

## Application for Alternate Arrangement: Responsible Lawyer to act on behalf of another Responsible Lawyer

Rule 119.8

### Instructions:

1. This form must be completed when a lawyer who is exempt from operating a trust account wishes to enter into an agreement with another law firm to use their approved trust account.
2. Prior to submitting the form, the applicant must review “Application of Rule 119.8 – Responsible Lawyer Acting on Behalf of another Responsible Lawyer” available on Law Society’s website.
3. **Guest Responsible Lawyer (Guest RL)** – a lawyer approved as a responsible lawyer permitted to receive trust money that will be held in the trust account of a law firm approved to operate a trust account where he or she is not practicing.
4. **Host Responsible Lawyer (Host RL)** – a law firm approved to operate a trust account permitted to hold trust money received by a lawyer approved as a responsible lawyer, who is not practicing with that law firm.

Please submit this form to [Trust.Safety@lawsociety.ab.ca](mailto:Trust.Safety@lawsociety.ab.ca). We do not require the original.

### SECTION A – APPLICANT (GUEST RL) DETAILS

1. Name: \_\_\_\_\_
2. Member ID:  
(on member card) \_\_\_\_\_
3. Business Name: \_\_\_\_\_
4. Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_
5. Main Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Direct Phone: \_\_\_\_\_
6. Email:  
(for Law Society use only) \_\_\_\_\_

7. The area of law practiced is (are) [please insert percentage]:

<input type="checkbox"/> Aboriginal	<input type="checkbox"/> Arbitration
<input type="checkbox"/> Civil Litigation	<input type="checkbox"/> Corporate
<input type="checkbox"/> Employment/Labour	<input type="checkbox"/> Entertainment
<input type="checkbox"/> Immigration	<input type="checkbox"/> International Business
<input type="checkbox"/> Mediation	<input type="checkbox"/> Tax
<input type="checkbox"/> Administrative / Boards / Tribunals	<input type="checkbox"/> Bankruptcy / Insolvency / Receivership
<input type="checkbox"/> Commercial	<input type="checkbox"/> Criminal
<input type="checkbox"/> Environmental	<input type="checkbox"/> Estate Planning & Administration
<input type="checkbox"/> Intellectual Property	<input type="checkbox"/> Matrimonial / Family
<input type="checkbox"/> Real Estate Conveyancing	
<input type="checkbox"/> Other (please specify) _____	
TOTAL 100%	

**SECTION B – APPLICANT (HOST RL) DETAILS**

1. Name of Law Firm: \_\_\_\_\_

2. Name of "Host" RL: \_\_\_\_\_

3. Street Address: \_\_\_\_\_

City: \_\_\_\_\_ Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

4. Main Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Direct Phone: \_\_\_\_\_

5. Email: \_\_\_\_\_  
(for Law Society use only)

**SECTION C – TERMS OF AGREEMENT**

1. Purpose of Arrangement with Host RL: \_\_\_\_\_

2. Client has been advised of trust arrangement, conditions of the agreement and consented to their name being disclosed.	Yes	No
3. A conflict check has been performed by the Host RL.	Yes	No
4. Signed Agreement obtained between Host and Guest RL that sets out the terms of the arrangement including fees, trust accounting and record keeping requirements etc.	Yes	No

*A signed copy of the agreement may be requested at any time by the Law Society of Alberta.*

5. Additional Comments

**SECTION D – DECLARATION**

I, \_\_\_\_\_

agree to maintain my approval as a Responsible Lawyer with an exemption from operating a trust account for my law firm during the currency of the attached agreement and hereby apply for an approval of the arrangement set out in this application. I agree to provide a copy of the signed agreement should the Law Society request it.

I acknowledge that I have reviewed “*Application of Rule 119.8 – Responsible Lawyer Acting on Behalf of another Responsible Lawyer*” prior to submitting this application.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Applicant Signature