

## **ALBERT H. OOSTERHOFF**

Barrister & Solicitor  
Professor Emeritus  
Western University (Faculty of Law)  
Counsel WEL Partners

### **PROFESSIONAL CURRICULUM VITAE**

**Date:** 2023 09 04

#### **1. PERSONAL**

Name: OOSTERHOFF, *Albert* H.  
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#### **2. EDUCATION**

Western University, London ON, JD, 1964; BA, 1968  
The Law Society of Upper Canada, Toronto ON, Barrister, 1966  
University of Toronto, Toronto ON, LLM, 1970 (Thesis: *The Prudent Man Rule in Trust Investments*)

#### **3. EMPLOYMENT AND ASSOCIATIONS**

WEL Partners, Toronto ON  
Counsel, 2014 to date  
The University of Toronto (Faculty of Law), Toronto ON  
Adjunct Professor, 2005 - 2013 (teaching Trusts)  
Western Ontario (Faculty of Law), London ON  
Associate Professor, 1972-80  
Professor 1980-2005  
Associate Dean (Student Affairs), 1982-85  
Associate Dean (Administration) 1989-92  
Acting Dean, 1999-2000  
Associate Dean (Academic) 2001-03  
Retired June 30, 2005, with title Professor Emeritus  
Member of the University Senate for three terms and served on numerous University and Faculty Committees  
University of Windsor (Faculty of Law), Windsor ON  
Associate Professor, 1970-72, with tenure  
Assistant Professor, 1969-70  
Shepherd, McKenzie, Plaxton, Little & Jenkins, Barristers & Solicitors, London ON,

Associate, 1966-68  
Articles of Clerkship, 1964-65

#### 4. HONOURS

Law Society Medal, presented by the Law Society of Ontario, 25 May 2022.  
Ramon John Hnatyshyn Award for Law, Canadian Bar Association, 2021.  
Recognized in *The Best Lawyers in Canada*, 2020-23, in the category of Trusts and Estates.  
Included in the 2022 Canadian Legal Lexpert Directory.  
Distinguished Service Award, Ontario Bar Association, 2019.  
Award for Excellence in Trusts and Estates Law, Ontario Bar Association (Trusts and Estates Section), 2019.  
Named Honorary Member by the Society of Trust and Estate Practitioners, 2019.

#### 5. ACADEMIC SPECIALIZATION

Property, Wills, and Trusts.

I have taught the Property, Wills, and Trusts courses for most of my academic career, as well as courses in Real Estate Transactions, and Legal Research, Writing and Advocacy.

#### 6. PUBLICATIONS

##### 6.1 Articles

Kirkham JG, Oosterhoff AH, Whaley KA, Akbary F, Shulman KI, “Predatory Marriage: An Emerging Medicolegal Issue”. *The Canadian Journal of Psychiatry* 2023 (Online First). doi: 10.1177/07067437231182564.

“Fiduciary Compensation and Passing of Accounts” (2019), 50 *The Advocates Quarterly* 54-79.

“Implications of Re Milne Estate: Are Multiple Wills the Tip of the Iceberg?” *STEP Inside*, January 2019, vol. 18, No. 1, pp. 3-7 (co-author Katy Basi). Awarded the 2019 Best Article Published in *STEP Inside* in 2019 by STEP Canada.

“Powers of Attorney for Property and Personal Care: The Good, the Bad, and the Ugly” *STEP Inside*, January 2019, vol. 18, No. 1, pp. 10-11 (co-author Corina Weigl).

“Predatory Marriages” (2018) 48 *The Advocates Quarterly* 253-338. (Co-author Kimberly A Whaley).

“Locus of Title in an Unadministered Estate and the Law of Assent” (2018) 48 *The Advocates Quarterly* 41-79.

“The Discrete Functions of Courts of Probate and Construction” (2017), 46 *The Advocates Quarterly* 316-373.

“Trust Law Reform: The Uniform Trustee Act” (2015), 34 *Estates, Trusts and Pensions Journal* 329-356.

“Predatory Marriages – Equitable Remedies” (2015), 34 *Estates, Trusts and Pensions Journal* 269-287. (Co-author Kimberly A. Whaley).

“Predatory Marriages” (2013), 32 *Estates, Trusts and Pensions Journal* 24-63.

- “Indemnity of Estate Trustees as Applied in Recent Cases” (2013), 41 *Advocates Quarterly* 123-147. (NB: This article was quoted and applied in *Furtney Estate v. Furtney*, 2014 ONSC 3774, 100 E.T.R. (3d) 312, at paras. 32-34, 44.). Reprinted in *WEL on Fiduciary Accounting: Guardianship, Attorney, Estate & Trust Accounts*, 2nd ed. (Toronto: Whaley Estate Litigation, 2016). Chapter 9, pp. 212-229.
- “Mutual Wills” (2008), 27 *Estates, Trusts and Pensions Journal* 135-157. Republished with permission in *Blended Families: Practical Estate Planning Considerations* (Vancouver: Continuing Legal Education Society of British Columbia, May 2010).
- “Secret and Half-Secret Trusts” (2007), 26 *Estates, Trusts and Pensions Journal* 173-196.
- “Testamentary Capacity, Suspicious Circumstances, and Undue Influence” (1999), 18 *Estates, Trusts and Pensions Journal* 369-395.
- “Consequences of a January/December Marriage: A Cautionary Tale” (1999), 18 *Estates, Trusts and Pensions Journal* 261-284.
- “Great Expectations: *Spes Successionis*” (1998), 17 *Estates, Trusts and Pensions Journal* 181-201.
- “Succession Law in the Antipodes: Proposals for Reform in New Zealand” (1996-97), 16 *Estates and Trusts Journal* 230-256.
- “The New Quebec Trust” (1990-91), 10 *Estates and Trusts Journal* 322-333.
- “The Law of Covenants: Background and Basic Principles” (1991), 4 *National Real Property Law Review* 25-45; reprinted (1993), 2 *National Real Property Law Review* (2d) 166-209.
- “Some Aspects of Support of Dependents” (1983), 12 *Estates and Trusts Reports* 197-204.
- “Religious Institutions and the Law in Ontario: An Historical Study of the Laws Enabling Religious Organizations to Hold Land” (1981), 13 *Ottawa Law Review* 441-468.
- “The Effect of Death on Familial Obligations” (1981), 23 *Reports of Family Law* (2d) 272-299.
- “The Application of the Rule in *Howe v. Earl of Dartmouth* to Residuary Real Property” (1980), 5 *Estates and Trusts Quarterly* 127-145.
- “Indemnification of Trustees: The Rule in *Hardoon v. Belilios*” (1978), 4 *Estates and Trusts Quarterly* 180-194.
- “The Law of Mortmain: An Historical and Comparative Review” (1977), 27 *University of Toronto Law Journal* 257-334.
- “Problems in Ascertaining Lives in Being under Ontario's Perpetuities Act (On Limiting Lives and Relevant Factors)” (1977), 4 *Estates and Trust Quarterly* 119-133. (Co-author: Gordon D. Cudmore).
- “Reform of the Law of Succession in Ontario” (1976), 3 *Estates and Trusts Quarterly* 191-285.

## 6.2 Comments and Annotations

- “Causative Mistake of Sufficient Gravity, or Retroactive Tax Planning? A Comment on *Re Pallen Trust*” (2015), 35 *Estates, Trusts and Pensions Journal* 135-145. Reprinted in *Histrop, Estate Planning Precedents, A Solicitor's Manual*.
- “Marriage – Validity – Marriage between elderly man with Alzheimer's disease and younger woman invalid for lack of capacity” (2001), 20 *Estates, Trusts and Pensions Journal* 115-123.
- “Wills — Beneficiaries — Rights while testator is living - Whether beneficiary, having been granted intervenor status, can veto settlement entered into by testator's litigation guardian in

- proceedings against testator's former attorney" (2000), 19 Estates, Trusts and Pensions Journal, 257 - 262.
- Case Comment: *Gennaro v. Gennaro* (2 R.F.L. (4th) 179), (1994), 2 Reports of Family Law (4th Series) 184-189.
- "Wills — Ademption — Devise to A for life, then to sell and pay the proceeds to B — Testator selling property — Whether remainder interest adeemed" (1989), 9 Estates and Trusts Journal, 191-198.
- "Family Law — Election — Effect on Other Gifts in Will — Acceleration" (1989), 9 Estates and Trusts Journal, 187-190.
- "Assents" (1988), 9 Estates and Trusts Journal 83-86.
- "Wills — Delegation of Will-Making Power — General Powers of Appointment — Validity" (1988), 9 Estates and Trusts Journal 1-12.
- "Dependants' Support — New Principles under the Succession Law Reform Act" (1982), 6 Estates and Trusts Quarterly, 1-10.
- "Support of Adult, Capacitated Beneficiaries" (1980), 7 Estates and Trusts Reports, 166-168.
- "Circumventing Capital Endowments in Favour of Charity" (1980), 7 Estates and Trusts Reports, 129-132.
- "Wills — Void Conditions — Conditions Precedent — Distinction Between Conditions Malum Prohibitum and Malum in Se — Applicability in Canada" (1980), 5 Estates and Trusts Quarterly 97-106.
- "Remedial Constructive Trusts — Matrimonial Property Disputes — Justice and Equity or 'Palm Tree' Justice?" (1979), 57 Canadian Bar Review 356-373.

### 6.3 Blog Posts

#### 2023

- "Can You Make an Irrevocable Gift of the Right of Survivorship?" 6pp. Posted \_\_\_\_ November 2023
- "Revival of a Will" . Posted \_\_\_\_ October 2023.
- "Use of Extrinsic Evidence to Interpret a Will" 4pp. Posted \_\_\_\_ October 2023.
- "Presumption of Revocation of a Will" 4pp. Posted \_\_\_\_ October 2023.
- "A Partial Intestacy?" 4pp. Posted \_\_\_\_ September 2023.
- "Another Will Rectification" 4pp. Posted \_\_\_\_ September 2023
- "Awarding Punitive Damages Against an Executor" . 4pp. Posted \_\_\_\_ September 2023.
- "Standing to Apply for Declaration of Death Order"  
<https://welpartners.com/blog/2023/08/standing-to-apply-for-declaration-of-death-order/>.  
 4pp. Posted 31 August 2023. Also published as an article in WEL Partners Newsletter, August 2023, No. 5.
- "Severance of a Joint Tenancy" <https://welpartners.com/blog/2023/08/severance-of-a-joint-tenancy/>. 5pp. Posted 31 August 2023. Also published as an article in WEL Partners Newsletter, August 2023, No. 5.
- "A Probate Doctrine of Laches? <https://welpartners.com/blog/2023/07/a-probate-doctrine-of-laches/>. 11pp. Posted 31 July 2023. Also published as an article in WEL Partners Newsletter, July 2023, No. 4.

- “Revocation Clause and Beneficiary Designations – Update”  
<https://welpartners.com/blog/2023/07/revocation-clause-and-beneficiary-designations-update/>. 3pp. Posted 31 July 2023. Also published as an article in WEL Partners Newsletter, July 2023, No. 4.
- “Creation of a Charitable Trust of a Park” <https://welpartners.com/blog/2023/08/creation-of-a-charitable-trust-of-a-park/>. 3pp. Posted 23 August 2023.
- “Another Removal of an Executor” <https://welpartners.com/blog/2023/07/another-removal-of-an-executor/>. 3pp. Posted 18 July 2023.
- “An Unsuccessful Application to Remove an Executor”. 4pp. Posted 27 June 2023.
- “Remedies for Misappropriation by Attorney”. 3pp. Posted 19 June 2023. Also published as an article in WEL Partner Newsletter, June 2023, vol 13, No. 3.
- “Gift to Charity That No Longer Exists” <https://welpartners.com/blog/2023/06/gift-to-charity-that-no-longer-exists/>. 4pp. Posted 19 June 2023. Also published as an article in WEL Partners Newsletter, June 2023, vol 13, No. 3.
- “Rectification of a Will” <https://welpartners.com/blog/2023/05/rectification-of-a-will/>. 4pp. Posted 24 May 2023. Also published as an article in WEL Partners Newsletter, May 2023, vol 13, No. 2.
- “Settlor’s Right to Restrain Discretion of Trustees”  
<https://welpartners.com/blog/2023/05/settlors-right-to-restrain-discretion-of-trustees/>. 5pp. Posted 24 May 2023. Also published as an article in WEL Partners Newsletter, May 2023, vol 13, No. 2.
- “Validity of a Non-Charitable Purpose Trust” <https://welpartners.com/blog/author/albert-h-oosterhoff/>. 5pp. Posted 10 May 2023.
- “Presumption of Resulting Trust and an Investment Bond”  
<https://welpartners.com/blog/2023/04/presumption-of-resulting-trust-and-an-investment-bond/>. 4pp. Posted 30 April 2023.
- “Proprietary Estoppel: *Adomaskas v Chrolavicius*”  
<https://welpartners.com/blog/2023/04/proprietary-estoppel-adomaskas-v-chrolavicius/>. 5pp. Posted 10 April 2023. Also published as an article in WEL Partners Newsletter April 2023, vol 13, No 1.
- “Will Invalid Because of Suspicious Circumstances” <https://welpartners.com/blog/2023/03/will-invalid-because-of-suspicious-circumstances/> 3pp. Posted 13 March 2023.
- “An Illusory Delusion” <https://welpartners.com/blog/2023/03/an-illusory-delusion/> 5pp. Posted 20 March 2023. Also published as an article in WEL Partners Newsletter. March 2023, vol 12, No 12.
- “Fiduciary Powers and the Proper Purpose Rule”  
<https://welpartners.com/blog/2023/03/fiduciary-powers-and-the-proper-purpose-rule/> pp.7 Posted 20 March 2023. Also published as an article in WEL Partners Newsletter. March 2023, vol 12, No 12.
- “Rebuttable Presumption of Knowledge and Approval & Capacity”  
<https://welpartners.com/blog/2023/04/rebuttable-presumption-of-knowledge-and-approval-capacity/> 7pp. Posted 10 April 2023. Also published as an article in WEL Partners Newsletter April 2023, vol 13, No 1.
- “Contrary Intention and the Armchair Rule” <https://welpartners.com/blog/2023/02/contrary-intention-and-the-armchair-rule/> 4pp. Posted 16 February 2023. Also published as an article in WEL Partners Newsletter. February 2023, vol 12, No 11.

- “Fraudulent Calumny” <https://welpartners.com/blog/2023/02/fraudulent-calumny/> 6pp. Posted 16 February 2023. Also published as an article in WEL Partners Newsletter. February 2023, vol 12, No 11.
- “Ademption of Gift of Proceeds of Sale of Property” <https://welpartners.com/blog/2023/02/ademption-of-gift-of-proceeds-of-sale-of-property/> 4pp. Posted 21 February 2023
- “Removal and Passing Over of Executors and Administrators” <https://welpartners.com/blog/2023/02/removal-and-passing-over-of-executors-and-administrators/> 10pp. Posted 2 February 2023. Also published as an article in WEL Partners Newsletter. January 2023, vol 12, No 10.
- “Conflict of Laws and Validity of Trust” <https://welpartners.com/blog/2023/01/conflict-of-laws-and-validity-of-trust/> 3pp. Posted 16 January 2023.
- “Rectification and Costs” <https://welpartners.com/blog/2023/02/rectification-and-costs/>. 4pp. Posted 2 February 2023. Also published as an article in WEL Partners Newsletter. January 2023, vol 12, No 10.

## 2022

- “Proprietary Estoppel: *Guest v Guest*” <https://welpartners.com/blog/2022/12/proprietary-estoppel-guest-v-guest/>. 9pp. Posted 30 December 2022. Also published as an article in WEL Partners Newsletter. December 2022, vol 12, No 9.
- “Protective Trusts and *Re Richards*” <https://welpartners.com/blog/2022/12/protective-trusts-and-re-richards/>. 8pp. Posted 30 December 2022. Also published as an article in WEL Partners Newsletter. December 2022, vol 12, No 9.
- “Trustee’s Right of Indemnity” <https://welpartners.com/blog/2022/12/trustees-right-of-indemnity/> 10pp. Posted 1 December 2022. Also published as an article in WEL Partners Newsletter. November 2022, vol 12, No 8.
- “Estate Planning and Changing Family Dynamics” <https://welpartners.com/blog/2022/12/estate-planning-and-changing-family-dynamics/> 4pp. Posted 1 December 2022. Also published as an article in WEL Partners Newsletter. November 2022, vol 12, No 8.
- “The Rule in *Cherry v Boulton* Redux” <https://welpartners.com/blog/2022/12/the-rule-in-cherry-v-boulton-redux/>. 3pp. Posted 9 December 2022.
- “Delusions and Testamentary Capacity” <https://welpartners.com/blog/2022/11/delusions-and-testamentary-capacity-2/> 6pp. Posted 11 November 2022.
- “Removal of Trustee for Breach of Trust” <https://welpartners.com/blog/2022/10/removal-of-trustee-for-breach-of-trust/> 6pp. Posted 13 October 2022.
- “The Presumption of Due Execution: *Re Grace Estate*” <https://welpartners.com/blog/2022/10/the-presumption-of-due-execution-re-grace-estate/>. 4pp. Posted 31 October 2022. Also published as an article in WEL Partners Newsletter, October 2022, vol 12, No 7.
- “Testamentary Document or Secret Trust?” <https://welpartners.com/blog/2022/10/testamentary-document-or-secret-trust/>. 4pp. Posted 31 October 2022. Also published as an article in WEL Partners Newsletter, October 2022, vol 12, No 7.
- “Life Estate or Licence – A Continuing Conundrum” <https://welpartners.com/blog/2022/10/life-estate-or-licence-a-continuing-conundrum/> 5pp. Posted 3 October 2022. Also published as an article in WEL Partners Newsletter, September 2022, vol 12, No 6.

- “No Assent – Property Does not Vest” <https://welpartners.com/blog/2022/10/no-assent-property-does-not-vest/> 7pp. Posted 3 October 2022. Also published as an article in WEL Partners Newsletter, September 2022, vol 12, No 6.
- “Rescission Not Possible to Avoid Adverse Tax Consequences” <https://welpartners.com/blog/2022/07/rescission-not-possible-to-avoid-adverse-tax-consequences/> 6 pp. Posted 26 July 2022. Also published as an article in WEL Partners Newsletter, July 2022, vol 12, No 4.
- “The best laid schemes o’ mice an’ men’ / Gang aft a-gley” <https://welpartners.com/blog/2022/08/the-best-laid-schemes-o-mice-an-men-gang-aft-a-gley/> 3 pp. Posted 26 August 2022. Also published as an article in WEL Partners Newsletter, August 2022, vol 12, No 5.
- “The Slayer Rule: *Re Unger Estate*” <https://welpartners.com/blog/2022/08/the-slayer-rule-re-ungers-estate/> 4 pp. Posted 29 August 2022.
- “Misdescription of a RRIF – Application of *Falsa Demonstratio* Principle” <https://welpartners.com/blog/2022/09/misdescription-of-a-rrif-application-of-falsa-demonstratio-principle/>. 3 pp. Posted 12 September 2022.
- “Recovery of Personal Tax Debt from Trustee” <https://welpartners.com/blog/2022/08/recovery-of-personal-tax-debt-from-trustee/> 3 pp. Posted 26 August 2022. Also published as an article in WEL Partners Newsletter, August 2022, vol 12, No 5.
- “Recovery of Overpayments into a Trust” <https://welpartners.com/blog/2022/07/recovery-of-overpayments-into-a-trust/> 5 pp. Posted 26 July 2022. Also published as an article in WEL Partners Newsletter, July 2022, vol 12, No 4.
- “Creation of Trust – Certainty of Intention” <https://welpartners.com/blog/2022/07/creation-of-trust-certainty-of-intention/> 2 pp. Posted 20 July 2022
- “A Quistclose Trust or a Dud?” <https://welpartners.com/blog/2022/06/a-quistclose-trust-or-a-dud/>, 5 pp. Posted 27 June 2022. Also published as an article in WEL Partners Newsletter, June 2022, vol 12, No. 3.
- “Designation of Beneficiaries and the Presumption of Resulting Trust” <https://welpartners.com/blog/2022/06/designation-of-beneficiaries-and-the-presumption-of-resulting-trust/>. 3 pp. Posted 27 June 2022. Also published as an article in WEL Partners Newsletter, June 2022, vol 12, No.3.
- “Application of Alberta’s Validating Power: *Re McCarthy Estate*”. 3 pp. Posted 14 June 2022.
- “Probate, Construction, and Law Reform” <https://welpartners.com/blog/2022/04/probate-construction-and-law-reform/> 9 pp. Posted 14 April 2022. Also published as an article in WEL Partners Newsletter, April 2022, vol 12, No.1.
- “Validating Powers and Rectification Powers” <https://welpartners.com/blog/2022/03/validating-powers-and-rectification-powers/>. 9 pp. Posted 3 March 2022.
- “Principles Governing the Determination of Testamentary Capacity” <https://welpartners.com/blog/2022/05/principles-governing-the-determination-of-testamentary-capacity/>. 7 pp. Posted 20 May 2022. Also published as an article in WEL Partners Newsletter, May 2022, vol 12, No. 2.
- “Ademption by Conversion: *Best v Hendry*” <https://welpartners.com/blog/2022/05/ademption-by-conversion-best-v-hendry/> 7 pp. Posted 20 May 2022. Also published as an article in WEL Partners Newsletter, May 2022, vo. 12, No. 2.

- “Duties of Executors and Limitations” <https://welpartners.com/blog/2022/04/duties-of-executors-and-limitations/>. 6 pp. Posted 22 April 2022. Also published as an article in WEL Partners Newsletter, April 2022, vol 12, No.1.
- “How Do You Become a Trustee” <https://welpartners.com/blog/2022/04/how-do-you-become-a-trustee/>. 4 pp. Posted 14 April 2022
- “Executor’s Compensation and Passing of Accounts”.  
<https://welpartners.com/blog/2022/03/executors-compensation-and-passing-of-accounts/>. 3 pp. Posted 18 March 2022. Also published as an article in WEL Partners Newsletter, February 2022, vol. 11, No. 11.
- “When Does an Attorney’s Duty to Keep Accounts Begin?”  
<https://welpartners.com/blog/2022/05/when-does-an-attorneys-duty-to-keep-accounts-begin/>. 3 pp. Posted 10 May 2022.
- “*Bayford v Boese Encore*”. <https://welpartners.com/blog/2022/03/bayford-v-boese-encore/>. 2 pp. Posted 18 March 2022. Also published as an article in WEL Partners Newsletter, March 2022, vol. 11, No. 12/
- “Should You be Able to Share in Your Common Law Partner’s Intestate Estate?”  
<https://welpartners.com/blog/2022/02/should-you-be-able-to-share-in-your-common-law-partners-intestate-estate/>. 6 pp. Posted 14 February 2022. Also published as an article in WEL Partners Newsletter, February 2022, vol. 11, No. 11.
- “Effect of a Will’s Revocation Clause on Beneficiary Designations”  
<https://welpartners.com/blog/2022/01/effect-of-a-wills-revocation-clause-on-beneficiary-designations/>. 4 pp. Posted 30 January 2022. Also published as an article in WEL Partners Newsletter, January 2022, vol. 11, No. 10.
- “Can an Unsigned Codicil Be Probated”. <https://welpartners.com/blog/2022/02/can-an-unsigned-holograph-codicil-be-probated/> 4 pp. Posted 14 February 2022. Also published as an article in WEL Partners Newsletter, February 2022, vol. 11, No. 11.
- “Using English Properly: The Possessive Case”. <https://welpartners.com/blog/2022/03/using-english-properly-the-possessive-case/>. 5 pp. Posted 7 March 2022.
- “Removal of Trustees for Unreasonable Conduct”  
<https://welpartners.com/blog/2022/01/removal-of-trustees-for-unreasonable-conduct/>. 7 pp. Posted 30 January 2022. Also published as an article in WEL Newsletter January 2022, vol. 11, No. 10.
- “Powers of Attorney and Mumpsimi” <https://welpartners.com/blog/2022/01/powers-of-attorney-and-mumpsimi/>. 2 pp. Posted 7 January 2022

## 2021

- “Recovery of Secret Profit from Directors Under Constructive Trust”.  
<https://welpartners.com/blog/2021/11/recovery-of-secret-profit-from-directors-under-constructive-trust/> 5pp. Posted 12 November 2021.
- “Derivative Actions in Estate Litigation”. 7 pp. Posted 10 December 2021. Also published as an article in WEL Partners Newsletter December 2021, Vol 11, No 9.
- “Costs of Estate Litigation on a Finding of Fraud”. <https://welpartners.com/blog/2021/12/costs-in-estate-litigation-on-a-finding-of-fraud/>. Posted 10 December 2021. 2 pp.



- “Electronic Wills in British Columbia – Update”.  
<https://welpartners.com/blog/2021/10/electronic-wills-in-british-columbia-update/> 1 p.  
 Posted 22 October 2021.
- “Yet Another May-December Marriage – Update”. <https://welpartners.com/blog/2021/10/yet-another-may-december-marriage-update/> 1 p. Posted 22 October 2021.
- “Disclaimer”. <https://welpartners.com/blog/2021/12/disclaimer/> 7 pp. Posted 1 December 2021.  
 Also published as an article in *WEL Newsletter*, November 2021, Vol. 11, No. 8.
- “Executor and Trustee?”. <https://welpartners.com/blog/2021/11/executor-and-trustee/> 6 pp.  
 Posted 22 November 2021.
- “A Question of Standing: What’s in It for You?”. <https://welpartners.com/blog/2021/11/a-question-of-standing-whats-in-it-for-you/> 3 pp. Posted 17 November 2021.
- “Entitlement to Constructive Trust for Tortious Conduct”.  
<https://welpartners.com/blog/2021/10/entitlement-to-constructive-trust-for-tortious-conduct/>  
 5 pp. Posted 29 October 2021. Also published as an article in *WEL Newsletter*, September 2021, Vol. 11, No. 7.
- “Third Party’s Rebuttal of Presumption of Advancement”.  
<https://welpartners.com/blog/2021/10/third-partys-rebuttal-of-presumption-of-advancement/>  
 5 pp. Posted 20 October 2021.
- “Canadian Will Validating Provisions and Their Application”.  
<https://welpartners.com/blog/2021/10/canadian-will-validating-provisions-and-their-application/> 10 pp. Posted 29 October 2021. Also published as an article in *WEL Newsletter*, September 2021, Vol. 11, No. 7.
- “Formalities, Probate, and Rectification: *Conner Estate v. Worthing*”.  
<https://welpartners.com/blog/2021/09/formalities-probate-and-rectification-conner-estate-v-worthing/> 4 pp. Posted 29 September 2021. Also published as an article in *WEL Newsletter*, September 2021, Vol. 11, No. 6.
- “Passing of Accounts: Executor Compensation and Costs”.  
<https://welpartners.com/blog/2021/09/passing-of-accounts-executor-compensation-and-costs/> 6 pp. Posted 16 September 2021.
- “Information Trustees Must Provide to Beneficiaries”.  
<https://welpartners.com/blog/2021/09/information-trustees-must-disclose-to-beneficiaries-the-joint-interest-exception/> 8 pp. Posted 7 September 2021.
- “Using English Properly: Misuse of Who and Whom”.  
<https://welpartners.com/blog/2021/08/using-english-properly-misuse-of-who-and-whom/> 4 pp. Posted 17 August 2021.
- “O What a Tangled Web We Weave: *Bayford v. Boese*”.  
<https://welpartners.com/blog/2021/08/o-what-a-tangled-web-we-weave-bayford-v-boese/> 3 pp. Posted 11 August 2021. Also published as an article in *WEL Newsletter*, September 2021, Vol. 11, No. 6.
- “Removal of Trustee for Inappropriate Use of Discretion”.  
<https://welpartners.com/blog/2021/08/removal-of-trustee-for-inappropriate-use-of-discretion/> 3 pp. Posted 30 August 2021. Also published as an article in *WEL Newsletter*, August 2021, Vol. 11, No. 5.
- “Applying Cy-Près When Named Charity Has Ceased to Exist”.  
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## 6.5 Books and Monographs

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## 7. REPORTS AND STUDIES

*Final Report of the Working Group on Crowdfunding*. August 2020. Adopted by the Uniform Law Conference of Canada on 12 August 2020. The Report was that of the Working Group, of which I was a member.

*Report of the Working Group on a Uniform Public Appeals Act*, August 2011. Pp. 33. For the Uniform Law Conference of Canada. The Report was that of the Working Group, of which I was a member. The Draft Act was attached to the Report. See [http://www.ulcc.ca/images/stories/2011\\_pdf\\_en/2011ulcc0011.pdf](http://www.ulcc.ca/images/stories/2011_pdf_en/2011ulcc0011.pdf). The Conference promulgated the Act at its annual meeting in Winnipeg in 2011. See [http://www.ulcc.ca/images/stories/2011\\_pdf\\_en/2011ulcc0018.pdf](http://www.ulcc.ca/images/stories/2011_pdf_en/2011ulcc0018.pdf) at p. 15.

*Charitable Fundraising: Report*, June 15, 2005. Pp. 11. For the Uniform Law Conference of Canada. I wrote the Report and was co-chair of the Working Group. See the Report, to which the draft Uniform Charitable Fundraising Act was attached as an Appendix at [http://www.ulcc.ca/images/stories/2005\\_English\\_pdf/2005-Charitable-Fundraising\\_E.pdf](http://www.ulcc.ca/images/stories/2005_English_pdf/2005-Charitable-Fundraising_E.pdf). The Conference promulgated the Act at its annual meeting in St. John’s in 2005. See minutes at <http://www.ulcc.ca/en/annual-meetings/250-2005-st-johns-nf/civil-section-minutes/84-civil-section-minutes-2005-2>. And see the Act at <http://www.ulcc.ca/en/uniform-acts-new-order/current-uniform-acts/664-charitable-fundraising/1433-charitable-fundraising-act>.

*Charitable Fundraising: Research Paper*, April 15, 2004. Pp. 39. For the Uniform Law Conference of Canada. I wrote the Report and was co-chair of the Working Group. See the Report at <http://www.ulcc.ca/en/uniform-acts-new-order/current-uniform-acts/664-charitable-fundraising/1529-charitable-fundraising>. The Conference received the Report at its Annual Meeting in Regina in 2004. See minutes at [http://www.ulcc.ca/images/stories/2004\\_English.pdf/2004ulcc0033.pdf](http://www.ulcc.ca/images/stories/2004_English.pdf/2004ulcc0033.pdf).

*Report on Basic Principles of Land Law*, 1997. Pp. x, 165 (Member of the Working Group) For the Ontario Law Reform Commission.

*Succession Aspects of the Family Law Act*, 1993. Pp. iii, 44. (For the Ontario Law Reform Commission).

*Positive and Restrictive Covenants Affecting Freehold Land*, 1985. Pp. viii, 420. (For the Ontario Law Reform Commission).

*Report on The Religious Institutions Act and The Mortmain and Charitable Uses Act*, 1976. Pp. v, 75. (Director of project, for the Ontario Law Reform Commission. N.B: The report resulted in the enactment of the *Religious Organizations' Land Act*, S.O. 1979, c. 45, the

*Charities Accounting Amendment Act*, S.O. 1982, c. 11, and the *Mortmain and Charitable Uses Repeal Act*, S.O. 1982, c. 12.).

*Trustees' Powers of Investment*, 1970. Pp. x, 257. (Background paper for the Ontario Law Reform Commission's *Report on the Law of Trusts* (Toronto: Ministry of the Attorney General, 1984)).

## 8. CONTINUING LEGAL EDUCATION PAPERS, PRESENTATIONS AND LECTURES

### 8.1 Papers and Presentations

- “Missing Beneficiaries”, Presentation to the Osgoode Professional Development Program, “Estate Litigation: The Practical Guide for Legal Professionals”, 6 October 2022.
- “Fun with the Rule Against Perpetuities”, Keynote speech to the Legal Education Society of Alberta, 2022 Refresher: Wills & Estates, 29 April-2 May 2022.
- “Compensation and Passing of Accounts”, for the Osgoode Professional Development Program, Passing of Accounts and Fiduciary Accounting, 26 April 2022, pp. 1-39. And a member of the Panel.
- “Predatory Marriages” for the Osgoode Professional Development Program, The Osgoode Certificate in Elder Law, 7 April 2022, with Kimberly Whaley.
- “Compensation and Passing of Accounts” for the Osgoode Professional Development Program, Passing of Accounts and Fiduciary Accounting, 7 April 2021, pp. 1-34. And member of panel (presented virtually via Zoom).
- “Executor’s Compensation and Passing of Accounts: How to Avoid the Pitfalls” for Concentra Trust, 9 July 2020. 21 pp.
- “Compensation and Passing of Accounts” for the Osgoode Professional Development Program, Passing of Accounts and Fiduciary Accounting, 7 April 2020, pp. 1-31. And member of panel.
- “Are Beneficiary Designations Testamentary?” for the Ontario Bar Association Institute 2020, Elder Law Program, Rights and Limitations on an Attorney Under a Power of Attorney, and member of panel on the topic, 7 February 2020, pp. 1-38. The program was presented virtually on ZOOM.
- “A Review of Testamentary Capacity in Canada with Reference to Recent Cases” for the Isaac Pitblado Lectures in Winnipeg, 8 November 2019. pp. 1-54.
- “Predatory Marriages and Financial Abuse of Elders” for the National Association of Public Trustees and Guardians 2019 Conference, held in Toronto. 27 May 2019 (Co-authors of paper Kimberly A. Whaley and Sareh Ebrahimi), pp. 1-88.
- “Predatory Marriages” for the STEP 20th National Conference program Powers of Attorney for Property and Personal Care, held in Toronto on 29 May 2018 (Co-author of paper Kimberly A. Whaley). See also 5.1 Articles, for the published paper.
- “Compensation and Passing of Accounts” for the Osgoode Professional Development Program, Passing of Accounts and Fiduciary Accounting, 13 February 2018, pp. 1-26.
- “Predatory Marriages” for the CBA – NS 1917 Annual Conference, Halifax, NS, 1 December 2017, pp. 1-85 (with Kimberly Whaley).
- “Equitable Remedies for Elder Abuse: A Case Law Review” in the STEP Canada, Toronto Branch Program, Elder Abuse and Ways of Protecting the Elderly, 18 October 2017, pp. 1-17. With Kate Stephens.

- “Locus of Title in an Unadministered Estate and the Law of Assent” in The Law Society of Upper Canada, 20th Annual Estates and Trusts Summit – Day One, 16 October 2017, pp. 1-52. See also 5.1 Articles, for the published paper.
- “Compensation and Passing of Accounts” in The Law Society of Upper Canada, Practice Gems: The Administration of Estates 2017 Program, 29 September 2017, pp. 1-26.
- “Elder Law: Marriage, Divorce & Predatory Marriages” in the OBA Program, Law & the Older Adult Client, 16 November 2016, pp. 1-71. With Kimberly A. Whaley.
- “The Discrete Functions of Courts of Probate and Construction,” for the Law Society of Upper Canada 19th Annual Estates and Trusts Summit – Day One, 3 November 2016, pp. 1-54.
- “The Discrete Functions of Courts of Probate and Construction,” for the STEP Annual Conference in Toronto, 9-10 June 2016, pp. 1-53. And member of panel with Archie Rabinowitz and John Poyser, chaired by Kimberly Whaley. See also 5.1 Articles, for the published paper.
- “The New Tax Rules: Spousal Trusts – Problems and Possible Solutions,” for the STEP Toronto Conference 18 May 2016, pp. 1-15. And member of Panel with Rachel Blumenfeld and Brian Cohen.
- “Crowdfunding and the Law of Trusts” for The Law Society of Upper Canada, 18th Annual Estates and Trusts Summit, Day One, 7 October 2015, Tab 3, pp. 3-1 to 3-22.
- “Ensuring Full Indemnification of Legal Fees and Disbursements” for The Law Society of Upper Canada program Practice Gems: The Administration of Estates, 10 September 2015, pp. 1-19. And member of Panel with the Honourable Susan Greer.
- “Indemnification of Trustees” for the Ontario Bar Association’s Institute 2015, Trusts and Estate Law – No Bones About It: Critical Issues and Essential Updates in Trusts and Estate Law, 4 February 2015, with John O’Sullivan and Sara Beheshti. Tab 2, pp. 1-41. And Member of Panel with John O’Sullivan. See also 5.1 Articles, for the published paper.
- “Reform of the Law of Trusts: The *Uniform Trustee Act 2012*” for The Law Society of Upper Canada, 17th Annual Estates and Trusts Summit, Day One, 3 November 2014, Tab 6, pp. 6-1 – 6-22. See also 5.1 Articles, for the published paper.
- “The Court’s Role under the Health Care Consent Act: With Specific Reference to *Grover v. Grover*,” for the B’nai Brith Seminar, 2 June 2014. Tab 3, pp. 1-17. And member of Panel with Marshall Swadron and Craig Vander Zee.
- “Causerie on Trust Law Reform,” at the Hull & Hull law firm, 6 January 2014. Pp. 1-17.
- “Some Aspects of Indemnification of Trustees,” for The Law Society of Upper Canada, 16th Annual Estates and Trusts Summit, Day One, 11 November 2013, pp 1-10. Reprinted WEL on Fiduciary Accounting: Guardianship, Attorney, Estate & Trust Accounts, 2nd ed. (Toronto: Whaley Estate Litigation, 2016). Pp. 231-240.
- “Indemnity of Estate Trustees as Applied in Recent Cases,” for the STEP Toronto Branch Conference, 9 January 2013, pp. 1-19. And member of Panel with the Honourable Maurice Cullity and Archie Rabinowitz.
- “Predatory Marriages,” for The Law Society of Upper Canada, 14th Annual Estates and Trusts Summit, 9 and 10 November 2011, Day 1. Pp. 1-47. See also 5.1 Articles, for the published paper.
- “Mutual Wills”, for the Ontario Bar Association, Trusts and Estates Program, “Trusts, Trustees, Trusteeships II”, 24 September 2007. Pp. 1-31. See also 5.1 Articles, for the published paper.

- “Secret and Half-Secret Trusts”, for the Ontario Bar Association, Trusts and Estates Program, “Trusts, Trustees, Trusteeship – All You Need to Know and More,” 18 September 2000, Pp. 1-35. See also 5.1 Articles, for the published paper.
- “Canadian Fundraising Laws: An Overview”, for the Canadian Bar Association/Ontario Bar Association, Third National Symposium on Charity Law, 6 May 2005, Pp. 1-20.
- “Testamentary Capacity, Suspicious Circumstances, and Undue Influence,” in the 1999 Mid-Winter Meeting Proceedings, *Chicken Soup for Lawyers*, Manitoba Bar Association, Winnipeg, 4 February 1999, pp. 1-49. See also 5.1 Articles, for the published paper.
- “Every Child’s Nightmare: January/December Marriages - The *Banton* Case,” in the 1999 Annual Institute of Continuing Legal Education Proceedings, *Estates: The Outer Limits: Current Issues in Agency, Guardianship and Power of Attorney Law*, Canadian Bar Association - Ontario, Toronto, 28 January 1999, Tab 3, pp. 1-34. See also 5.1 Articles, for the published paper.
- “The Fiduciary Obligation,” in *Civil Law Seminar*, for the National Judicial Institute, Ottawa, 22 May 1997, pp. 1-45.
- “The Law of Covenants: Background and Basic Principles,” in *Easements and Restrictive Covenants*, The Law Society of Upper Canada, Department of Education, 1989, pp. B1-B55. In The Law Society of Upper Canada Program on Easements and Restrictive Covenants, 7 December 1989. See also 5.1 Articles, for the published paper.
- “The Agreement of Purchase and Sale,” *Real Estate Conveyancing*, The University of Western Ontario Technical Services, 1982, pp. 1-64, in the Continuing Legal Education Program on Real Estate Conveyancing, sponsored by the Faculty of Law, The University of Western Ontario, March 1981.
- “The Effect of Death on Familial Obligations,” *Current Problems in Family Law*, The University of Western Ontario Technical Services, 1981, pp. 1-55, in the Continuing Legal Education Program on Current Problems in Family Law, sponsored by the Faculty of Law, The University of Western Ontario, June 1981. See also 5.1 Articles, for the published paper.
- “Remedies After Closing,” *Real Estate Remedies*, The University of Western Ontario Technical Services, 1980, pp. 1-43, in the Continuing Legal Education Program on Real Estate Remedies, sponsored by the Faculty of Law, The University of Western Ontario, October 1980.

## 8.2 Other Presentations and Lectures

- Interview by Cindy Radu, Chief Learning Officer of Tamarind Learning Canada, for a podcast entitled “Trust Basics in Plain English”, 14 October 2022.
- “Constructive Trusts” for the Cross-Country Book Club, 12 October 2022.
- “A Cross-Canada Update on Predatory Marriages” at the Ontario Bar Association’s program, Elder Law Day: A Conference for Lawyers Representing Seniors, 20 June 2022.
- “Fiduciary Accounting and Compensation” for the GT Accountants Network, 22 October 2021.
- “Fun with the Rule Against Perpetuities”, Keynote address to the LESA Conference, Banff, 1 May 2022.
- “Unjust Enrichment and Quantum Meruit” for Cross-Country Book Club, 13 April 2022.
- “Fiduciary Compensation” for the GT Accountants Network, 20 October 2020, with Kimberly Whaley and Tracey Phinnemore.

- “The Continuing Importance of the Distinction Between Probate and Construction”. Lecture in Dr. Susan Drummond’s Estates Course, Osgoode Hall Law School, York University, 8 October 2020.
- Chaired a panel on Capacity Assessments at the Isaac Pitblado Lectures in Winnipeg, 8 November 2019. Kimberly Whaley, John Poyser and Dr. Barry Campbell were the panellists.
- “Fiduciary Obligations where an Estate Has Potential Dependents under the Succession Law Reform Act”. Presentation to CIBC Private Wealth Management, 22 July 2019, with Marian Passmore.
- “Unjust Enrichment, Constructive Trust, Resulting Trust, and Quantum Meruit”. Lecture to WEL Partners, 11 April 2019
- “Removal of Fiduciaries, Including an Estate Trustee, and Exoneration of Trustees” Lecture in the Estates Litigation course at Western University Faculty of Law, 3 April 2019.
- “Marriage Contracts; Conflicts in Blended Families; Sibling Struggles; Predatory Marriages; Family Meetings” Panel discussion in Osgoode Certificate in Elder Law, 26 February 2019. Chair of panel.
- “Unjust Enrichment, Constructive Trust, Resulting Trust, and Quantum Meruit” Lecture in the Estates Litigation course at Western University Faculty of Law, 13 February 2019.
- “Compensation and Passing of Accounts” to Junior Trusts and Estates Practitioners, WEL Partners, Toronto, 31 July 2017.
- “Critical Update on Predatory Marriages & Later Life Partnerships,” in the Osgoode Professional Development Program, “Advising the Elderly Client,” 29 September 2016. With Kimberly Whaley.
- “The Discrete Functions of Courts of Probate and Construction” to Junior Trusts and Estates Practitioners, WEL Partners, Toronto, 29 August 2016.
- “New Spouse/Old Money: Claims Arising out of Later in Life Partnerships,” Webinar in the Osgoode Professional Development, Elder Law Webinar Series, 4 February 2016. With Kimberly Whaley.
- “Predatory Marriages” Carswell Webinar, 4 June 2013. With Kimberly Whaley.
- “Predatory Marriages,” for the National Initiative for the Care of the Elderly, 2013 Annual Conference, 4 June 2013.
- “*Spes Successionis*,” address to the Middlesex Family Lawyer’s Association, 12 April 1998.
- Presented demonstration on Future Interests Program (rewritten for the IQ program) in “Helping You to be There — Electronically: Enhancing Your Course Using Technology,” in “Fall Perspectives on Teaching,” UWO, 3 September 1997.
- “Why Saying So, Won’t Make it So.” Lecture in the Canadian Bar Association - Ontario Program, “‘Righting’ Wills: Practice Improvement and Loss Prevention,” London, 20 September 1995.
- “Introduction to the Law of Property,” in the Civil Law/Common Law Summer Exchange Programme, sponsored by the Department of Justice, held at the Faculty of Law, Dalhousie University, June-July, 1981.

## 9. EDITORSHIPS

- Editor-in-Chief, *Estates and Trusts Journal* (Canada Law Book Inc.). 1987-89.
- Member, Advisory Board, *The Philanthropist*. 1986-97.

Associate editor of *Dominion Law Reports* (Canada Law Book Inc.). (Selection of cases for publication and writing of catchlines, headnotes, and cases considered). 1973-2007.

Associate editor of *Canadian Criminal Cases* (Canada Law Book Inc.). (Selection of cases for publication and writing of catchlines, headnotes, and cases considered). 1973 - 2007.

Associate editor of *Ontario Reports* (Canada Law Book Inc., for Law Society of Upper Canada). (Selection of cases for publication and writing of catchlines, headnotes, and cases considered.) 1973-1981; 1983-1990.

## 10. CONSULTANTSHIPS HELD

Uniform Law Conference of Canada, member of the Working Group on Crowdfunding. 2019-.  
Uniform Law Conference of Canada, member of the Working Group on Informal Public Appeals. 2009-2012. The Report of the Working Group resulted in the *Uniform Informal Public Appeals Act*, 2011.

Uniform Law Conference of Canada, Charitable Fundraising Project. Co-chair of Working Group, author of Research Paper and of the Report. 2004-05. NB: The Project resulted in the promulgation of the *Uniform Charitable Fundraising Act 2005*.

Ontario Law Reform Commission, Report on Basic Principles of Land Law, 1996, member of the Advisory Board.

Ontario Law Reform Commission, Project on the Family Law Act. Contributed research paper on Succession Aspects of the Family Law Act. 1993.

Ontario Law Reform Commission, Law of Property Project, Positive Covenants. Contributed research paper on positive and restrictive covenants. 1984-85.

Ontario Law Reform Commission, Reference re The Mortmain and Charitable Uses Act and The Religious Institutions Act. Director of Reference. 1974-76. N.B.: The report resulted in the enactment of the *Religious Organizations' Land Act*, S.O. 1979, c. 45, the *Charities Accounting Amendment Act*, S.O. 1982, c. 11, and the *Mortmain and Charitable Uses Repeal Act*, S.O. 1982, c. 12.).

Ontario Law Reform Commission, Law of Property, Project, The Trustee Act and related Acts. Contributed research paper on "Trustees' Powers of Investments." 1969-72.

## 11. MEMBERSHIP IN ACADEMIC/PROFESSIONAL SOCIETIES

The Law Society of Ontario (formerly The Law Society of Upper Canada), since 1966

The Canadian Bar Association, since 1966

The Ontario Bar Association (formerly The Canadian Bar Association – Ontario), since 1966

The Ontario Bar Association (formerly The Canadian Bar Association – Ontario) – Wills and Trusts section

The National Initiative for the Care of the Elderly

## 12. PROFESSIONAL COMMITTEES' MEMBERSHIPS

Uniform Law Conference of Canada, Crowdfunding Project. Member of Working Group. 2019-.

Ontario Bar Association, Wills and Trusts Subsection, ad hoc Committee on the Wolfe Goodman Award. 2017. Member. April-May 2017; April-May 2020.

Ontario Bar Association, Predatory Marriages Working Group. Member. 2016-17.

Canadian Bar Association, Charity Law Reform Committee, formerly Provincial Initiatives Committee on Charity Law Reform, a subcommittee of the CBA Charities and Not-for-Profit Law Section. Member. 2013-16.

Ontario Bar Association, ad hoc Committee on submission to the Ontario Law Foundation on Predatory Marriages. Co-chair. 2013-14.

Uniform Law Conference of Canada, Informal Public Appeals Project. Member of Working Group. 2009-12. NB: Project resulting in promulgation of the *Uniform Informal Public Appeals Act 2011*.

Uniform Law Conference of Canada, Working Group on Charitable Fundraising. Co-chair. 2003-2005. NB: Project resulted in promulgation of the *Uniform Charitable Fundraising Act 2005*.

Ontario Law Reform Commission, Law of Property Project, Basic Principles of Land Law, Draft Proposals. Member, Advisory Board. 1992.

Legal Aid Ontario, Area Committee of Middlesex County, member, 1999 - 2000.

Legal Aid Ontario, Area Committee of Middlesex County, member, 1999 - 2000.

The Law Society of Upper Canada Advisory Council: Member. 1976-77; 1978-82.

Professional Training Committee of The Ontario Legal Education Council: Member. 1976-77; 1978-79.

Ontario Legal Education Council: Member. 1976-77; 1978-79.

### 13. SERVICE TO THE COMMUNITY

“Predatory Marriages” on “Heirs and Omissions” program, Cable 14 TV, Hamilton ON, taped 4 November 2013 (with Kimberly Whaley).

Paideia Centre for Public Theology, Hamilton ON, member of board of directors, 2012-2013

Health Research Council (U.W.O. Faculty of Medicine and Dentistry), member, 1999-2000.

Address, “Legal Liability of Governments, Hospitals, and Physicians Arising from Health Care Restructuring,” to the London Health Sciences Centre, Bioethics Committee, 27 January 1998.

London Health Sciences Centre, Bioethics Committee: Member. 1997- 2003.

Address, “Living Wills: You and Your Property,” to the Law Alumni and guests, UWO: Invited lecturer. 4 October 1997.

Address, “Powers of Attorney and Living Wills: The New Legislation,” to the Faculty and Staff Retirees Assoc., UWO: Invited lecturer. 19 January 1995.

Address, “Wills, Will Substitutes and Substitute Decisions,” to the Lou Gehrig’s Disease Assoc., London: Invited Lecturer. 29 March 1993.

Address, “Making a Will” to the Staff Retirees Association (U.W.O.): Invited Lecturer. 16 November 1992.

Address, “Making a Will” to the U.W.O. Staff Association: Invited Lecturer. 1 April 1992.

“Legal Eagles” Television Program on Wills & Estates. Cable Television, London: Panel member. Spring 1991.