

Simcoe Trusts and Estates Lawyers Association (STELA) Report

The Simcoe Trusts and Estates Lawyers Association (STELA) is an informal and educational monthly gathering of wills, trusts, and estates lawyers in Simcoe County. We regularly meet on the third Tuesday of each month. Prior to the pandemic, our meetings would take place in the boardroom of Carroll Heyd Chown LLP from 12pm-2pm. During the first hour we would participate in the OBA Trusts and Estates Brown Bag Lunch conference call. This was followed by an hour focusing on the issues of the local wills and estates bar. With the pandemic, the OBA Trusts and Estates call has moved to meeting via Zoom from 12pm-1pm and lawyers can participate in a similar manner and address questions and concerns to participants to the Zoom call from across Ontario, followed by a virtual Zoom meeting for STELA from 1pm-2pm.

There are a variety of topics discussed during our meetings, which ranges from substantive legal issues, practice management and ethics, to developments in case law and legal precedent. We have had the opportunity to welcome a variety of speakers to our meetings and have had discussions on topics that are pertinent to the local wills and estates bar. These speakers include insurance agents who have discussed insurance products available for estate lawyers and their clients, accounts who have discussed estate tax planning, family lawyers to discuss family law matters in relation to estate planning, and estate litigators to discuss best practices for estate litigation.

The OBA Trusts and Estates Brown Bag Lunch, and the STELA meeting, each qualify for one hour of substantive CPD. There is also no membership fee, meaning that you can earn CPD and meet fellow members of the local wills and estates bar by participating. The current STELA Chair is Victoria Schut. If you have any questions, or wish to suggest a topic for our next meeting, she can be contacted at 705-722-7272 x 106 or by email at victoria@wall-arm.ca.