

## Matter-Matter Trust Transfers

**Instructions:**

1. This form must be completed for all electronic payments under Rule 119.33. The Law Firm may choose not to use this form, provided that all the information listed below is being recorded on an internal document.
2. The Law Firm must complete this form (or equivalent) when funds are being transferred from one client matter to another client matter under Rule 119.33.
3. Please save the completed form in a secured location for appropriate record keeping. Do **NOT** send this form to the Law Society of Alberta.

### SECTION A – Law Firm Information

1. Law Firm name: \_\_\_\_\_
2. Lawyer responsible \_\_\_\_\_  
for file: \_\_\_\_\_

### SECTION B – Transfer Details

1. Source Matter Number: \_\_\_\_\_
2. Destination Matter Number: \_\_\_\_\_
3. Amount: \_\_\_\_\_
4. Reason for transfer: \_\_\_\_\_
5. Did the client approve the transfer? Yes ☐ No ☐
6. Is the client's direction to transfer the funds obtained & retained? Yes ☐ No ☐
7. Comments (if any):

### SECTION C – LAWYER APPROVAL

Dated: \_\_\_\_\_

(mm/dd/yyyy)

\_\_\_\_\_  
Signature

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.