

August 10, 2011 • Pantages Hotel, Toronto

The Canadian Institute's Advanced

LITIGATION LAW CLERK SUMMIT

**SPECIAL
TEAM RATES!**
Increase the expertise of all
your clerks. Call for details.

Immediate Strategies for Applying the Revitalized Rules
of Civil Procedure

Gain Critical Skills from our Distinguished Faculty:

AccessData

Bates Barristers Professional Corporation

Borden Ladner Gervais LLP

Cassels Brock & Blackwell LLP

Koprich Paralegal Services

Ogilvy Renault LLP

Osler Hoskins & Harcourt LLP

Siskinds LLP

Thomson Rogers

Wortzman Nickle Professional Corporation

Senior In-House And Law Firm Litigation Law Clerks: Maximize Your Effectiveness By Gaining Critical Practical Skills To:

- Effectively manage document and **e-documents**
- Master key changes about **expert evidence**
- Effectively chart your path through the new **discovery process**
- Boost your efficiency in **trial preparation**
- Develop strategies for **organizing class action suits**
- Issue and manage **small claims files**

AS AN ADDED BONUS

AccessData will provide an advanced demonstration of **Summation!**

Develop additional skills by participating in the Post-Summit
Masterclass on August 11, 2011 from 9:00 am to 12 pm:

“Drafting Skills: Amplify the Effectiveness of your Motion Records”.

Sponsored by:



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The Institute
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of Ontario

Supporting Partner:



Do not miss our **Advanced
Corporate Law Clerk Forum** on
July 20 & 21, 2011 ! *See details inside*



Brian Halladay • 1-877-927-0718x7335 • b.halladay@CanadianInstitute.com



Gain the knowledge and skills you need to meet the demands of a senior litigation law clerk in a tightened economy!

The Canadian Institute has developed **The Advanced Forum for Litigation Law Clerks** to help senior law clerks meet the **critical objectives of controlling legal costs and minimizing risk** in both law firms and corporate legal departments. Senior litigation law clerks who complete this training will gain the skills to more efficiently manage increasingly complex litigation matters within strict time limits.

You will also develop crucial skills in document and e-document management, managing evidence in mega and class action files, efficiently navigating the new discovery process and trial preparation. Take away essential tools, guidelines and checklists to excel in the new litigation Rules regime.

Top business reasons to attend:

- Receive checklists, precedents and practical advice on **trial preparation**
- Further develop critical skills for **managing documents and e-documents**
- Increase your skills in using **Summation**
- Comprehend and apply the **new discovery rules**
- Develop innovative strategies for **small claims court** drafting and management
- Learn tips and strategies for controlling **class action** and **mega files** from senior experienced law clerks
- Develop guidelines and further knowledge concerning **expert evidence** - who can be an expert, contents of expert reports and forms required
- Learn to create stellar **motion records**
- **Network** and developing contacts for mentorship

PLUS! Do not miss our Post-Summit Masterclass:

DRAFTING SKILLS: AMPLIFY THE EFFECTIVENESS OF YOUR MOTION RECORDS

REGISTER TODAY by calling toll-free 1-877-927-7936 or register online at www.CanadianInstitute.com/litigationlawclerk to secure your spot.

We look forward to seeing you at the event on August 10, 2011!

Who Should Attend

- Senior litigation law clerks in law firms
- Senior litigation law clerks in corporations
- Litigation law clerk managers
- E-document and document managers

Distinguished Faculty

Chair:

Timothy Pinos
Partner
Cassels Brock & Blackwell LLP

Speakers:

Remi Adedugbe
Law Clerk/Litigation Support Specialist
Cassels Brock & Blackwell LLP

Christian Burnett
International Legal Sales - Canada
AccessData

Rachael Chadwick
Senior E-Discovery Analyst
and Project Manager
Wortzman Nickle Professional
Corporation

Lisa Hagglund
Senior Litigation Clerk
Ogilvy Renault LLP

Susan M. Koprach, B.A.
Licensed Paralegal
Koprach Paralegal Services

Shana Martins
Law Clerk- Health Law
Borden Ladner Gervais LLP

Barbara O'Gorman
Senior Law Clerk
Thomson Rogers LLP

Michael Peerless
Partner
Siskinds LLP

Chuck Rothman
Director, E-Discovery Services
Wortzman Nickle Professional
Corporation

Scott Werry
Law Clerk
Bates Barristers Professional Corporation

Sponsorship & Exhibition Opportunities

Maximize your organization's visibility in front of key decision-makers in your target market. For more information, contact Director Business Development **Daniel Gellman** at 416-927-0718 ext. 7389, toll-free 1-877-927-0718 ext. 7389 or by email at d.gellman@CanadianInstitute.com

Register at 1-877-927-7936 or in Toronto 416-927-7936 or www.CanadianInstitute.com/litigationlawclerk

8:00 Registration and Coffee Served

8:30 Opening Remarks from the Chair

Timothy Pinos

Partner, Cassels Brock & Blackwell LLP

8:45 Applying the Revitalized Rules of Civil Procedure: Address Your Timing and Process Challenges

Barbara O’Gorman

Senior Law Clerk, Thomson Rogers LLP

Critical changes to the Rules of Civil Procedure were implemented January 1, 2010, and your files applying these new Rules will proceed to trial this fall! Capitalize on a timely clarification of the Rule changes to timing, service, content and process and ensure you meet your file obligations. Take away essential tools, charts and checklists to control the new litigation process so it does not control you!

Address your key timing and process challenges including:

- How to apply the new wording in Rule 3 for ‘timetables’
- Receive guidelines on the changes to service times so you are always meeting them
- How to apply the changes to creating discovery plans to your files
- Manage expert evidence effectively and on time
- Develop applicable tools for preparing and serving motions
- Effectively draft motions by understanding the changes to Rule 20
- What are the impacts of the new requirements for pre-trials: the documents required, timelines, expert reports, and attendance
- Learn to draft and employ Requests to Admit to simplify discovery
- Prepare for mediation within the new timeframes under Rule 24
- Correctly determine the Notices of Intention required
- Avoid the sanctions for your clients by meeting the obligations under Rule 48 regarding Dismissal and Status Hearings
- Apply the new case management regime for Toronto, Ottawa and London cases to your files
- Learn the new Simplified Procedure and apply to commercial cases
- Explore examples of files in transition and how to resolve issues

9:45 Master Key Changes to the Rules about Expert Evidence and Develop Action Plans for Meeting New Content, Service and Document Obligations

Shana Martins

Law Clerk- Health Law, Borden Ladner Gervais LLP

Who can be an expert witness? What content is now required in the expert report? When and how do you share and notify the other parties and the court? In this session, gain the knowledge you require to efficiently manage expert testimony in your files.

- Content of report now required under Rule 53.03(2.1)
- Duty of experts and obligations imposed by Rule 4.1.01
- When are expert reports served under new Rules
- Who can be an expert, applying *Beasley v Barrand*, 2010 ONSC 2095 (SCJ)

- Determining types and when notices are required under the *Evidence Act*
- How and when to set expert meetings
- Number of experts now allowed under the proportionality requirements of the Rules and expertise required of experts
- Forms now required under the Rules, in specific, Form 53A, and when you use it

10:30 Networking Refreshment Break

10:45 Effectively Chart Your Path through the New Discovery Process

Remi Adedugbe

Law Clerk/ Litigation Support Specialist
Cassels Brock & Blackwell LLP

Law clerks fulfil an essential role in navigating the discovery process. The primary changes to the Rules of Civil Procedure relate to the process of discovery, and the required context of proportionality given the complexity of issues. Ensure you can manage the new discovery process by learning strategies and tips concerning:

- Effectively drafting discovery plans
 - learn the required components, timeframe and application of proportionality
 - how to apply the “semblance of relevance” test in establishing the scope of discovery
 - solidify your knowledge on the identification, preservation, collection and production of electronic evidence
 - develop action plans to format and exchange evidence with other firms
- Implementing the new standard of privilege in preparing Affidavits of documents
- Determining which corporate representatives or employees to examine and when
- Meeting your obligations for continued disclosure until trial and understand the sanctions for failing to do so

11:45 Networking Luncheon for Delegates and Speakers

1:00 Advanced Summation Demonstration by AccessData

Christian Burnett

International Legal Sales- Canada, AccessData

Bring your questions about the best use of this essential legal software program and ask the expert after a demonstration of the advanced use of this program!

2:00 Guidelines for Effectively Managing Evidence in Complex Litigation

Chuck Rothman

Director, E-Discovery Services
Wortzman Nickle Professional Corporation

Rachael Chadwick

Senior E-Discovery Analyst and Project Manager
Wortzman Nickle Professional Corporation

Mega cases are impacting the efficiencies of senior litigation clerks in both corporations and law firms. Ensure you meet the obligations required in juggling multiple parties and complex evidentiary issues by developing strategies for document and e-document management. Elevate your ability to manage document reviews and their flow to other parties.

Take away executable techniques for organizing your files incorporating:

- Document review management processes
- Resources, such as EDRM, Sedona Canada Principles and OBA Model e-discovery precedents
- Cutting-edge technology that can ease the document review burden
- Practices for in-house clerks to share documents with outside counsel

3:00 **Networking Refreshment Break**

3:15 **Boost Your Efficiency in Preparing a Case for Trial: Best Trial Preparation Practices**

Lisa Hagglund

Senior Litigation Clerk, Ogilvy Renault LLP

A roundtable of senior law clerks and lawyers will engage in a dialogue on best practices, checklists and forms required when managing a file under the new Rules and e-discovery environment. Learn how to prepare your files for trial and avoid the rush!

This session will provide:

- Clarification for the roles of lawyers and law clerks in trial preparation
- Tools for seizing control of the process
- Guidelines on the process and timing of components of trial preparation

4:15 **BREAK OUT SESSIONS – CHOOSE TRACK 1 OR 2**

Track 1

Develop Strategies For Organizing and Managing Class Action Suits

Michael Peerless

Partner, Siskinds LLP

Scott Werry

Law Clerk, Bates Barristers Professional Corporation

The high level of skills, organization and management required in class proceedings claims can challenge the most seasoned law clerk. Increase your organizational strategies and maintain your sanity through guidance and tips from an experienced class action partner and senior law clerk. A team representing a large firm and a smaller boutique firm conducting class action suits, will outline best practices from two differing environments.

Track 2

Critical Skills for Preparing and Managing Small Claims Court Actions

Susan M. Koprach, B.A.

Licensed Paralegal, Koprach Paralegal Services

In-house counsel and select law firms are saving costs by engaging their senior litigation clerks in preparing and managing Small Claims Court matters. Ensure you have the knowledge, skills and precedents for drafting and managing a small claims court file from start to finish.

5:15 **Concluding Remarks from the Chair**

Post-Summit Masterclass
Thursday, August 11, 2011 • 9:00 am – 12 pm

Drafting Skills: Amplify the Effectiveness of your Motion Records

Osler Hoskins & Harcourt LLP

Senior law clerks must draft succinct, effective motion records to meet the clients' needs. This in-depth, practical and comprehensive session will ensure you further develop your drafting skills to meet this challenge. Learn hands-on how to draft Notices of Motion and Affidavits which clarify and communicate your clients' position.

- Further develop a clear and effective writing style which communicates the facts
- Learn advocacy strategies required in the preparation of the documents
- Learn to better prepare a Notice of Motion which provides clarity to the Court on the causes of action
- Develop a strategy for drafting Affidavits which provide the facts succinctly
- Review specific requirements for motions seeking specific remedies and take away examples

Save the Date – July 20 & 21, 2011!

July 20 & 21, 2011 • Toronto

The Canadian Institute's 5th Annual Advanced

**CORPORATE
LAW CLERK
SUMMIT**

Critical Skills and Updates for the Experienced Law Clerk

Attend the **Canadian Institute's** advanced two-day forum providing critical skills and updates for the experienced corporate law clerk. Gain practical skills on Minute Book review and rectification, extra-provincial filing, closing agendas and more, with precedents you can use immediately!

Register Now: www.CanadianInstitute.com/corplawclerk

Approved By:



The Institute
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Supporting Partner:



The **Canadian Association of Paralegals ("CAP")**, a national professional association, has over 700 members across Canada. **CAP's** mission is to promote the paralegal profession, provide support and an exchange of ideas between colleagues and members; Offer continuing education; Supply valuable information to paralegals useful in their field of practice. www.caplegal.ca

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Immediate Strategies for Applying the Revitalized Rules of Civil Procedure

Top Reasons to Attend

- ✓ Manage e-documents and documents more effectively
- ✓ Learn to navigate new discovery rules
- ✓ Effectively manage trial preparation
- ✓ Save money by keeping small claims files in-house
- ✓ Use Summation more efficiently

REGISTRATION FORM

To expedite your registration, please mention your Priority Service Code

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Litigation Law Clerk, Litigation Law Services Manager, Director HR



5 EASY WAYS TO REGISTER

- Phone:** 1-877-927-7936 or 416-927-7936
- Fax:** 1-877-927-1563 or 416-927-1563
- Email:** b.halladay@CanadianInstitute.com
- Mail:** The Canadian Institute
1329 Bay Street
Toronto, Ontario M5R 2C4
- Online:** www.CanadianInstitute.com /litigationlawclerk

PROGRAM CODE: 293L12-TOR

Register 4 for the price of 3!

YES! Please register the following delegate for the **ADVANCED LITIGATION LAW CLERK SUMMIT**

FEE PER DELEGATE	Register & Pay by June 3, 2011	Register & Pay by July 13, 2011	Register & Pay after July 13, 2011
<input type="checkbox"/> ELITEPASS*: Program + Workshop	\$1690 + 13% HST	\$1790 + 13% HST	\$1990 + 13% HST
<input type="checkbox"/> Program (on site)	\$1195 + 13% HST	\$1295 + 13% HST	\$1495 + 13% HST
I am attending BREAKOUT SESSION <input type="checkbox"/> Track 1 OR <input type="checkbox"/> Track 2			
<input type="checkbox"/> Live Webcast (Program Only)	\$1295 + 13% HST		
Program participants will receive a CD-ROM of the program materials as part of their registration fee			
<input type="checkbox"/> Please add a copy of the *Program Proceedings (BINDER) to my order for \$195 + \$21.95 (S&H) + applicable taxes *Published and shipped within 4 weeks from program			
<input type="checkbox"/> I cannot attend, but I would like to purchase the CD-ROM for \$320 + 15.95 (S&H) + applicable taxes			

*ELITEPASS is recommended for maximum learning and networking value.

CONTACT DETAILS

NAME _____ POSITION _____

ORGANIZATION _____

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I have enclosed my cheque for \$ _____ including applicable taxes made payable to **The Canadian Institute** (GST No. 84221 1153 RT0001)

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Please quote the name of the attendee(s) and the program code 293L12 as a reference.
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ADMINISTRATIVE DETAILS

VENUE: PANTAGES HOTEL TORONTO CENTRE
ADDRESS: 200 VICTORIA STREET, TORONTO, ON
TEL.: 416-362-1777

Hotel Reservations

For information on hotel room availability and reservations, please contact the Pantages Hotel at 416-362-1777.

Registration Fee

The fee includes the program, all program materials, continental breakfasts, lunches and refreshments.

Program Materials

Program participants will receive a comprehensive set of program materials prepared by the speakers. If you have paid and are unable to attend, these will be shipped to you upon request only. Request must be received within 30 days upon conclusion of the program.

Payment Policy

Payment must be received in full by the program date to ensure admittance. All discounts will be applied to the Program Only fee (excluding add-ons), cannot be combined with any other offer, and must be paid in full at time of order. Group discounts available to individuals employed by the same organization. **Groups of 4 will be invoiced individually at 25% off the available rate at the time of registration. For groups of 5 or more please call 1-877-927-7936 for additional discounts.**

Cancellation and Refund Policy

You must notify us by email at least 48 hrs in advance if you wish to send a substitute participant. Delegates may not "share" a pass between multiple attendees without prior authorization. If you are unable to find a substitute, please notify **The Canadian Institute** in writing no later than 10 days prior to the program date and a credit voucher will be issued to you for the full amount paid. Credit Vouchers are valid for 1 year and are redeemable against any other program by **The Canadian Institute**. If you prefer, you may request a refund of fees paid less a 25% service charge. No credits or refunds will be given for cancellations received after 10 days prior to the program date. **The Canadian Institute** reserves the right to cancel any program it deems necessary and will, in such event, make a full refund of any registration fee, but will not be responsible for airfare, hotel or other costs incurred by registrants. No liability is assumed by **The Canadian Institute** for changes in program date, content, speakers or venue.

STEP 1

STEP 2

STEP 3