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**Bencher Robert Adourian** has been re-elected as a Bencher from Toronto following the appointment of Justice Catherine Rhinelandt to the Ontario Superior Court of Justice.

**Bencher Murray Klippenstein** has been re-elected as a Bencher from Toronto due to the appointment of Justice John Callahan to the Ontario Superior Court of Justice.

Mr. Klippenstein thus can maintain his 2022 lawsuit relating to his pursuit of documents based on his rights as a “director” and desire “to do his job correctly” concerning the LSO’s equity, diversity, and inclusion initiatives. In particular he seeks documents related to a survey executed in 2013 by Stratcom Communications, which informed a working group then studying the challenges faced by racialized licensees. That led to a report and recommendations the LSO later voted to adopt and then reverse following the 2019 Bencher election. A summary judgment hearing has been set for June 20, 2024. Hopefully the newly elected Bench will bring a fresh perspective to the dispute which cries out for resolution.

### **CRA MANDATORY REPORTING REQUIREMENTS:**

**BE CAREFUL:** The federal government has expanded the mandatory disclosure rules in the *Income Tax Act* (ITA). Any lawyer who serves clients in respect of certain transactions with tax consequences may be required to report those transactions to CRA.

The significant ITA amendments:

- Expand the existing reportable transactions.
- Reduce the hallmarks requiring reporting of an avoidance transaction.
- Create “notifiable” transactions that must be reported.
- Create new penalties for non-reporting licensees.

Lawyers acting on reportable transactions must consider Section 3.3 Confidentiality in the *Rules of Professional Conduct*. If a transaction must be reported, the client should be advised in writing that their confidential information will be disclosed to the CRA. However, disclosure of information is not required if it is reasonable to believe that the information is subject to solicitor-client privilege. Therefore, consider whether any of the CRA required information is subject to solicitor-client

privilege and advise clients that you will thus not report that information.

Contact the LSO Practice Management Helpline for any questions about your obligations under the Rules of Professional Conduct.

### **KING'S COUNSEL APPOINTMENTS:**

On June 30<sup>th</sup>, allegedly in celebration of the coronation of His Majesty King Charles III, the Ontario government disclosed a list of 91 lawyers to receive the designation long-abandoned in this province by the late Ian Scott. As a result those lawyers may add the initials K.C. to their names denoting their “commitment to the pursuit of legal excellence in service to the Crown, the public and their communities.”

Among some very worthy appointees, the list, not surprisingly included members of the Ontario Progressive Conservative caucus, cabinet ministers, senior staff in the attorney general’s office, the A.G. himself, the Premier’s family lawyer and donors to the Ontario PC party.

Kudos to Treasurer Horvat who turned down the designation saying: “I declined this designation based primarily on considerations around the lack of established criteria for the designation and the absence of a consultation process on the need to resurrect such a credential.”

Perhaps having run out of worthy friends, the Premier has now said the province will implement a different process for choosing which lawyers are in the future to be given the K.C. title – let’s wait and see.

### **VIRTUAL CLIENT IDENTIFICATION**

Effective January 1, 2024, the Law Society will allow virtual verification of client identity where the licensee determines that the client’s government-issued photo identification is authentic. Details will be forthcoming in a Notice to the Professions that will include links to technology products that will be helpful in the authentication process.

### **COMMITTEE APPOINTMENTS:**

The Treasurer has now made the following selections to lead Convocation into a brave new world with other Benchers assigned to each committee (some appointments are made by the External Board). Stay tuned for the emergence of wannabe Treasurer Candidates for the Spring of 2024:

#### **Access to Justice**

Cheryl Siran (Co-Chair)  
Doug Wellman (Co-Chair)  
Robert Adourian

#### **Alliance for Sustainable Legal Aid**

Shalini Konanur  
Greg Monforton

#### **Audit & Finance**

Sidney Troister (Chair)  
Michelle Lomazzo (Vice-Chair)

#### **Audit & Finance - Compensation Fund Subcommittee**

Laura Emmett (Chair)

## **Compensation**

Jacqueline Horvat (Chair)

## **Equity and Indigenous Affairs**

Catherine Banning (Co-Chair)

Gerald Chan (Co-Chair)

Annamaria Enenajor (Vice-Chair)

## **Futures**

Karen Hulan (Co-Chair)

Quinn Ross (Co-Chair)

## **Governance Review Task Force**

Genevieve Painchaud (Co-Chair)

Peter Wardle (Co-Chair)

## **Human Rights Monitoring Group (Equity)**

Tanya Walker (Chair)

## **Law Foundation of Ontario Board**

Linda Rothstein (Chair)

## **Law Society Foundation Board of Trustees**

Ian Hull (Chair)

## **Lawyers Professional Indemnity Review Task Force**

William McDowell (Chair)

Pam Hrick (Vice-Chair)

## **Paralegal Standing**

Michelle Lomazzo (Chair)

Genevieve Painchaud (Vice-Chair)

## **Proceedings Authorization**

Jonathan Rosenthal (Chair)

## **Professional Development and Competence**

Atrisha Lewis (Chair)

Jasminka Kalajdzic (Vice-Chair)

Peter Wardle (Vice-Chair)

## **Professional Regulation**

Megan Shortreed (Chair)

William McDowell (Vice-Chair)

## **Real Estate Liaison Group**

(Law Society Representatives)

Matthew Wilson (Chair)

## **Restaurant Working Group**

Michael Winward (Chair)

## **Salary Disclosure Working Group**

Heather Hansen (Chair)

## **Strategic Planning and Advisory**

Jacqueline Horvat (Chair)

Catherine Banning

## **Summary Orders**

Tanya Walker

**Tribunal**

Rebecca Duncan (Chair) (Ex-officio)

Catherine Banning (Vice-Chair)

**ENJOY A HAPPY HEALTHY SUMMER –  
YOU HAVE EARNED A BREAK**

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