LAW SOCIETY of ALBERTA

Resources – Membership Services

Department	Link	Resource Information
Membership Services	Fee Schedule for 2020/2021	Prorated Fee Schedule for Annual Membership Fees
Membership Services	ALIA Indemnity Coverage for July 2019 through June 2020	Prorated Levy Schedule for Part A and Part B Indemnity Coverage
Membership/ALIA	User Guide to download LSA Key Dates Calendar to Desktop	LSA Key Dates Calendar – Desktop User Guide
Membership/ALIA	User Guide to download LSA Key Dates Calendar to Mobile Phone	LSA Key Dates Calendar – Mobile User Guide
Membership/ALIA	Alberta Lawyer's Professional Liability and Misappropriation Indemnity Group Policy	Group Policy Information – LSA website
Membership/ALIA	Form 7-1 Application for Professional Liability Indemnity Coverage	LSA form to apply for indemnity coverage
Membership/ALIA	Form 7-2 Exemption from Professional Liability Indemnity Coverage	LSA form for certifying exemption from carrying indemnity coverage
Membership	Request to Change Contact Particulars	LSA Form for changing member contact particulars (see Rule 42)
Membership	Form 2-20 Election to become a Non-Practising (Inactive) Member	LSA form to elect to go Inactive/Non-Practising
Membership	Application for Active Member, Pro Bono Legal Services	LSA form to elect to change status to Active for Pro Bono Legal Services
Membership	Form 4-1.1 Application for Reinstatement	LSA form to elect to reinstate to Active practice status
Membership	Rule 155 Approval of Articles of Incorporation	Professional Corporation Forms

Membership	Form 8-1 Application for a Permit	Professional Corporation Forms
Membership	How to Decide on a Business Structure for Your Law Firm	CBA Practice Link Article April 2014

Resources – Trust Safety

Department	Link	Resource Information
Trust Safety RL Designations and Trust Account Exemptions	Application to Designate a Responsible Lawyer and Exemption from Operating a Trust Account	Application for exemption from operating a trust account
Trust Safety RL Designations and Applying for a Trust Account	Application to Designate a Responsible Lawyer and/or Operate a Trust Account	Application to operate a Trust Account
Trust Safety RL acting on behalf of another RL	Application for Alternate Arrangement: Responsible Lawyer to act on behalf of another Responsible Lawyer	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
Trust Safety Trust Accounting Fundamentals - Education for RLs	Trust Accounting for Responsible Lawyers – Online Course	Administered through the Legal Education Society of Alberta (LESA), this course focuses on trust accounting for Responsible Lawyers. **Contact Trust Safety to be registered**
Trust Safety Trust Accounting Fundamentals	Trust Accounting Fundamentals – Online Course	Administered through the Legal Education Society of Alberta (LESA) this course focuses on the basics of trust accounting. **Contact Trust Safety to be registered**

TRUST ACCOUNTING MILESTONES AT A GLANCE

MAR 31

ANNUAL DUE DATE

This includes Self-Report and Trust Accounting Upload or Accountant's Report

APR 1

Late filing fee due if annual reports not submitted by Mar 31

Late Fee: $250
Cumulative Fee: $250

MAY 1

Late filing fee due if annual reports not submitted by Apr 30

Late Fee: $500
Cumulative Fee: $750

MAY 31

CDIC Reporting

Submit CDIC disclosure to the financial institution in which the law firm holds its trust account by May 31*

JUN 1

Late filing fee due if annual reports not submitted by May 31

Late Fee: $750
Cumulative Fee: $1500

JUL 1

Administrative Suspension of the Responsible Lawyer (applicable if Annual reports not submitted by June 30)

Reinstatement Fee: $225
Cumulative Fee: $1725

DEC 31

Designated Trust Safety Year End

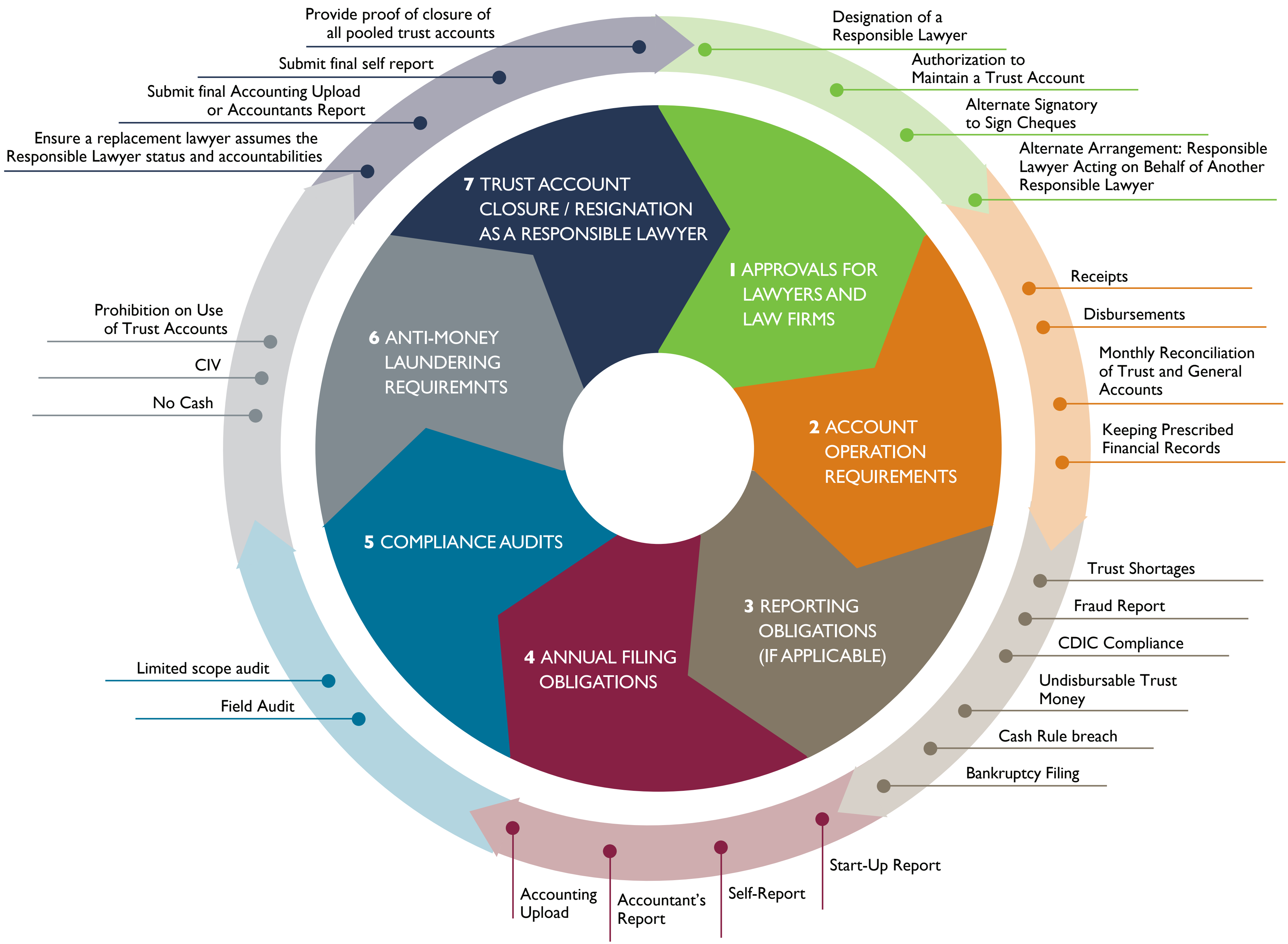
OTHER REPORTING OBLIGATIONS:

- Reconciliation of all of the trust, SIBA and general accounts for the month should be completed by the end of the following month.
- Monthly reports must be reviewed and approved by the Responsible Lawyer by the end of every month.
- Law firms are also required to submit the following reports (if applicable) - Trust shortage form, Cash rule breach, Bankruptcy and Fraud reporting.

**Not applicable for trust accounts in ATB & with Credit Unions*

QUESTIONS? Do not hesitate to contact us, we are here to help. Please email: **trust.safety@lawsociety.ab.ca** or call **403-228-5632**

LIFECYCLE OF A TRUST ACCOUNT



LAW SOCIETY of ALBERTA

Resource Links – Practice Management

Department	Link	Resources
Practice Management Consultations	Practice Management Consultations	
Mentor Connect	Mentor Connect Program	Mentor Connect Handbook Mentor Connect FAQ
Mentor Express	Mentor Express Program	Mentor express Handbook Mentor express FAQ
Locum Connect	Locum Connect Program	Locum Connect Handbook Top 10 Tips for Surviving as a Locum Locum Connect Fact Sheet Working with Locums
Transitioning Your Practice	Returning to Active Practice	Returning to Active Practice
Practice Management Technology	LSA Software Comparison Chart	Software Comparison Chart
Client Relationship Management	Client Communication Toolkit	Client Communication Toolkit: Legal Fees Client Communication Toolkit: Client Service Contingency Fee Issues Interactive Retainer Letter Guide Interactive Non-Engagement Letter Guide

Department	Link	Resources
Contingency & Disaster Planning	Contingency Planning Video When Bad Things Happen to Good Lawyers: Contingency Planning Guide	When Bad Things Happen to Good Lawyers Contingency Planning Video
Starting a Law Office	Considerations when Opening a Law Office	Considerations When Opening a Law Office
Going Solo	Goods on Going Solo - Webinar	Goods on Going Solo Webinar

Resources – Office of the Practice Advisor and Equity Ombudsperson

Department	Link	Resources
Practice Advisors	Conflicts Essentials Webinar – September 2017	Conflicts Essentials Webinar LSA Practice Advisors
Practice Advisors	Ethical Queries and Quandaries: Issues Commonly Raised with the Practice Advisors	Published in CBA Law Matters Winter 2019
Practice Advisors	Ethical Considerations when Lawyers Leave Law Firms	Updated February 2017
Practice Advisors	Checklist when Moving Law Offices	2018 Checklist created by the Practice Advisors for moving between law practices
Practice Advisors	File Storage and Document Management	Article and checklist outlining the requirements for retention and file storage
Practice Advisors	Considerations for Opening a Law Office	Article identifying various aspects to consider when opening a law practice
Practice Advisors / Practice Management	Goods on Going Solo Webinar – April 2016	Joint webinar covering the basics of starting a solo practice

Practice Advisors / Practice Management	Law Society of Alberta Firm Start-Up Kit	Articles, checklists and resources relating to starting your own practice
Practice Advisors	Office of the Practice Advisor: AdvisorLink Program	Volunteer lawyer advisors to answer one-off inquiries and substantive legal advice in various areas of law
Practice Advisors	Office of the Equity Ombudsperson	Provides confidential advice, resources, information and assistance to lawyers and students working in the legal profession on issues of discrimination or harassment
Practice Advisors	Office of the Practice Advisor: SoloNet	Confidential online network for sole and small firm practitioners to share professional knowledge, ideas and experience
Practice Advisors	Article: Should I Practice through a Professional Corporation?	Author: Henry Berg Siskinds LLP