

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

Rule 119.2

### 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. This is permissible pursuant to Rule 119.2.
2. Prior to submitting the form, the applicant must review “Application of Rule 119.2 – 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)

The information provided in this form will be used by the Law Society of Alberta for one or more purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Insurance Association. The information may be used or disclosed by the Law Society of Alberta, now or in the future, for regulatory purposes, including Law Society of Alberta investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about this, please contact the Privacy Officer at 403-229-4700.

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

_____	Aboriginal	_____	Arbitration
_____	Civil Litigation	_____	Corporate
_____	Employment/Labour	_____	Entertainment
_____	Immigration	_____	International Business
_____	Mediation	_____	Tax
_____	Administrative / Boards / Tribunals	_____	Bankruptcy / Insolvency / Receivership
_____	Commercial	_____	Criminal
_____	Environmental	_____	Estate Planning & Administration
_____	Intellectual Property	_____	Matrimonial / Family
_____	Real Estate Conveyancing		
_____	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 119.2 – Responsible Lawyer Acting on Behalf of another Responsible Lawyer*” prior to submitting this application.

\_\_\_\_\_  
Date

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