

# Welcome to the 2025 FOLA Fall Plenary

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Ontario Law  
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**Federation of Ontario  
Law Associations**

Call to Order

Welcoming Remarks from the  
Chair Allen Wynperle

Roll Call of the Presidents



# Welcoming Remarks



**CCLA President  
Katie Black**



# Committee Chairs' Reports

Family Law – Logan Rathbone

Real Estate – Mark Giavedoni

Legal Aid Committee – Terry

Brandon

Estates – Andrew Keesmaat

Criminal – Karen Seeley





# Federation of Ontario Law Associations

# Break

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# LiRN Update

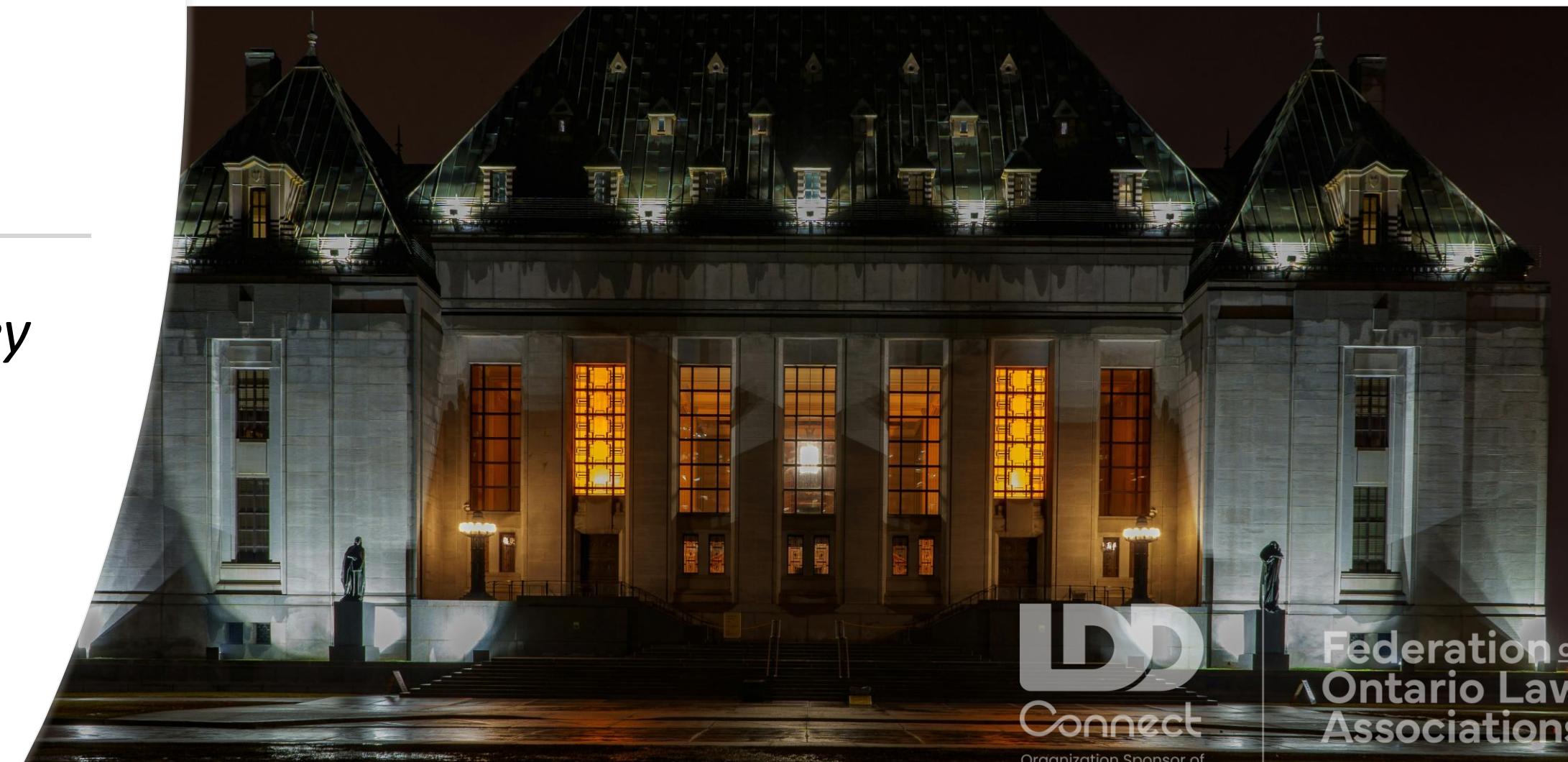
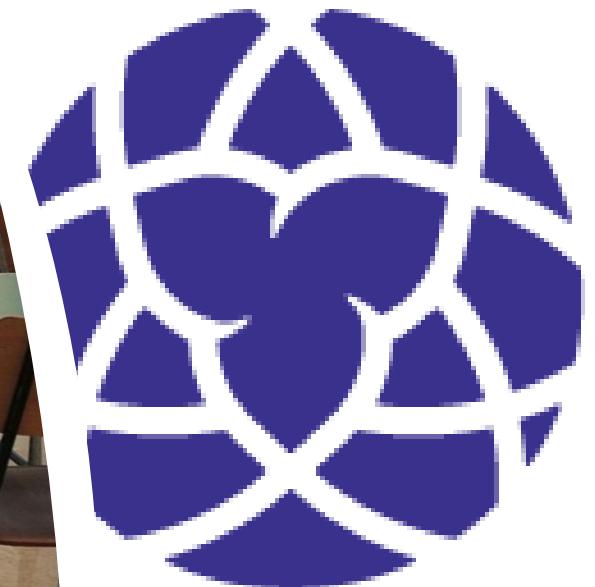


# FOLA as intervenor at the SCC

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*English Montreal School Board v. Attorney General of Quebec*

*Minister of Education v. UR Pride Centre for Sexuality and Gender Diversity*



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# Lunch

# Sponsored by Closer

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Priya Bhatia  
Acting Chief Executive Officer

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# Law Society of Ontario Update

November 2025

# Overview

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- Governance Review Task Force
- Great Library
- LSO Connects
- Consultations
  - Trust account management and enforcement project
  - Modernizing the lawyer licensing candidate assessment process
  - *Pro bono* services CPD eligibility pilot project
- Resources and supports for lawyers and paralegals

# Governance review task force update

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- Implementation of the recommendations in O'Connor report
- Improved policies and procedures
- Clear and unambiguous approval process for CEO compensation
- Enhanced accountability and transparency

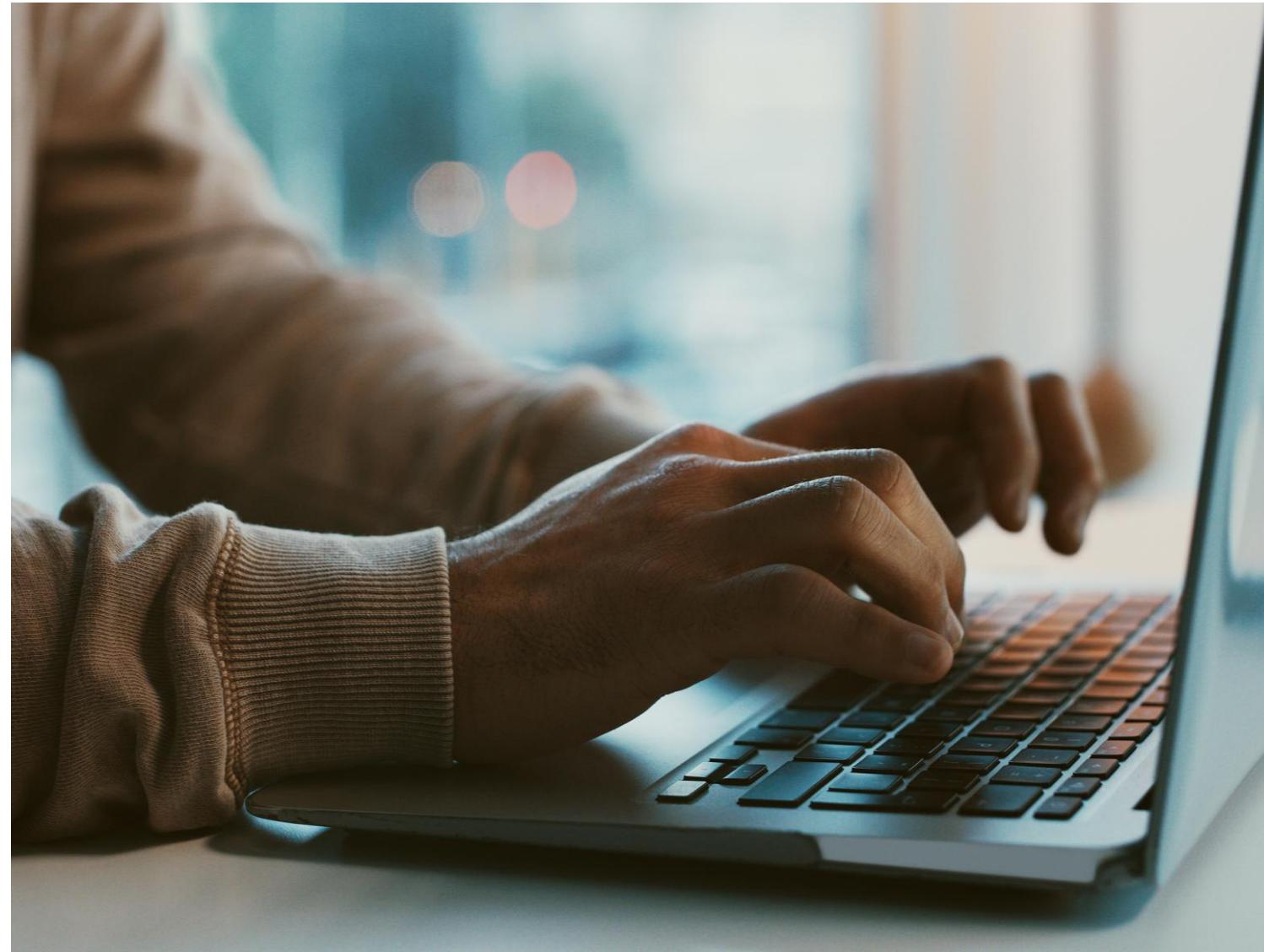
# Changes to the Great Library

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- The Law Society will be transitioning out of certain provincially-owned spaces within Osgoode Hall that have historically supported aspects of the Great Library's operations.
- We are working closely with the Province to help facilitate this transition in a way that maintains continuity of service.

# LSO Connects

## Acting on your feedback



- Enhanced navigation
- New feature to enable updates to credit and debit card information

### Coming soon:

- Streamlined process for generating and paying your annual fee
- Updated invoice printing
- Additional option for multifactor authentication

# LSO Connects

## Listening to you

### Our goal:

To enable self-service to minimize the time you spend on the administration of your licence.



# Consultations

## Listening to you



Trust account management and enforcement project



Modernizing the lawyer licensing candidate assessment process



Piloting some *pro bono* services as an eligible activity for Continuing Professional Development

# Consultations

## Trust account management and enforcement project



Enhancing Law Society oversight of trust account records



Facilitating early identification of account management issues



Improving Law Society's ability to intervene quickly and effectively



Reducing burdens for licensees where possible

# Consultations

## Trust account management and enforcement project

### By-law 9 amendments

- Update language to clarify requirements
- Remove outdated provisions
- Enhance public protection by narrowing unnecessary exceptions
- Update method by which client funds can be moved from trust

### By-Law 11 amendments

- Enhance efficiency of the practice review program
- Provide more flexibility in the form of the final report

### Authorization and direction requirement

- Authorize release of trust account records to Law Society in certain circumstances

# Consultations

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Modernizing the  
lawyer licensing  
candidate  
assessment process

Replacing licensing examinations with a  
mandatory skills-based course and  
assessment process:

1. Training and instruction to develop the skills required to practise as a lawyer
2. Assessments throughout would provide ongoing evaluation of skills to improve abilities and understanding based on feedback
3. Final assessment, including scenarios, to ensure candidates meet entry-level competence standards

Provide input by **January 31**

# Consultations

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Piloting some  
*pro bono*  
services as an eligible  
activity for Continuing  
Professional  
Development

- Meaningful incentive to engage in eligible *pro bono* work, particularly for sole practitioners and those without employer support
- A practical way for both the Law Society and licensees to support access to justice, while advancing professional competence

Provide input by **November 28**

# Practice supports and resources

Cybersecurity

Client contingency planning

Coach and Advisor Network

Practice Management Helpline

Member Assistance Program

# Practice resources

## Cybersecurity

- Checklists with easy-to-follow steps aimed at preventing cyber-attacks and providing guidance on what to do if you are a cyber-attack victim
- Infographic explaining what you need to know about deepfake technology

### Cybersecurity checklist for legal professionals



#### WHAT TO DO AFTER A CYBER ATTACK

CONFIRM THE INCIDENT AND CONTAIN THE THREAT	NOTIFY KEY PARTIES
<ul style="list-style-type: none"><li>Identify and isolate impacted systems by disconnecting or disabling them.</li><li>Prevent access to any compromised accounts such as email, bank accounts or remote login.</li><li>Promptly contact your IT provider or a cybersecurity specialist.</li><li>Preserve evidence for forensic analysis (e.g., logs, emails, screenshots).</li></ul>	<ul style="list-style-type: none"><li>Notify your insurer if the breach could lead to a claim or is required under your policy.</li><li>Report any risk to client property or confidentiality to the Law Society of Ontario by submitting a complaint in <a href="#">LSO Connects</a>. Include details about the steps taken to mitigate loss.</li><li>Promptly notify affected clients.</li></ul>

ASSESS THE IMPACT	TAKE PROTECTIVE STEPS
<ul style="list-style-type: none"><li>Identify what information or property was accessed or leaked.</li><li>Identify and document whether trust fund accounts and confidential client information or documents were impacted.</li></ul>	<ul style="list-style-type: none"><li>Change passwords on affected devices and implement authentication measures.</li><li>Make sure back-up data and systems are not compromised.</li><li>Engage an IT or cybersecurity analyst to help recover any lost data.</li><li>Monitor systems for signs of continued unauthorized access.</li></ul>

REVIEW YOUR OBLIGATIONS	DOCUMENT STEPS TAKEN
<ul style="list-style-type: none"><li>Review and understand your professional obligations. This may include:<ul style="list-style-type: none"><li>duty of confidentiality</li><li>supervision and delegation</li><li>duty to report</li><li>errors or omissions</li></ul></li><li>If you have questions about your obligations, call the <a href="#">Practice Management Helpline</a>.</li><li>If the breach involves personal information, check the relevant privacy legislation, such as <a href="#">PIPEDA</a> or <a href="#">PHIPA</a>.</li></ul>	<p>Keep a detailed record of all steps, including:</p> <ul style="list-style-type: none"><li>date, time and location of the breach</li><li>communications with your insurer, the Law Society and clients</li><li>actions to recover lost data or prevent further loss</li><li>reports from your IT or cybersecurity team.</li></ul>

Law Society of Ontario | Barreau de l'Ontario

### Can you trust what you see and hear?

#### What legal professionals need to know about **deepfake** technology

Law Society of Ontario | Barreau de l'Ontario

##### What is deepfake technology?

Deepfake technology uses artificial intelligence (AI) and deep learning to generate or alter images, voices, videos or text to closely resemble real content. Like other AI-driven technologies, deepfake tools have both beneficial and harmful uses. While they can drive innovation in areas such as entertainment, education and accessibility, their misuse is growing.

Common examples of malicious uses include:

- spreading deceptive or misleading content
- committing identity fraud
- forging official documents
- violating personal privacy.

##### How are deepfakes impacting legal practice?

Deepfakes are difficult to detect and can mislead even experienced professionals, creating real liability risks. Below are examples of how they are currently being used in the legal context.

###### Impersonating clients and others.

Criminal actors are using deepfake technology during video or phone meetings to impersonate clients and others. These impersonations enable sophisticated fraud and money laundering schemes.

###### Forging identities and other official documents.

Criminal actors are using AI-generated deepfake faces to create synthetic identities and falsify documents, including evidentiary materials, to facilitate fraud.

###### Cloning voices to facilitate fraud or money laundering.

Criminal actors are using deepfake technology to replicate the voices of clients, opposing licensees, and others to provide fraudulent payment instructions and launder money.

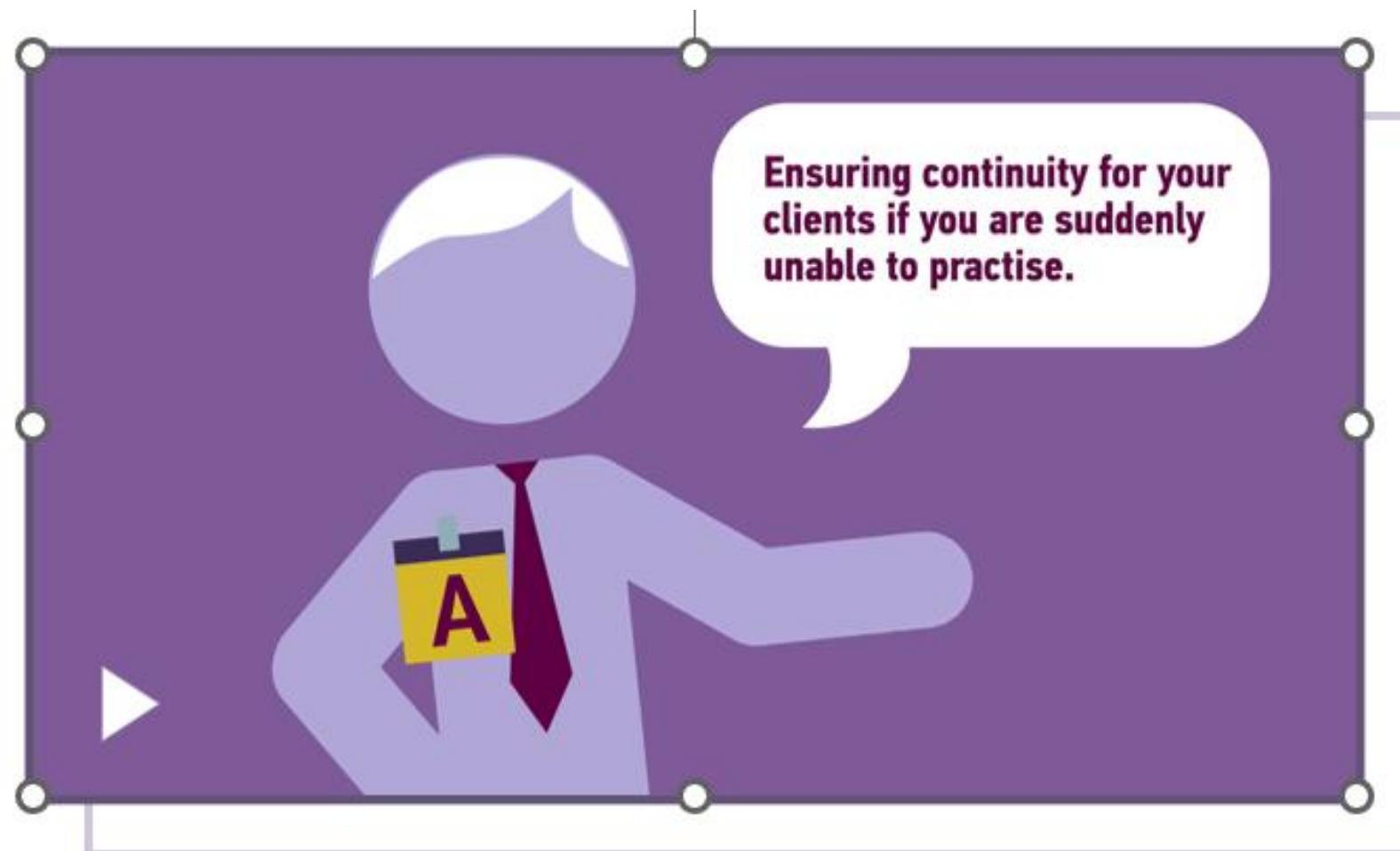
##### Quick red-flag screening questions

Answering **'yes'** to any of the questions below may suggest the use of deepfake technology and should prompt heightened scrutiny before proceeding:

- Do the documents contain visual or **metadata** inconsistencies or information inconsistent with other sources?
- Does the person's face on camera show any visual anomalies like glitches, unnaturally smooth skin, strange shadows or blurring, flickering edges or unnatural movements?
- Do the person's spoken words fail to align perfectly with their lip movements or does their voice sound robotic, overly smooth or unnaturally pitched?
- Is the source of the document or media unknown, missing metadata, lacking a verifiable origin, or without a clear chain of custody?
- Is the client unusually urgent, vague, resistant to providing originals or meeting in person, or giving instructions that deviate from typical expectations for the transaction or client profile?

# Practice resources

## Client contingency planning



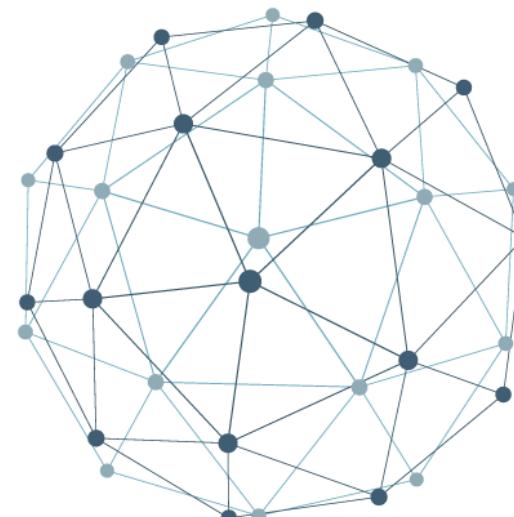
Please email [contingencyplanning@LSO.ca](mailto:contingencyplanning@LSO.ca) if you'd like to be included in a roster of licensees who are willing to serve as administrators.

### PLANNING LICENSEE

#### 6 STEPS TO DEVELOPING A CLIENT CONTINGENCY PLAN

- 1  Consider using the Law Society's template plan
- 2  Appoint an Administrator
- 3  Provide location of and access to property
- 4  Facilitate access to practice-related technology
- 5  Provide location of and access to bank accounts
- 6  Include any other information required to wind-up your professional business

# Supports for lawyers and paralegals



**CAN**  
Coach and Advisor Network



**PRACTICE  
MANAGEMENT  
Helpline**



**Member  
Assistance  
Program**



**Homewood  
Health Santé**

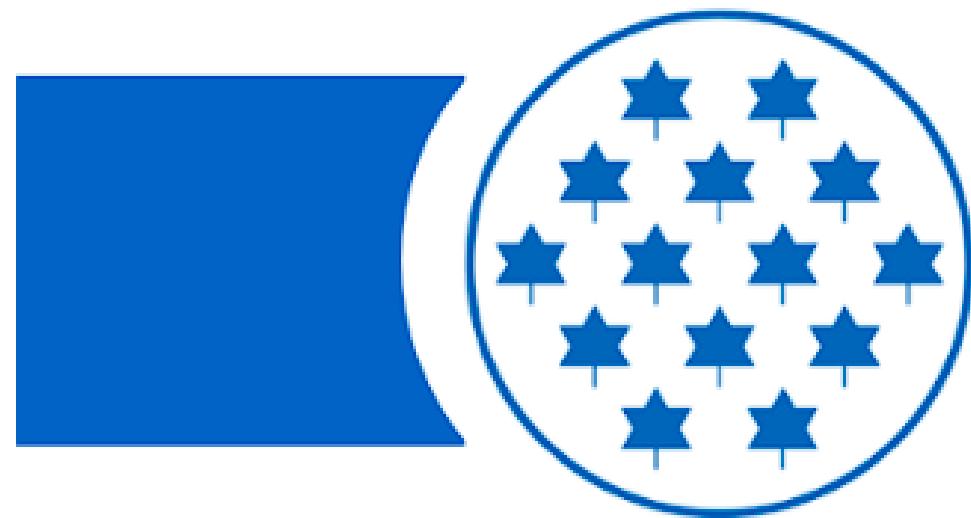
Learn more at **LSO.ca**  
Email: **pbhatia@lso.ca**

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of Ontario

**Barreau**  
de l'Ontario



**Federation of  
Law Societies  
of Canada**

**Fédération des ordres  
professionnels de juristes  
du Canada**



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# Break: Find Your Breakout Session!

A: Newbridge I & II (here)

B: Newbridge IV (next door)

C: Newbridge V (next door)

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Mark's Real Estate Roundtable

Mark Giavedoni

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# Kevin's Civil Rules Reform Roundtable

Kevin Cooke

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# People-Centred Ethics & Practice in Ontario Family Law

Archana Medhekar



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# AI Tools: LiRN & CanLII

Theresa Leitch

Ivan Mokanov

Curtis Pineiro



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# Andrew's Estates Law Roundtable

Andrew Keesmaat



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# Karen's Criminal Law Roundtable

Karen Seeley



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**Treasurer's Dinner**

**LAWPRO Hospitality Suite**

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# Happy Friday!

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survey at  
[fola.ca/plenary](http://fola.ca/plenary)

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**General Meeting**



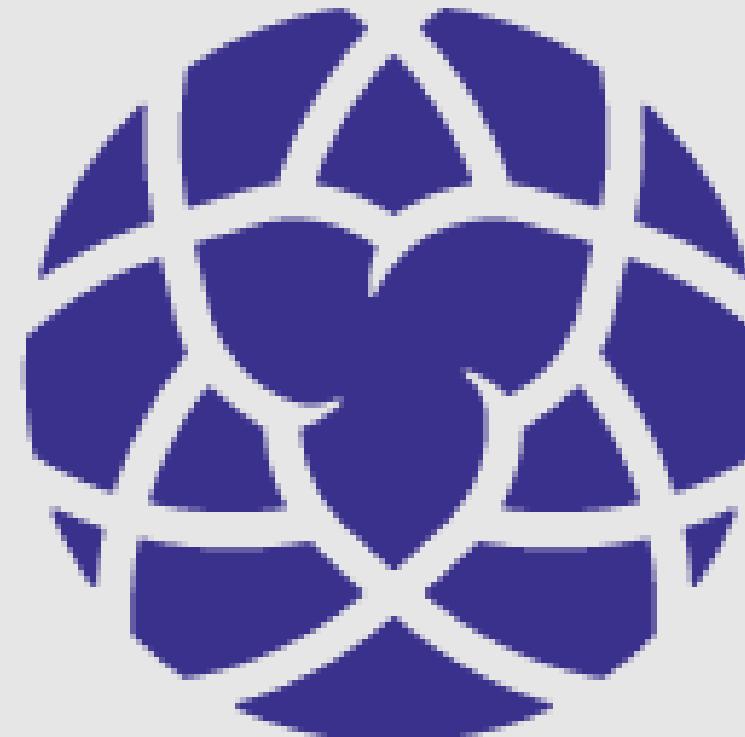
**Materials available at [FOLA.CA/PLENARY](http://FOLA.CA/PLENARY)**

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LDD Connect



# LiRN's Library Operations Policy



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# 30 Tips in 30 Minutes

(ANYTHING GOES)



KB

Call at least one friend every day.



KB

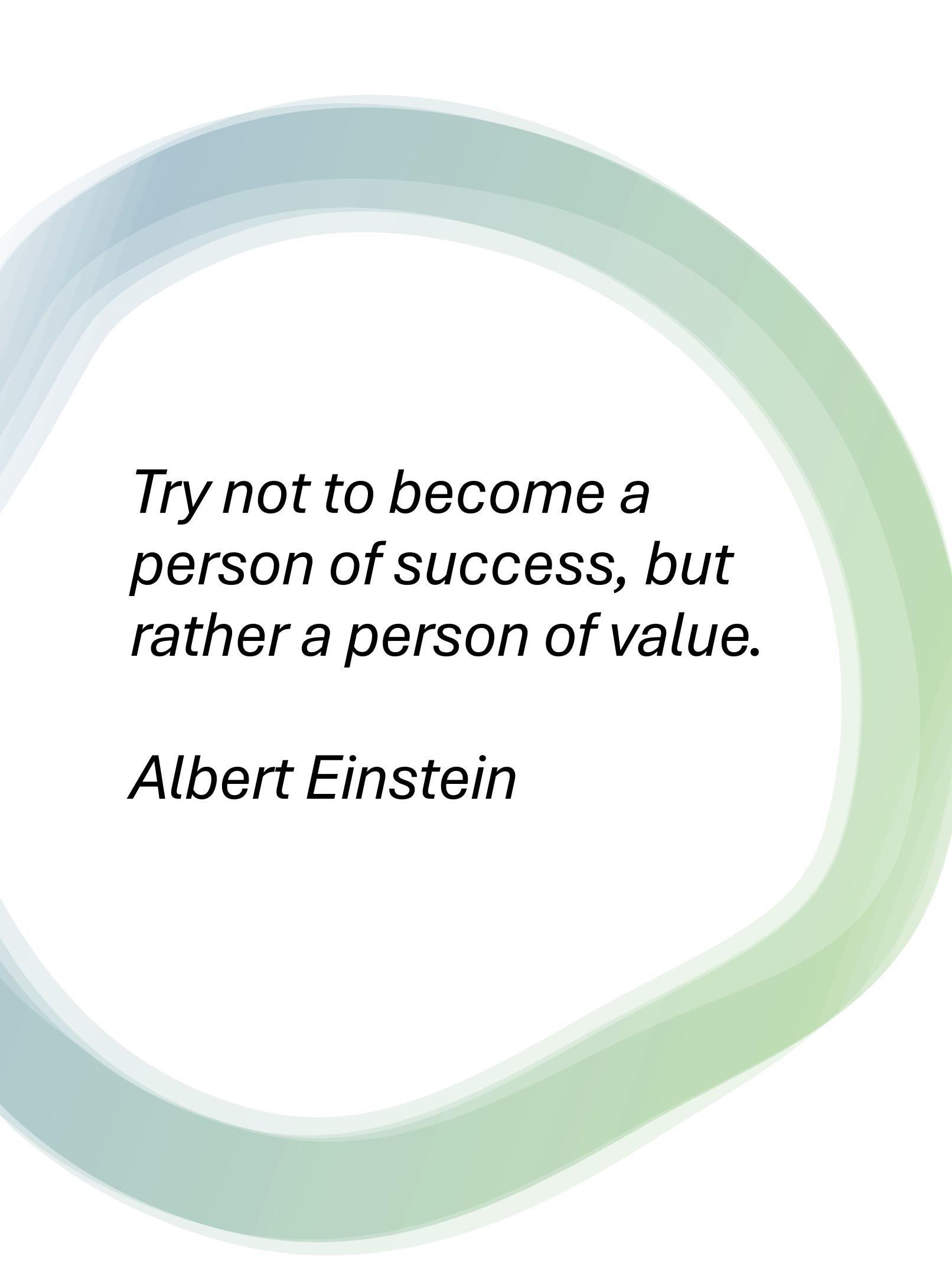
# Keep Notes and Cards of Gratitude

**Put them in a drawer, or—if you are more extroverted—display them somewhere.**

**When you have a bad day, review a few of these cards.**

**Being reminded of gratitude in the face of negativity bolsters your ability to address challenges.**





*Try not to become a person of success, but rather a person of value.*

*Albert Einstein*

**Leadership isn't about having followers — it's about creating more leaders.**

Take your integrity, your humility, your gratitude, and your humour — and keep building workplaces where people don't just perform well, but feel set up for success.

Leadership is less about climbing and more about lifting. *Who got better because you showed up? Who stays in touch years/decades later?*

A simple “thank you” — meant sincerely, said promptly — does more for morale than a year-end email blast to everyone.

- **TIP 1: Badges? BADGES!? WE DON'T NEED NO STINKING BADGES!**

(<https://www.youtube.com/watch?v=gx6TBrfCW54>)

- Turn off the badges on the email app on your phone, and be free.

- **For an iphone, change your Mail notifications**

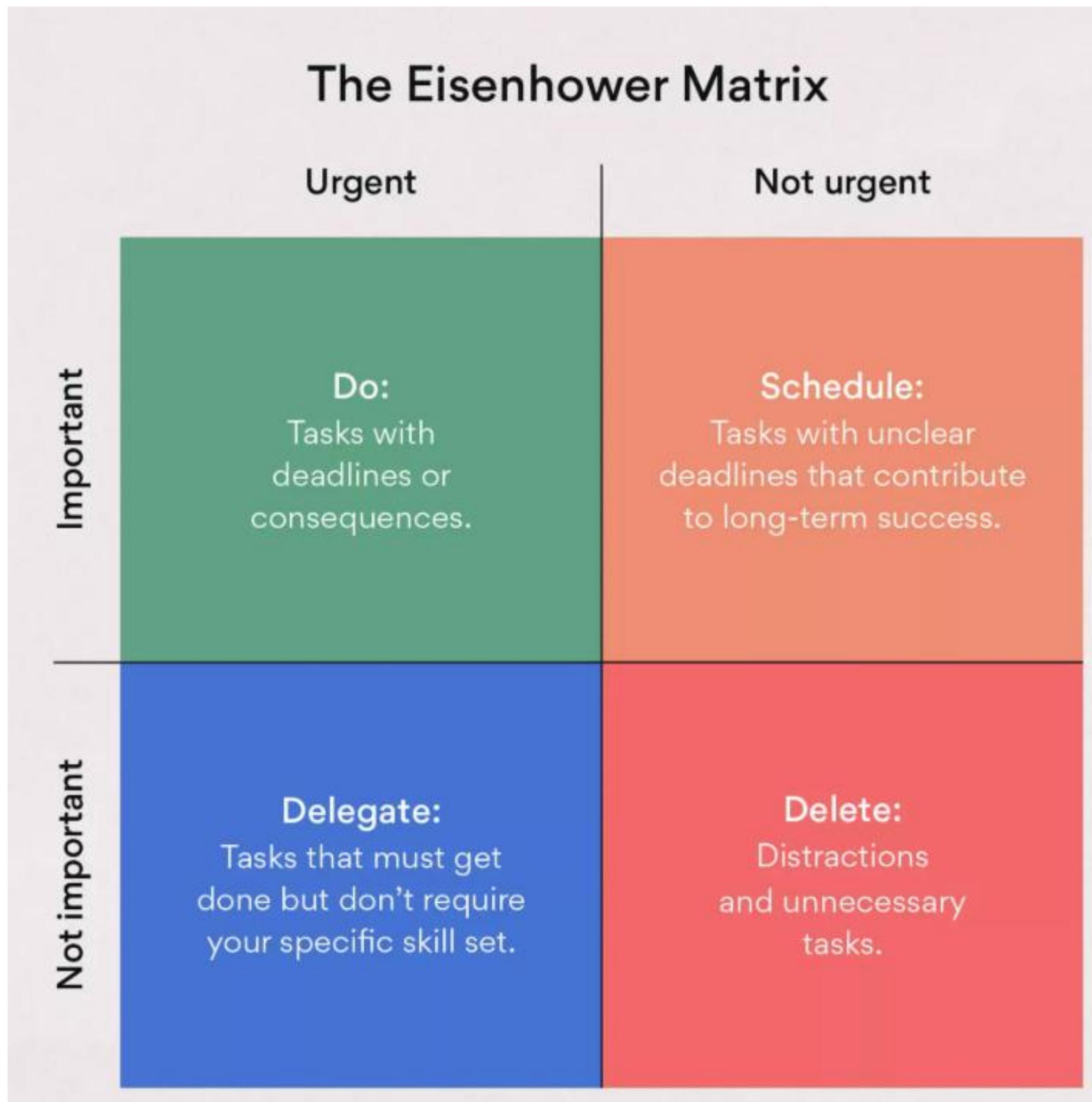
- Go to Settings > Apps > Mail.
- Tap Notifications.
- Tap Customize Notifications.
- Tap the email account.
- Turn off Alerts or Badges.





Offer — and promote —  
flat fee workshops for  
organizations

# The Eisenhower Matrix





# Have a Hobby

**If you don't have one, get one.**

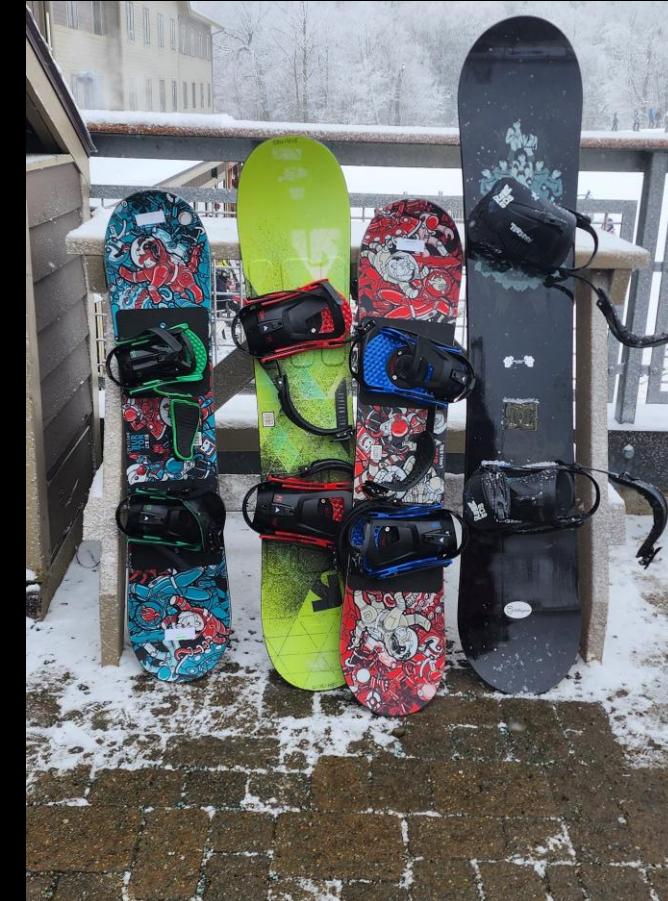
**I ride my motorcycle or snowboard to counter job stress.**

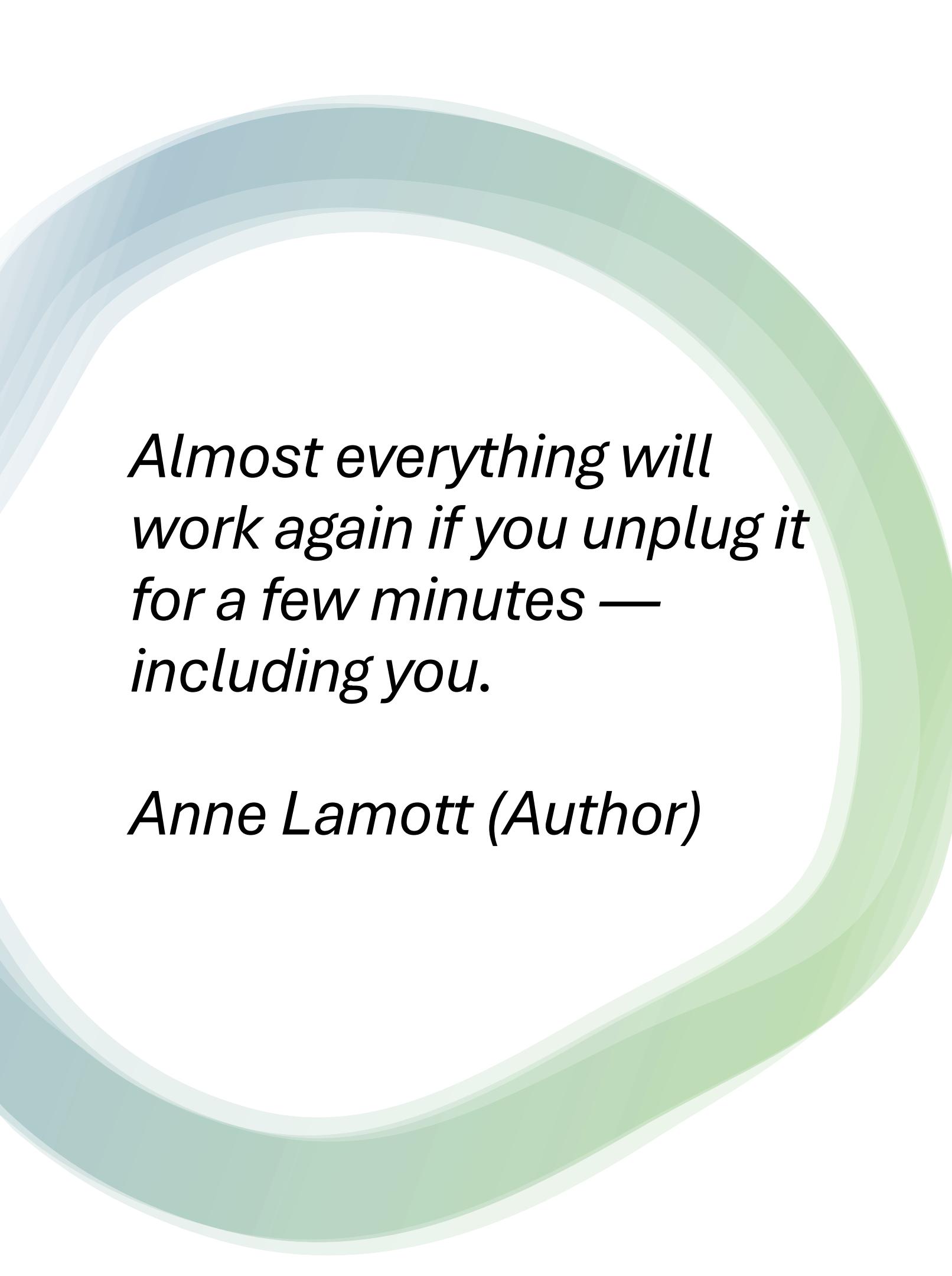
**You'd be surprised how much perspective you gain when your activity mantra is 'Don't Die.'**

**Seriously though, even less risky endeavours pay mental-health dividends.**



WALL LAW





*Almost everything will work again if you unplug it for a few minutes — including you.*

*Anne Lamott (Author)*

**Burnout doesn't make you a hero.**

**Rest isn't retreat; it's repair.**

Everyone has a different definition of 'work-life-balance' so learn what that is for yourself so you can recharge.

Success might mean peace, health, mentoring, or using all your vacation days.

FEATURED IN  
HEMINGWAY  
A FILM BY KEN BURNS AND LYNN NOVICK  
ON PBS

*The*  
**OLD MAN**  
*and*  
**THE SEA**



*Ernest  
Hemingway*

Send wish lists of books  
to your law library —  
before you need them.



# Take responsibility for your life.

- You can only control yourself.
- Consistency + motivation is unstoppable.
- Done is better than perfect.
- Being nice is a superpower.



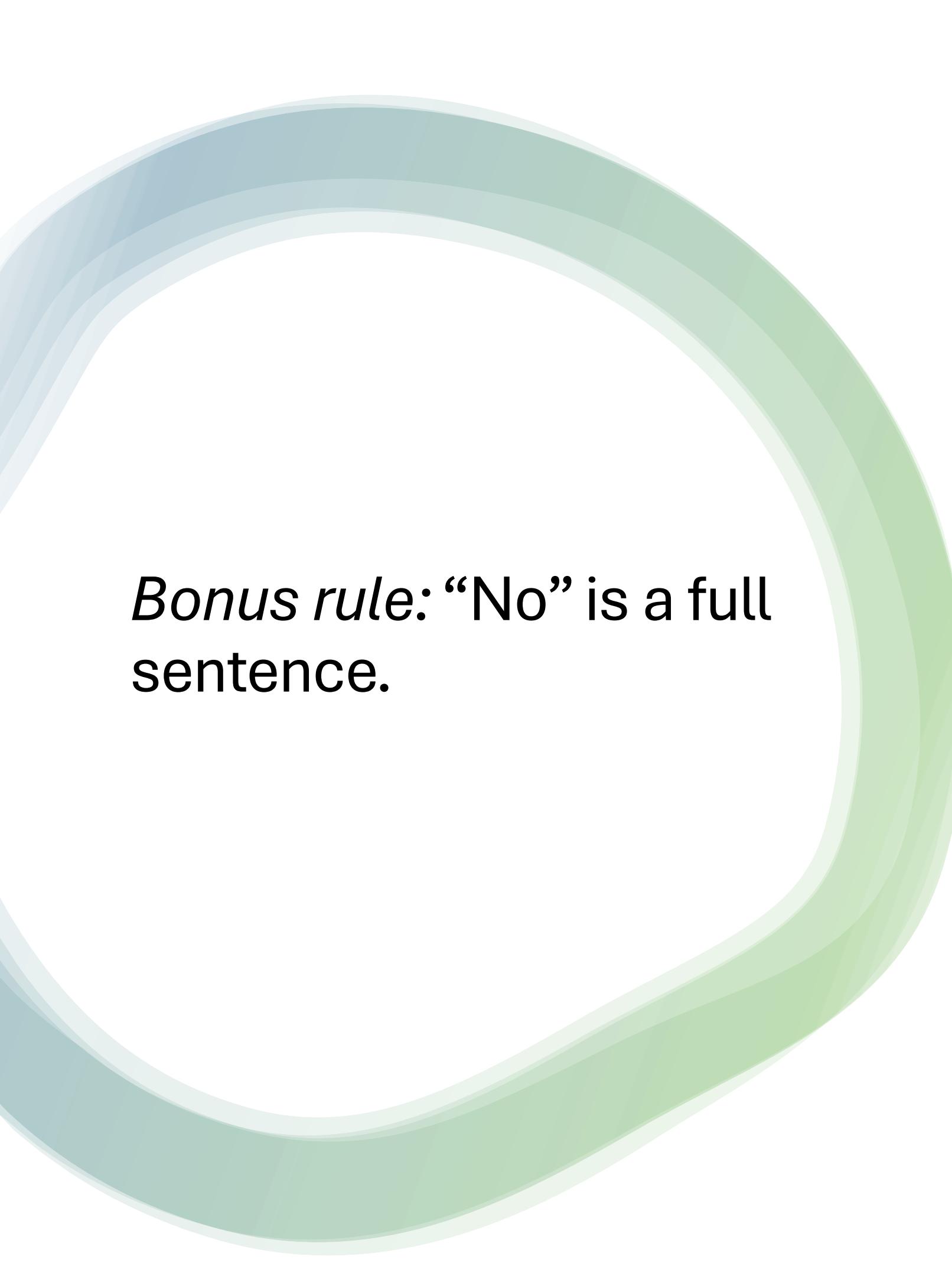
# Consider a Credit Union

**If you've struggled with the financial service your firm receives, consider a credit union.**

**When I started my solo practice, I was encouraged to use one for my trust account.**

**The service and support I've received from my credit union has far surpassed my experiences with banks so much so that I included it in this presentation.**





*Bonus rule:* “No” is a full sentence.

## Protect Your Energy Like It’s a Limited Edition

Time was precious in your 30s.  
Energy is the real currency in your 50s.

If something drains you — meetings, people, projects — it’s okay to say *no* (or give a qualified *no*).

# Get Creative: Email sign-offs

“Sincerely, despite the circumstances.”

“Stay golden, Ponyboy!”

“Envoyé depuis mon iPhone”

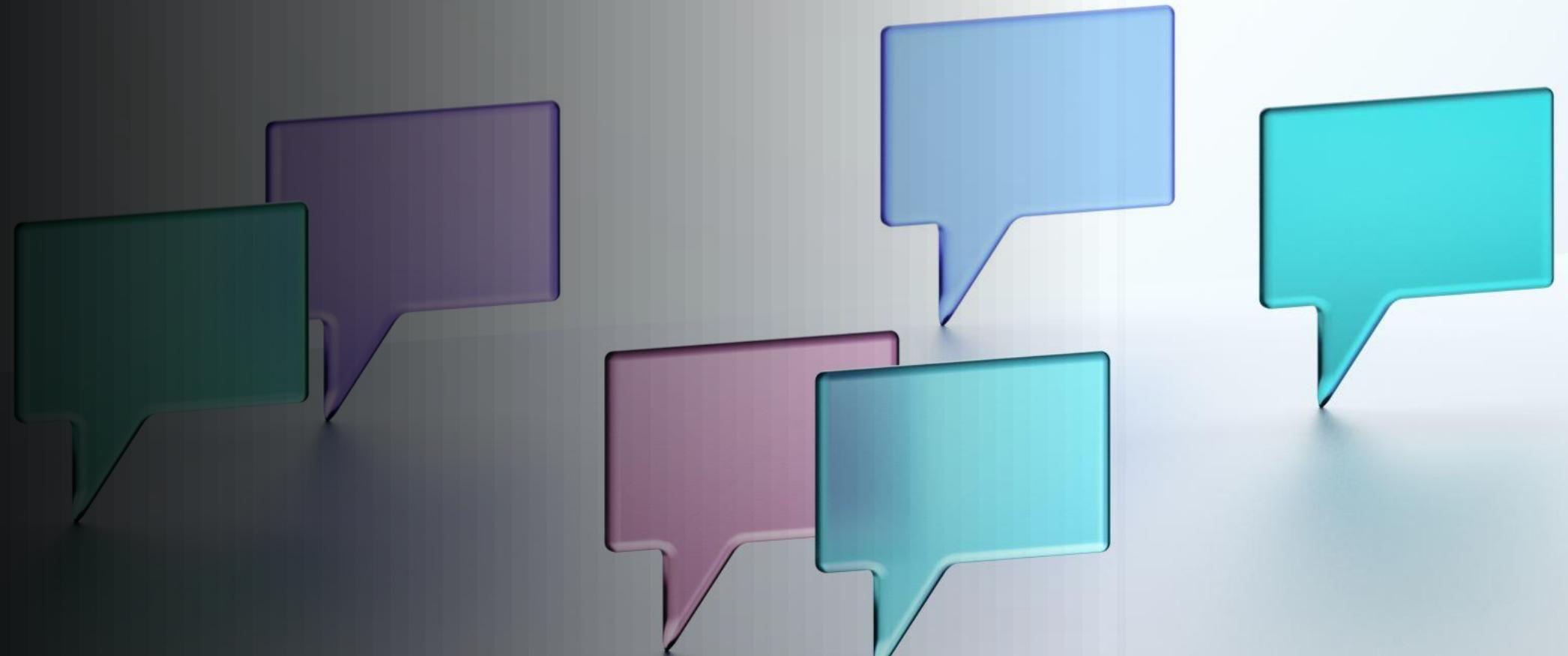
“Stay tuned....”

“I hope you have the day you deserve.”

“I look forward to your reply with keen anticipation.”

“ok thanks”

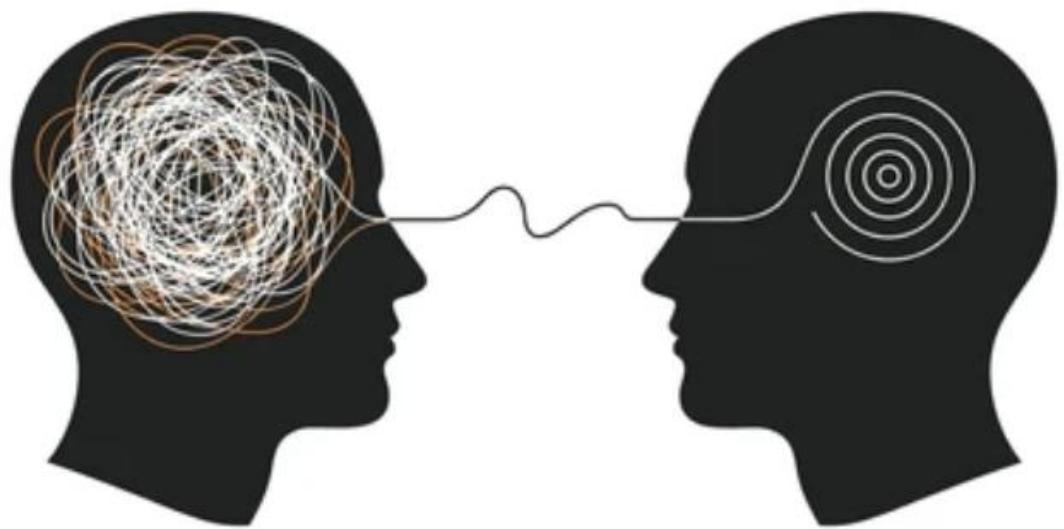
Publish plain language explainers on significant cases.



DJ

# Play the “In-fairness” Game

- Perspective changes everything.
- Before reacting emotionally to the actions of others, play the “In-fairness game”.
  - *In fairness to X:*
    - *Their world view is A*
    - *Their circumstances are B*
    - *They are under C pressures*
    - *They can't do D*
    - *Etc.*
  - Always try to understand the motivation and actions of others.

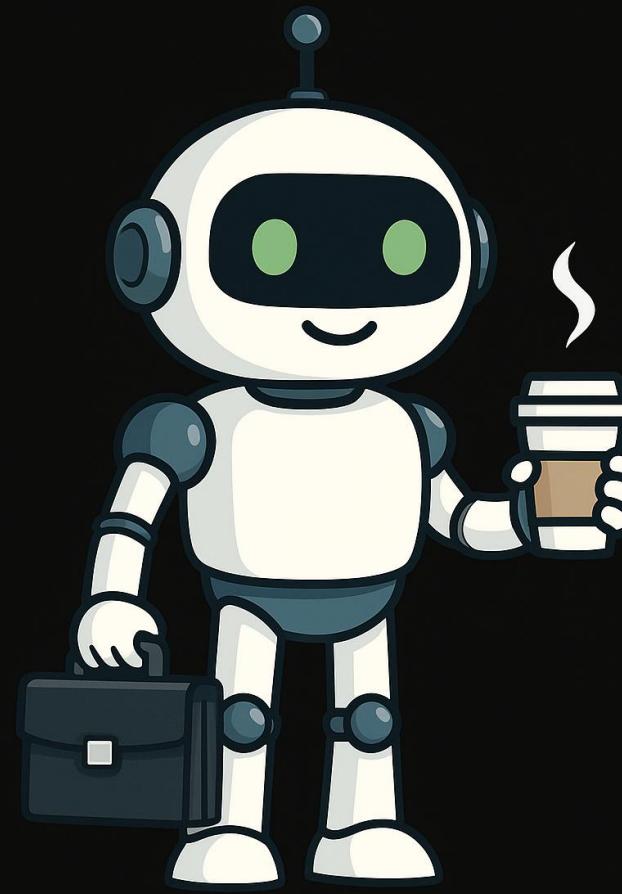


# Take the Time to Learn New Tech

Stay current with legal tech.

Tools like AI can assist with non-sensitive administrative work, saving time and improving efficiency.

Consider using a service like Scribe to make training videos for tasks you are asked about repeatedly.



It isn't always perfect (I asked AI to make these slides the first time and they weren't great), but don't let perfect be the enemy of good.





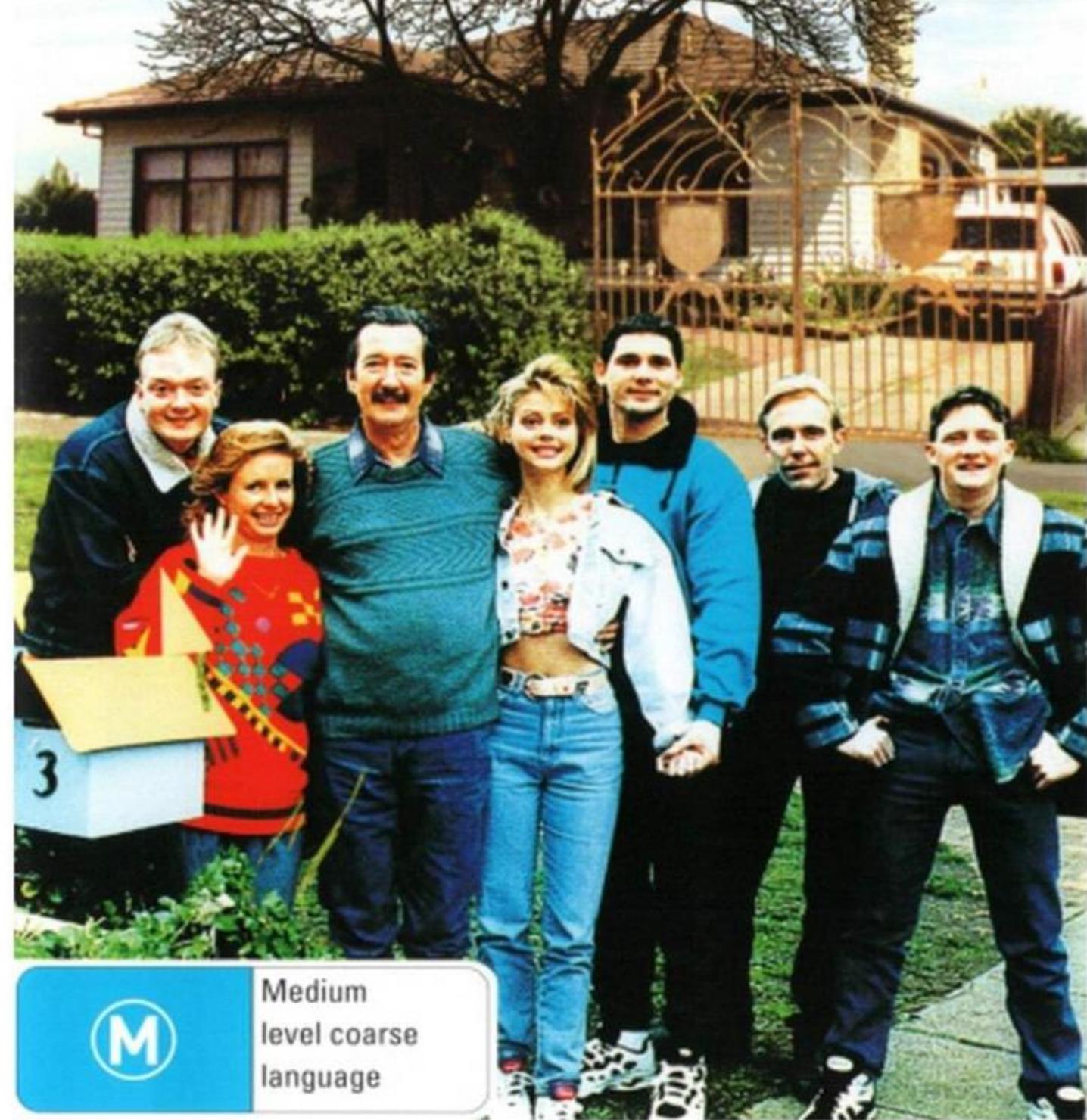
The best lawyers know when to drop the Latin and share a good laugh.

## Keep Your Sarcasm Sharp and Your Kindness Sharper

Two-steps: dry humour, and a real authentic heart.

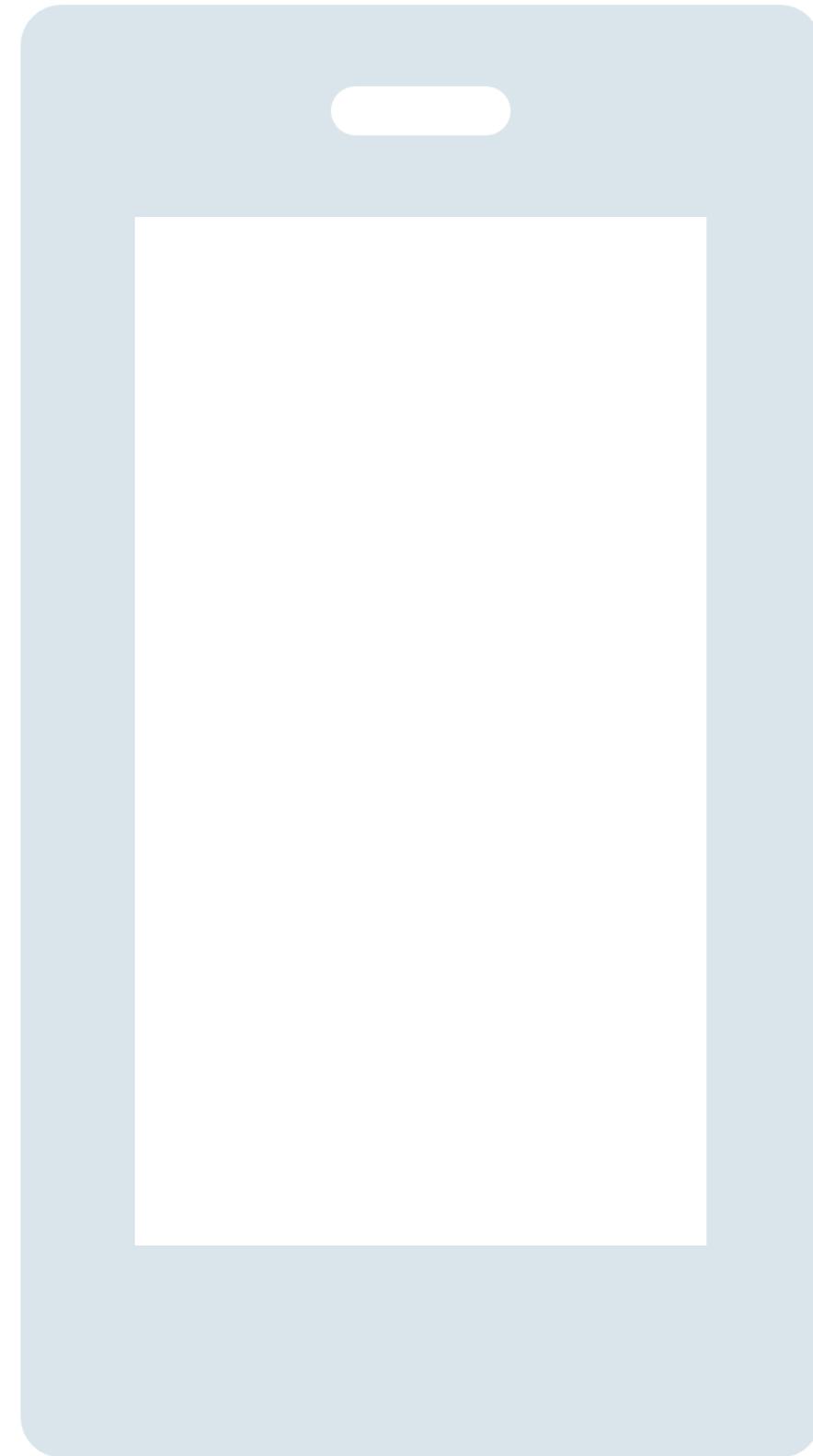
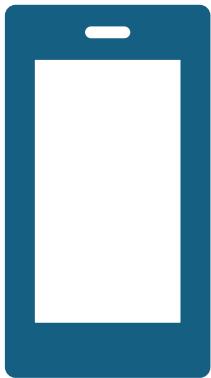
Laugh first. Help second — *always* show up.

RE-MASTERED AND RE-PLASTERED  
**THE CASTLE**



JL

Get a VOIP service  
with a good mobile  
app



DJ

# When people show you who they are, believe them.

- Pay attention to a person's actions (demonstrated character), rather than the character you might wish them to have.



# Accept and Provide Help

**Don't hesitate to accept or ask for assistance from others.**

**Collaboration strengthens practice, reduces burnout, and acknowledges that we are not all superheroes in our fortresses of solitude.**

**Many of my best practices have come from speaking with others about how they handled challenges.**

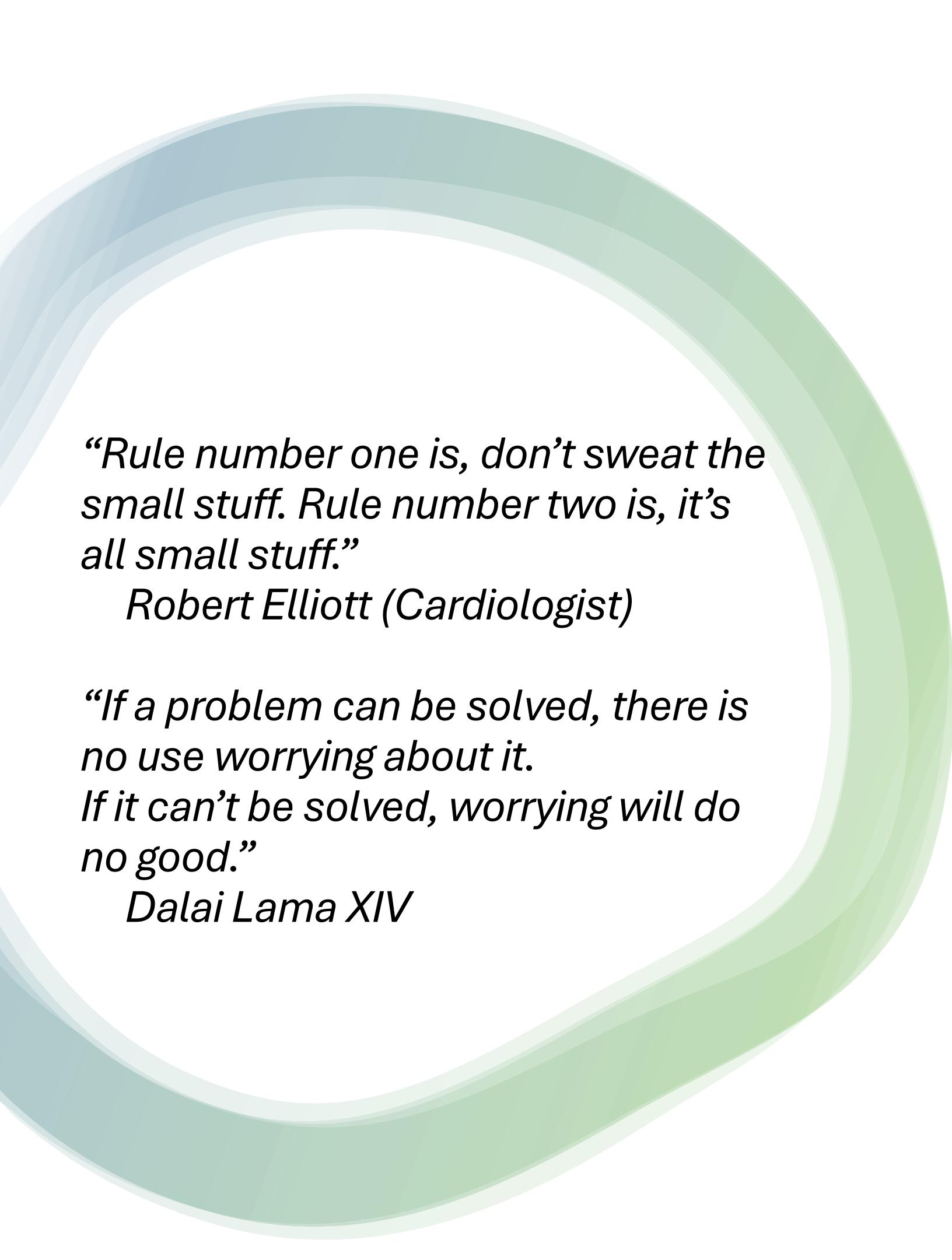


**Accept help**

**As a solo litigator, if I am called to a long hearing or trial, I sometimes need to reach out to other lawyers to act as agent if an adjournment cannot be obtained.**



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*“Rule number one is, don’t sweat the small stuff. Rule number two is, it’s all small stuff.”*

*Robert Elliott (Cardiologist)*

*“If a problem can be solved, there is no use worrying about it.*

*If it can’t be solved, worrying will do no good.”*

*Dalai Lama XIV*

**If you grew up without helmets or Wi-Fi – Then you know...  
No need to panic!**

If you could survive being told to “*come home when the streetlights come on*”, you can survive your inbox, your teen’s playlist, and your company’s latest “*strategic pivot*.”

# *Britton v. Leigh, 2025 ONSC 3541*



Get a placement student from the  
Bora Laskin Faculty of Law.



DJ

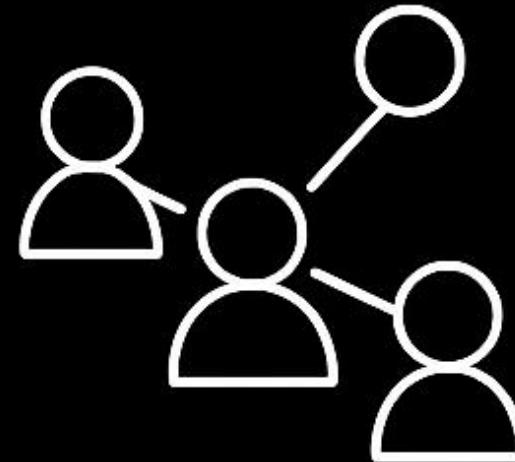
# Learn Word Shortcuts and Footnote Cross-Referencing

- Microsoft:
  - Copy (ctrl + c); Past (ctrl + v); Cut (ctrl + x); Undo (ctrl + z); Redo (ctrl + y); Footnote (ctrl + alt + F)
- Mac:
  - Copy (⌘ + C); Past (⌘ + v); cut (⌘ + x); undo (⌘ + z); Redo (⌘ + y); Footnote (Option + Command + F)
- Footnote cross-referencing - <https://www.simuldocs.com/blog/how-to-cross-reference-footnotes-and-endnotes-in-microsoft-word>

# Connect with Other Lawyers

Engage with peers outside of client work.

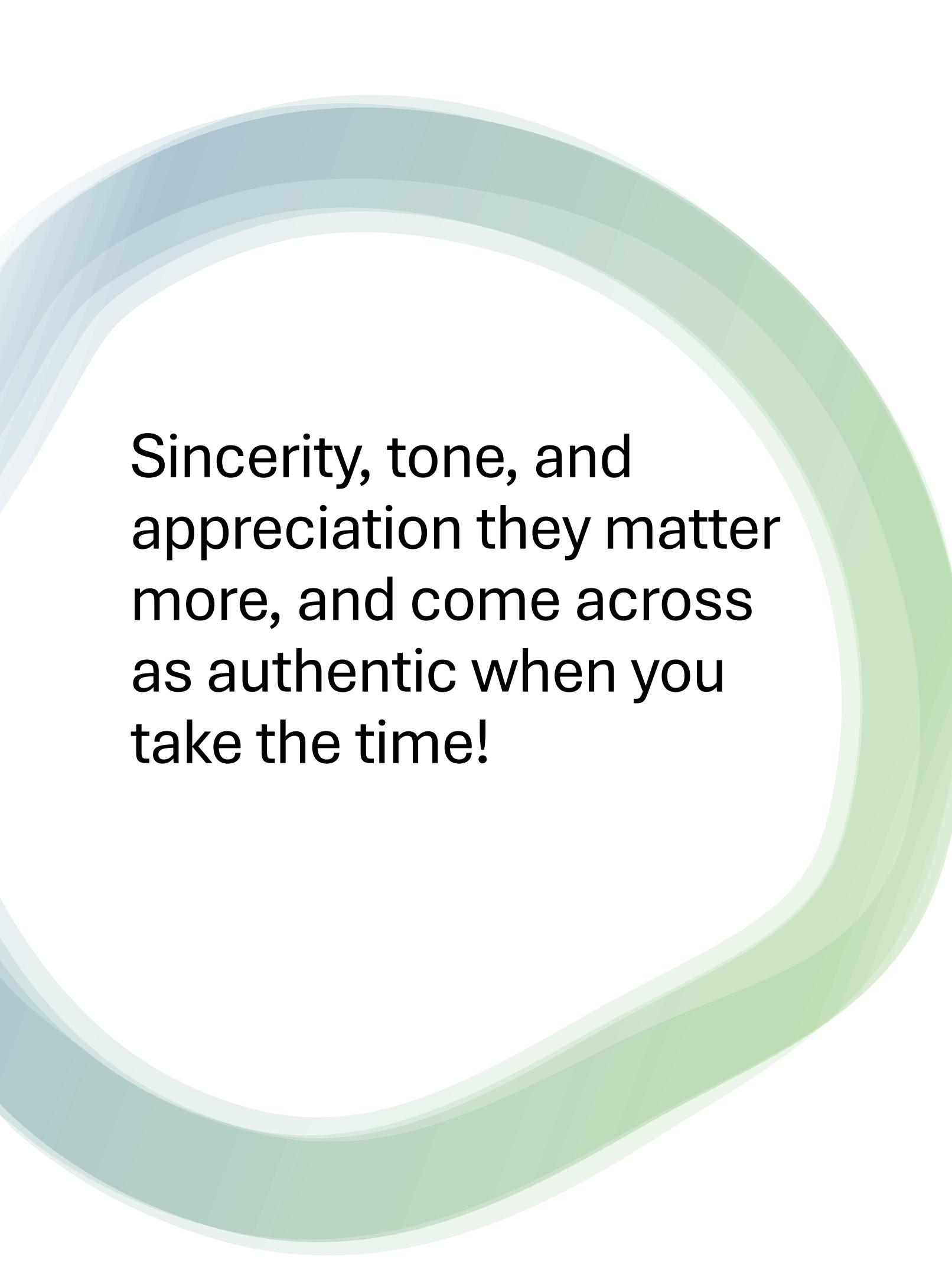
**It may seem basic, but talking about life outside of law builds professional civility and strengthens community within the bar.**



**Non-client-related conversations between counsel remind us that fellow professionals are human.**

**It is surprising how much grace and gratitude people will show when they are acknowledged beyond just their work function.**





Sincerity, tone, and appreciation they matter more, and come across as authentic when you take the time!

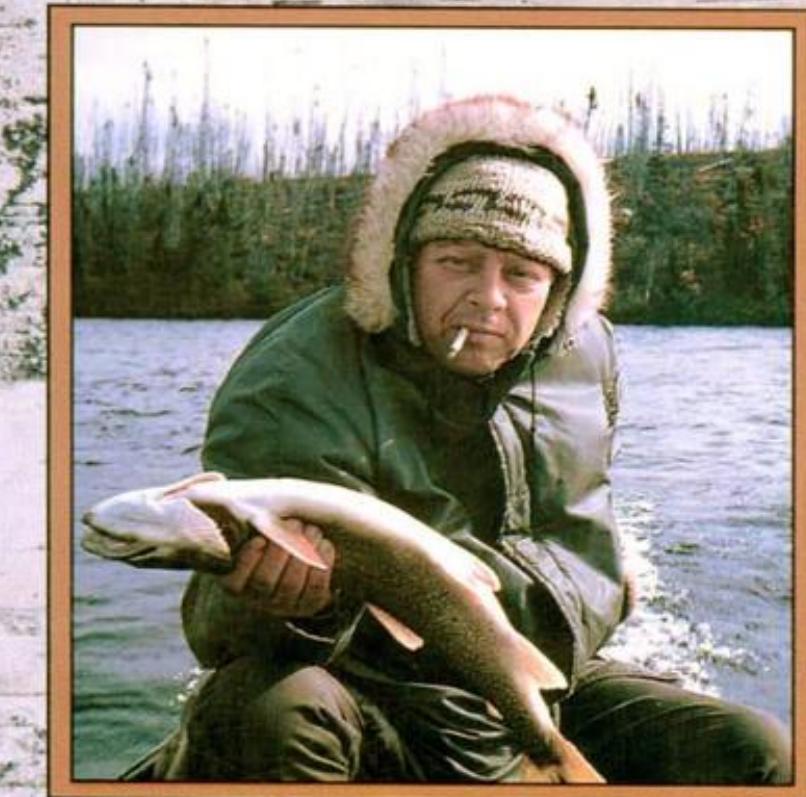
**Pick up the phone and call your colleagues, stakeholders, partners, family and friends.**

Most of us are the last generation that used to talk for hours on the phone.

Reclaim it. Real connection doesn't happen in emojis.

# Journal of a Country Lawyer

Crime, Sin and Damn  
Good Fun



E. C. (Red) Burton

JL

\$

Give your staff an  
annual personal  
tech budget.



DJ



*Bonus: We've earned the right to wear sneakers or comfortable shoes to meetings!*

## **Keep Your Friends, Keep Your Humour, Keep Your Humanity**

Gen X learned early: nothing lasts forever — except your best friends, a good laugh, and the ability to quote *The Breakfast Club* on demand.

*“Each one of us is a brain, and an athlete, and a basket case, a princess, and a criminal.”*

*“We’re all pretty bizarre. Some of us are just better at hiding it, that’s all.”* — Andrew (Emilio Estevez)



# Federation of Ontario Law Associations

# Thank You!

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