for managing the wealth of some of the country's most prominent individuals, families and corporations for more than a century.

Tom received his law degree from the University of Toronto and was called to the Ontario Bar in 1994. He is certified as a specialist in estates and trusts law by The Law Society of Upper Canada. Prior to joining Royal Trust Corporation of Canada in 2000, he was an associate lawyer in the Prosperity Planning Group of the national law firm then known as Gowling, Strathy & Henderson.

Tom has contributed articles for continuing legal education programs, in-house publications, and the Estates, Trusts & Pensions Journal ("ET&PJ"), and in 2005 was the recipient of the first Widdifield Award for his article that appeared in the ET&PJ entitled "Conflict of Laws and Trust of Movables in Canada: Determining the Applicable Law for Essential Validity and Administration." His article has also been cited in a recent judicial case. For several years, Tom was an instructor for the Estate Planning and Administration section of the Ontario Bar Administration Course program. He has been a guest lecturer at the University of Ottawa, Faculty of Law and at Osgoode Hall Law School, York University.

Tom is a member of the Society of Trust and Estate Practitioners (STEP), being the first Chair of STEP's Ottawa chapter (established in 1999). He and his wife, Kerry Lynn, a Chartered Accountant, live in Ottawa and have two children, Katrina and Derek.



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Joan E. Jung is the senior tax partner and Chair of the firm's Tax and Succession Planning Group. Joan is a tax lawyer with particular expertise in corporate tax planning for private enterprise, personal tax planning and trust taxation. She has extensive experience in business succession planning, family trusts and reorganizations and mergers. She regularly advises private clients on structuring investments, both domestic and international.

Joan provides advice to high net worth individuals, entrepreneurs and private companies. Joan is ranked by her peers as a leading practitioner in her field in the *Canadian Lexpert Directory*.

Joan is an active member in a number of tax and estate planning professional associations. She is a regular presenter at conferences of the Canadian Tax Foundation; Law Society of Upper Canada and Society of Trust and Estate Practitioners (STEP), where she is the chair of the Programming Committee of the Toronto Branch of STEP Canada. Joan has been a member of the Planning Committee for the Ontario Tax Conference of the Canadian Tax Foundation for a number of years. She is presently a member of the Executive Committee of the Board of Governors of the Canadian Tax Foundation.

Joan is a prolific author. Her writing has been published in *TaxFind* and *Tax for the Owner Manager* (Canadian Tax Foundation), and *STEP Inside*. She is a Contributing Editor to *Personal Tax and Estate Planning*, published by Thomson Reuters.

Sean Lawler

B.Sc., LL.B., STEP, is a partner at Shibley Righton LLP. Received his B.Sc. in economics from St. Michael's College at the University of Toronto in 1992, and his LL.B. from the University of Toronto's Faculty of Law in 1995. Was called to the Bar in 1997. From 1997 to 2001 Sean worked for John F. Evans, Q.C., in Hamilton. Has been with Shibley Righton LLP since 2001. Practices litigation in the areas of estates and trusts and professional negligence.



FLORENCE MARINO
B.A., LL.B, TEP

Assistant Vice President,
Tax, Retirement and Estate Planning
Services, Retail Markets

Florence Marino is the Assistant Vice President, Tax, Retirement and Estate Planning Services, and she provides tax, retirement, estate, insurance and investment planning support and consultation to advisors regarding complex cases in the affluent and business markets. She leads a team of regional professionals providing this type of support and consultation across the country.

Florence began her career as a tax lawyer with a major Toronto law firm. Her experience includes personal and corporate tax, trusts, estate planning and administration, as well as life and living benefits insurance and investments taxation.

A graduate of McGill University, she received her Bachelor of Laws degree from Osgoode Hall Law School and was called to the Ontario Bar in 1988. Florence joined Manulife Financial in 1989 and, in 1994, she became Assistant Vice President of the Tax, Retirement Estate Planning Group.

Florence is a member of the Canadian Bar Association, the Canadian Tax Foundation, the Waterloo-Wellington Estate Planning Council, the Conference for Advanced Life Underwriting and the Society of Trust and Estate Practitioners.

She is a frequent speaker at industry conferences and seminars and has published numerous articles for Federated Press Insurance Planning. She is co-editor of "Canadian Taxation of Life Insurance" published by Carswell.

FOR MORE INFORMATION, VISIT MANULIFE.CA





Krystyne Rusek

Krystyne is an associate with the firm of Pallett Valo LLP, in Mississauga, Ontario, and is a member of the Estate Litigation Group and the Wills, Estates & Trusts Practice.

Krystyne's practice focuses on the area of estate, trust and capacity disputes, including will challenges, dependant support claims, *inter vivos* trust disputes, fiduciary accountings, guardianship applications and power of attorney disputes.

Krystyne has authored various articles and blogs in the areas of estate planning, estate administration and estate litigation. She has also been a presenter at educational seminars for clients and colleagues.

Krystyne was called to the Bar in 2004 and is a member of the Canadian Bar Association, the Estates and Trusts Section of the Ontario Bar Association and the Ukrainian Canadian Bar Association.

Susan Sack

Called to the Ontario Bar in 1987

Susan Sack graduated with distinction from the University of Western Ontario with a B.A. in Economics in 1982, and from Osgoode Hall Law School with an LL.B. in 1985. Susan has been practicing since her call to the bar in Ontario in 1987. Before starting Rosen Sack LLP with her partner Avra Rosen in 2016, Susan had been a partner at two well-known boutique litigation firms in Toronto.

Susan's litigation experience is wide ranging. She has had extensive experience acting in complex insolvency and commercial matters, estate litigation and insurance defence matters especially in relation to solicitors' negligence claims. For almost twenty years, Susan has been a "lawyer's lawyer," selected as preferred counsel by insurer and insured alike. As part of Susan's professional negligence defence work, she acts as both repair and defence counsel in estate cases.

As a natural outgrowth of that practice, Susan has come to act in family law cases for the participants themselves. She brings compassion and sensitivity to all her cases and her broad based experience gives her insight into the "big picture." Susan has appeared in all levels of court in Ontario and on countless mediations, where she has brought matters to a successful conclusion.

Susan is a member of the Law Society of Upper Canada, the Canadian Bar Association, and the Advocates Society. Susan is a frequent speaker on professional negligence issues and risk proofing your practice.



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Family Wealth Counsel
Estates and Trusts
Private Company

EXECUTIVE SUMMARY

Paul Taylor is an associate in the Ottawa office of Borden Ladner Gervais LLP. Paul's practice focuses on issues relating to trust, estate, and incapacity planning and administration, as well as related tax issues. Paul has a wide range of experience in this area, including advising financial institutions, planning for individuals with cross-border, high value and complex assets, working with clients to provide for beneficiaries with disabilities, and preparing, amending, and interpreting trusts.

REPRESENTATIVE WORK

- Estate planning and drafting wills, powers of attorney and trusts, including for individuals with cross-border assets, complex assets, and beneficiaries living with disabilities.
- Completing a secondment with a financial institution to assist in the interpretation and administration of wills, powers of attorney and trusts.
- Drafting, amending, and interpreting trusts, including for financial institutions and aboriginal groups.
- Drafting account agreements, client intake forms, and other related documentation for financial institutions.
- Administering and advising on the administration of estates and trusts.

SELECTED PUBLICATIONS & PRESENTATIONS

- Panel Moderator, "International Planning Issues – Updates from the UK to the Far East", STEP National Conference, Toronto, June, 2017.
- Speaker, "Border Walls and a Hard Brexit: The Current State of Cross-Border Planning", LSUC Six-Minute Estates Lawyer, Toronto, May 2017.
- Speaker, "Common Complexities: There is no such thing as a simple estate", STEP Ottawa, February 2017.
- Instructor, "Changes to Testamentary Trust Rules – A Comprehensive Case Study", Canadian Tax Foundation National Conference, November, 2016.
- Speaker, "Taxation of Inter Vivos Trusts, GREs, and Testamentary Trusts – Where are we now?", Canadian Tax Foundation Ontario Conference, October, 2016.
- Panelist, "Advising Families with Special Needs", STEP National Conference, Toronto, June 2016.
- Instructor, "Trusts for Disabled and Dependent Children", CBA WET Fundamentals for Estate Practitioners, October 2015 and October 2016.
- Speaker, "Dealing with Incapacity Issues and Preventing Financial Abuse", STEP Ottawa, September 2015.

Education / Bar Admissions

LLB, University of Manitoba (Robson Hall), 2007 (prizes for legal writing, restitution, and community involvement)

Faculty of Arts, University of Manitoba (Dean's Honour List; prizes for astronomy, history, English, and community involvement)

Ontario, 2008

Professional Involvement

STEP Ottawa Executive Committee Member for Member Services

STEP Canada National Conference Planning Committee Member

Member, Law Society of Upper Canada, Canadian Bar Association and County of Carleton Law Association

Co-Chair, Organizing Committee, East Region Solicitors Conference

Member, Ottawa Estate Planning Council

Community Involvement

Board President, Ottawa Salus

Former board member, Bruce House, Ryan's Well Foundation, and Fund for a New Generation