The Institute of Law Clerks of Ontario

ANNUAL CONFERENCE

Let's Make Waves!

MAY 14-16, 2025 | HALIFAX, NS

OUR SPONSORS

Wednesday
Networking Reception

MinuteBox

Thursday
Dinner

Stewart McKelvey
LAWYERS • AVOCATS

Friday
Networking Reception

Cox & Palmer

Breakfast

McCarthy Tétrault

Lunch

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SUMMARY AGENDA

Wednesday, May 14

Registration Opens 5:00pm - Nova Scotia Foyer

Welcome Reception 6:00pm - 8:00pm - Sable CD

Thursday, May 15 - Nova Scotia Foyer

Registration 7:30am - 9:00am - Nova Scotia Foyer

Breakfast & Exhibitor Hall 8:00am - 9:00am - Halifax Foyer

Keynote Speaker: Tyler Harden 9:00am - 10:30am - Nova Scotia BCD

Breakout Sessions 11:00am - 12:15pm - Various

Lunch & Exhibitor Hall 12:15pm - 1:30pm - Halifax Foyer

Breakout Sessions 1:30pm - 2:45pm - Various

Breakout Sessions 3:15pm - 4:30pm - Various

Cocktail Reception 5:00pm - 6:30pm - Stewart McKelvey Office

Dinner 6:30pm - 10:00pm - Alexander Keith's Brewing

Friday, May 16

Registration 7:30am - 9:00am - Nova Scotia Foyer

Breakfast & Exhibitor Hall 8:00am - 9:00am - Halifax Foyer

Keynote Speaker: Tareq Hadhad 9:00am - 10:30am - Nova Scotia BCD

Breakout Sessions 11:00am - 12:15pm - Various

Lunch & Exhibitor Hall 12:15pm - 1:30pm - Halifax Foyer

Breakout Sessions 1:30pm - 2:45pm - Various

Breakout Sessions 3:15pm - 4:30pm - Various

Cocktail Reception 5:00pm - 7:00pm - Bitter End Martini Bar

KEYNOTE SPEAKER

DAY 1

TYLER HAYDEN

Hall of Fame Speaker and Best Selling Author

LIVIN' LIFE LARGE: Simple Actions Create Success

Join us on a Content Rich, Humourous, Adventure with Canada's answer to alternative energy Tyler Hayden CSP. Tyler will share some insights from his best selling book Livin' Life Large: Simple Actions that Create Success. You will feel like you too are swimming with Great White Sharks in Australia and Jumping off Cliffs in the Swiss Alps all the while rolling in the aisles with laughter as you learn techniques for better work life integration, connection with colleagues, and of course fun.

Tyler will remind us several simple management approaches including thing like, "Energy goes where attention goes," in which he will actively show us how to focus our teams energy and harness our best leadership skills to effectively engage in a diverse and growing workforce.

This presentation is about creating long-term life integration by living "every single moment of every single day." In doing so we are able to effectively and efficiently balance the rigours that work and life throw our way. We explore this by learning about how to support each other, set goals/intentions, relationship building, recognizing opportunities, and so much more.

KEYNOTE SPEAKER

DAY 2

TAREQ HADHAD

CEO and Founder, Peace by Chocolate

ONE PEACE WON'T HURT

Building a Cause through Entrepreneurship and Community

With customers from across Canada and Internationally, Peace By Chocolate is the result of people and passions coming together to advocate for a cause: peace.

From owning a successful middle eastern chocolate factory in Syria to losing everything to war and conflict, Tareq shares the back story of his father's love of chocolate and all that was lost when the family fled to Lebanon.

When the family lands in Canada they have only themselves to build on. With the support of their community (Antigonish, Nova Scotia), Isam, Tareq's father, and Tareq began making chocolate in their tiny kitchen. An entrepreneurial spirit brought them to their local farmers market and customers were soon flocking to their small table to purchase their delicious treats.

"People, they loved our chocolate before they even tried it. They loved our story, the cause it represented, and the hope it gave us all,"

We will hear how the family reacted and struggled to make the most out of this once in a lifetime opportunity.

Tareq will delve into the challenges that come with rapid growth, in expanding to new markets and gaining national distribution while staying true to the peace based cause that started it all.

BREAKOUT SESSIONS

Tiffany Pereira
VP, Customer Success
Minutebox

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Empowering Women and Allies in Law: Confronting Imposter Syndrome and Strengthening Resilience

Open to all, this session invites women and their allies to explore the unique challenges faced by women in the legal profession, particularly around Imposter Syndrome and self-doubt. Our speaker will share her insights, personal experiences, and actionable strategies to help attendees recognize and address these challenges.

Together, we will uncover the roots of Imposter Syndrome, examine its impact on career growth, and share practical tools to cultivate a stronger, more resilient mindset. This session will also emphasize the importance of mentorship, allyship, and creating supportive professional environments that empower women and foster inclusivity.

Whether you're a legal professional navigating Imposter Syndrome, a leader striving to empower your team, or an ally committed to building an equitable workplace, this session offers valuable insights and strategies to promote confidence, resilience, and inclusivity in the legal profession.

Ravinder Rai
Senior Legal Counsel
First Canadian Title

Identifying Fraud in Real Estate Transactions

Hosted by Ravinder Rai, Senior Legal Counsel at FCT, you will gain key insights into the world of fraud in real estate transactions, its perpetrators and its victims. With real-life commercial and residential fraud examples, Ravinder will teach you how to spot the red flags and employ simple strategies to minimize risk for you, your firm and your clients. Topics will include synthetic identification fraud, wire fraud, hijacking corporations and more.

BREAKOUT SESSIONS

P. Robert Arkin
Partner
Cox & Palmer

A Comprehensive Review of Dividends

Topics will include the history and origin of dividends and their role in modern-day corporate governance and finance. We'll explore the various types, such as cash dividends, stock/share dividends, and dividends-in-kind, along with their respective implications. The discussion will also cover key compliance requirements, including solvency, income, and profit tests, as well as the importance of appropriate documentation. Participants will gain insights into critical considerations like record dates, timing of distributions, waivers of dividends, and the intricacies of formulaic and retroactive dividends. Additionally, we'll address issues surrounding stated and paid-up capital, as well as creditor claims against directors and dividend recipients, including tax-related claims under the Income Tax Act and the Excise Tax Act.

Michelle Crabb
Manager, Corporate Support Services
Davies

Sharon D'Souza
Law Clerk
Primerica

Navigating Canadian Corporate Compliance: Insights from Private Practice and In-House Perspectives

Corporate compliance in Canada is a dynamic and evolving field, requiring businesses to navigate legal frameworks and various regulatory requirements. In this session, we will explore latest trends, challenges, and best practices in corporate compliance from both private practice and in-house perspectives.

BREAKOUT SESSIONS

Meagan Jennings
Senior Associate
BLG

Will Challenges: How Can We Help?

This session will discuss the procedural steps that take place in a Will Challenge, and the different forms and steps that clerks can take in order to assist their team in moving the litigation forward from the outset to the conclusion of a file. Further, we will discuss the recent estate decisions released pertaining to Will Challenge and provide an update on the status of the law in this area.

Charles Reagh
Partner
Stewart McKelvey

Wanda Doiron
Manager, Business Paralegals, NL & NS
Stewart McKelvey

Nova Scotia Companies in 2025

This session focuses on understanding the uses and recent changes in the mechanics of Nova Scotia companies.

BREAKOUT SESSIONS

Daniel Levine
CEO
MinuteBox

Steven Pulver
CCO
MinuteBox

Embracing AI in Law: A Beginner's Guide to Transformative Legal Technology

Explore the transformative potential of Artificial Intelligence (AI) in the legal profession. This session is designed for legal professionals who have little to no experience with AI technology. We'll demystify AI, explain its basic concepts, and demonstrate its practical applications within the legal field. Learn how AI can enhance legal research, improve document management, streamline case analysis, and boost overall productivity.

Legal professionals that attend this talk will leave equipped with the knowledge and tools needed to integrate AI into their practice. Join us to discover how embracing AI can lead to more efficient, accurate, and innovative legal services.

Dawn Cottreau
Director, Strategy & Innovation
Stewart McKelvey

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Time & Workflow Best Practices

This session will cover recommended best practices for managing your time, email and workflow, including practical tips for configuring your Outlook to maximize efficiency.

BREAKOUT SESSIONS

Margaret Tsetsakos
Director, Legal Operations
Rogers Communications

Sarah Trask
Manager, Advocacy Paralegals
Stewart McKelvey

Part 1: Working with your Client as you Navigate the What, Where and Who in E-Discovery

Focusing on getting started and understanding the data environment from a law firm and in-house point of view, this session will equip you with the knowledge and resources to help navigate the complexity of data collection today:

In this session we will discuss:

- Important questions to ask prior to collection
- Developing a collection strategy
- Identifying key custodians and data sources
- Understanding the retention policies and the litigation hold

Margaret Tsetsakos
Director, Legal Operations
Rogers Communications

Part 2: Surviving the Collection Process

In the earlier session we talked about working with your client as you navigate what, where and who. We touched on collection and important questions to ask and developing a collection strategy. Now, let's take a deeper dive into COLLECTIONS. Organizing and managing your collections to get you to the next step.

In this session we will discuss:

- Data sources and creating a data map
- Collection methodologies
- Best Practices
- Checklists and Tracking

BREAKOUT SESSIONS

Ron Badr
Director, Business Development
Estatesearch

Michael Malloy
Director, Business Development
Estatesearch

Missing Billions – Canada's Unclaimed Assets, Risk and Best Practice For Estate Practitioners

There is estimated to be over $4 billion in unclaimed assets across Canada, sitting in banks, trust funds, insurance policies, bonds, securities, and pensions.

This issue significantly impacts the estates sector, as unclaimed assets increase the risk of executors overlooking important estate components during administration.

Our Unclaimed Assets Knowledge Session dives deeper into this topic, exploring how to tackle the challenge effectively.

Learning objectives:

- You will learn the value of the missed billions – how much money is unclaimed in Canada.
- We will explore a variety of different financial institutions, and the unclaimed funds held within them.
- We will explain how all this money has accumulated and why it is unclaimed.
- The Federal and Provincial landscapes and how unclaimed assets are dealt with.
- You will understand the implications for Executors and Beneficiaries.
- We will discuss how to conduct best practice and due diligence when locating and identifying assets we'll also explore our solution to the ever-growing problem.

Kristopher Rodrigues
Securities Law Clerk
Stikeman Elliott LLP

Private Placements and Offering Non-Resident Funds and Investment Advice into Canada

This session will cover, from a law clerk's perspective, the process, analysis, reporting and work involved in assisting an issuer in conducting a private placement into Canada. Topics will include private placement materials and disclosures, prospectus exemptions, registration and registration exemptions, and post-closing requirements.

BREAKOUT SESSIONS

Rollie Thompson
Partner
Epstein Cole LLP

How Guidelines Work: Child Support and Spousal Support

Ever wonder where the child support table amounts came from? The ins and outs of the Child Support Guidelines? How the Spousal Support Advisory Guidelines were created? How they work in typical cases? All the questions you ever had about support in family law answered!

Kathleen Leighton
Senior Strategy and Innovation Lawyer
Stewart McKelvey

Introduction to AI: Understanding Its Potential and Applications in the Legal Industry

As artificial intelligence continues to shape industries across the globe, the legal field is no exception. This session provides an accessible introduction to AI, demystifying its core concepts and exploring how it can be leveraged in a law firm setting. Attendees will gain a clear understanding of what AI is and how it can enhance efficiency and improve client services. From document review and contract analysis to legal research and predictive analytics, this session will highlight practical AI applications tailored to the needs of legal professionals, while also exploring the potential risks and ethical considerations of its use in legal practice. Whether you're new to AI or curious about its potential, this session will equip you with the foundational knowledge to begin integrating AI into your legal practice.

BREAKOUT SESSIONS

Kim Miyanishi
Senior Law Clerk
Epstein Cole LLP

Marina Pavicevic
Senior Law Clerk
Epstein Cole LLP

WHAT DO YOU DO WHEN... Tips and Tricks to Help Family Law Clerks

Ever found yourself in a situation with a client or lawyer where you wished you had insight into how other family law clerks would handle it? If so, this session is for you! Join Marina and Kim, law clerks from Epstein Cole LLP, one of the top family law firms, for an engaging, interactive discussion where they'll tackle real-life scenarios and share strategies to help you manage tricky situations and streamline your work.

Lisa Matchim
Real Estate
Law Clerk
Stikeman Elliott

O'Canada – Commercial Real Estate from Coast to Coast

More commercial real estate transactions now involve multiple properties in other provinces across Canada. Whether it is a share purchase transaction, an asset purchase transaction or even a name change that needs to be recorded in other provinces, the differences in what is required can be a challenge to navigate if you are the person appointed in the project management role for the transaction. We will discuss some of the differences between what we do in Ontario and what will be needed in the other provinces.

BREAKOUT SESSIONS

Karen Tuschak
Founder and CEO
Spider Silk Innovative Solutions Inc.

Nicole Burch
Head of Business, Corporate
Appara.

Leading Without a Title: Influence, Inspire, Empower

Join us for an inspiring and interactive training program designed to elevate your leadership capabilities and refine your communication skills. This dynamic session will provide you with essential tools and actionable insights to thrive in your role and lead with confidence, integrity, trust, and resilience—regardless of your title.

Engage in meaningful discussions as we create a supportive space to share real-world challenges and successes, learning from one another's leadership experiences. With the demands of today's multi-generational and hybrid work environments, effective communication has never been more critical. This program will help you navigate these challenges with practical strategies you can apply immediately.

Prepare to be inspired and motivated as we explore key leadership concepts together.

Lana Papp
Municipal Law Clerk
City of Hamilton

Barbara Barclay
Law Clerk
Region of Peel

Municipal Real Estate Round Table Forum

Bring your Real Estate Questions!