

## Matter-Matter Trust Transfers

### Instructions:

1. This form must be completed for all electronic payments under Rule 119.25. 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 119.25.
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 \_\_\_\_\_