PROFESSIONAL RESPONSIBILITY - TABLE OF CONTENTS

|  |  |  |
| --- | --- | --- |
| **Ch.** | **Topic** | **Pages** |
| 1 | Regulating the legal professions | 1 |
| 2 | Professionalism | 5 |
| 3 | Who is the client | 9 |
| 4 | Competence | 15 |
| 5 | Confidentiality | 19 |
| 6 | Conflicts of interest | 25 |
| 7 | Duty to the client | 37 |
| 8 | Fees and disbursements | 43 |
| 9 | Managing the client relationship | 49 |
| 10 | Withdrawal from representation | 55 |
| 11 | Duty to others | 59 |
| 12 | Advocacy | 67 |
| 13 | Practice management | 75 |
| 14 | Accounting, Bank Accounts, and bookkeeping | 89 |

PROFESSIONAL RESPONSIBILITY - NUMERICAL INDEX

|  |  |  |
| --- | --- | --- |
| Regulating the Legal Profession | 1-4 | 1-2.5 |
| Law Society - mandate | 1(L) | 1 |
| Law Society - Permission to practice | 1(L) | 1 |
| Law Society - primary functions | 1(L) | 1 |
| LSUC - mandate | 1(L) | 1 |
| LSUC - Permission to practice  | 1(L)  | 1  |
| LSUC - primary functions | 1(L) | 1 |
| Mandate - Law Society | 1(L) | 1 |
| Primary functions - law society | 1(L) | 1 |
| Professional development - lawyers | 1(L) | 1.2 |
| Benchers | 1(L) | 1.1 |
| CEO - Law Society | 1(L) | 1.1 |
| Chief Executive Officer - Law Society | 1(L) | 1.1 |
| Convocation | 1(L) | 1.1 |
| Convocation and management - LSUC | 1(L) | 1.1 |
| Law Society - Benchers  | 1(L) | 1.1 |
| Law Society - CEO  | 1(L) | 1.1 |
| Law Society - Chief Executive Officer | 1(L) | 1.1 |
| Law Society - Convocation | 1(L) | 1.1 |
| Law Society - Treasurer | 1(L) | 1.1 |
| LSUC - Benchers | 1(L) | 1.1 |
| LSUC - CEO  | 1(L) | 1.1 |
| LSUC - Chief Executive Officer | 1(L) | 1.1 |
| LSUC - Convocation  | 1(L) | 1.1 |
| LSUC - Treasurer  | 1(L) | 1.1 |
| Management and Convocation - LSUC | 1(L) | 1.1 |
| Treasurer - Law Society | 1(L) | 1.1 |
| Education, licensing and professional development - LSUC  | 1(L) | 1.2 |
| Law Society - Education, licensing, professional development | 1(L) | 1.2 |
| Law Society - Professional Development and Competence Division | 1(L) | 1.2 |
| Law Society - Professional Development and Competence Division - Goal | 1(L) | 1.2 |
| LSUC - Education, Licensing, professional development | 1(L) | 1.2 |
| LSUC - Professional Development and Competence Division | 1(L) | 1.2 |
| LSUC - Professional Development and Competence Division - Goal | 1(L) | 1.2 |
| Education and licensing - Professional development | 1(L) | 1.2 |
| Professional development - education and licensing  | 1(L) | 1.2 |
| Professional Development and Competence Division - Law Society | 1(L) | 1.2 |
| Professional Development and Competence Division - LSUC | 1(L) | 1.2 |
| Complaints Resolution Dept - LSUC  | 1(R) | 1.3 |
| Discipline Dept - LSUC  | 1(R) | 1.3 |
| Investigations Dept - LSUC  | 1(R) | 1.3 |
| Law Society - Complaints Resolution Dept | 1(R) | 1.3 |
| Law Society - Discipline Dept | 1(R) | 1.3 |
| Law Society - Investigations Dept | 1(R) | 1.3 |
| Law Society - Professional Regulation Division | 1(R) | 1.3 |
| Law Society - Unclaimed Trust Fund | 1(R);94(R)-95(L) | 1.3;4.4 |
| LSUC - Complaints Resolution Dept | 1(R) | 1.3 |
| LSUC - Discipline Dept | 1(R) | 1.3 |
| LSUC - Professional Regulation Division | 1(R) | 1.3 |
| LSUC - Unclaimed Trust Fund | 1(R);94(R)- 95(L)  | 1.3;4.4 |
| Professional regulation division - Law Society | 1(R) | 1.3 |
| Professional regulation division - LSUC | 1(R) | 1.3 |
| Unclaimed Trust Fund - Law Society | 1(R)94(R)-95(L) | 1.34.4 |
| Unclaimed Trust Fund - LSUC | 1(R)94(R)-95(L) | 1.34.4 |
| Call Centre | 1(R) | 1.4 |
| Client Service Centre (CSC)-Support to lawyers, paralegals and the public - LSUC | 1(R) | 1.4 |
| Equity Initiatives Department - Law Society | 1(R)6(R)-7(R) | 1.46 |
| Equity Initiatives Department - LSUC | 1(R)6(R)-7(R) | 1.46 |
| Communication and Public Affairs Law Society | 1(R) | 1.4 |
| Communication and Public Affairs - LSUC | 1(R) | 1.4 |
| Law Society - Call Centre | 1 (R) | 1.4 |
| Law Society - Client Service Centre | 1(R) | 1.4 |
| Law Society - Communication and Public Affairs | 1(R) | 1.4 |
| Law Society - Equity Initiatives Department | 1(R)6(R)-7(R)  | 1.46 |
| Law Society - Support to Lawyers, Paralegals and the public | 1(R) | 1.4 |
| LSUC - Call Center | 1(R) | 1.4 |
| LSUC - Client Service Centre | 1(R) | 1.4 |
| LSUC - Communication and Public Affairs | 1(R) | 1.4 |
| LSUC - Equity Initiative Division | 1(R)6(R)-7(R) | 1.46 |
| LSUC - Support to Lawyers, Paralegals and the public | 1(R) | 1.4 |
| Support to Lawyers, Paralegals and the public - Law Society | 1(R) | 1.4 |
| Support to Lawyers, Paralegals and the public - LSUC | 1(R) | 1.4 |
| Ethical behavior - req. to comply with the *Rules* | 1(R) | 2 |
| Public interest - regulating legal profession | 1(R) | 2 |
| Law Society - Regulating the legal profession in the public interest | 1(R) | 2 |
| LSUC - Regulating the legal profession in the public interest | 1(R) | 2 |
| Regulating the legal profession in the public interest | 1(R) | 2 |
| Definition: lawyer, legal practitioner, legal profession, licensee, paralegal | 1(R)-2(L) | 2.1 |
| Terminology: lawyer, legal practitioner, legal profession, licensee, paralegal | 1(R)-2(L) | 2.1 |
| Lawyer - definition | 2(L) | 2.1  |
| Legal practitioner - definition | 2(L) | 2.1 |
| Legal profession - definition | 2(L) | 2.1 |
| Licensee - definition | 2(L) | 2.1 |
| Paralegal - definition | 2(L) | 2.1 |
| Law Society Act | 2(L) | 2.1-2.2 |
| Law Society - right to make rules and regulations | 2(L) | 2.2 |
| Right to make rules and regulations - law society | 2(L) | 2.2 |
| Rules of Professional Conduct  | 2(L-R) | 2.2 |
| Rules of Professional Conduct - Summary | 2(L-R) | 2.2 |
| Ethical Issue / Problem - Steps for dealing with | 2(R)-3(L) | 2.2 |
| Competence and professional development | 3(L) | 2.3 |
| Continuing Professional Development - Seminars and Materials | 3(L) | 2.3 |
| CPD - Seminars and Materials | 3(L) | 2.3 |
| Practice Management Helpline - LSUC | 3(L) | 2.3 |
| LSUC - Practice Management Helpline | 3(L) | 2.3 |
| Law Society - Practice Management Helpline | 3(L) | 2.3 |
| Spot Audit and Practice Review programs - LSUC | 3(L) | 2.3 |
| LSUC - Spot Audit and Practice Review programs | 3(L) | 2.3 |
| Law Society - Spot Audit and Practice Review | 3(L) | 2.3 |
| Spot audits | 3(L) | 2.3 |
| Practice Review | 3(L) | 2.3 |
| Complaints, investigations, discipline, and appeals | 3(L-R) | 2.4 |
| Complaints | 3(L-R) | 2.4 |
| Complaints Resolution | 3(L-R) | 2.4 |
| Investigations | 3(L) | 2.4 |
| Proceedings Authorization Committee (PAC) | 3(L) | 2.4 |
| Hearing Panel | 3(L-R) | 2.4 |
| Hearing Panel - Lawyer or Paralegal Discipline | 3(R) | 2.4 |
| Lawyer or Paralegal Discipline - Hearing Panel | 3(R) | 2.4 |
| Hearing Panel - Appeal | 3(R) | 2.4 |
| Appeal - Hearing Panel | 3(R) | 2.4 |
| Appeal Panel - Ontario Divisional Court | 3(R) | 2.4 |
| Ontario Divisional Court - Appeal Panel | 3(R) | 2.4 |
| Good Character Hearings - Licensing Process (LSUC) | 3(R) | 2.4 |
| Licensing Process (LSUC) - Good Character Hearings | 3(R) | 2.4 |
| Grounds for Discipline - failure to respond to LSUC communication | 3(R) | 2.4 |
| Failure to Respond to LSUC Communication - grounds for discipline | 3(R) | 2.4 |
| Administrative Suspension of License | 4(L-R) 83(L-R)  | 2.58 |
| Suspension of License - Administrative | 4(L-R) 85(L-R)  | 2.58 |
| Disciplinary Suspension vs. Administrative Suspension | 4(R) | 2.5 |
| Administrative Suspension vs. Disciplinary Suspension | 4(R) | 2.5 |
| Disciplinary Suspension of License | 3(R)-4(L-R) | 2.5 |
| Discipline - Suspensions | 3(R)-4(L-R) | 2.5 |
| Administration - Suspensions | 4(L-R) | 2.5 |
| Lawyer and Paralegal - Suspension  | 3(R)-4(L-R) | 2.5 |
| Suspension - Lawyer and Paralegal | 3(R)-4(L-R) | 2.5 |
| Suspensions of License - Administrative and Disciplinary | 3(R)-4(L-R) | 2.5 |
| Suspensions - Additional Obligations re Trust Funds | 4(R) | 2.5 |
| Additional Obligations re Trust Funds - Suspensions | 4(R) | 2.5 |
| Professionalism | 5-7 | 1-6 |
| Duty - Professionalism  | 5(L) | 1 |
| Duty - Professionalism - components  | 5(L) | 1 |
| Professionalism - Duty - components  | 5(L) | 1 |
| Standards of the legal profession - Rules 2.1-1-2.1-2 and commentary | 5(L) | 1 |
| Rules 2.1-1-2.1-2 and commentary - Standards of the legal profession | 5(L) | 1 |
| Commentary and Rules 2.1-1-2.1-2 - Standards of the legal profession | 5(L) | 1 |
| Professional Lawyer - Definition | 5(L) | 1 |
| Duty of Lawyer | 5(L) | 1 |
| Lawyer - Professional Duty | 5(L) | 1 |
| Duty - Professional Duty - Lawyer  | 5(L) | 1 |
| Lawyer - Professionalism | 5(L) | 1 |
| Civility and Integrity - Professionalism  | 5(L) | 2 |
| Duty - Integrity and civility  | 5(L) | 2 |
| Integrity and civility - Professionalism  | 5(L) | 2 |
| Professionalism - Civility  | 5(L) | 2 |
| Professionalism - Integrity | 5(L) | 2 |
| Courtesy and Civility and Good Faith - Rules 5.1-5 and 7.2-1 and Commentary | 5(L-R) | 3 |
| Rules 5.1-5 and 7.2-1 and Commentary - Courtesy and Civility and Good Faith | 5(L-R) | 3 |
| Professionalism and Duty - Courtesy and Civility and Good Faith | 5(L-R) | 3 |
| Good Faith and Courtesy and Civility - Professionalism and Duty  | 5(L-R) | 3 |
| Civility and Courtesy and Good Faith - Professionalism and Duty | 5(L-R) | 3 |
| Professionalism and Duty - Courtesy  | 5(L-R) | 3 |
| Professionalism and Duty - Good faith | 5(L-R) | 3 |
| Courtesy and good faith - Duty | 5(L-R); 62(R) -63(L)  | 33.1 |
| Advancement of the legal profession - Rules 2.1-2 and Commentary | 5(R) | 4 |
| Rules 2.1-2 and Commentary - Advancement of the legal profession | 5(R) | 4 |
| Duty - advancement of legal profession | 5(R) | 4 |
| Professionalism - Advancement of the legal profession | 5(R) | 4 |
| Human Rights Code and Lawyers - Rule 2.1-1 and Commentary and Sections 6.3-6.3.1 | 5(R) -6(L) | 5 |
| Rule 2.1-1 and Commentary and Sections 6.3-6.3.1 - Human Rights Code and Lawyers | 5(R) -6(L) | 5 |
| Sections 6.3-6.3.1 and Rule 2.1-1 and Commentary - Human Rights Code and Lawyers | 5(R) -6(L) | 5 |
| Lawyers and the Ontario Human Rights Code | 5(R)-6(L) | 5 |
| Ontario Human Rights Code and Lawyers | 5(R)-6(L) | 5 |
| Ontario Human Rights Code - Purpose | 5(R)-6(L) | 5 |
| Ontario Human Rights Code - Summary of Discriminations | 5(R)-6(L) | 5 |
| Ontario Human Rights Code - Legal Services | 5(R) -6(L) | 5 |
| Discrimination | 5(R) -6(L) | 5-5.1 |
| Discrimination - Section 6.3.1 and Commentaries | 6(L) | 5.1 |
| Section 6.3.1 and Commentaries - Discrimination | 6(L) | 5.1 |
| Lawyers - Ontario Human Rights Code | 5(R)-6(L) | 5 |
| Lawyer Duty - Discrimination | 5(R)-6(L) | 5-5.1 |
| Adverse effect discrimination | 6(L) | 5.1 |
| Discrimination - Definition  | 6(L) | 5.1 |
| Discrimination - Neutral rule or policy is discrimination | 6(L) | 5.1 |
| Duty - re discrimination - accommodate up to undue hardship | 6(L) | 5.1 |
| Harassment - Section 6.3 and Rule 6.3.1-3 | 6(L-R) | 5.2 |
| Section 6.3 and Rule 6.3.1-3 - Harassment | 6(L-R) | 5.2 |
| Harassment - Definition | 6(L) | 5.2 |
| Harassment - Examples | 6(L-R) | 5.2 |
| Sexual Harassment - Definition | 6(L-R) | 5.2 |
| Sexual Harassment - Examples | 6(R) | 5.2 |
| Discrimination - model policies | 6(R)-7(L-R) | 6 |
| Model Policies - Discrimination  | 6(R)-7(L-R) | 6 |
| Model Policies - Definition | 6(R)-7(L) | 6 |
| LSUC - Equity Initiatives Department | 6(R)-7(L) | 6 |
| Equity Initiatives Department - LSUC | 6(R)-7(L) | 6 |
| Discrimination and Harassment Counsel (DHC)-Law Society  | 7(R) | 6 |
| Law Society - Discrimination and Harassment Counsel (DHC) | 7(R) | 6 |
| LSUC - Discrimination and Harassment Counsel (DHC) | 7(R) | 6 |
| Who is the Client  | 9-13 | 1-3.4 |
| Definition of Client - SEE Rule 1.1-1 | 9(L) | 1 |
| Prospective Client | 9(L-R) | 1.1 |
| Prospective Client - Definition | 9(L) | 1.1 |
| Client Identification  | 9(L) | Intro |
| Duty - of Lawyer to Service to client | 9(L) | Intro |
| Lawyer - Duty of Quality Service to Client | 9(L) | Intro |
| Duty of Quality Service to Client - Lawyer | 9(L) | Intro |
| Client - determining who is | 9(L-R) | 1.1 |
| Determining who is the client | 9(L-R) | 1.1 |
| Duty - at first contact with client  | 9(L-R) | 1.1 |
| First Meeting or Contact with Client - Duties SEE ALSO: Stages of Client Relationship:  Initial Screening Stage | 9(L-R)47(L-R) | 1.11.1 |
| Duty - confidentiality - prospective client  | 9(R) | 1.1 |
| Confidentiality - Duty - Prospective Client | 9(R) | 1.1 |
| Duty - prospective client - confidentiality  | 9(R) | 1.1 |
| Lawyer - Client Relationship  | 9(R) -10(L)  | 1.2 |
| Client - Definition | 9(R) 10(L) | 1.21.3 |
| TESTs for Determining Existence of Lawyer Client Relationship | 9(R) | 1.2 |
| Determining Existence of Lawyer Client Relationship - TEST | 9(R) | 1.2 |
| Client - Unintentional client - how to avoid | 10(L) | 1.2  |
| Client - Unintentional client - Initial contact | 9(R)-10(L) | 1.2 |
| Lawyer - Client Relationship - unintentional Clients | 9(R)-10(L) | 1.2 |
| Prospective clients - Risk of unintentional Clients | 9(R)-10(L) | 1.2 |
| Unintentional client - how to avoid | 10(L) | 1.2 |
| Lawyer - Client Relationship - avoiding unintentional clients  | 10(L)  | 1.2 |
| Client - a client of the law firm - definition | 10(L) | 1.3 |
| Client of a law firm - definition | 10(L) | 1.3 |
| Client - firm client - definition  | 10(L) | 1.3 |
| Client - firm client - duties to  | 10(L) | 1.3 |
| Duty - to Firm clients | 10(L) | 1.3 |
| Firm clients - definition  | 10(L) | 1.3 |
| Firm clients - Duty to avoid conflicts | 10(L) | 1.3 |
| Duty to avoid conflicts - Firm Clients | 10(L) | 1.3 |
| Determining who is the client - Examples | 10(R) | 2 |
| Examples - determining who is the client | 10(R) | 2 |
| Confidentiality - joint clients | 10(R) | 2.1 |
| Joint Clients - Confidentiality | 10(R) | 2.1 |
| Conflict of interest - joint clients | 10(R) | 2.1 |
| Joint Clients - Conflict of Interest | 10(R) | 2.1 |
| Instructions - from Joint Clients | 10(R) | 2.1 |
| Joint Clients - Contentious Issue | 10(R)-11(L) | 2.1 |
| Contentious Issue - Joint Clients | 10(R)-11(L) | 2.1 |
| Lawyer Withdrawal - Joint Clients | 11(L) | 2.1 |
| Joint Clients - Lawyer Withdrawal | 11(L) | 2.1 |
| Joint Clients - Rules 3.4-5-3.4-9 and Commentaries | 10(R)-11(L) | 2.1 |
| Rules 3.4-5-3.4-9 and Commentaries - Joint Clients | 10(R)-11(L) | 2.1 |
| TEST for Accepting Joint Clients | 10(R) | 2.1 |
| Accepting Joint Clients - TEST | 10(R) | 2.1 |
| Joint Retainer - Definition | 10(R) | 2.1 |
| Joint Retainer - conflicts | 10(R) | 2.1 |
| Joint Retainer - Consent in writing | 10(R) | 2.1 |
| Joint Retainer - when lawyer can accept | 10(R) | 2.1 |
| Joint retainer - Instructions | 10(R) | 2.1 |
| Joint Clients  SEE: Joint Retainer SEE ALSO: Conflict of interest | 10(R)-11(L)26(L)-27(R)25(L-R) | 2.15-5.21 |
| Authorized representative - Client - Rules 3.2-9 and Commentary | 11(L) | 2.2 |
| Rules 3.2-9 and Commentary - Authorized representative - Client | 11(L) | 2.2 |
| Client - Rules 3.2-9 and Commentary - Authorized representative - Client | 11(L) | 2.2 |
| Client - Legal Capacity - Authorized Representative | 11(L) | 2.2 |
| Authorized Representative - Capacity | 11(L) | 2.2 |
| Capacity of Authorized Legal Representative | 11(L) | 2.2 |
| Client - Legal Capacity - Joint clients | 11(L) | 2.2 |
| Joint Clients - Legal Capacity | 11(L) | 2.2 |
| Legal Capacity - Joint Clients | 11(L) | 2.2 |
| Disability - Authorized Representative | 11(L) | 2.2 |
| Instructions - from authorized representative (client under disability or Legal Capacity)  | 11(L) | 2.2 |
| Legal Capacity - Authorized Representative | 11(L) | 2.2 |
| Legal Capacity - Client - Authorized Representative | 11(L) | 2.2 |
| Client -Third Parties | 11(L) | 2.3 |
| Instructions - Third Party | 11(L) | 2.3 |
| Third Party - Instructions | 11(L) | 2.3 |
| Third Party - Clients | 11(L) | 2.3 |
| Conflict of interest - unrepresented parties - Rule 7.2-9 and Commentary | 11(L) -12(L) | 2.6 |
| Client - Organization - Rule 3.2-3 and Commentary | 11(L-R)  | 2.4 |
| Rule 3.2-3 and Commentary - Client - Organization | 11(L-R)  | 2.4 |
| Organization - Client - Rule 3.2-3 and Commentary | 11(L-R) | 2.4 |
| Client - joint retainer - organization | 11(R)  | 2.4 |
| Client - organization - joint retainer  | 11(R)  | 2.4 |
| Joint Retainer - Organization - Client | 11(R) | 2.4 |
| Client - organization or corporation or institution | 11(R)  | 2.4 |
| Corporation - as client | 11(R)  | 2.4 |
| Corporation - as client - instructions  | 11(R)  | 2.4 |
| Institutional or Organizational Clients | 11(R)  | 2.4 |
| Instructions - Client is organization or corporation | 11(R)  | 2.4 |
| Instructions - from organization client  | 11(R)  | 2.4 |
| Joint retainer - organization | 11(R)  | 2.4 |
| Organization - as client | 11(R)  | 2.4 |
| Organization - as client - instructions  | 11(R)  | 2.4 |
| Organization - as client - joint retainer | 11(R)  | 2.4 |
| Limited Scope Clients - Rules 3.2-1A-3.2-1A.2 and Commentaries | 11(R) | 2.5 |
| Rules 3.2-1A-3.2-1A.2 and Commentaries - Limited Scope Clients | 11(R) | 2.5 |
| Client - limited scope client - definition  | 11(R) | 2.5 |
| Client - limited scope client - duties to  | 11(R) | 2.5 |
| Client - limited scope client - retainer | 11(R) | 2.5 |
| Duty - limited - scope clients | 11(R) | 2.5 |
| Limited scope client - retainers | 11(R) | 2.5 |
| Retainer - limited scope clients | 11(R) | 2.5 |
| Limited Scope Clients - Conflict Check | 11(R) | 2.5 |
| Conflict Check - Limited Scope Clients | 11(R) | 2.5 |
| Unrepresented Parties - Rule 7.2-9 and Commentary | 11(R)-12(L) | 2.6 |
| Rule 7.2-9 and Commentary - Unrepresented Parties | 11(R)-12(L) | 2.6 |
| Duties to - unrepresented parties | 11(R)-12(L) | 2.6 |
| Unrepresented parties - Duties to  | 11(R)-12(L) | 2.6 |
| Unrepresented parties - Conflict of Interest - Rule 7.2-9 and Commentary | 11(R)-12(L) | 2.6 |
| Identification and verification of client - Generally SEE ALSO: Client - Identification; SEE ALSO: Client - Verification | 12-1312(L-R)12(R)-13 | 3-3.43-3.1.13.2-3.4 |
| Client - Identification - SEE ALSO: Client - Verification | 12(L-R)12(R)-13(R) | 3-3.23.2-3.4 |
| Client - Verification - SEE ALSO: Client - Identification | 12(L-R)12(R)-13(R) | 3-3.23.2 -3.4 |
| Client Identification and Verification Requirements - By-Law 7.1 Part III | 12(L-R)-13(L-R) | 3 |
| By-Law 7.1 Part III - Client Identification and Verification Requirements  | 12(L-R)-13(L-R) | 3 |
| Identification - Definition | 12(L) | 3 |
| Verification - Definition | 12(L) | 3 |
| Client - identification - by - law 7.1 | 12(L) | 3 |
| Identification - When is it Required | 12(L) | 3.1 |
| Identification and verification of client - Identification - when required | 12(L) | 3.1 |
| Identification - Required Information - Individual | 12(R) | 3.1.1 |
| Identification - Required Information - Organization | 12(R) | 3.1.1 |
| Verification - When is it Required | 12(R) | 3.2 |
| Verification - Individual | 12(R) | 3.2 |
| Verification - Organization | 12(R) | 3.2 |
| Client - identification - how to identify | 12(R) | 3.1.1 |
| Client - identification - requirements | 12(R) | 3.1.1 |
| Identification and verification of client - Identification - How to identify  | 12(R) | 3.1.1 |
| Client - verification - when required | 12(R) | 3.2 |
| Identification and verification of client - Verification - When Required | 12(R) | 3.2 |
| Verification and identification client - when required  | 12(R) | 3.2 |
| Verification of identity - client  SEE: Identification and Verification | 12(R)12(L) | 3.23 |
| Verification - How To | 12(R)-13(L-R) | 3.2.1 |
| How to verify identity of client  | 12(R)-13(L) | 3.2.1 |
| Client - Verification SEE ALSO: Client - Identification | 12(R)-13(R)12(L-R) | 3.2-3.43-3.2 |
| Client - Individual - Verifying Identity | 12(R)-13(R) | 3.2.1 |
| Client - Organization - Corp - Verifying Identity | 12(R)-13(R) | 3.2.1 |
| Client - Organization - Trust and Partnership and Etc.- Verifying Identity | 12(R)-13(R) | 3.2.1 |
| Client - verification - how to  | 12(R)-13(R) | 3.2.1 |
| Client - Verifying Identity - Individual | 12(R)-13(R) | 3.2.1 |
| Client - Verifying Identity - Organization - Corp  | 12(R)-13(R) | 3.2.1 |
| Client.- Verifying Identity - Organization - Trust and Partnership and Association | 12(R)-13(R) | 3.2.1 |
| Identification and verification of client - Verification - How to verify  | 12(R)-13(R) | 3.2.1 |
| Identity - Verification SEE: Identification and Verification | 12(R)-13(R) | 3.2.1 |
| Organizations - Verifying Identity - Additional Steps | 12(R)-13(R) | 3.2.1 |
| Verification and identification of client - how to  | 12(R)-13(R) | 3.2.1 |
| Verifying Identity - for Organization - Additional Steps | 12(R)-13(R) | 3.2.1 |
| Verifying Identity - Individual | 12(R)-13(R) | 3.2.1 |
| Verifying Identity - Organization - Corp  | 12(R)-13(R) | 3.2.1 |
| Verifying Identity - Organization - Trust and Partnership Etc | 12(R)-13(R) | 3.2.1 |
| Verification - Special Provisions - When Client or Third Party Cannot Meet in Person | 13(L-R) | 3.2.1 |
| Verification - How To - Individual | 13(L) | 3.2.1 |
| Verification - How To - Organization | 13(L) | 3.2.1 |
| Verification - How To - Organization that is a Trust or Partnership or Association | 13(L) | 3.2.1 |
| Verification - How To - Organization - Additional Information | 13(L) | 3.2.1 |
| Verification - Client and Third Party in Canada | 13(R) | 3.2.1 |
| Verification - Attestation | 13(R) | 3.2.1 |
| Client Identification and Verification Records | 13(R) | 3.3 |
| Records - Client Identification and Verification | 13(R) | 3.3 |
| Client - identification and verification - Records  | 13(R) | 3.3 |
| Identification and verification of client - Keeping records | 13(R) | 3.3 |
| Identification and verification of client - Retaining Records | 13(R) | 3.3 |
| Records - identification and verification of client | 13(R) | 3.3 |
| Retaining Records - client identification and verification  | 13(R) | 3.3 |
| Verification and identification of client - Records | 13(R) | 3.3 |
| Identification and Verification - Withdrawal Obligations | 13(R) | 3.4 |
| Withdrawal Obligations - Identification and Verification | 13(R) | 3.4 |
| Client - identification and verification - withdrawal obligations | 13(R) | 3.4 |
| Identification and verification of client - Withdrawal obligations  | 13(R) | 3.4 |
| Verification and identification of client - withdrawal obligations | 13(R) | 3.4 |
| Withdrawal of services - client identification and verification | 13(R) | 3.4 |
| Competence | 15-17 | 1-2 |
| Competence - Required Standard - Rules 3.1-1-3.1-2 and Commentary and Rule 3.7-7 | 15(L-R) | 1 |
| Rules 3.1-1-3.1-2 and Commentary and Rule 3.7-7 - Competence - Required Standard | 15(L-R) | 1 |
| Required Standard - Competence - Rules 3.1-1-3.1-2 and Commentary and Rule 3.7-7  | 15(L-R) | 1 |
| Competent Lawyer - Definition | 15(L-R) | 1 |
| Minimum Standards for a competent lawyer | 15(L-R) | 1 |
| Standard of Competence -Minimum Standards list | 15(L-R) | 1 |
| Knowledge - Standard of competence - Failure - discipline  | 15(L-R) | 1 |
| Competence - Standards in s.41 of LSA | 15(L) | Intro |
| Competent Lawyer - Standard | 15(L) | 1 |
| Competence - duty of - general  | 15(L)  | 1 |
| Competence - duty of - requirement | 15(L) | 1 |
| Competent Lawyer -Minimum Standards list | 15(L) | 1 |
| Duty - Standard of Competence -Minimum Standards list | 15(L) | 1 |
| Six Areas of Competence | 15(L) | 1 |
| Competence - Six Areas | 15(L) | 1 |
| Knowledge - Standard of competence - Competent Lawyer | 15(R) | 1.1 |
| Standard of competence - Competent Lawyer - Knowledge | 15(R) | 1.1 |
| Competent Lawyer - Standard of competence - Knowledge | 15(R) | 1.1 |
| Competence - duty of - knowledge - client’s matter | 15(R) | 1.1 |
| Competence - Duty of - Knowledge - Legal Principles | 15(R) | 1.1 |
| Competence - duty of - knowledge - substantive law | 15(R) | 1.1 |
| Duty - Competence - knowledge - client’s matter | 15(R) | 1.1 |
| Duty - Competence - knowledge - Legal Principles | 15(R) | 1.1 |
| Duty - Competence - knowledge - Substantive Law | 15(R) | 1.1 |
| General Legal knowledge - Lawyer Competence  | 15(R) | 1.1 |
| Knowledge - duty of competence - client’s matter | 15(R) | 1.1 |
| Lawyer Competence - knowledge - General Legal knowledge | 15(R) | 1.1 |
| Lawyer Competence - knowledge - Legal Principles | 15(R) | 1.1 |
| Lawyer Competence - knowledge - Substantive Law | 15(R) | 1.1 |
| Competence - duty of - skills | 15(R) -16(L) | 1.2 |
| Duty - competence -skills | 15(R) -16(L) | 1.2 |
| Lawyer Competence - duty of - skills | 15(R) -16(L) | 1.2 |
| Skills - duty of competence | 15(R) -16(L) | 1.2 |
| Lawyer Skills - Examples | 15(R)-16(L) | 1.2 |
| Skills - Lawyers - Examples | 15(R)-16(L) | 1.2 |
| Client Service and Communication - Lawyer Competence | 16(L-R) | 1.4 |
| Competence - Client Service and Communication | 16(L-R) | 1.4 |
| Lawyer Duty - Client Service and Communication | 16(L-R) | 1.4 |
| Duty - Client Service and Communication | 16(L-R) | 1.4 |
| Competence - Client Service and Communication | 16(L-R) | 1.4 |
| Client Complaints | 16(L-R) | 1.4 |
| Complaints - Clients | 16(L-R) | 1.4 |
| Client Expectations - Lawyer | 16(L-R) | 1.4 |
| Communications Duties - Client service | 16(L-R) | 1.4 |
| Competence - duty of judgment | 16(L) | 1.3 |
| Duty - competence - judgment | 16(L) | 1.3 |
| Judgment - Component competencies | 16(L) | 1.3 |
| Judgment - duty of competence  | 16(L) | 1.3 |
| Lawyer Competence - duty of judgment | 16(L) | 1.3 |
| Lawyer Competence - Intellectual Capacity | 16(L) | 1.3 |
| Competence - Intellectual Capacity | 16(L) | 1.3 |
| Intellectual Capacity - Competence - Lawyer | 16(L) | 1.3 |
| Lawyer Competence - Deliberation | 16(L) | 1.3 |
| Deliberation - Competence - Lawyer | 16(L) | 1.3 |
| Competence - Deliberation | 16(L) | 1.3 |
| Deliberation - Competence - Lawyer | 16(L) | 1.3 |
| Lawyer Competence - Judgment | 16(L) | 1.3 |
| Competence - Judgment | 16(L) | 1.3 |
| Judgment - Competence - Lawyer | 16(L) | 1.3 |
| Instructions - client service - duty of competence | 16(L) | 1.4 |
| Client Instructions - New or Different | 16(R) | 1.4 |
| Client - Instruction  | 16(R) | 1.4 |
| Instruction - Client | 16(R) | 1.4 |
| Client - managing client expectations - duty of competence | 16(R) | 1.4 |
| Client - retainer - communications | 16(R) | 1.4 |
| Client service - Communications Duties | 16(R) | 1.4 |
| Communication - client - client does not intend to follow lawyer’s advice | 16(R) | 1.4 |
| Instructions - where lawyer cannot follow client’s instructions | 16(R) | 1.4 |
| Retainer - client service - explaining to client | 16(R) | 1.4 |
| Retainer - communications | 16(R) | 1.4 |
| Retainer - explaining to client - client service | 16(R) | 1.4 |
| Practice Management – staff, time, finances, client information | 16(R) | 1.5 |
| Duty - Practice Management | 16(R) | 1.5 |
| Competence - Practice Management | 16(R) | 1.5 |
| Lawyer Competence - Practice Management | 16(R) | 1.5 |
| Competent Practice Management - Requirements | 16(R) | 1.5 |
| Competence - duty of - practice management | 16(R) | 1.5 |
| Duty - competence - practice management | 16(R) | 1.5 |
| Practice management - Competence | 16(R) | 1.5 |
| Practice management - duty of competence | 16(R) | 1.5 |
| Competence - duty of - Quality of Service  | 17(L-R) | 2 |
| Duty - competence - quality of service | 17(L-R) | 2 |
| Duty - quality of service to client | 17(L-R) | 2 |
| Quality of Service to Client - Duty  | 17(L-R) | 2 |
| Quality of Service - Rule 3.2-1 and Commentary - Competence | 17(L-R) | 2 |
| Rule 3.2-1 and Commentary - Quality of Service  | 17(L-R) | 2 |
| Competence - Quality of Service - Rule 3.2-1 and Commentary | 17(L-R) | 2 |
| Competence - duty of - professional development | 17(L) | 1.6 |
| Competence - Professional development | 17(L) | 1.6 |
| Duty - Competence - Professional development | 17(L) | 1.6 |
| Lawyer - Professional development - annual requirements – By-Law 6.1 | 17(L) | 1.6 |
| Professional development - annual requirements - Lawyer  | 17(L) | 1.6 |
| Professional development - annual requirements | 17(L) | 1.6 |
| Professional Development - Competence - Adapting to Change | 17(L) | 1.6 |
| Adapting to Change - Competence - Professional Development | 17(L) | 1.6 |
| Competence - Adapting to Change - Professional Development | 17(L) | 1.6 |
| By-Law 6.1 – professional development requirements  | 17(L) | 1.6 |
| Confidentiality | 19-23 | 1-6.2 |
| Duty of Confidentiality (Requirements) - Rule 3.3-1 and Commentary | 19(L-R) | 2 |
| Rule 3.3-1 and Commentary - Duty of Confidentiality (Requirements) | 19(L-R) | 2 |
| Confidentiality - Rule 3.3-1 and Commentary - Duty of Confidentiality (Requirements) | 19(L-R) | 2 |
| Confidentiality - Duty - Rule 3.3-1  | 19(L-R) | 2 |
| Privileged communication - duty to protect | 19(L-R) | 2 |
| Lawyer Duty - Confidentiality and Loyalty | 19(L) | Intro |
| Confidentiality and Loyalty - Lawyer Duty | 19(L) | Intro |
| Confidentiality vs Privilege - Rule 3.3-1 and Commentary | 19(L) | 1 |
| Rule 3.3-1 and Commentary - Confidentiality vs Privilege | 19(L) | 1 |
| Confidentiality - Rule 3.3-1 and Commentary - Confidentiality vs Privilege | 19(L) | 1 |
| Confidentiality - definition  | 19(L) | 1 |
| Confidentiality - vs. Privilege | 19(L) | 1 |
| Privilege - Definition | 19(L) | 1 |
| Privileged Information - Definition | 19(L) | 1 |
| Duty - Client - Privilege | 19(L) | 1 |
| Lawyer - client privilege - evidentiary rule - vs. confidentiality | 19(L) | 1 |
| Privilege - evidentiary rule - vs. confidentiality | 19(L) | 1 |
| Solicitor - client privilege - evidentiary rule - vs. confidentiality  | 19(L) | 1 |
| Confidentiality - scope of duty (not privilege) | 19(L)-20(L) | 1-2.3 |
| Duty - confidentiality SEE: Confidentiality | 19(L)-20(L) | 1-2.3 |
| Scope of duty - confidentiality  | 19(L)-20(L) | 1-2.3 |
| Duty - client - confidentiality  SEE: Confidentiality  | 19(L)-20(L) | 2-2.3  |
| Duty - client - confidentiality  SEE: Confidentiality  | 19(L)-20(L) | 2-2.3  |
| Duty to Disclose Confidential Information - Confidentiality | 19(R) | 2 |
| Confidential Information - Duty to Disclose - Confidentiality | 19(R) | 2 |
| Confidentiality - Duty to Disclose Confidential Information | 19(R) | 2 |
| Confidentiality - information that must be protected | 19(R) | 2.1 |
| Information that must be protected - confidentiality  | 19(R) | 2.1 |
| Confidentiality - when duty arises (first contact) | 19(R) | 2.2 |
| Confidentiality - duration of duty (perpetual) | 19(R)-20(L) | 2.2 |
| Duration - duty of confidentiality (perpetual) | 19(R)-20(L) | 2.2 |
| Protection of confidential information - when duty arises and duration of duty  | 19(R)-20(L) | 2.2 |
| Disclosure - confidential information SEE: Confidentiality - disclosure  | 20(L-R) | 3-4  |
| Justified or permitted disclosure of confidential information | 20(L-R) | 4 |
| Disclosure of Confidential Information - Justified or Permitted Disclosure | 20(L-R) | 4 |
| Confidentiality - Disclosure of Confidential Information - Justified or Permitted Disclosure | 20(L-R) | 4 |
| Confidentiality - duty owed by all members of firm to all firm clients  | 20(L) | 2.3 |
| Confidentiality - duty owed to every client  | 20(L) | 2.3 |
| Confidentiality - duty to all clients of firm - owed by all firm members | 20(L) | 2.3 |
| Firm members - duty of confidentiality - owed to all clients | 20(L) | 2.3 |
| Law firm - confidentiality - duty to all clients | 20(L) | 2.3 |
| Confidential information - Disclosure - with client authority | 20(L) | 3 |
| Confidentiality - disclosure - with client authority (r. 3.3-1) | 20(L) | 3 |
| Disclosure - confidential information - with client authority | 20(L) | 3 |
| Permitted disclosure of confidential info - with client authority (r. 3.3-1) | 20(L) | 3 |
| Disclosure with Client Authority - Rule 3.3-1 and Commentary - Confidentiality | 20(L) | 3 |
| Confidentiality - Rule 3.3-1 and Commentary - Disclosure with Client Authority | 20(L) | 3 |
| Confidentiality - Disclosure with Client Authority - Rule 3.3-1 and Commentary | 20(L) | 3 |
| Disclosure - confidential information - without client authority - justified or permitted  | 20(L)-22(L) | 4-4.6 |
| Disclosure (Permitted) of confidential info SEE ALSO: Confidentiality - disclosure - permitted disclosure | 20(L)-22(L) | 4-4.6 |
| Permitted disclosure of confidential info SEE ALSO: Confidentiality - disclosure - permitted disclosure | 20(L)-22(L) | 4-4.6 |
| Confidentiality - disclosure - justified disclosure (required by law) | 20(R)-21(L) | 4.1 |
| Confidentiality - mandatory disclosure (without client consent) | 20(R)-21(L) | 4.1 |
| Disclosure - confidential information - Justified disclosure - legally required | 20(R)-21(L) | 4.1 |
| Disclosure - confidential information - mandatory - (without client authority) (r. 3.3-1.1) | 20(R)-21(L) | 4.1 |
| Disclosure (Justified) of confidential info - required by law SEE ALSO: Confidentiality - disclosure - justified disclosure | 20(R)-21(L) | 4.1  |
| Duty - disclose confidential information - (where required by law) (r. 3.3-1.1) | 20(R)-21(L) | 4.1 |
| Justified disclosure of confidential info - required by law SEE ALSO: Confidentiality - disclosure - justified disclosure | 20(R)-21(L) | 4.1  |
| Justified disclosure of confidential info - required by law SEE ALSO: Confidentiality - disclosure - justified disclosure | 20(R)-21(L) | 4.1  |
| Legally required disclosure, justified (r. 3.3-1.1) | 20(R)-21(L) | 4.1 |
| Mandatory disclosure - confidentiality | 20(R)-21(L) | 4.1 |
| Legally Required Disclosure - Justified - Rule 3.3-1.1 | 20(R)-21(L) | 4.1 |
| Rule 3.3-1.1 - Legally Required Disclosure - Justified  | 20(R)-21(L) | 4.1 |
| Confidentiality - Rule 3.3-1.1 - Legally Required Disclosure - Justified  | 20(R)-21(L) | 4.1 |
| Confidentiality - Legally Required Disclosure - Justified - Rule 3.3-1.1 | 20(R)-21(L) | 4.1 |
| Confidentiality - disclosure - permitted disclosure - to prevent death or serious bodily harm - Rule 3.3-3 and Commentary | 21(L-R) | 4.2 |
| Disclosure - confidential information - permitted disclosure - to prevent death or serious bodily harm - Rule 3.3-3 and Commentary | 21(L-R) | 4.2 |
| Permitted disclosure of confidential info - to prevent death or serious bodily harm - Rule 3.3-3 and Commentary | 21(L-R) | 4.2 |
| Prevention of death or serious harm - permitted disclosure of confidential info - Rule 3.3-3 and Commentary | 21(L-R) | 4.2 |
| Confidentiality - disclosure - permitted disclosure - to defend against allegations - Rule 3.3-4 | 21(R) | 4.3 |
| Defense against allegations - permitted disclosure of confidential info - Rule 3.3-4 | 21(R) | 4.3 |
| Defense against allegations - permitted disclosure of confidential info - Rule 3.3-4 | 21(R) | 4.3 |
| Disclosure - confidential information - permitted disclosure - to defend against allegations - Rule 3.3-4 | 21(R) | 4.3 |
| Permitted disclosure of confidential info - to defend against allegations - Rule 3.3-4 | 21(R) | 4.3 |
| Confidentiality - disclosure - permitted disclosure - to establish or collect fees - Rule 3.3-5 | 21(R) | 4.4 |
| Disclosure - confidential information - permitted disclosure - to establish or collect fees - Rule 3.3-5 | 21(R) | 4.4 |
| Fees - establish or collect fees - permitted disclosure of confidential info - Rule 3.3-5 | 21(R) | 4.4 |
| Permitted disclosure of confidential info - to establish or collect fees - Rule 3.3-5 | 21(R) | 4.4 |
| Confidentiality - organization as client - whistle blowing - Rules 3.2-8 and 3.3-3 and Commentaries | 22(L-R) | 5.1 |
| Confidentiality - organization as client - engages or intends to engage in illegal activity - Rules 3.2-8 and 3.3-3 and Commentaries | 22(L-R) | 5.1 |
| Confidentiality - whistleblowing (organizations) | 22(L-R) | 5.1 |
| Whistleblowing - duty of confidentiality | 22(L-R) | 5.1 |
| Security - court room facilities - disclosure of confidential info - Rule 5.6-3 and Commentary | 22(L-R)64(L) | 5.25.3 |
| Confidentiality - disclosure - permitted disclosure - to secure legal advice about lawyer’s proposed conduct - Rule 3.3-6 | 22(L) | 4.5 |
| Disclosure - confidential information - permitted disclosure - to secure legal advice about lawyer’s proposed conduct - Rule 3.3-6 | 22(L) | 4.5 |
| Legal advice about lawyer’s proposed conduct - permitted disclosure of confidential info - Rule 3.3-6 | 22(L) | 4.5 |
| Permitted disclosure of confidential info - to secure legal advice about lawyer’s proposed conduct - Rule 3.3-6 | 22(L) | 4.5 |
| Permitted Disclosure - To Detect and Resolve Conflicts of Interest - Rule 3.3-7 and Commentary | 22(L) | 4.6 |
| Confidentiality - Disclosure - Permitted Disclosure - To Detect and Resolve Conflicts of Interest - Rule 3.3-7 and Commentary | 22(L) | 4.6 |
| Disclosure - Confidential Information - Permitted Disclosure - To Detect and Resolve Conflicts of Interest - Rule 3.3-7 and Commentary | 22(L) | 4.6 |
| Confidentiality - Other obligations - generally | 22(L) | 5 |
| Client - organization - engages or intends to engage in illegal activity | 22(R) | 5.1 |
| Confidentiality - disclosure - security of court facilities - Rule 5.6-3 and Commentary | 22(R) | 5.2 |
| Disclosure - confidential information - security of court facilities - Rule 5.6-3 and Commentary | 22(R) | 5.2 |
| Mandatory disclosure of confidential info - for security of court facilities - Rule 5.6-3 and Commentary | 22(R) | 5.2 |
| Confidentiality - duty to report lawyer or paralegal misconduct - Rule 7.1-3 and Commentary | 22(R)-23(L) | 5.3 |
| Duty - report misconduct of lawyer, paralegal - confidential information - Rule 7.1-3 and Commentary | 22(R)-23(L) | 5.3 |
| Misconduct by lawyer or paralegal - duty to report - confidential information - Rule 7.1-3 and Commentary | 22(R)-23(L) | 5.3 |
| Confidentiality - prohibited use or disclosure of client information - Rule 3.3-1 | 23(L) | 6 |
| Duty - loyalty - prohibited use of client information - Rule 3.3-1 | 23(L) | 6 |
| Prohibition - client information - use or disclosure of - Rule 3.3-1 | 23(L) | 6 |
| Confidentiality - prohibited use or disclosure of client information - for literary works - Rule 3.3-1 | 23(L) | 6.1 |
| Confidentiality - literary works by the lawyer - Rule 3.3-1 | 23(L) | 6.1 |
| Literary works - confidentiality - Rule 3.3-1 | 23(L) | 6.1 |
| Disclosure - confidential information - prohibited uses (literary works, office gossip) - Rule 3.3-1 | 23(R) | 6.2 |
| Client - discussion of by lawyer - in office - Rule 3.3-1 | 23(R) | 6.2 |
| Confidentiality - discussion of client matters in office - Rule 3.3-1 | 23(R) | 6.2 |
| Confidentiality - discussion of client matters in public - Rule 3.3-1 | 23(R) | 6.2 |
| Confidentiality - office - sharing arrangements with other lawyers - Rule 3.3-1 | 23(R) | 6.2 |
| Discussion of client matters in public - Rule 3.3-1 | 23(R) | 6.2 |
| Lawyer - office - sharing arrangements with other lawyers - confidentiality - Rule 3.3-1 | 23(R) | 6.2 |
| Rule 3.3-1 - Discussions within Office and Public | 23(R) | 6.2 |
| Discussions within Office and Public - Rule 3.3-1 | 23(R) | 6.2 |
| Confidentiality - Discussions within Office and Public - Rule 3.3-1 | 23(R) | 6.2 |
| Disclosure - Confidential Information - Discussions within Office and Public - Rule 3.3-1 | 23(R) | 6.2 |
| Conflicts of Interest | 25-35 | 1-13 |
| Confidentiality - duty to avoid conflict of interest from confidential information - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Conflict of interest - conflict from having confidential information - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Conflict of interest - Example Situations - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Conflict of interest - divided loyalties - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Conflict of interest - recognizing conflict - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Divided loyalties - conflict of interest - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Duty - avoid conflicts of interest - Rules 1.1-1 and 3.4-1 SEE: conflict of interest | 25(L-R) | 1 |
| Duty - conflict of interest - Rules 1.1-1 and 3.4-1 SEE: conflict of interest | 25(L-R) | 1 |
| Loyalty - divided - conflict of interest | 25(L-R) | 1 |
| Recognizing conflict of interest - Rules 1.1-1 and 3.4-1 | 25(L-R) | 1 |
| Rules 1.1-1 and 3.4-1 - Recognizing Conflicts of Interests | 25(L-R) | 1 |
| Conflicts of Interest - Definition | 25(L)25(R) | Intro2 |
| Conflict of Interest - Rules 1.1-1 and 3.4-1 - Definition | 25(R) | 2 |
| Avoiding conflicts of interest - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Conflict of interest - avoiding - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Conflict of interest - prospective clients - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Conflict of interest - third parties - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Obligations - third parties (conflicts of interest) - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Potential/prospective clients - conflict of interest - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Prospective client - screen for conflict of interest - Rule 3.4-1 and Commentary | 25(R)34(R) | 311 |
| Screening - for conflicts of interest - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Third parties - conflicts of interest - Rule 3.4-1 and Commentary | 25(R) | 3 |
| Client - informed consent to conflict of interest Rules 1.1-1 and 3.4-2 and Commentary | 26(L-R) | 4.1 |
| Confidentiality - conflict of interest - cannot disclose confidential information - Rule 3.4-1 and Commentary  | 26(L-R) | 4.1 |
| Conflict of interest - consent - cannot disclose confidential information - Rule 3.4-1 and Commentary  | 26(L-R) | 4.1 |
| Conflict of interest - consent by client - Rule 3.4-1 and Commentary | 26(L-R) | 4.1 |
| Conflict of Interest - informed consent by client - cannot disclose confidential information - Rule 3.4-1 and Commentary | 26(L-R) | 4.1 |
| Conflict of Interest - informed consent by client (- Rule 3.4-1 and Commentary | 26(L-R) | 4.1 |
| Consent - conflict of interest - Rule 3.4-1 and Commentary SEE: Conflicts of Interest | 26(L-R)25(L-R) | 4.11 |
| Disclosure - conflict of interest - cannot disclose confidential information - Rule 3.4-1 and Commentary | 26(L-R) | 4.1 |
| Required Disclosure - Conflicts of Interests | 26(L-R) | 4.1 |
| Conflicts of Interests - Required Disclosure | 26(L-R) | 4.1 |
| Conflict of interest - dealing with | 26(L) | 4 |
| Conflict of interest - managing conflict | 26(L) | 4 |
| Managing conflicts of interest | 26(L) | 4 |
| Independent Legal Advice - Conflicts of Interests | 26(L) | 4 |
| Conflicts of Interests - Independent Legal Advice | 26(L) | 4 |
| Continued Representation - Conflicts of Interests | 26(L) | 4 |
| Conflicts of Interests - Continued Representation | 26(L) | 4 |
| Disclosure - Definition - Conflicts of Interests | 26(L) | 4.1 |
| Conflicts of Interests - Disclosure - Definition | 26(L) | 4.1 |
| Conflict of interest - consent by client - independent legal advice may be required | 26(R) | 4.2 |
| Conflict of interest - independent legal advice may be required - consent  | 26(R) | 4.2 |
| Conflict of Interest - informed consent by client - independent legal advice may be required  | 26(R) | 4.2 |
| Consent - conflict of interest - Independent legal advice and/or representation | 26(R) | 4.2 |
| Independent legal advice - representation - conflict of interest - consent | 26(R) | 4.2 |
| Informed Consent - Independent Legal Advice - Conflicts of Interests | 26(R) | 4.2 |
| Independent Legal Advice - Informed Consent - Conflicts of Interests | 26(R) | 4.2 |
| Conflicts of Interests - Informed Consent - Independent Legal Advice | 26(R) | 4.2 |
| Client - opponent of current client - impermissible to represent - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Conflict of interest - consent - exception - cannot act even with clients’ consent - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Conflict of Interest - consent may be insufficient - Rules 3.4-1 and 3.4-3 and 3.7-7  | 26(R) | 4.3 |
| Conflict of interest - mandatory withdrawal or refusal to act - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Conflict of interest - refusal to act - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Conflict of interest - representing opponents in dispute - impermissible - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Opponents of current clients, representing - conflict of interest - impermissible - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Refuse to act - conflict of interest - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Representing more than one side in a dispute (impermissible) - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Withdrawal of services - conflict of interest - Rules 3.4-1 and 3.4-3 and 3.7-7 | 26(R) | 4.3 |
| Current Client Conflicts - Rules 3.4-1-3.4-3 and Commentaries - Conflicts of Interest | 26(R)-27(L) | 5 |
| Conflicts of Interest - Current Client Conflicts - Rules 3.4-1-3.4-3 and Commentaries | 26(R)-27(L) | 5 |
| Rules 3.4-1-3.4-3 and Commentaries - Current Client Conflicts - Conflicts of Interest | 26(R)-27(L) | 5 |
| Conflicts of Interest - Current Client Conflicts - Rules 3.4-1-3.4-3 and Commentaries - Disputes between Clients | 26(R)-27(L) | 5.1 |
| Disputes between Clients - Current Client Conflicts - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 26(R)-27(L) | 5.1 |
| Current Client Conflicts - Disputes between Clients - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 26(R)-27(L) | 5.1 |
| Acting against former client - Rules 3.4-10-11 and Commentary SEE ALSO: Conflict of Interest | 27(L-R)25(L-R) | 6-6.1-6.21 |
| Client - Acting against former client - Rules 3.4-10-11 and Commentary SEE ALSO: Conflict of Interest | 27(L-R)25(L-R) | 6-6.1-6.21 |
| Law firm - acting against former clients - Rules 3.4-10-3.4-11 and Commentaries | 27(L-R) | 6 |
| Former clients - acting against - Rules 3.4-10-11 and CommentarySEE ALSO: Conflict of Interest | 27(L-R)25(L-R) | 6-6.1-6.21 |
| Conflicts of Interest - Prohibition - acting against former client (without consent) - Rules 3.4-10-11 and Commentary SEE: Former Clients  | 27(L-R)27(L-R) | 6-6.26-6.2 |
| Conflict of interest - representing opponents of former clients - Rules 3.4-10-11 and Commentary | 27(L-R) | 6-6.2 |
| Acting against former client - prohibition for same or related matters, unless client consents - Rules 3.4-10-11 and Commentary | 27(L-R) | 6-6.1 |
| Same or related matter - acting against former client - Rules 3.4-10-11 and Commentary | 27(L-R) | 6-6.1 |
| Former clients - acting against - same or related matter (OK with consent) - Rules 3.4-10-11 and Commentary | 27(L-R) | 6-6.1 |
| Client - Acting against former client - Rules 3.4-10-3.4-11 and Commentaries | 27(L-R) | 6 |
| Conflicts of Interest - Current Client Conflicts - Rules 3.4-1-3.4-3 and Commentaries - Acting Directly Adverse to Current Client Interests – BRIGHT LINE TEST (Canadian National Railway Co v. McKercher LLP) | 27(L) | 5.2 |
| Acting Directly Adverse to Current Client Interests - Current Client Conflicts - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 27(L) | 5.2 |
| BRIGHT-LINE TEST - Acting Directly Adverse to Current Client Interests - Current Client Conflicts - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 27(L) | 5.2 |
| Current Client Conflicts - Acting Directly Adverse to Current Client Interests - BRIGHT-LINE TEST (Canadian National Railway Co v. McKercher LLP) - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 27(L) | 5.2 |
| Canadian National Railway Co v. McKercher LLP - BRIGHT-LINE TEST - Acting Directly Adverse to Current Client Interests - Current Client Conflicts - Conflicts of Interest - Rules 3.4-1-3.4-3 and Commentaries | 27(L) | 5.2 |
| Conflict of interest - acting against former clients - Rules 3.4-10-11 and Commentary | 27(R) | 6.1-6.2 |
| Conflict of interest - representing opponents of former clients - consent - Rules 3.4-10-11 and Commentary | 27(R) | 6.1-6.2 |
| Opponents of former clients, representing - conflict of interest - consent - Rules 3.4-10-11 and Commentary  | 27(R) | 6.1-6.2 |
| Representing opponents of former clients (informed consent) | 27(R) | 6.1-6.2 |
| Confidentiality - acting against former clients - Rules 3.4-10-11 and Commentary | 27(R) | 6.1-6.2 |
| Former clients - acting against - circumstances where permissible | 27(R) | 6.1-6.2 |
| Representing opponents of former clients - prohibited, without consent (r. 3.4-10-11) | 27(R) | 6.1-6.2 |
| Conflict of interest - former clients - acting against - same or related matters - Rules 3.4-10-11 and Commentary | 27(R) | 6-6.1 |
| Acting in the same or a related matter - against former client - prohibited unless client consents - Rules 3.4-10-11 and Commentary | 27(R) | 6.1 |
| Acting against former client - new matter - Rules 3.4-10-11 and Commentary | 27(R) | 6.2 |
| Acting in new matter - against former client - Rules 3.4-10-11 and Commentary | 27(R) | 6.2 |
| Conflict of interest - former clients - acting against - new matters - Rules 3.4-10-11 and Commentary | 27(R) | 6.2  |
| Former clients - acting against - new matters - Rules 3.4-10-11 and Commentary | 27(R) | 6.2  |
| New matter - acting against former client (- Rules 3.4-10-11 and Commentary | 27(R) | 6.2 |
| Representing joint clients - same side of dispute or contentious matter - Rules 3.4-5 and 3.4-7 and 3.4-9 and 3.7-7 and 3.7-9, and commentaries | 27(R)-28(L-R) | 7-7.1-7.2 |
| Conflict of interest - joint retainer - when lawyer can act - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries SEE: Joint Retainer  | 27(R)-28(L-R)10(R)-11(L) | 7-7.12.1 |
| Joint Retainer - conflict of interest - when lawyer can act - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L-R) | 7-7.1 |
| Joint Retainer - when lawyer can act - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L-R) | 7-7.1 |
| Joint retainer - must advise clients of - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries SEE: Joint Retainer | 27(R)-28(L-R)10(R)-11(L) | 7-7.12.1 |
| Joint retainer - representing - same side or both sides of non-contentious matter - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L-R) | 7-7.1 |
| Non-contentious matter - joint clients - representation - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L-R) | 7-7.1 |
| Joint Clients - same side or both sides of non-contentious matter – Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L) | 7-7.1 |
| Representing joint clients - same side or both sides of non-contentious matter - Rules 3.4-5 and 3.4-7 and 3.4-9 and commentaries | 27(R)-28(L-R) | 7-7.1 |
| Joint Retainers - General Rules - Conflicts of Interest | 27(R)-28(L) | 7 |
| Joint Retainers - General Rules - Conflicts of Interest - Rules 3.4-5-3.4-9 and Commentaries | 27(R)-28(L) | 7 |
| Joint Clients - General Rules - Conflicts of Interest | 27(R)-28(L) | 7 |
| Rules 3.4-5-3.4-9 and Commentaries - Joint Retainers - General Rules - Conflicts of Interest | 27(R)-28(L) | 7 |
| Conflicts of Interest - Joint Retainers - General Rules - Rules 3.4-5-3.4-9 and Commentaries | 27(R)-28(L) | 7 |
| Client - joint retainer - continuing relationship with one of the clients - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Client - joint retainer - old client and new client - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Conflict of interest - joint retainer - continuing relationship with one client - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Conflict of interest - joint retainer - informed consent - Rules 3.4-5 and Rules 3.4-7 | 28(L-R) | 7.1 |
| Consent - joint retainers - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Informed consent - joint retainers - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Joint retainer - consent requirement - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Joint retainer - continuing relationship with one of the clients - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Joint retainer - old client and new client - Rules 3.4-5 and 3.4-7 | 28(L-R) | 7.1 |
| Conflict of interest - joint retainer - contentious issue - Rules 3.4-9 and 3.7-7 and 3.7-9 | 28(R) | 7.2 |
| Conflict of Interest - joint retainer - withdrawal (contentious issue) - Rules 3.4-9 and 3.7-7 and 3.7-9 | 28(R) | 7.2 |
| Contentious Issues - Joint Retainer - withdrawal - Rules 3.4-9 and 3.7-7 and 3.7-9 | 28(R) | 7.2 |
| Joint retainer - contentious issues (withdraw) - Rules 3.4-9 and 3.7-7 and 3.7-9 | 28(R) | 7.2 |
| Withdrawal of services - joint retainer - contentious issue - Rules 3.4-9 and 3.7-7 and 3.7-9 | 28(R) | 7.2 |
| Conflicts of interest - estate and real estate matters | 28(R) | 8 |
| Conflict of interest - joint retainer - estate and real estate matters | 28(R) | 8 |
| Estate and real estate matters - joint retainer | 28(R) | 8 |
| Joint retainer - estate and real estate matters | 28(R) | 8 |
| Conflict of Interest - joint retainer - estate and real estate matters SEE also: Joint Retainer | 28(R)-30(L)27(R)-28(L-R) | 8-8.37-7.2 |
| Acting for borrower and lender - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Acting for borrower and lender - where lender in business of lending money - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Acting for borrower and lender, when permitted - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Borrower and lender - acting for both - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Borrower and lender - acting for both - where lender in business of lending money - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Conflict of interest - acting for borrower and lender - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Conflict of interest - joint retainer - acting for borrower and lender - where lender in business of lending money (r. 3.4-12 - 3.4-16 and commentaries) | 29(L-R) | 8.2 |
| Joint retainer - acting for borrower and - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Joint retainer - acting for borrower and lender - where lender in business of lending money - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Loan transaction - acting for borrower and lender - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Loan transaction - acting for borrower and lender - where lender in business of lending money - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Mortgage transaction - acting for borrower and lender - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Mortgage transaction - acting for borrower and lender - where lender in business of lending money - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Real estate matters - acting for borrowers and lenders - Rules 3.4-12 and 3.4-16 and commentaries | 29(L-R) | 8.2 |
| Acting for spouses or partners in prep of joint spousal wills - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Conflict of interest - joint retainer - joint wills for spouses or partners - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Conflict of interest - joint wills for spouses or partners - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Joint retainer - joint wills for spouses or partners - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Joint wills for spouses or partners - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Spouse, partner definition - Substitute Decisions Act - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Spouses or partners - acting for - joint wills - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Substitute Decisions Act 1992 - definition of spouse or partner - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Will - joint retainers - Rules 3.4-5 and Commentary | 29(L) | 8.1 |
| Conflict of Interest - Pro Bono Law Ontario - Rules 3.4-16.2-3.4-16.6, and commentary | 30(L-R) | 9 |
| Conflict of Interest - short term or limited legal service - Rules 3.4-16.2-3.4-16.6, and commentary | 30(L-R) | 9 |
| Limited or short term legal services - conflict of interest - Rules 3.4-16.2-3.4-16.6, and commentary | 30(L-R) | 9 |
| Pro Bono Law Ontario - conflict of interest - Rules 3.4-16.2-3.4-16.6, and commentary | 30(L-R) | 9 |
| Short term or limited legal services - conflict of interest - Rules 3.4-16.2-3.4-16.6, and commentary | 30(L-R) | 9 |
| Land Registration Reform Act - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Acting for transferor (vendor) & transferee (purchaser) - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Conflict of Interest - Acting for transferor and transferee - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Conflict of Interest - joint retainer - acting for transferor and transferee - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Joint retainer - acting for transferor (vendor) & transferee (purchaser) - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Transferor & transferee of real estate - acting for - Rules 3.4-16.7 -3.4-16.9 | 30(L) | 8.3 |
| Articling student - transfer between firms - conflict of interest - Rules 3.4-17-20-21-22-23 and commentaries | 30(R)-31(L-R) | 10-10.3 |
| Conflict of interest - lawyer transferring - Rules 3.4-17-20-21-22-23 and commentaries | 30(R)-31(L-R) | 10- 10.3 |
| Lawyer - transfer between firms - conflict of interest - Rules 3.4-17-20-21-22-23 and commentaries | 30(R)-31(L-R) | 10- 10.3 |
| Confidentiality - conflict of interest - transfer between law firms - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Confidentiality - transfer between law firms - conflict of interest - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Conflict of interest - articling student transferring firms (r. 3.4-17-26 and commentaries) | 30(R)-31(L) | 10 |
| Conflict of interest - transfer between law firms - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Government lawyer - transfer between gov’t departments - conflict of interest - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Transfer between law firms - confidential info - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Transfer between law firms - conflict of interest - Rules 3.4-17-3.4-23 and commentaries | 30(R)-31(L) | 10 |
| Conflict of interest - lawyer transferring law firms - law firm disqualification - Rule 3.4-20 | 31(L-R)  | 10.1 |
| Conflict of interest - transfer between law firms - law firm disqualification - Rule 3.4-20 | 31(L-R) | 10.1 |
| Conflict of interest - transfer between law firms - new firm can act - Rule 3.4-20 | 31(L-R) | 10.1 |
| Disqualification - law firm - transfer - Rule 3.4-20 | 31(L-R) | 10.1 |
| Transfer between law firms - disqualification of new firm - Rule 3.4-20 | 31(L-R) | 10.1 |
| Transfer between law firms - when new firm can act - Rule 3.4-20 | 31(L-R) | 10.1 |
| Articling student - transfer between firms - disqualification - Rule 3.4-20 | 31(L-R) | 10.1 |
| Articling student - transfer between firms - when student can act - Rule 3.4-20 | 31(L-R) | 10.1 |
| Conflicts of Interest - Transferring Lawyer Disqualification - Rules 3.4-21-3.4-22 | 31(R) | 10.2 |
| Transferring Lawyer Disqualification - Rules 3.4-21-3.4-22 - Conflicts of Interest | 31(R) | 10.2 |
| Conflicts of Interest - Lawyer Due Diligence for Non-Lawyer Staff - Rules 3.4-23 | 31(R) | 10.3 |
| Lawyer Due Diligence for Non-Lawyer Staff - Rules 3.4-23 - Conflicts of Interest - | 31(R) | 10.3 |
| Client - doing business with client - conflict of interest - Rules 3.4-28-3.4-36 | 31(R) | 11 |
| Doing Business with a client - Rules 3.4-28-3.4-36 | 31(R) | 11 |
| Transactions with clients | 31(R) | 11 |
| Conflict of interest - business with client - Rules 3.4-28-3.4-36 | 31(R)-33(L) | 11-11.4 |
| Doing business with client - Conflict of interest - Rules 3.4-28-3.4-36 | 31(R)-33(L) | 11-11.4 |
| Clients - permissible transactions | 32(L) | 11.3 |
| Prohibition - borrowing from clients - Rules 3.4-31 and 3.4-33 | 31(R) | 11.1 |
| Borrowing from client - Rules 3.4-27 and 3.4-28.1 | 31(R) | 11.1 |
| Conflict of interest - borrowing from client - Rules 3.4-27 and 3.4-28.1 | 31(R) | 11.1 |
| Conflict of interest - borrowing from client exceptions - Rules 3.4-27 and 3.4-28.1 | 32(R) | 11.1 |
| Regulated lender - definition | 32(R) | 11.1 |
| Rules 3.4-27 and 3.4-28.1 - borrowing from client | 32(R)-33(L) | 11.1 |
| Related Person - Definition - Conflicts of Interest | 31(R) | 11.1 |
| Conflicts of Interest - Related Person - Definition | 31(R) | 11.1 |
| Conflicts of Interest - indirect transactions – prohibited | 32(L) | 11.2 |
| Indirect transactions - conflict of interest - prohibited | 32(L) | 11.2 |
| Prohibited - indirect transactions - conflict of interest | 32(L) | 11.2 |
| Conflicts of Interest - permissible transactions | 32(L) | 11.3 |
| Permissible transactions | 32(L) | 11.3 |
| Independent legal advice requirement - conflicts of interest - permissible transactions | 32(L-R) | 11.3.1 |
| Conflicts of Interest - independent legal advice requirement | 32(L-R) | 11.3.1 |
| Indirectly - Definition - Mortgage or Loan Transactions - Rules 3.4-34-3.4-34.3 | 32(R) | 11.4 |
| Mortgage or Loan Transactions - Indirectly - Definition - Rules 3.4-34-3.4-34.3 | 32(R) | 11.4 |
| Client - lending to - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Conflict of interest - lending to client - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Conflict of interest - loan or mortgage transactions - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Conflict of interest - mortgage or loan transactions - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Conflict of interest - syndicated mortgages - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Lawyer - loan or mortgage transactions with client - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Loan or mortgage transaction - conflict of interest - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Mortgage or loan transaction - conflict of interest - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Syndicated mortgage - conflict of interest - Rules 3.4-34-3.4-34.3 | 32(R)-33(L) | 11.4 |
| Lending to client - Rules 3.4-34-3.4-34.3 | 33(L) | 11.4 |
| Acting for clients in transactions with clients - Rule 3.4-29, commentary | 33(L-R) | 11.5 |
| Client - lawyer acts for client in joint transaction  | 33(L-R) | 11.5 |
| Conflict of interest - lawyer acts for client in joint transaction  | 33(L-R) | 11.5 |
| Lawyer accepting payment for fees from client - conflict of interest | 33(R) | 11.6 |
| Conflict of interest - lawyer accepting payment for fees from client | 33(R) | 11.6 |
| Conflict of interest - guarantees by lawyer - prohibited; exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Conflict of interest - personal guarantees by lawyer - prohibited; exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Conflict of interest - security for debts - provided by lawyer - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Guarantees - by lawyers - prohibited - exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Lawyer - guarantees - prohibited - exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Lawyer - personal guarantees - prohibited - exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Lawyer - security for debts - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Personal guarantees - by lawyers - prohibited; exceptions - Rules 3.4-35-3.4-36 | 33(R) | 11.7 |
| Client - lawyer has personal relationship with - conflict of interest - Rule 3.4-1 | 33(R)-34(L) | 12.1 |
| Conflict of interest - personal relationships with client - Rule 3.4-1 | 33(R)-34(L) | 12.1 |
| Conflict of interest - sexual relationship with client - Rule 3.4-1 | 33(R)-34(L) | 12.1 |
| Personal relationships with client - conflict of interest - Rule 3.4-1 | 33(R)-34(L) | 12.1 |
| Sexual relationship with client - conflict of interest - Rule 3.4-1 | 33(R)-34(L) | 12.1 |
| Affiliation - conflict of interest - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Client - consent - where lawyer in affiliation - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Conflict of interest - affiliations - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Conflict of interest - joint services - affiliations - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Conflict of interest - multi-discipline practices/partnerships - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Consent - lawyer in affiliation - consent required - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Joint provision of services - affiliations - conflict of interest - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Multi-discipline practice - conflict of interest - Rules 3.4-11.1-3.4-11.3 and Commentary and 3.4-16.1 | 34(L) | 12.2 |
| Other Conflicts of Interest | 33(R)-35(R) | 12 |
| Conflict of interest - testamentary instruments - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Conflict of interest - wills - drafting lawyer retained to provide legal services to estate - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Conflict of interest - wills - lawyer prepares will and receives bequest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Conflict of interest - wills - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Lawyer - drafts will - receives bequest - conflict of interest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Lawyer - drafts will - retained to provide services to estate - conflicts of interest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Testamentary instrument - conflict of interest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Will - conflict of interest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Will - lawyer draft will - receives bequest - conflict of interest - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Will - lawyer draft will - retained to provide legal services to estate - Rule 3.4-37-3.4-38 | 34(R) | 12.4 |
| Conflict of interest - lawyers outside interests - Rules 7.3-7.4 | 34(R)  | 12.3  |
| Conflict of interest - public office - Rules 7.3-7.4 | 34(R) | 12.3  |
| Lawyer - outside interests - conflict of interest - Rules 7.3-7.4 | 34(R) | 12.3 |
| Lawyer - public office - conflict of interest - Rules 7.3-7.4 | 34(R) | 12.3 |
| Outside Interest - public office of lawyer - conflict of interest - Rules 7.3-7.4 | 34(R) | 12.3 |
| Public office - held by lawyer - outside interests of lawyers - conflict of interest - Rules 7.3-7.4 | 34(R) | 12.3 |
| Accused - assisting with release from custody - conflict of interest - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Conflict of interest - accused - assisting accused with release from custody - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Conflict of interest - assisting accused with release from custody - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Conflict of interest - judicial interim release of accused from custody - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Custody - assisting accused with release from - conflict of interest - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Judicial interim release of accused - conflict of interest - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Lawyer - assist accused with interim release from custody - conflict of interest - Rule 3.4-40-3.4-41 | 35(L) | 12.5 |
| Conflicts of Interest - Unrepresented Persons - Rule 7.2-9 | 35(R) | 12.6 |
| Rule 7.2-9 - Unrepresented Persons - Conflicts of Interest | 35(R) | 12.6 |
| Conflicts of Interest - Unrepresented Persons - Rule 7.2-9 - Conflicts of Interest | 35(R) | 12.6 |
| Conflict of interest - technology - checking system | 35(R) | 13 |
| Lawyer - new lawyer enters firm - conflicts check required  | 35(R) | 13 |
| Prospective client - conflict of interest - conflict checking system | 35(R) | 13 |
| Duty to Client | 37-42 | 1-3.3 |
| Client - lawyer as agent | 37(L-R) | 1 |
| Client - lawyer as fiduciary | 37(L-R) | 1 |
| Agent - lawyer - agent of client | 37(L-R) | 1 |
| Client - duty to client - fiduciary duty | 37(L-R) | 1 |
| Client - duty to client - loyalty | 37(L-R) | 1 |
| Duty - client - fiduciary duty  | 37(L-R)  | 1 |
| Duty - client - loyalty  | 37(L-R)  | 1 |
| Duty - fiduciary duty | 37(L-R) | 1 |
| Duty - loyalty | 37(L-R) | 1 |
| Duty - loyalty (fiduciary duty) to client | 37(L-R)  | 1 |
| Fiduciary - lawyer as | 37(L-R) | 1 |
| Fiduciary duty to client - lawyer  | 37(L-R) | 1 |
| Lawyer - duty to client - fiduciary | 37(L-R) | 1 |
| Lawyer - duty to client - loyalty | 37(L-R) | 1 |
| Lawyer - fiduciary duty  | 37(L-R) | 1 |
| Loyalty - duty of | 37(L-R) | 1 |
| Client - duty to client - summary | 37(L) | Intro |
| Duty - client - list of | 37(L) | Intro |
| Lawyer - duty to client - summary | 37(L) | Intro |
| Rules of Professional Conduct - duties to client - summary | 37(L) | Intro |
| Fiduciary - definition | 37(L) | 1 |
| Advising client - duty to client | 37(R) | 2 |
| Client - duty to client - when advising | 37(R) | 2 |
| Duty - client - when advising clients | 37(R) | 2 |
| Lawyer - duty to client - advising client | 37(R) | 2 |
| Candour and honesty - duty to client - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Client - duty to client - honesty and candour - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Duty - client - honesty and candour - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Duty - honesty and candour - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Honesty and candour - duty to client - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Lawyer - duty of honesty and candour - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Lawyer - duty to client - honesty and candour - Rule 3.2-2 and Commentary | 37(R) | 2.1 |
| Client - crime, dishonesty, fraud, illegal conduct - appropriate lawyerly instructions - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - dishonesty, fraud, crime, illegal conduct - appropriate lawyerly instructions - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - duty to client - client’s dishonesty, fraud, crime, illegal conduct - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - fraud, crime, dishonesty, illegal conduct - appropriate lawyerly instructions - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - illegal conduct, crime, dishonesty, fraud - appropriate lawyerly instructions - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - institution - client’s illegality - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Client - organization - client’s illegality - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Crime by client - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Dishonesty, fraud, etc. by client - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Duty - client - client’s dishonesty, fraud, crime, illegal conduct - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Duty - client’s dishonesty, fraud, crime, illegal conduct - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Duty - report up the ladder (unethical conduct) - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Fraud, dishonesty etc. by client - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Illegal conduct by client - lawyer’s duty (r. 3.2-7-8 and commentary) | 38(L-R) | 2.4 |
| Institutional client - client’s illegality - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Lawyer - duty re client’s dishonesty, fraud, illegal conduct - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Lawyer - duty to client - client’s dishonesty, fraud, illegal conduct - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| Organization - as client - client’s illegality - lawyer’s duty - Rules 3.2-7-3.2-8 and Commentaries | 38(L-R) | 2.4 |
| ADR & Settlement - duty to encourage - Rule 3.2-4 | 38(L) | 2.2 |
| Client - duty to client - encourage settlement or ADR - Rule 3.2-4 | 38(L) | 2.2 |
| Duty - client - encouraging settlement or ADR - Rule 3.2-4 | 38(L) | 2.2 |
| Duty - encourage settlement or ADR - Rule 3.2-4 | 38(L) | 2.2 |
| Duty - settlement or ADR - encourage - Rule 3.2-4 | 38(L) | 2.2 |
| Lawyer - duty to client - encourage settlement or ADR - Rule 3.2-4 | 38(L) | 2.2 |
| Lawyer - duty to encourage settlement or ADR - Rule 3.2-4 | 38(L) | 2.2 |
| Settlement & ADR - duty to encourage - Rule 3.2-4 | 38(L) | 2.2 |
| Complaint - regulatory authority - threaten proceedings - duty to client - Rule 3.2-5 | 38(L) | 2.3 |
| Criminal proceeding - threatening - Rule 3.2-5 | 38(L) | 2.3 |
| Duty - abstain from threatening criminal, quasi-criminal, regulatory proceedings - Rule 3.2-5 | 38(L) | 2.3 |
| Duty - client - threatening criminal, quasi-criminal, regulatory proceedings - Rule 3.2-5 | 38(L) | 2.3 |
| Duty - threaten criminal, quasi-criminal, regulatory proceedings - Rule 3.2-5 | 38(L) | 2.3 |
| Lawyer - duty to avoid threatening criminal, quasi-criminal, regulatory proceedings - Rule 3.2-5 | 38(L) | 2.3 |
| Lawyer - duty to client - threatening criminal, quasi-criminal, regulatory proceedings - Rule 3.2-5 | 38(L) | 2.3 |
| Quasi-criminal prosecution - threaten - Rule 3.2-5 | 38(L) | 2.3 |
| Authorized representative - individual lacking legal capacity - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - diminished capacity - lawyer’s duty - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - disability - lawyer’s duty - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - duty to client - client with diminished capacity - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - duty to client - minor client - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - individuals lacking legal capacity - authorized representatives - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - minor client - lawyer’s duty - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - vulnerable/disabled - authorized representatives - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Diminished capacity - client - lawyer’s duty - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Disability - Client - Generally - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Disability - duty to client under disability - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Duty - client - client with diminished capacity - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Duty - client - minor client - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Duty - client with diminished capacity - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Duty - diminished capacity client - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Duty - minor client - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Lawyer - duty to client - client with diminished capacity - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Lawyer - duty to client - minor client - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Legal capacity - individuals lacking - authorized representative - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Minor client - lawyer’s duty - Rule 3.2-9 and commentary | 38(R) | 2.5 |
| Client - under duress/undue influence/pressure | 38(R)-39(L) | 2.6 |
| Client - under duress/undue influence/pressure - client’s wishes | 38(R)-39(L) | 2.6 |
| Client - under duress/undue influence/pressure - vulnerability - validity of legal instruments - client’s wishes  | 38(R)-39(L) | 2.6 |
| Client - under duress/undue influence/pressure - vulnerability - validity of legal instruments - client’s wishes - voluntariness | 38(R)-39(L) | 2.6 |
| Duty - client under duress/undue influence/pressure  | 38(R)-39(L) | 2.6 |
| Duty - client under duress/undue influence/pressure - client’s wishes/instructions | 38(R)-39(L) | 2.6 |
| Duty - client under duress/undue influence/pressure - client’s wishes - voluntariness | 38(R)-39(L) | 2.6 |
| Lawyer - duty to client - client under duress/undue influence/pressure | 38(R)-39(L) | 2.6 |
| Lawyer - duty to client - client under duress/undue influence/pressure - client’s instructions/wishes | 38(R)-39(L) | 2.6 |
| Legal capacity - vulnerability - client under duress or undue influence or pressure - client’s wishes | 38(R)-39(L) | 2.6 |
| Vulnerability - client under duress or undue influence/pressure - voluntariness | 38(R)-39(L) | 2.6 |
| Client - duty to client - legal or medical reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Client - duty to client - medical or legal reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Duty - client - legal/medical reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Duty - client - medical/legal reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Duty - legal / medical reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Duty - medical / legal reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Lawyer - duty to client - medical / legal reports Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Legal-medical reports - duty to client Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Medical-legal reports - duty to client Rules 3.2-9.1 - 3.2-9.3 and commentary | 39(L) | 2.7 |
| Client - duty to client - conveyance of property - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Client - duty to client - title insurance - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Conveyance of property - lawyer’s duties - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Duty - client - conveyance of property - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Duty - client - title insurance - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Duty - conveyance of property - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Duty - title insurance - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| LawPRO - TitlePlus program - lawyer’s duty - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Lawyer - conveyance of property - duty - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Lawyer - duty to client - conveyance of property - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Lawyer - duty to client - title insurance - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Lawyer - title insurance - duty - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Title - minimize risk of conveyance - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Title insurance - duty to client - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| TitlePlus program - LawPRO - lawyer’s duty - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Transaction - minimize conveyance risks - lawyer’s duties - Rules 3.2-9.4-3.2-9.7 and Commentaries | 39(R) | 2.8 |
| Client - duty to client - mortgage transactions - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Client - lender where loan secured by mortgage on real property - lawyer’s duty - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Duty - client - mortgage - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Duty - reporting mortgage transactions - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Lawyer - duty to client - mortgage transactions - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Lawyer - duty to report on mortgage transactions - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Mortgage transaction - duty to client - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Reporting - mortgage transaction - lawyer’s duty - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Transaction - mortgage - duty to client - Rules 3.2-9.8-3.2-9.9 | 39(R) | 2.9 |
| Client - duty to client - report omission or error - Section 7.8 | 40(L) | 2.10  |
| Conflict of interest - error or omission by lawyer - Section 7.8 | 40(L) | 2.10 |
| Duty - disclose error or omission to professional liability insurer - Section 7.8 | 40(L) | 2.10 |
| Insurer - professional liability - duty to disclose errors, omissions - Section 7.8 | 40(L) | 2.10 |
| Professional liability - insurer - duty to report errors or omissions - Section 7.8 | 40(L) | 2.10 |
| Withdrawal of services - duty to withdraw due to lawyer’s error - Section 7.8 | 40(L) | 2.10 |
| Duty - error or omission - report - Section 7.8 | 40(L) | 2.10 |
| Duty - omissions - report - Section 7.8 | 40(L) | 2.10 |
| Duty - report errors or omissions - Section 7.8 | 40(L) | 2.10 |
| Errors or omissions - duties - reporting - Section 7.8 | 40(L) | 2.10  |
| Lawyer - duty to report omission or error - Section 7.8 | 40(L)  | 2.10 |
| Client - duty to client - French language rights - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Client - French language rights - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Duty - client - language rights (French) - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Duty - French language rights of client - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| French speaking clients - official language rights - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Lawyer - duty to client - advise client re French language rights - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Lawyer - duty to client - French language rights - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Official language rights - French speaking clients - Commentary and Rules 3.2-2A-3.2-2B | 40(L) | 2.11 |
| Omissions or errors - duties - reporting - Section 7.8 | 40(L);  | 2.10  |
| Duty - client - errors and omissions - Section 7.8 | 40(L); | 2.10 |
| By-Law 9 - client property - lawyer’s duty | 40(R) | 3 |
| Client - property - definition | 40(R) | 3 |
| Client - property - lawyer’s duty - Section 3.5 and Commentaries and By-Law 9 | 40(R)-41(L) | 3-3.1 |
| Client - property (duties regarding) - Section 3.5 and Commentaries and By-Law 9 | 40(R)-41(L) | 3-3.1 |
| Property - property of client - lawyer’s duty - Section 3.5 and Commentaries and By-Law 9 | 40(R)-41(L) | 3-3.1 |
| By-Law 9 - valuable property record - lawyer’s duty | 40(R)-41(L) | 3-3.1 |
| Client - duty to client - client property  | 40(R)-41(L) | 3-3.1 |
| Client - duty to client - valuable property - lawyer’s duty | 40(R)-41(L) | 3-3.1 |
| Client - valuable property - lawyer’s duty | 40(R)-41(L) | 3-3.1 |
| Property - valuable client property - lawyer’s duty | 40(R)-41(L) | 3-3.1 |
| Valuable property record - lawyer’s duty | 40(R)-41(L) | 3-3.1 |
| Duty - client - client property and money and files - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3-3.3 |
| Duty - client property, money, & files - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3 - 3.3 |
| Handling of money, documents and other property of client - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3 - 3.3 |
| Lawyer - duty to client - client’s property, money, file - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3 - 3.3 |
| Preservation of clients’ property - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3 - 3.3 |
| Property - clients’ - lawyer’s duty - Section 3.5 and Commentaries and By-Law 9 | 40(R)-42(R) | 3 - 3.3 |
| By-Law 9 - trust account | 41(R) | 3.2 |
| Client - duty to client - client money | 41(R) | 3.2 |
| Client - handling client money | 41(R) | 3.2 |
| Client - money - lawyer’s duty - preserve | 41(R) | 3.2 |
| Duty - client - client money | 41(R) | 3.2 |
| Duty - client money | 41(R) | 3.2 |
| Lawyer - duty to client - client money | 41(R) | 3.2 |
| Lawyer - duty to preserve client money | 41(R) | 3.2 |
| Money - client money - lawyer’s duty | 41(R) | 3.2 |
| Trust account - client’s money - lawyer’s duty | 41(R) | 3.2 |
| Client - closed files - if contain documents or property | 41(R) - 42(R) | 3.3 |
| Client - duty to client - client file | 41(R)-42(R) | 3.3 |
| Client - duty to client - returning documents | 41(R)-42(R) | 3.3 |
| Client - returning documents to client | 41(R)-42(R) | 3.3 |
| Client file - closing - if contain docs or property | 41(R)-42(R) | 3.3 |
| Client file - closing - returning client materials | 41(R)-42(R) | 3.3 |
| Client file - lawyer duty | 41(R)-42(R) | 3.3 |
| Documents - client file - return to client | 41(R)-42(R) | 3.3 |
| Duty - client - client files | 41(R)-42(R) | 3.3 |
| Duty - client - returning documents to client | 41(R)-42(R) | 3.3 |
| Duty - client file | 41(R)-42(R) | 3.3 |
| Duty - returning documents to client  | 41(R)-42(R) | 3.3 |
| File - documents - what to return or keep | 41(R)-42(R) | 3.3 |
| Lawyer - duty to client - client files | 41(R)-42(R) | 3.3 |
| Lawyer - duty to client - returning documents | 41(R)-42(R) | 3.3 |
| Fees and Disbursements | 43-47 | 1-5 |
| Client - money retainers | 43(L-R) | 1 |
| Client - retainer  | 43(L-R) | 1 |
| Money retainers - definition and usage | 43(L-R) | 1 |
| Retainer - determining amount | 43(L-R) | 1 |
| Retainer - money retainers | 43(L-R) | 1 |
| Retainer – use | 43(L-R) | 1 |
| Trust account - money retainer | 43(L-R) | 1 |
| Retainer – definition | 43(L) | 1 |
| Retainer agreement - definition | 43(L) | 1 |
| Billing - fee types SEE: Fees | 43(R)46(R)-47(R) | 22 |
| Block fee – fees | 43(R) | 2 |
| Fees - by stages | 43(R) | 2 |
| Fixed fee – fees | 43(R) | 2 |
| Flat fee – fees | 43(R) | 2 |
| Hourly rate – fees | 43(R) | 2 |
| Contingency fees | 43(R)-44(L)46(R)-47(R) | 24 |
| Billing - methods and charges - financial management - fees and disbursements | 43(R)-44(L) | 2 |
| Client - fees – types | 43(R)-44(L) | 2 |
| Common charges - disbursements SEE: disbursements | 43(R)-44(L) | 2 |
| Disbursement - definition SEE ALSO: Fees | 43(R)-44(L)43(R)-44(L) | 22 |
| Disbursement - common charges | 43(R)-44(L) | 2 |
| Disbursement - not permitted to make a profit from | 43(R)-44(L) | 2 |
| Fee Types - billing | 43(R)-44(L) | 2 |
| Fees - generally | 43(R)-44(L) | 2 |
| Fees - disbursements | 43(R)-44(L) | 2 |
| Fees - types | 43(R)-44(L) | 2 |
| Methods - for billing or client fees | 43(R)-44(L) | 2 |
| Types - of billing methods - fees | 43(R)-44(L) | 2 |
| Types - of client fees | 43(R)-44(L) | 2 |
| Types - of fees  | 43(R)-44(L) | 2 |
| Division of fees - joint retainer - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Fees - joint retainer - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Joint retainer - fees (division) - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 SEE ALSO: Fees | 44(L-R)43(R)-44(L) | 2.12 |
| Duty - client - fair & reasonable compensation - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 SEE: Fees | 44(L-R) | 2.1 |
| Duty - fair & reasonable compensation - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 SEE: Fees | 44(L-R)44(L)-47(R) | 2.12.1-4 |
| Fair and reasonable - fees - determination - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Fees - duty to client - fair and reasonable fees - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Fees - fair and reasonable requirement - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Fees - pro bono - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Pro bono - fees - Rule 3.6-1 and Commentary and Rule 3.6-4 and Commentary and Rule 4.1-1 | 44(L-R) | 2.1 |
| Client - fees - lawyers duty  SEE: Fees | 44(L)-47(R) | 2.1-4 |
| Duty - client - fees SEE: Fees | 44(L)-47(R) | 2.1-4 |
| Duty - fees - to client SEE: Fees | 44(L)-47(R) | 2.1-4 |
| Lawyer - duty to client - fees SEE: Fees | 44(L)-47(R) | 2.1-4 |
| Change - to costs estimates - Rule 3.6-1 and Commentary SEE: Fees | 44(R) | 2.2 |
| Cost estimates - changes - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Cost estimates - timely disclosure - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Disclosure - cost estimates - timely - Rule 3.6-1 and Commentary SEE: Fees | 44(R)  | 2.2 |
| Disclosure - estimate of fees - Rule 3.6-1 and Commentary SEE: Fees | 44(R) | 2.2 |
| Disclosure - fees - timely - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Estimate of fees - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - change to costs estimate - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - cost estimate - changes - disclosure - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - cost estimate - disclosure - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - estimate - changes - disclosure - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - estimate - disclosure - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - interim billing - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - interim statement of account - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - must be paid by client - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - timely disclosure to client - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Interim billing, work in progress, or account status reports - fees - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Statement of account - fees - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Timely disclosure - estimate of fees - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Timely disclosure - fees - Rule 3.6-1 and Commentary | 44(R) | 2.2 |
| Fees - hidden fees, prohibition against - Rule 3.6-1.1 Commentary | 44(R)-45(L) | 2.3 |
| Hidden fees - prohibition - Rule 3.6-1.1 Commentary | 44(R)-45(L) | 2.3 |
| Prohibition - hidden fees - Rule 3.6-1.1 Commentary | 44(R)-45(L) | 2.3 |
| Billing - statement of account for client - Rule 3.6-3 | 45(L-R) | 2.6 |
| Disbursement - HST - Rule 3.6-3 | 45(L-R) | 2.6 |
| Disbursement - statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - billing - statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - disclose amount charged (statement of account) - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - disclose amount charged for fees and disbursements (statement of account) - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - HST - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| HST - legal fees, disbursements - Rule 3.6-3 | 45(L-R) | 2.6 |
| HST - statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| Statement of account - fees, disbursements, HST - Rule 3.6-3 | 45(L-R) | 2.6 |
| Statement of account - joint retainer - Rule 3.6-3 | 45(L-R) | 2.6 |
| Statement of account - must be clear - Rule 3.6-3 | 45(L-R) | 2.6 |
| Client - dispute over fees - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - disagreement with client - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - statement of account - lawyer must sign - Rule 3.6-3 | 45(L-R) | 2.6 |
| Joint retainer - statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| Lawyer - statement of account - must sign - Rule 3.6-3 | 45(L-R) | 2.6 |
| Signature - lawyer must sign statement of account - Rule 3.6-3 | 45(L-R) | 2.6 |
| Statement of account - lawyer must sign - Rule 3.6-3 | 45(L-R) | 2.6 |
| Fees - interest - overdue accounts - Rule 3.6-1.1 | 45(L) | 2.4 |
| Interest - fees - overdue accounts - Rule 3.6-1.1 | 45(L) | 2.4 |
| Overdue accounts - interest - fees - Rule 3.6-1.1 | 45(L) | 2.4 |
| Client - receipt of client settlement funds - written confirmation - Rule 3.6-1.1 | 45(L) | 2.5 |
| Contingency fees - written confirmation - Rule 3.6-1.1 | 45(L) | 2.5 |
| Fees - contingency fees - written confirmation - Rule 3.6-1.1 | 45(L) | 2.5 |
| Fees - receipt of client settlement funds - written confirmation - Rule 3.6-1.1 | 45(L) | 2.5 |
| Fees - written confirmation required - Rule 3.6-1.1 | 45(L) | 2.5 |
| Engagement - letterSEE ALSO: Engagement or non-engagement stage | 45(L)49(L)-50(L-R) | 2.51.2 |
| Letter - EngagementSEE ALSO: Engagement or non-engagement stage | 45(L)49(L)-50(L-R) | 2.51.2 |
| Retainer - billing method - written confirmation - Rule 3.6-1.1 | 45(L) | 2.5 |
| Retainer - engagement letter - Rule 3.6-1.1 | 45(L) | 2.5 |
| Written Confirmation - fees, disbursements - Rule 3.6-1.1 | 45(L) | 2.5 |
| Appropriation of client funds from trust to pay fees - Rule 3.6-10; By-Law 9  | 45(R) - 46(L) | 2.7 |
| Client - fees - trust funds to pay fees - Rule 3.6-10; By-Law 9  | 45(R) - 46(L) | 2.7 |
| Client - funds - appropriation of funds from trust - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Client - money - appropriation of funds from trust - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Client - trust funds - permitted withdrawals - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Fees - appropriation of funds from trust - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Fees - payment from trust account - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Fees - withdrawal from trust account - Rule 3.6-10; By-Law 9 SEE: Trust account - withdrawal | 45(R) - 46(L)91(L)-92(R) | 2.74.3-4.3.4 |
| Money retainer - trust account - permitted withdrawal to pay fees - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Trust account - money to be paid into - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Trust account - withdrawal - Rule 3.6-10; By-Law 9 | 45(R) - 46(L)91(L) -92(R) | 2.74.3-4.3.4 |
| Trust account - withdrawal to pay fees - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Fees - trust account - money earmarked for purpose - cannot be used for fees - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Money that may be withdrawn from trust accounts - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Trust account - money earmarked for specific purpose - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Trust account - withdrawal to pay disbursements - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Disbursement - pay from trust account - Rule 3.6-10; By-Law 9 | 45(R) - 46(L) | 2.7 |
| Automatic withdrawals from trust accounts - Rule 3.6-10; By-Law 9  SEE ALSO: Trust account - withdrawal | 45(R)-46(L)91(L)-92(R) | 2.74.3 |
| Division of fees - Rules 3.6-5-3.6-7 and Commentary SEE: Fees - division of | 46(L-R)46(L-R) | 33 |
| Fees - division of (with another licensee) - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Fees - referral fee - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Fees - splitting (with another licensee) - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Referral fees - generally - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Referral fees - division of fees - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Sharing of fees - Rules 3.6-5-3.6-7 and Commentary SEE: Fees - division of | 46(L-R) | 3 |
| Splitting of fees - - Rules 3.6-5-3.6-7 and Commentary SEE: Fees - division of | 46(L-R)46(L-R) | 33 |
| Fees - arrangements with other lawyers - Rules 3.6-5-3.6-7 and Commentary | 46(L-R) | 3 |
| Division of fees - with non licensee - Rule 3.6-5-3.6-7 and 3.6-8 and commentary | 46(R) | 3.1-3.2 |
| Referral fees - paid to non-licensee - Rule 3.6-5-3.6-7 and 3.6-8 and commentary | 46(R) | 3.1-3.2 |
| Referral fees - received from non-licensee - allowed, with client consent - Rule 3.6-5- 3.6-7 and 3.6-8 and commentary | 46(R) | 3.1-3.2 |
| Splitting of fees - with non licensee - Rule 3.6-5-3.6-7 and 3.6-8 and commentary | 46(R) | 3.1-3.2 |
| Compensation - received from title insurer for referral - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - division of (with non-licensee) - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - non-licensees - lawyer may accept reward for referral, with client consent - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - non-licensees - prohibition of fee division, splitting, sharing, referral fees | 46(R) | 3.1 |
| Fees - referral fee - from title insurer - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - referral fee - paid to non-licensee - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - referral fee - received from non-licensee - allowed, with client consent - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Fees - splitting (with non-licensee) - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Non-licensee - prohibition of fee division, splitting, sharing, referral fees - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Prohibition - fee division, splitting, sharing, referral fees - non-licensees - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Referral fees - from title insurer - prohibited - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Title insurer - may not give referral fee to lawyer - Rules 3.6-5-3.6-7 and Commentary | 46(R) | 3.1 |
| Affiliation - division of fees, referral fees - cannot share lawyer’s revenue, profits - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Fees - affiliations - cannot share lawyer’s revenue, profits - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Fees - division of (with non-licensee) - exceptions - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Fees - referral fee - non-licensees - exceptions - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Fees - splitting (with non-licensee) - exceptions - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Interprovincial law firm - division of fees, referral fees - permitted - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Law firm - interprovincial - division of fees, referral fees - permitted - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Law partnership - Ontario and non-Canadian lawyers - division of fees - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Multi-Discipline Practice - division of fees, referral fees - permitted - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Multi-discipline practice - fee splitting OK - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Referral fees - exceptions to prohibition on non-licensee fee sharing - Rule 3.6-8 and Commentary | 46(R) | 3.2 |
| Client - under disability or vulnerable - contingency fees - Rule 3.6-2 and Commentary | 47(R) | 4 |
| Contingency fees - agreements - formal requirements - Rule 3.6-2 and Commentary |  47(L-R) | 4 |
| Contingency fees - agreements - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Contingency fees - agreements must be in writing - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Contingency fees - client under disability or vulnerable - Rule 3.6-2 and Commentary | 47(R) | 4 |
| Contingency fees - costs award paid to lawyer - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Contingency fees - how to calculate - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Contingency fees - when prohibited (family, criminal, quasi-criminal cases) - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Costs - costs award paid to lawyer - under contingency fee agreement - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Disability - Client - Contingency fee - Rule 3.6-2 and Commentary |  47(R) | 4 |
| Fees - contingency fee agreements - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees - client under disability or vulnerable - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees - costs award paid to lawyer - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees - how to calculate - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees - when prohibited (family, criminal, quasi-criminal cases) - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees - contingency fees agreements - formal requirements - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Prohibition - contingency fees (family, criminal, quasi-criminal cases) - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Vulnerable client - restrictions on contingency fee arrangements - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Agreements - contingency fee - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Contingency Fee - Definition - Fees and Disbursements - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Fees and Disbursements - Contingency Fee - Definition - Rule 3.6-2 and Commentary | 47(L-R) | 4 |
| Rule 3.6-2 and Commentary - Fees and Disbursements - Contingency Fee - Definition | 47(L-R) | 4 |
| Billing - methods of securing payment of fees - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Charge - on client’s property - securing payment of fees - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Fees - securing payment - mortgage and charge and lien - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Fees - securing payment - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Lien - on client’s property - securing payment of fees - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Mortgage - against client’s property - securing payment of fees - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Securing payment for legal fees - mortgage and charge and lien - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Securing payment for legal fees - Rule 3.4-27- 3.4-29 | 47(R) | 5 |
| Client - initial screening stage  | 49(L-R) | 1.1 |
| Client - relationship with client - initial screening stage | 49(L-R) | 1.1 |
| Client - screening stage | 49(L-R) | 1.1 |
| Conflict of interest - initial screening stage - evaluate potential conflicts | 49(L-R) | 1.1 |
| Contact with client - initial screen | 49(L-R) | 1.1 |
| Fees - discussion of fees during initial screening stage | 49(L-R) | 1.1 |
| Initial screening - client relationship  SEE ALSO: Stages of client relationship SEE ALSO: First meeting/contact with client | 49(L-R)49(L)9(L-R) | 1.111 |
| Managing client relationship - initial screening | 49(L-R) | 1.1 |
| Relationship with client - initial screening | 49(L-R) | 1.1 |
| Screening - clients - initial screening by lawyer | 49(L-R) | 1.1 |
| Stages of client relationship - 1 - initial screening | 49(L-R) | 1.1 |
| Client - managing relationship with client | 49(L) | 1 |
| Client - relationship with client - managing stages | 49(L) | 1 |
| Managing client relationship - stages | 49(L) | 1 |
| Relationship with client - managing  | 49(L) | 1 |
| Client - engagement - letter - required contents |  50(L-R) | 1.2 |
| Client - engagement - or non-engagement  | 49(R)-50(L-R) | 1.2 |
| Client - limited scope retainer | 50(L-R) | 1.2 |
| Client - relationship with client - engagement or non-engagement stage - letters | 50(L-R) | 1.2 |
| Client - retainer agreement  | 50(L-R) | 1.2 |
| Conflict of interest - engagement or non-engagement of client  | 49(R)-50(L-R) | 1.2 |
| Engagement - client - letters - required contents | 50(L-R) | 1.2 |
| Engagement - letters and retainer agreements - required contents | 50(L-R) | 1.2 |
| Engagement - limited scope retainer | 50(L-R) | 1.2 |
| Engagement - non-engagement - letter | 49(R)-50(L-R) | 1.2 |
| Engagement - or Non engagement stage - managing client relationship | 49(R)-50(L-R) | 1.2 |
| Letter - engagement and non-engagement  | 49(R)-50(L-R) | 1.2 |
| Limited scope retainer - written agreement | 50(L-R) | 1.2 |
| Managing client relationship - engagement or non-engagement - letters  | 49(R)-50(L-R) | 1.2 |
| Non-engagement - letter - required contents | 49(R)-50(R) | 1.2 |
| Relationship with client - engagement or non-engagement - letters  | 49(R)-50(L-R) | 1.2 |
| Retainer - agreements and engagement letters -required contents | 49(R)-50(L-R) | 1.2 |
| Retainer - limited scope retainer - written agreement | 50(L-R) | 1.2 |
| Stages of client relationship - 2 - engagement or non-engagement - letters  | 49(R)-50(L-R) | 1.2 |
| Terms of engagement - in engagement letter | 50(L-R) | 1.2 |
| Client - disengagement with | 51(L-R) | 1.4 |
| Client - relationship with client - disengagement | 51(L-R) | 1.4 |
| Client - relationship with client - termination | 51(L-R) | 1.4 |
| Client - termination of relationship | 51(L-R) | 1.4 |
| Closing letter - termination of relationship with client | 51(L-R) | 1.4 |
| Disengagement - relationship with client | 51(L-R) | 1.4 |
| Disengagement Letter - termination of relationship with client | 51(L-R) | 1.4 |
| Engagement - Disengagement Letter | 51(L-R) | 1.4 |
| Engagement - ending or withdrawal of services - disengagement | 51(L-R) | 1.4 |
| Letter - closing, reporting - termination of relationship with client | 51(L-R) | 1.4 |
| Letter - disengagement with client  | 51(L-R) | 1.4 |
| Letter - termination of client relationship | 51(L-R) | 1.4 |
| Limited scope retainer - disengagement letter | 51(L-R) | 1.4 |
| Managing client relationship - disengagement | 51(L-R) | 1.4 |
| Managing client relationship - termination | 51(L-R) | 1.4 |
| Relationship with client - disengagement | 51(L-R) | 1.4 |
| Relationship with client - termination | 51(L-R) | 1.4 |
| Reporting - letter - termination of relationship with client | 51(L-R) | 1.4 |
| Retainer - limited scope retainer - disengagement letter | 51(L-R) | 1.4 |
| Retainer - termination of client relationship | 51(L-R) | 1.4 |
| Stages of client relationship - 4 - disengagement  | 51(L-R) | 1.4 |
| Termination - relationship with client | 51(L-R) | 1.4 |
| Termination letter - relationship with client | 51(L-R) | 1.4 |
| Change - to terms of engagement / retainer | 51(L) | 1.3 |
| Client - engagement - terms change | 51(L) | 1.3 |
| Client - implementation stage | 51(L) | 1.3 |
| Client - instructions - changes to  | 51(L) | 1.3 |
| Client - instructions - to lawyer - cannot instruct lawyer to violate Rules | 51(L) | 1.3 |
| Client - lawyer unable to fulfill retainer | 51(L) | 1.3 |
| Client - relationship with client - implementation stage | 51(L) | 1.3 |
| Engagement - lawyer unable to fulfill retainer | 51(L) | 1.3 |
| Engagement - terms of engagement / retainer change | 51(L) | 1.3 |
| Implementation stage - client relationship  | 51(L) | 1.3 |
| Instructions - from client - cannot instruct lawyer to violate Rules | 51(L) | 1.3 |
| Instructions - from client - changes to  | 51(L) | 1.3 |
| Lawyer - unable to fulfill retainer | 51(L) | 1.3 |
| Managing client relationship - implementation stage | 51(L) | 1.3 |
| Relationship with client - implementation stage | 51(L) | 1.3 |
| Retainer - change to terms of engagement / retainer | 51(L) | 1.3 |
| Retainer - lawyer unable to fulfill  | 51(L) | 1.3 |
| Stages of client relationship - implementation  | 51(L) | 1.3 |
| Terms of engagement - changes to | 51(L) | 1.3 |
| Meeting client expectations - client relationship | 51(R) - 52(L-R) | 2 - 2.2 |
| Client - contact with client - managing expectations | 51(R)-52(L) | 2 |
| Client - does not follow lawyer’s advice | 51(R)-52(L) | 2 |
| Client - expectations - managing  | 51(R)-52(L) | 2 |
| Client - managing client expectations | 51(R)-52(L) | 2 |
| Client - relationship with client - managing expectations | 51(R)-52(L) | 2 |
| Client relationship - managing client expectations | 51(R)-52(L) | 2 |
| Contact with client - managing expectations | 51(R)-52(L) | 2 |
| Expectations - managing clients expectations SEE ALSO: Client service and communication | 51(R)-52(L-R)16(L-R) | 2-2.2;1.4 |
| Managing client expectations | 51(R)-52(L) | 2 |
| Managing client relationship - client expectations | 51(R)-52(L) | 2 |
| Relationship with client - managing expectations | 51(R)-52(L) | 2 |
| Client - expectations - list of | 52(L-R) | 2.1 |
| Client - relationship with client - client’s expectations | 52(L-R) | 2.1 |
| Client - what do clients want | 52(L-R) | 2.1 |
| Expectations - list of client expectations | 52(L-R) | 2.1 |
| Challenging clients - managing client relationship | 52(R)-53(L) | 2.2 |
| Client - difficult clients - indicators | 52(R)-53(L) | 2.2 |
| Client - relationship with client - difficult clients | 52(R)-53(L) | 2.2 |
| Difficult clients- managing client relationships | 52(R)-53(L) | 2.2 |
| Hard clients - difficult clients - managing client relationship | 52(R)-53(L) | 2.2 |
| Managing client relationship - difficult clients | 52(R)-53(L) | 2.2 |
| Relationship with client - difficult clients - managing | 52(R)-53(L) | 2.2 |
| Tough clients - difficult clients - managing client relationship | 52(R)-53(L) | 2.2 |
| Unpleasant clients - difficult clients - managing client relationship | 52(R)-53(L) | 2.2 |
| Client - communications with - factors to consider | 53(L-R) | 2.3 |
| Client - diminished capacity - communications with | 53(L-R) | 2.3 |
| Client - relationship with client - communication | 53(L-R) | 2.3 |
| Communication - ensuring client understands | 53(L-R) | 2.3 |
| Communication - lawyer-client - timely and effective | 53(L-R) | 2.3 |
| Communication - with client - technologies | 53(L-R) | 2.3 |
| Communication - with client - factors to consider | 53(L-R) | 2.3 |
| Contact with client - communications | 53(L-R) | 2.3 |
| Diminished capacity - client - communications | 53(L-R) | 2.3 |
| Managing client relationship - communications  | 53(L-R) | 2.3 |
| Methods of communication - client communication - client preferences | 53(L-R) | 2.3 |
| Relationship with client - communication with  | 53(L-R) | 2.3 |
| Court - withdrawal of lawyer’s services - r. 3.7-1 | 55(L-R) | Intro; 1 |
| Engagement letter - details re withdrawal of services - r. 3.7-1  | 55(L-R) | 1 |
| Good cause - withdrawal of services - notice - r. 3.7-1  | 55(L-R) | 1 |
| Good cause - withdrawal of services - r. 3.7-1  SEE: Withdrawal of services - good cause |  55(L-R) | 1 |
| Letter - engagement / retainer - details re withdrawal of services - r. 3.7-1  | 55(L-R) | 1 |
| Notice - withdrawal of services - good cause - r. 3.7-1  | 55(L-R) | 1 |
| Reasonable notice - withdrawal of services - cause - r. 3.7-1  | 55(L-R) | 1 |
| Retainer - details re withdrawal of services - r. 3.7-1  | 55(L-R) | 1 |
| Tribunal process - lawyer withdrawal of services -r. 3.7-1  | 55(L-R) | 1 |
| Withdrawal of services - discuss with client at outset of relationship - r. 3.7-1  | 55(L-R) | 1 |
| Withdrawal of services - good cause and reasonable notice - r. 3.7-1  | 55(L-R) | 1 |
| Withdrawal of services - reasonable notice - r. 3.7-1  | 55(L-R) | 1 |
| Withdrawal from representation -  SEE: Withdrawal of services | 55(L) | Intro |
| Withdrawal of services - generally - s. 3.7  | 55(L)  | Intro |
| Optional withdrawal of services  SEE: Withdrawal of services - optional  | 55(R)55(R) | 22 |
| Withdrawal of services - optional - good cause + reasonable notice + no prejudice to client  | 55(R) | 2 |
| Client - serious loss of confidence - withdrawal of services - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Confidence - serious loss of - withdrawal of services - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Good cause - serious loss of confidence - withdrawal of services - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Optional withdrawal of services - serious loss of confidence - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Reasonable notice - serious loss of confidence - withdrawal of services - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Serious loss of confidence - withdrawal of services - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Withdrawal of services - optional - serious loss of confidence - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Withdrawal of services - serious loss of confidence - r. 3.7-2  | 55(R)-56(L) | 2.1 |
| Withdrawal of services - criminal - generally | 56(L-R) | 3 |
| Criminal proceeding - withdrawal of services - lawyer’s duty on withdrawal - r. 3.7-4 - 3.7-5 | 56(L-R)-57(L) | 3-3.2 |
| Client - non-payment of fees - withdrawal of services - r. 3.7-3 | 56(L) | 2.2 |
| Fees - non-payment of fees - withdrawal of services - r. 3.7-3 | 56(L) | 2.2 |
| Good cause - non-payment of fees - withdrawal of services - r. 3.7-3 | 56(L) | 2.2 |
| Non-payment of fees - optional withdrawal of services - r. 3.7-3 | 56(L) | 2.2 |
| Optional withdrawal of services - non-payment of fees - r. 3.7-3 | 56(L) | 2.2 |
| Reasonable notice - non-payment of fees - withdrawal of services - r. 3.7-3 | 56(L) | 2.2 |
| Withdrawal of services - non-payment of fees | 56(L) | 2.2 |
| Withdrawal of services - optional - non-payment of fees - r. 3.7-3 | 56(L) | 2.2 |
| Non-payment of fees - withdrawal of services - criminal - sufficient time - permitted - r.3.7-4 | 56(R) | 3.1 |
| Withdrawal of services - criminal - lawyer’s duties on withdrawal - r. 3.7-4  | 56(R) | 3.1 |
| Withdrawal of services - criminal - permitted - sufficient time before trial - r. 3.7-4  | 56(R) | 3.1 |
| Withdrawal of services - criminal - non-payment of fees - not permitted - r. 3.7-5 | 56(R)-57(L) | 3.2 |
| Non-payment of fees - criminal - withdrawal of services - not permitted - r. 3.7-5 | 56(R)-57(L) | 3.2 |
| Withdrawal of services - criminal - insufficient time before trial - not permitted - r. 3.7-5 | 56(R)-57(L) | 3.2 |
| Discharge - lawyer discharged by client - lawyer’s duties on withdrawal - rr. 3.7-8-3.7-9  | 57(L-R) | 5 |
| Law firm - dismantling - withdrawal of lawyer from client’s matter - rr. 3.7-8-3.7-9  | 57(L-R) | 5 |
| Lawyer - leaving law firm - withdrawal of lawyer from client’s matter - rr. 3.7-8-3.7-9  | 57(L-R) | 5 |
| Lien - on client file - lawyer withdrawal - rr. 3.7-8-3.7-9  | 57(L-R) | 5 |
| Manner of withdrawal of services - rr. 3.7-8-3.7-9  | 57(L-R) | 5 |
| Obligations - to client - withdrawal of services - rr. 3.7-8 - 3.7-9 | 57(L-R) | 5 |
| Withdrawal obligations - duties upon withdrawal for any reason - rr. 3.7-8 - 3.7-9 | 57(L-R) | 5 |
| Withdrawal of services - duties upon withdrawal for any reason - rr. 3.7-8 - 3.7-9  | 57(L-R) | 5 |
| Withdrawal of services - file contents ownership rr. 3.7-8 - 3.7-9  | 57(L-R) | 5 |
| Withdrawal of services - leaving, dismantling a law firm rr. 3.7-8 - 3.7-9  | 57(L-R) | 5 |
| Withdrawal of services - manner of withdrawal - rr. 3.7-8 - 3.7-9  | 57(L-R) | 5 |
| Adequate cause - withdrawal of services - criminal - permission of trial judge - r. 3.7-6 | 57(L) | 3.3 |
| Criminal proceeding - withdrawal of services - permission of trial judge - r. 3.7-6 | 57(L) | 3.3 |
| Permission of trial judge - withdrawal of services - r. 3.7-6 | 57(L) | 3.3 |
| Withdrawal of services - criminal - permission of trial judge - r. 3.7-6 | 57(L) | 3.3 |
| Client - discharges lawyer - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Client - instructions - to lawyer - to violate Rules, By-Laws - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Competence - duty of - lawyer not competent to handle matter - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Criminal proceeding - withdrawal of services - mandatory withdrawal - r. 3.7-7  | 57(L) | 4 |
| Instructions - to Violate Rules, By-Laws - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Lawyer - discharged by client - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Lawyer - not competent to handle matter - mandatory withdrawal of services - r. 3.7-7  | 57(L) | 4 |
| Mandatory withdrawal of services - list of circumstances leading to mandatory withdrawal - r. 3.7-7  | 57(L) | 4 |
| Mandatory withdrawal of services - obligations - r. 3.7-7  | 57(L) | 4 |
| Withdrawal of services - criminal - mandatory withdrawal - r. 3.7-7  | 57(L) | 4 |
| Withdrawal of services - mandatory - list of circumstances leading to mandatory withdrawal - r. 3.7-7  | 57(L) | 4 |
| Confidentiality - withdrawal, upon - r. 3.3-1  | 57(R) | 5.1 |
| Non-disclosure - client information - withdrawal of services - r. 3.3-1 | 57(R) | 5.1 |
| Withdrawal of services - confidentiality - r. 3.3-1  | 57(R) | 5.1 |
| Client file - withdrawal of services - transfer or return  | 58(L) | 5.2 |
| Confirmation of file transfer - withdrawal of services | 58(L) | 5.2 |
| File transfer - withdrawal of services - written confirmation | 58(L) | 5.2 |
| Transfer of file - withdrawal of services - written confirmation | 58(L) | 5.2 |
| Withdrawal of services - client file - transfer or return | 58(L) | 5.2 |
| Withdrawal of services - written confirmation | 58(L) | 5.2 |
| Written Confirmation - withdrawal from services - transfer of file | 58(L) | 5.2 |
| Duty - successor lawyer - after withdrawal of services - r. 3.7-10  | 58(R) | 6 |
| Lawyer - successor lawyer - duty after withdrawal of services - r. 3.7-10  | 58(R) | 6 |
| Obligations - successor lawyer - after withdrawal of services - r. 3.7-10 | 58(R) | 6 |
| Successor lawyer - duties - after withdrawal of services - r. 3.7-10  | 58(R) | 6 |
| Withdrawal of services - duties of successor lawyer - r. 3.7-10  | 58(R) | 6 |
| Duty - Law Society* Respond promptly
* Prevent unauthorized practice
* Working with unauthorized persons
* Cease practicing if suspended
* Submit to disciplinary authority
 | 59(L-R)59(R)59(R)-60(L)60(L)60(R) | 1.11.21.31.41.5 |
| Complete and prompt response - duty to law society - r. 7.1-1 | 59(L-R) | 1.1 |
| Duty - respond promptly and completely to law society - r. 7.1-1 | 59(L-R) | 1.1 |
| Prompt and complete response - duty to law society - r. 7.1-1 | 59(L-R) | 1.1 |
| Respond promptly and completely - duty to law society - r. 7.1-1 | 59(L-R) | 1.1 |
| Duty - LSUC SEE: Duty - Law Society | 59(L)59(L) | 11 |
| Duty - others - Law Society SEE: Duty - Law Society  | 59(L)59(L) | 11 |
| Law Society - duty to SEE: Duty - Law Society | 59(L)59(L) | 11 |
| LSUC - duty to SEE: Duty - Law Society | 59(L)59(L) | 11 |
| Duty - prevent paralegals - unauthorized practice - r. 7.6-1 | 59(R) | 1.2 |
| Duty - prevent unauthorized practice of law, provision of legal services - r. 7.6-1 | 59(R) | 1.2 |
| Paralegal - lawyer’s duty to prevent unauthorized practice of law - r. 7.6-1 | 59(R) | 1.2 |
| Practice of law - unauthorized - duty to law society - r. 7.6-1 | 59(R) | 1.2 |
| Unauthorized practice of law or provision of legal services - duty to law society - r. 7.6-1 | 59(R) | 1.2 |
| Duty - working with or employing unauthorized persons - duty to law society - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Employing unauthorized persons - duty to law society - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Former lawyer - duty not to employ - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Former paralegal - duty not to employ - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Lawyer - former - duty not to employ, work with -r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Lawyer - no longer licensed - duty not to employ -r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Lawyer - suspended - duty not to employ, work with - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Paralegal - former - duty not to employ, work with - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Paralegal - no longer licensed - duty not to employ, work with - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Paralegal - suspended - duty not to employ, work with - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Suspended lawyer - duty not to employ - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Suspended paralegal - duty not to employ - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Unauthorized persons - working with or employing - duty to law society - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Unlicensed persons - working with or employing - duty to law society - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Working with unauthorized persons - duty to law society - r. 7.6-1.1 | 59(R)-60(L) | 1.3 |
| Duty - supervision - Non-licensee employees | 59(R)-60(L) | 1.3 |
| Employee - non-licensee - lawyer’s duty to supervise | 59(R)-60(L) | 1.3 |
| Non-licensee - employee - lawyer’s duty to supervise | 59(R)-60(L) | 1.3 |
| Duty - not to practice - suspension / restriction of license - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Duty - not to practice - undertaking not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Duty - restriction of license - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Duty - suspension of license - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Duty - suspension of license - lawyer’s duties during suspension - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Duty - undertaking not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| License suspension - duty during suspension - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| License suspension or restriction - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Restriction of license - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Suspension of license - duty during suspension - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Suspension of license - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Trust account - lawyer suspended - lawyer’s duties during suspension - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Undertaking - not to practice - duty not to practice - rr. 7.6-1.2 - 7.6-1.4; By-Law 7.1, Part II; and By-Law 9, Part II.1 | 60(L) | 1.4 |
| Authority - disciplinary - Law Society - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Discipline - authority of LSUC - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Discipline - professional misconduct - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Duty - submit to discipline by LSUC - duty to law society - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Law Society - discipline - duty to submit to - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Law Society - discipline - professional misconduct - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Law Society - professional misconduct - definition - r. 1.1-1 | 60(R)-61(L) | 1.5 |
| LSUC - discipline - duty to submit to - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| LSUC - discipline - professional misconduct - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| LSUC - professional misconduct - definition - r. 1.1-1 | 60(R)-61(L) | 1.5 |
| Professional misconduct - definition - r. 1.1-1 | 60(R)-61(L) | 1.5 |
| Conduct unbecoming a barrister or solicitor - definition - r. 1.1-1 | 60(R)-61(L) | 1.5 |
| Discipline - conduct unbecoming a barrister or solicitor - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Law Society - conduct unbecoming a barrister or solicitor - definition - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Law Society - discipline - conduct unbecoming a barrister or solicitor - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| LSUC - conduct unbecoming a barrister or solicitor - definition - r. 1.1-1 | 60(R)-61(L) | 1.5 |
| LSUC - discipline - conduct unbecoming a barrister or solicitor - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Disciplinary action - by LSUC - professional or personal sphere - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Discipline - review of conduct by LSUC - professional/personal sphere - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| LSUC - discipline - review of conduct in professional/personal sphere - rr. 1.1-1, 2.1-1 and s. 7.8.2 | 60(R)-61(L) | 1.5 |
| Duty - legal profession* Report misconduct
* Encourage clients to report dishonesty
* Reporting criminal charges/convictions
* Reporting errors and omissions
 | 61(L-R)61(R)61(R)-62(L)62(L-R) | 2.12.22.32.4 |
| Lawyer - misconduct - duty to report - r. 7.1-3 | 61(L-R) | 2.1 |
| Paralegal - misconduct - duty to report - r. 7.1-3 | 61(L-R) | 2.1 |
| Reporting - misconduct of lawyer, paralegal - r. 7.1-3 | 61(L-R) | 2.1 |
| Duty - lawyer, paralegal misconduct - duty to report - r. 7.1-3 | 61(L-R) | 2.1 |
| Duty - misconduct of lawyer, paralegal - duty to report - r. 7.1-3 | 61(L-R) | 2.1 |
| Duty - report misconduct of lawyer, paralegal - r. 7.1-3 | 61(L-R) | 2.1 |
| Misconduct of lawyer, paralegal - duty to report - r. 7.1-3 | 61(L-R) | 2.1 |
| Public confidence in legal profession | 61(L) | 2 |
| Duty - others - legal profession SEE: Duty - legal profession  | 61(L) | 2 |
| Legal profession - duty to  SEE: Duty - legal profession | 61(L) | 2 |
| Profession - legal profession - duty to  SEE: Duty - legal profession | 61(L) | 2 |
| Client - encourage client to report dishonest conduct of another lawyer - duty - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Dishonest - conduct of lawyer, paralegal - duty to encourage client to report - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Duty - dishonest conduct of another lawyer - encourage client to report | 61(R) | 2.2 |
| Duty - encourage client to report dishonest conduct of another lawyer - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Encourage client - report lawyer dishonest conduct - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Lawyer - dishonest conduct - encourage client to report - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Paralegal - dishonest conduct - encourage client to report - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Reporting - dishonest conduct of lawyer, paralegal - encourage client to report - r. 7.1-4 - 4.3 | 61(R) | 2.2 |
| Charges - criminal - duty to report - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Convictions - criminal - duty to report - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Criminal charges, convictions - duty to report - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Duty - criminal charges, convictions - report - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Duty - report criminal charges, convictions - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Reporting - criminal charges/convictions - duty to report - r. 7.1-4.4; By-Law 8, s.2 | 61(R)-62(L) | 2.3 |
| Duty - error or omission - disclose to insurer - s. 7.8 | 62(L-R) | 2.4 |
| Duty - insurance - disclose error, omissions - s. 7.8 | 62(L-R) | 2.4 |
| Duty - insurance - duties after error, omissions - s. 7.8 | 62(L-R) | 2.4 |
| Error - duty to insurer - s. 7.8 | 62(L-R) | 2.4 |
| Insurance - Duty to report errors, omissions to liability insurer - s. 7.8 | 62(L-R) | 2.4 |
| LAWPRO - Duty to report errors, omissions - s. 7.8 | 62(L-R) | 2.4 |
| LAWPRO - Duty, error omissions - s. 7.8 | 62(L-R) | 2.4 |
| Liability insurance - duty to report errors, omissions - s. 7.8 | 62(L-R) | 2.4 |
| Omission - duty to insurer - s. 7.8 | 62(L-R) | 2.4 |
| Duty - error or omission - duty to insurer - s. 7.8 | 62(L-R) | 2.4 |
| Reporting - errors and omissions - s. 7.8 SEE ALSO:  | 62(L-R); 40(L) | 2.4; 2.10 |
| Duty - others - lawyer and others  SEE: Duty - lawyers and others  | 62(R) | 3 |
| Lawyer - duty to lawyers and others SEE: Duty - lawyers and others | 62(R) | 3 |
| Courtesy - duty to lawyers and others - rr. 7.2-1 - 7.2-3 | 62(R)- 63(L) | 3.1 |
| Duty - courtesy and good faith - duty to lawyers and others - rr. 7.2-1 - 7.2-3 | 62(R)- 63(L) | 3.1 |
| Duty - good faith and courtesy - duty to lawyers and others - rr. 7.2-1 - 7.2-3 | 62(R)- 63(L) | 3.1 |
| Good faith - duty to lawyers and others - rr. 7.2-1 - 7.2-3 | 62(R)- 63(L) | 3.1 |
| Duty - lawyers and others* Courtesy and good faith
* Communications
* Communications with represented persons, providing second opinions
* Undertakings and Trust Conditions
* Financial obligations
 | 62(R)-63(L)63(L)63(L-R)- 64(R)64(L-R)64(R) | 3.13.23.33.43.5 |
| Duty - sharp practice - avoid - rr. 7.2-1 - 7.2-3 | 62(R)-63(L) | 3.1 |
| Sharp practice - duty to avoid - rr. 7.2-1 - 7.2-3 | 62(R)-63(L) | 3.1 |
| Civility - in communications - duty - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Communication - duty of courtesy and civility - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Courtesy - in communications - duty - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Duty - civility in communications - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Duty - communication - courtesy, civility - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Duty - courtesy in communications - rr. 7.2-4 - 7.2-5 | 63(L) | 3.2 |
| Communication - with represented persons or organizations - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Corporation - represented - communications with - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - communication - with represented person / organization - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - represented person / org - communications with - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Organization - represented - communications with - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Partnership - represented - communications with - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Person - represented - communications with - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Represented person / organization - communications with - duty - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Communication - with represented persons or organizations - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - communication - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - represented person / org - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Organization - represented - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Person - represented - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Represented person / organization - second opinion - rr. 7.2-6 - 7.2-8.2 | 63(L)-64(L) | 3.3 |
| Duty - promises - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - trust conditions - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - undertakings - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Managing undertakings - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Promises - duty to uphold - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Trust conditions - duty - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Undertaking - duties to uphold - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Court - enforce lawyer’s undertaking, trust condition, practice-related promise - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Discipline - breach of undertaking, trust condition, practice-related promise - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Document registration agreement - undertakings - real estate transaction - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - document registration agreement - real estate transactions - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - real estate transactions - document registration agreement - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - undertakings - document registration agreement - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Duty - undertakings - real estate transactions - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Real estate matters - document registration agreement - undertakings - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Tribunal - enforce lawyer’s undertaking, trust condition, practice-related promise - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Undertaking - document registration agreement - real estate transaction - rr. 5.1-6 and 7.2-11 | 64(L-R) | 3.4 |
| Conflict of interest - acting for employee of client - s. 3.4 | 64(L) | 3.3 |
| Conflict of interest - representing organization and employees - s. 3.4 | 64(L) | 3.3 |
| Employee - lawyer represents both employee and his organization - conflict of interest - s. 3.4 | 64(L) | 3.3 |
| Lawyer - acting for employee of client - conflict - s. 3.4 | 64(L) | 3.3 |
| Organization - lawyer represents both org and its employees - conflict of interest - s. 3.4 | 64(L) | 3.3 |
| Duty - financial obligations - r. 7.1-2 SEE: Financial responsibilities - on behalf of client | 64(R)82(R)-83(L) | 3.56.1 |
| Payment - duty to make payments on behalf of client - r. 7.1-2 SEE: Financial responsibilities - on behalf of client | 64(R)82(R)-83(L) | 3.56.1 |
| Integrity of profession - duty to uphold - r. 2.1-1 - 2.1-2 | 64(R)-65(L) | 4 |
| Profession, integrity of - duty to uphold - r. 2.1-1 - 2.1-2 | 64(R)-65(L) | 4 |
| Uphold integrity of profession - duty - r. 2.1-1 - 2.1-2 | 64(R)-65(L) | 4 |
| Duty - others - uphold integrity of profession SEE: Duty - uphold integrity of profession | 64(R)-65(R) | 4 |
| Appearances and statements in public - duty - r. 7.5 | 65(L-R) | 4.3 |
| Communication - with media - duty - r. 7.5 | 65(L-R) | 4.3 |
| Duty - appearances in public - r. 7.5 | 65(L-R) | 4.3 |
| Duty - communication - with media - r. 7.5 | 65(L-R) | 4.3 |
| Duty - public appearance and statements - r. 7.5 | 65(L-R) | 4.3 |
| Duty - statements in public - r. 7.5 | 65(L-R) | 4.3 |
| Public appearances and statements - duty - r. 7.5 | 65(L-R) | 4.3 |
| Statements and appearances in public - duty - r. 7.5 | 65(L-R) | 4.3 |
| Duty - uphold integrity of profession* Outside interests
* Public office
* Public appearances and statements
* Multi-discipline practices
 | 65(L)65(L)65(L-R)65(R) | 4.14.24.34.4 |
| Activities - unrelated to law - duty - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Duty - interests - outside interests - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Duty - outside interests - cannot interfere with lawyer obligations - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Interests - outside interests - duty - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Lawyer - outside interests - duty - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Outside Interest - duty - cannot interfere with obligations - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Unrelated activities to law - duty - rr. 7.3-1 - 7.3-2 | 65(L) | 4.1 |
| Administrative office - lawyer’s duty to uphold integrity of profession - r. 7.4-1 | 65(L) | 4.2 |
| Duty - lawyer in public office - r. 7.4-1 | 65(L) | 4.2 |
| Duty - public office - integrity of profession - r. 7.4-1 | 65(L) | 4.2 |
| Government - lawyer in government - duty to integrity of profession - r. 7.4-1 | 65(L) | 4.2 |
| Integrity of profession - public office - duty to uphold - r. 7.4-1 | 65(L) | 4.2 |
| Legislative office - lawyer’s duty to integrity of profession - r. 7.4-1 | 65(L) | 4.2 |
| Office - public office - duty - r. 7.4-1 | 65(L) | 4.2 |
| Public office - integrity of profession - duty - r. 7.4-1 | 65(L) | 4.2 |
| Duty - multi-discipline practices - r. 7.8-1 | 65(R) | 4.4 |
| Multi-discipline practice - duty to others - r. 7.8-1 | 65(R) | 4.4 |
| Multi-discipline practice - r. 7.8-1 SEE ALSO: Multi-discipline practice - conflict of interest | 65(R)33(R) | 4.412.2 |
| Administration of justice - duty to SEE: Duty - Administration of Justice | 65(R) | 5 |
| Duty - others - Administration of justice SEE: Duty - Administration of Justice | 65(R) | 5 |
| Justice, Administration of - Duty to  SEE: Duty - Administration of justice | 65(R) | 5 |
| Acting as mediator - duties - s. 5.7 | 66(L-R) | 5.4 |
| Confidentiality - mediation - s. 5.7 | 66(L-R) | 5.4 |
| Duty - mediator - s. 5.7 | 66(L-R) | 5.4 |
| Lawyer - as mediator - duties - s. 5.7 | 66(L-R) | 5.4 |
| Lawyer-client privilege - mediation - s. 5.7 | 66(L-R) | 5.4 |
| Mediator - duties - s. 5.7 | 66(L-R) | 5.4 |
| Privilege - mediation - s. 5.7 | 66(L-R) | 5.4 |
| Solicitor-client privilege - mediation - s. 5.7 | 66(L-R) | 5.4 |
| Duty - Administration of justice* Encourage respect for admin of justice
* Seeking legislative/admin. change
* Security of court facilities
* Acting as mediator
* Retired judges returning to practice
 | 66(L)66(L)66(L)66(L-R)66(R) | 5.15.25.35.45.5 |
| Administration of justice - encouraging respect for - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Duty - encourage respect for administration of justice - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Duty - respect for administration of justice - encourage - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Encouraging - respect for administration of justice - duty - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Justice, Administration of - encouraging respect for - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Respect for administration of justice - duty - rr. 5.6-1 and 7.2-1 | 66(L) | 5.1 |
| Administrative change - seeking - duty - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Change - seeking legislative or administrative change - duty - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Duty - administrative change - seeking - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Duty - change - seeking legislative or administrative - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Duty - legislative change - seeking - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Duty - seeking legislative or administrative change - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Legal system - improvements - duties - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Legislative change - Seeking - duty - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Reform - legislative or administrative change - duty - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Seeking legislative or administrative change - rr. 5.6-1 - 5.6-2 | 66(L) | 5.2 |
| Court facilities - security - duty - r. 5.6-3 SEE ALSO: Security - court room facilities - disclosure of confidential info | 66(L)22(R) | 5.35.2 |
| Duty - court facilities - security - duty of confidentiality - r. 5.6-3 SEE ALSO: Security - court room facilities - disclosure of confidential info | 66(L)22(R) | 5.35.2 |
| Duty - security of court facilities - duty of confidentiality - r. 5.6-3 SEE ALSO: Security - court room facilities - disclosure of confidential info | 66(L)22(R) | 5.35.2 |
| Security - courtroom facilities - duty - r. 5.6-3 SEE ALSO: Security - court room facilities - disclosure of confidential info | 66(L)22(R) | 5.35.2 |
| Duty - judges returning to practice - s. 7.7 | 66(R) | 5.5 |
| Duty - retired judges returning to practice - s. 7.7 | 66(R) | 5.5 |
| Judge - retired, returning to practice - duty - s. 7.7 | 66(R) | 5.5 |
| Judge - returning to practice after retirement - s. 7.7 | 66(R) | 5.5 |
| Lawyer - retired judge returning to practice - s. 7.7 | 66(R) | 5.5 |
| Retired judges returning to practice - s. 7.7 | 66(R) | 5.5 |
| Advocacy - developing the theory - steps | 67(L-R) | 1.1 |
| Developing the theory - steps - advocacy | 67(L-R) | 1.1 |
| Theory - developing - steps | 67(L-R) | 1.1 |
| Steps - developing theory of case  | 67(L-R) | 1.1 |
| Advocacy - theory of the case | 67(L) | 1 |
| Advocacy - lawyer’s position - theory | 67(L) | 1 |
| Theory - of case - lawyer as advocate | 67(L) | 1 |
| Theory - lawyer’s position - advocacy | 67(L) | 1 |
| Advocacy - lawyer’s duties - to client | 67(R)-68(L) | 2 |
| Client - duty to client - lawyer as advocate  | 67(R)-68(L) | 2 |
| Duty - advocacy - lawyer as advocate  | 67(R)-68(L) | 2 |
| Duty - lawyer as advocate  | 67(R)-68(L) | 2 |
| Lawyer - as advocate - duties  | 67(R)-68(L) | 2 |
| Advocacy - defence counsel - duties - r. 5.1-1 | 68(L) | 2.1 |
| Advocacy - lawyer as defence counsel - duty - r. 5.1-1 | 68(L) | 2.1 |
| Client - duty to client - defence counsel - r. 5.1-1 | 68(L) | 2.1 |
| Criminal proceeding - defence counsel - duties - r. 5.1-1 | 68(L) | 2.1 |
| Defence counsel - duties - r. 5.1-1 | 68(L) | 2.1 |
| Duty - advocacy - defence counsel - r. 5.1-1 | 68(L) | 2.1 |
| Duty - advocacy - lawyer as defence counsel - r. 5.1-1 | 68(L) | 2.1 |
| Duty - defence counsel - r. 5.1-1 | 68(L) | 2.1 |
| Duty - lawyer as defence counsel - r. 5.1-1 | 68(L) | 2.1 |
| Advocacy - lawyer as prosecutor - duty - r. 5.1-3 | 68(L) | 2.2 |
| Advocacy - prosecutor - duties - r. 5.1-3 | 68(L) | 2.2 |
| Criminal proceeding - prosecutor - duties - r. 5.1-3 | 68(L) | 2.2 |
| Duty - advocacy - lawyer as prosecutor - r. 5.1-3 | 68(L) | 2.2 |
| Duty - advocacy - prosecutor - r. 5.1-3 | 68(L) | 2.2 |
| Duty - lawyer as prosecutor - r. 5.1-3 | 68(L) | 2.2 |
| Duty - prosecutor - r. 5.1-3 | 68(L) | 2.2 |
| Prosecutor - duties - r. 5.1-3 | 68(L) | 2.2 |
| Advocacy - duty to tribunal process | 68(L) | 3 |
| Advocacy - tribunal processes - duties | 68(L) | 3 |
| Duty - tribunal* Not to abuse process
* Not to mislead
* Not to influence
* Not to engage in dishonest conduct
* Not to mistreat or influence witnesses
* No drugs or alcohol
* No concealment, destruction, alteration of incriminating physical evidence
 |  68(R)68(R)68(R)-69(L)69(L)69(L-R)69(R)69(R)69(L)-70(L-R) | 33.13.23.33.43.53.63.7 |
| Duty - tribunal processes | 68(R) | 3 |
| Lawyer - tribunal process | 68(R) | 3 |
| Tribunal process - duties | 68(R) | 3 |
| Abuse of tribunal process - duty - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Advocacy - duty not to abuse tribunal - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Duty - abuse tribunal process - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Duty - shall not abuse tribunal process - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Threaten - criminal proceedings - abuse of tribunal process - duty - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Tribunal process - shall not abuse - threaten proceedings - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Useless proceedings - duty - rr. 3.2-5, 3.2-5.1, 5.1-2(a) and (n) SEE ALSO: Criminal proceeding - threatening | 68(R)38(L) | 3.12.3 |
| Advocacy - duty not to mislead tribunal - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Duty - not to mislead tribunal process - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Duty - shall not mislead tribunal process - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| False evidence - tribunal process - shall not mislead - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Mislead tribunal process - shall not - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Tribunal process - shall not mislead - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Untrue evidence - tribunal process - shall not mislead - rr. 5.1-2(e), (f), (h), (i), (l) | 68(R)-69(L) | 3.2 |
| Advocacy - duty not to engage in dishonest conduct before tribunal - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Dishonest conduct - tribunal process - duties - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - criminal conduct before tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - dishonesty before tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - falsehood to tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - fraud before tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - illegal conduct before tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - lie to tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Duty - shall not lie to tribunals - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Falsehood - tribunal process - duties - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Fraud - tribunal process - duties - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Illegal conduct - tribunal process - duties - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Lie - tribunal process - duties - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Tribunal process - shall not engage in dishonest conduct - rr. 5.1-1, 5.1-2(b), (e), (g), (j), and (k) | 69(L-R) | 3.4 |
| Advocacy - duty not to influence tribunal - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Duty - not to influence tribunal process - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Duty - relationship with judge, tribunal member - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Duty - shall not influence tribunal process - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Influence - tribunal process - shall not - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Judge - personal relationship with - duty - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Tribunal process - relationship with judge, tribunal member - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Tribunal process - shall not influence tribunal - rr. 5.1-2(c) and (d) | 69(L) | 3.3 |
| Advocacy - duty not to influence, mistreat witnesses - rr. 5.1-2(j), (k), (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Advocacy - duty not to permit witness to mislead tribunal - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - influencing witnesses - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - mistreating witnesses - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - shall not influence, mistreat witnesses - rr. 5.1-2(m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - witnesses - may not permit to mislead tribunal - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - witnesses - shall not influence or mistreat - rr. 5.1-2(m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Influence - witnesses - duty not to - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Mistreat - witnesses - duty not to - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Tribunal process - shall not mistreat or influence witnesses - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Tribunal process - witnesses - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Witnesses - duty not to influence or mistreat - rr. 5.1-2(m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.53.1 |
| Witnesses - lawyer may not permit to mislead - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Duty - witnesses - tribunal - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Witnesses - lawyer’s duties regarding - tribunal - rr. 5.1-2 (m), (o), 5.3-1, 7.2-6, 7.2-8 - 7.2-8.2 | 69(R) | 3.5 |
| Advocacy - duty not to appear under influence of alcohol, drugs - r. 5.1-2(p) | 69(R) | 3.6 |
| Alcohol or drugs - tribunal processes - shall not - r. 5.1-2(p) | 69(R) | 3.6 |
| Drugs or alcohol - tribunal processes - shall not - r. 5.1-2(p) | 69(R) | 3.6 |
| Duty - alcohol, drugs before tribunal process - r. 5.1-2(p) | 69(R) | 3.6 |
| Duty - drugs, alcohol before tribunal process - r. 5.1-2(p) | 69(R) | 3.6 |
| Duty - shall not appear before tribunal under influence of alcohol, drugs - r. 5.1-2(p) | 69(R) | 3.6 |
| Influence - alcohol or drugs - tribunal process - shall not - r. 5.1-2(p) | 69(R) | 3.6 |
| Tribunal process - shall not appear under influence of drugs, alcohol - r. 5.1-2(p) | 69(R) | 3.6 |
| Alteration - physical evidence - shall not - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Concealment - physical evidence - shall not - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Destruction - physical evidence - shall not - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Duty - alteration of physical evidence - shall not - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Duty - concealment of physical evidence - shall not - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Duty - destruction of physical evidence - shall not - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Duty - shall not counsel - concealment, destruction, alteration - physical evidence - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Duty - shall not participate - concealment, destruction, alteration - physical evidence - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Physical Evidence - shall not conceal, destroy, alter - tribunal - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Tribunal Process- physical evidence - shall not conceal, destruct, alter - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Tribunal Process - shall not conceal, destroy, alter - physical evidence - r. 5.1-2A | 69(R)-70(R) | 3.7 |
| Advocacy - lawyer dealing with witnesses | 70(R) | 4 |
| Advocacy - communication with witness giving evidence - r. 5.4-2 | 70(R)-72(L) | 4 -4.3.3 |
| Communication - witness giving evidence - r. 5.4-2 | 70(R)-72(L) | 4 -4.3.3 |
| Duty - communication - with witness giving evidence (r. 5.4-2) | 70(R)-72(L) | 4-4.3.3 |
| Advocacy - interviewing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Advocacy - preparing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Duty - interviewing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Duty - preparing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Duty - witnesses - interviewing - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Duty - witnesses - preparing - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Interviewing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Preparing witnesses - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Witnesses - interviewing - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Witnesses - preparing - r. 5.3-1 | 70(R)-71(L) | 4.1 |
| Advocacy - duty to witnesses | 70(R)-72(L) | 4-4.3.3 |
| Duty - lawyer dealing with witnesses  | 70(R)-72(L) | 4-4.3.3 |
| Testimony - witnesses, communication with during testimony - duties | 70(R)-72(L) | 4-4.3.3 |
| Advocacy - interviewing represented persons - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - communication - represented person as witness - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - interviewing represented person - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - represented person - as witness - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - witnesses - interviewing represented persons - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - witnesses - represented persons - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Interviewing represented persons - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Interviewing witness - represented person - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Represented person - witnesses - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Witnesses - interviewing - represented persons - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Witnesses - represented persons - interviewing - rr. 5.3-1, 7.2-6 - 7.2-6A | 71(L) | 4.2 |
| Duty - witnesses - communication with witness giving evidence - r. 5.4-2 | 71(L) | 4.3 |
| Duty - witnesses - giving evidence - communication with - r. 5.4-2 | 71(L) | 4.3 |
| Evidence - communication with witness - r. 5.4-2 | 71(L) | 4.3 |
| Evidence - witnesses - communication with - r. 5.4-2 | 71(L) | 4.3 |
| Witnesses - communication with witness giving evidence - r. 5.4-2 | 71(L) | 4.3 |
| Witnesses - giving evidence - communication with - r. 5.4-2 | 71(L) | 4.3 |
| Advocacy - sympathetic and unsympathetic witnesses | 71(R)-72(L) | 4.3.2 |
| Duty - communication - sympathetic and unsympathetic witnesses | 71(R)-72(L) | 4.3.2 |
| Duty - sympathetic and unsympathetic witnesses - communication | 71(R)-72(L) | 4.3.2 |
| Duty - witnesses - sympathetic and unsympathetic - communication | 71(R)-72(L) | 4.3.2 |
| Sympathetic and unsympathetic witnesses | 71(R)-72(L) | 4.3.2 |
| Unsympathetic and sympathetic witnesses | 71(R)-72(L) | 4.3.2 |
| Witnesses - sympathetic and unsympathetic | 71(R)-72(L) | 4.3.2 |
| Duty - witnesses - communication with witness giving evidence  | 71(R)-72(L) | 4.3.2 |
| Advocacy - communication with witness giving evidence  | 71(R)-72(L) | 4.3.2 |
| Obligations - sympathetic and unsympathetic witnesses  | 71(R)-72(L) | 4.3.2 |
| Sympathetic and unsympathetic witnesses - obligations  | 71(R)-72(L) | 4.3.2 |
| Witnesses - communication with witness giving evidence  | 71(R)-72(L) | 4.3.2 |
| Duty - communication with witnesses - practical considerations - rule 7.2-6  | 72(L) | 4.3.3 |
| Witnesses - communication - best practices -practical considerations - rule 7.2-6  | 72(L) | 4.3.3 |
| Testimony - witnesses - communication - practical considerations - rule 7.2-6  | 72(L) | 4.3.3 |
| Duty - jurors - lawyer’s relations and communications with | 72(L-R) | 5 - 5.2 |
| Duty - lawyer dealing with jurors - relations with jurors SEE: Jurors - communications with | 72(L-R)72(L) | 5 - 5.25.1 |
| Advocacy - disclose jurors’ interest in case or improper conduct - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Disclosure - juror interest in or connection with case - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Duty - disclose juror improper conduct - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Duty - disclose jurors interest or connection with case or party - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Duty - jurors - disclose juror improper conduct - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Duty - jurors - disclose juror interest in or connection to case - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Jurors - interest or connection with case or party - lawyer’s duty to disclose - r. 5.5-2 - 5.5-3 | 72(R) | 5.2 |
| Stage - of witness’s testimony | 71(L-R) | 4.3.1 |
| Witness - stage of testimony | 71(L-R) | 4.3.1 |
| Advocacy - relations with jurors | 72(L) | 5 |
| Duty - jurors - improper conduct - duty to report | 72(L) | 5 |
| Duty - relations with jurors | 72(L) | 5 |
| Jurors - improper conduct (duty to disclose)  | 72(L) | 5 |
| Jurors - relations with | 72(L) | 5 |
| Relations with jurors - lawyer’s duties | 72(L) | 5 |
| Advocacy - communication with jurors - rr. 5.5-1, 5.5-4 | 72(L-R) | 5.1 |
| Communication - with jurors rr. 5.5-1, 5.5-4 | 72(L-R) | 5.1 |
| Duty - communication - with jurors - rr. 5.5-1, 5.5-4 | 72(L-R) | 5.1 |
| Duty - jurors - communications with - rr. 5.5-1, 5.5-4 | 72(L-R) | 5.1 |
| Jurors - communications with - rr. 5.5-1, 5.5-4 | 72(L-R) | 5.1 |
| Advocacy - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Affidavit - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Appeals - lawyer as witness in trial proceeding - s. 5.2 | 72(R)-73(L) | 6 |
| Duty - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Duty - witnesses - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Lawyer - as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Testimony - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Witnesses - lawyer as witness - s. 5.2 | 72(R)-73(L) | 6 |
| Advocacy - agreement on guilty pleas - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Advocacy - plea bargain - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Agreement on guilty pleas - lawyer’s duty - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Criminal proceeding - plea bargain - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Duty - agreement on guilty pleas - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Duty - criminal proceeding - plea bargain - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Duty - plea bargain - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Guilty pleas - lawyer’s duty - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Plea bargain - lawyer’s duty - r. 5.1-7 - 5.1-8 | 73(L-R) | 8 |
| Advocacy - disclosure - discovery obligations - r. 5.1-3.1 | 73(L) | 7 |
| Advocacy - discovery - lawyer’s duties - r. 5.1-3.1 | 73(L) | 7 |
| Advocacy - duty re examinations for discovery - r. 5.1-3.1 | 73(L) | 7 |
| Advocacy - examinations for discovery - lawyer’s duties - r. 5.1-3.1 | 73(L) | 7 |
| Disclosure - Discovery obligations - r. 5.1-3.1 | 73(L) | 7 |
| Discovery - lawyer’s duties - r. 5.1-3.1 | 73(L) | 7 |
| Duty - disclosure - examinations for discovery - r. 5.1-3.1 | 73(L) | 7 |
| Duty - discovery - lawyer’s obligations - r. 5.1-3.1 | 73(L) | 7 |
| Duty - examinations for discovery - r. 5.1-3.1 | 73(L) | 7 |
| Duty - lawyer’s duty in examinations for discovery - r. 5.1-3.1 | 73(L) | 7 |
| Examinations for discovery - lawyer’s duties - r. 5.1-3.1 | 73(L) | 7 |
| Obligations - discovery - r. 5.1-3.1 | 73(L) | 7 |
| Affiliation - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Business structures, permitted - By-Law 7 | 75(L-R) | 1 |
| General partnership - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Interprovincial law firm - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Law practice - management SEE: Practice management  | 75(L-R) | 1 |
| Limited Liability Partnerships - permitted business structures and practice arrangements - By-Law 7 | 75(L-R) | 1 |
| Multi-discipline practice - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Permitted business structures & practice arrangements - By-Law 7 | 75(L-R) | 1 |
| Practice arrangements and business structures - permitted - By-Law 7 | 75(L-R) | 1 |
| Practice management - permitted business structures - By-Law 7 | 75(L-R) | 1 |
| Professional corporation - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Sole proprietorship - permitted practice structure - By-Law 7 | 75(L-R) | 1 |
| Duty - practice management SEE: Practice management | 75(L) | Intro |
| Practice management - general | 75(L) | Intro |
| Rules of Professional Conduct - Practice Management | 75(L) | Intro |
| Duty - making legal services available - s. 4.1 | 75(R) | 2 |
| Duty - offering legal services - s. 4.1 | 75(R) | 2 |
| Duty - practice management - making legal services available - s. 4.1 | 75(R) | 2 |
| Legal services - making available - s. 4.1 | 75(R) | 2 |
| Making legal services available - s. 4.1 | 75(R) | 2 |
| Offering legal services - s. 4.1 | 75(R) | 2 |
| Practice management - making legal services available - s. 4.1 | 75(R) | 2 |
| Advertising - legal services - - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - advertising legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - firm names - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - law firm names - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - legal services - marketing, advertising - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - marketing legal services - rr. 4.2-0 - 4.2-1  | 75(R)-76(L) | 2.1 |
| Duty - practice management - advertising legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - practice management - firm names - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Duty - practice management - marketing legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Firm name - requirements - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Law firm - name - requirements - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Legal services - marketing, advertising - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Marketing - legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Name - firm name - requirements - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Practice management - advertising legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Practice management - firm names - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Practice management - marketing legal services - rr. 4.2-0 - 4.2-1 | 75(R)-76(L) | 2.1 |
| Advertising - fees - r. 4.2-2 | 76(L) | 2.2 |
| Duty - advertising fees - r. 4.2-2 | 76(L) | 2.2 |
| Duty - fees - advertising of - r. 4.2-2 | 76(L) | 2.2 |
| Duty - practice management - advertising fees - r. 4.2-2 | 76(L) | 2.2 |
| Fees - advertising of - r. 4.2-2 | 76(L) | 2.2 |
| Practice management - advertising fees - r. 4.2-2 | 76(L) | 2.2 |
| Practice management - fees advertising - r. 4.2-2 | 76(L) | 2.2 |
| Advertising - nature of practice - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Certified specialist - LSUC - advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Duty - advertising nature of practice - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Duty - nature of practice - advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Duty - practice management - advertising nature of practice - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Law Society - certified specialist - advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| LSUC - certified specialist advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Nature of practice - advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Practice - advertising nature of - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Practice management - advertising nature of practice - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Specialist - certified by LSUC - advertising - r.4.3-1; By-Law 15 | 76(L) | 2.3 |
| Client information - file management  | 76(R) | 3 |
| File management - recording client information  | 76(R) | 3 |
| Record - client information - file management | 76(R) | 3 |
| Client file - conflict checking - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict checking - practice management - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict checking - what to look for - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict of interest - conflict checking system - practice management - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict of interest - conflict searching - practice management - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict of interest - practice management - conflict check - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict of interest - screen for conflicts - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict of interest - search for conflict - practice management - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Duty - check for conflict of interest - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Duty - conflict checking - screen for conflict of interest - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Duty - practice management - conflict checking - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Duty - search for conflict of interest - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| File management - conflict checking - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Practice management - conflict checking - rr. 3.4-1 - 3.4-3 SEE ALSO: Conflict of interest - technology - checking system | 76(R)-77(R)35(L-R) | 3.113 |
| Conflict checking - manual and computerized - rr. 3.4-1 - 3.4-3 | 76(R)-77(R) | 3.1 |
| Conflict names - conflict check - rr. 3.4-1 - 3.4-3 | 76(R)-77(R) | 3.1 |
| Essential Requirements - file management, organization and conflict checking | 76(R)-78(R) | 3; 3.1; 3.2 |
| Client file - file management | 76(R)-79(R) | 3 - 3.4 |
| Duty - file management | 76(R)-79(R) | 3 - 3.4 |
| Duty - practice management - file management | 76(R)-79(R) | 3 - 3.4 |
| File management - generally | 76(R)-79(R) | 3 - 3.4 |
| Management - file management - generally | 76(R)-79(R) | 3 - 3.4 |
| Practice management - file management | 76(R)-79(R) | 3 - 3.4 |
| Client - file SEE: Client File - opening SEE: Client File - closing | 76(R)-79(R)77(R)-78(R)78(R)-79(L) | 3-3.43.23.3 |
| Confidential information - lawyer must open file upon receipt of confidential info | 77(R)-78(R) | 3.2 |
| Active client files - naming | 77(R)-78(R) | 3.2 |
| Active client files - opening and maintaining  | 77(R)-78(R) | 3.2 |
| Active client files - organization | 77(R)-78(R) | 3.2 |
| Active client files - storage | 77(R)-78(R) | 3.2 |
| Client file - maintaining | 77(R)-78(R) | 3.2 |
| Client file - opening | 77(R)-78(R) | 3.2 |
| Client file - organization | 77(R)-78(R) | 3.2 |
| Client file - storage | 77(R)-78(R) | 3.2 |
| Determining when to open a file | 77(R)-78(R) | 3.2 |
| Duty - client file - maintaining | 77(R)-78(R) | 3.2 |
| Duty - client file - opening | 77(R)-78(R) | 3.2 |
| Duty - client file - organization | 77(R)-78(R) | 3.2 |
| Duty - client file - storage | 77(R)-78(R) | 3.2 |
| Duty - maintaining client file | 77(R)-78(R) | 3.2 |
| Duty - opening client file | 77(R)-78(R) | 3.2 |
| Duty - organization of client file | 77(R)-78(R) | 3.2 |
| Duty - practice management - maintaining client file | 77(R)-78(R) | 3.2 |
| Duty - practice management - opening client file | 77(R)-78(R) | 3.2 |
| Duty - practice management - organizing client file | 77(R)-78(R) | 3.2 |
| Duty - practice management - storing client file | 77(R)-78(R) | 3.2 |
| Duty - storage of client file | 77(R)-78(R) | 3.2 |
| File - maintaining | 77(R)-78(R) | 3.2 |
| File - opening | 77(R)-78(R) | 3.2 |
| File - organization | 77(R)-78(R) | 3.2 |
| File - storage | 77(R)-78(R) | 3.2 |
| File management - maintaining client file | 77(R)-78(R) | 3.2 |
| File management - opening client file | 77(R)-78(R) | 3.2 |
| File management - organizing client file | 77(R)-78(R) | 3.2 |
| File management - storing client file | 77(R)-78(R) | 3.2 |
| Maintaining client file | 77(R)-78(R) | 3.2 |
| Opening - client file | 77(R)-78(R) | 3.2 |
| Organizing of client file | 77(R)-78(R) | 3.2 |
| Practice management - client file - maintaining | 77(R)-78(R) | 3.2 |
| Practice management - client file - opening | 77(R)-78(R) | 3.2 |
| Practice management - client file - organization | 77(R)-78(R) | 3.2 |
| Practice management - client file - storage | 77(R)-78(R) | 3.2 |
| Practice management - maintaining client file | 77(R)-78(R) | 3.2 |
| Practice management - opening client file | 77(R)-78(R) | 3.2 |
| Practice management - organization of client file | 77(R)-78(R) | 3.2 |
| Practice management - storage of client file | 77(R)-78(R) | 3.2 |
| Procedure - opening a client file | 77(R)-78(R) | 3.2 |
| Storing - client file | 77(R)-78(R) | 3.2 |
| Client - limitation period - duty to advise | 77(R)-78(R) | 3.2 |
| Client file - naming | 77(R)-78(R) | 3.2 |
| Duty - client file - naming | 77(R)-78(R) | 3.2 |
| Duty - limitation period - to advise client regarding | 77(R)-78(R) | 3.2 |
| Duty - naming of client file | 77(R)-78(R) | 3.2 |
| Duty - practice management - naming client file | 77(R)-78(R) | 3.2 |
| File - naming | 77(R)-78(R) | 3.2 |
| File management - naming client file | 77(R)-78(R) | 3.2 |
| Limitation period - duty to advise client regarding | 77(R)-78(R) | 3.2 |
| Name - client file | 77(R)-78(R) | 3.2 |
| Practice management - client file - naming | 77(R)-78(R) | 3.2 |
| Practice management - naming client file | 77(R)-78(R) | 3.2 |
| Client file - closing - prior to - lawyer should | 78(R)-79(L) | 3.3 |
| Client file - closing | 78(R)-79(L) | 3.3 |
| Client file - closing - destruction of file  | 78(R)-79(L) | 3.3 |
| Client file - closing - disposing of contents | 78(R)-79(L) | 3.3 |
| Client file - closing - retrieval | 78(R)-79(L) | 3.3 |
| Client file - closing - storage | 78(R)-79(L) | 3.3 |
| Client file - closing - when to | 78(R)-79(L) | 3.3 |
| Client file - destroying closed file | 78(R)-79(L) | 3.3 |
| Client file - retaining closed file | 78(R)-79(L) | 3.3 |
| Closing client file - destroying | 78(R)-79(L) | 3.3 |
| Closing client file - retaining | 78(R)-79(L) | 3.3 |
| Closing of client file  | 78(R)-79(L) | 3.3 |
| Closing, retaining, and disposing of client files | 78(R)-79(L) | 3.3 |
| Destruction - client file  | 78(R)-79(L) | 3.3 |
| Disposing of client files | 78(R)-79(L) | 3.3 |
| Duty - client file - closing | 78(R)-79(L) | 3.3 |
| Duty - client file - destroying closed file | 78(R)-79(L) | 3.3 |
| Duty - client file - retaining closed file | 78(R)-79(L) | 3.3 |
| Duty - closing client file | 78(R)-79(L) | 3.3 |
| Duty - destroying closed client file | 78(R)-79(L) | 3.3 |
| Duty - practice management - closing client file | 78(R)-79(L) | 3.3 |
| Duty - practice management - destroying closed client file | 78(R)-79(L) | 3.3 |
| Duty - practice management - retaining closed client file | 78(R)-79(L) | 3.3 |
| Duty - retaining closed client file | 78(R)-79(L) | 3.3 |
| File - closing | 78(R)-79(L) | 3.3 |
| File - destroying closed client file | 78(R)-79(L) | 3.3 |
| File - retaining closed client file | 78(R)-79(L) | 3.3 |
| File management - closing client file | 78(R)-79(L) | 3.3 |
| File management - destroying closed client file | 78(R)-79(L) | 3.3 |
| File management - retaining closed client file | 78(R)-79(L) | 3.3 |
| Practice management - client file - closing | 78(R)-79(L) | 3.3 |
| Practice management - client file - destroying file | 78(R)-79(L) | 3.3 |
| Practice management - client file - retaining closed file | 78(R)-79(L) | 3.3 |
| Practice management - closing client file | 78(R)-79(L) | 3.3 |
| Practice management - destroying closed client file | 78(R)-79(L) | 3.3 |
| Practice management - retaining closed client file | 78(R)-79(L) | 3.3 |
| Procedure - closing a file | 78(R)-79(L) | 3.3 |
| Retention - of closed client file | 78(R)-79(L) | 3.3 |
| Retention - of file - length of time | 78(R)-79(L) | 3.3 |
| Storing - closed files | 78(R)-79(L) | 3.3 |
| System - file closing | 78(R)-79(L) | 3.3 |
| Accounting records - must be maintained by lawyer - By-Law 9 | 79(L-R) | 3.4 |
| By-Law 9 - accounting records retained by lawyer | 79(L-R) | 3.4 |
| Client file - documents to be retained after closing | 79(L-R) | 3.4 |
| Client file - retaining documents | 79(L-R) | 3.4 |
| Closing client file - documents to be retained after closing  | 79(L-R) | 3.4 |
| Documents - retained by lawyer after closing of file | 79(L-R) | 3.4 |
| Documents to be retained by lawyer - By-Law 9 | 79(L-R) | 3.4 |
| Duty - client file - documents to be retained after closing | 79(L-R) | 3.4 |
| Duty - documents to be retained after closing of file | 79(L-R) | 3.4 |
| Duty - practice management - documents to be retained after closing  | 79(L-R) | 3.4 |
| File - documents to be retained after closing | 79(L-R) | 3.4 |
| File management - documents to be retained after closing  | 79(L-R) | 3.4 |
| File Management - retaining documents | 79(L-R) | 3.4 |
| Practice management - client file - documents to be retained after closing | 79(L-R) | 3.4 |
| Practice management - documents to be retained after closing of file  | 79(L-R) | 3.4 |
| Records - accounting records - must be maintained by lawyer - By-Law 9 | 79(L-R) | 3.4 |
| Retention - of documents after closing of file | 79(L-R) | 3.4 |
| Duty - practice management - time management | 79(R) | 4 |
| Duty - time management  | 79(R) | 4 |
| Practice management - time management | 79(R) | 4 |
| Time management - practice management - basic elements | 79(R) | 4 |
| Delegation - time management - practice management | 79(R)-80(L) | 4.1 |
| Duty - practice management - time planning | 79(R)-80(L) | 4.1 |
| Duty - time management - time planning | 79(R)-80(L) | 4.1 |
| Effective use of time - practice management | 79(R)-80(L) | 4.1 |
| Planning - time planning | 79(R)-80(L) | 4.1 |
| Practice management - time planning | 79(R)-80(L) | 4.1 |
| Time management - time planning | 79(R)-80(L) | 4.1 |
| Time planning - practice management | 79(R)-80(L) | 4.1 |
| Calendaring and scheduling - technology - reminder system | 80(L-R) | 4.2 |
| Centralized tickler system - time management | 80(L-R) | 4.2 |
| Duty - practice management - tickler system - time management  | 80(L-R) | 4.2 |
| Duty - practice management - time reminder systems | 80(L-R) | 4.2 |
| Duty - reminder systems - time management | 80(L-R) | 4.2 |
| Duty - tickler system - time management  | 80(L-R) | 4.2 |
| Duty - time management - reminder systems | 80(L-R) | 4.2 |
| Duty - time management - tickler systems | 80(L-R) | 4.2 |
| Duty - time reminder systems | 80(L-R) | 4.2 |
| Practice management - reminder systems | 80(L-R) | 4.2 |
| Practice management - tickler system (reminders) | 80(L-R) | 4.2 |
| Practice management - time reminder systems | 80(L-R) | 4.2 |
| Reminder systems - practice management | 80(L-R) | 4.2 |
| Reminder systems - time management | 80(L-R) | 4.2 |
| Scheduling systems - calendaring systems | 80(L-R) | 4.2 |
| Tickler - centralized reminder systems | 80(L-R) | 4.2 |
| Tickler system - time management | 80(L-R) | 4.2 |
| Time management - planning and reminder systems | 80(L-R) | 4.2 |
| Time management - tickler system  | 80(L-R) | 4.2 |
| Time management - time reminder systems | 80(L-R) | 4.2 |
| Time reminder systems - practice management | 80(L-R) | 4.2 |
| Continuing legal education - time management | 80(L) | 4.1 |
| Interruptions, control - time management | 80(L) | 4.1 |
| Lawyer - professional development - time management | 80(L) | 4.1 |
| Strategies - time management  | 80(L) | 4.1 |
| Time management - control interruptions | 80(L) | 4.1 |
| Time management - cultivate time management skills | 80(L) | 4.1 |
| Time management - delegate | 80(L) | 4.1 |
| Time management - focus on one task at a time | 80(L) | 4.1 |
| Time management - keep time records | 80(L) | 4.1 |
| Time management - procedures to eliminate inefficiencies | 80(L) | 4.1 |
| Time management - records | 80(L) | 4.1 |
| Billable vs. non-billable hours - time docketing | 80(R)-81(L) | 4.3 |
| Docket entry - time management - requirements | 80(R)-81(L) | 4.3 |
| Docketing system - elements of a good one - time management  | 80(R)-81(L) | 4.3 |
| Docketing time - recording system | 80(R)-81(L) | 4.3 |
| Docketing time - time management | 80(R)-81(L) | 4.3 |
| Duty - docketing of time  | 80(R)-81(L) | 4.3 |
| Duty - practice management - docketing time | 80(R)-81(L) | 4.3 |
| Duty - practice management - time docketing | 80(R)-81(L) | 4.3 |
| Duty - time docketing | 80(R)-81(L) | 4.3 |
| Non-billable vs. billable hours - time docketing | 80(R)-81(L) | 4.3 |
| Practice management - docketing of time | 80(R)-81(L) | 4.3 |
| Practice management - recording time (docketing) | 80(R)-81(L) | 4.3 |
| Practice management - time docketing | 80(R)-81(L) | 4.3 |
| Recording systems - time docketing  | 80(R)-81(L) | 4.3 |
| Recording time (docketing)  | 80(R)-81(L) | 4.3 |
| Time docketing | 80(R)-81(L) | 4.3 |
| Time docketing - billable vs. non-billable hours | 80(R)-81(L) | 4.3 |
| Time management - docketing | 80(R)-81(L) | 4.3 |
| Time management - docketing - billable vs. non-billable hours  | 80(R)-81(L) | 4.3 |
| Time management - recording time (docketing) | 80(R)-81(L) | 4.3 |
| Time management - time docketing | 80(R)-81(L) | 4.3 |
| Advertising - technology - practice management | 81(L-R) | 5.1 |
| Delivery of legal services through the Internet | 81(L-R) | 5.1 |
| Duty - practice management - technology - advertising, marketing, providing legal services | 81(L-R) | 5.1 |
| Duty - technology - advertising legal services | 81(L-R) | 5.1 |
| Duty - technology - marketing legal services | 81(L-R) | 5.1 |
| Duty - technology - providing legal services | 81(L-R) | 5.1 |
| Identification of lawyer in electronic media - delivering legal services - practice management | 81(L-R) | 5.1 |
| Legal services - technology - practice management | 81(L-R) | 5.1 |
| Marketing - using technology - practice management | 81(L-R) | 5.1 |
| Practice management - advertising legal services - technology | 81(L-R) | 5.1 |
| Practice management - marketing legal services - technology | 81(L-R) | 5.1 |
| Practice management - providing legal services - technology | 81(L-R) | 5.1 |
| Practice management - technology - advertise legal services  | 81(L-R) | 5.1 |
| Practice management - technology - market legal services  | 81(L-R) | 5.1 |
| Practice management - technology - provide legal services  | 81(L-R) | 5.1 |
| Technology - advertising legal services - practice management | 81(L-R) | 5.1 |
| Technology - controlling misuse of electronic communications - practice management | 81(L-R) | 5.1 |
| Technology - delivery of legal services through the Internet - practice management | 81(L-R) | 5.1 |
| Technology - guidelines - delivering legal services | 81(L-R) | 5.1 |
| Technology - identification of lawyer in electronic media - delivering legal services - practice management | 81(L-R) | 5.1 |
| Technology - making available legal services - practice management | 81(L-R) | 5.1 |
| Technology - marketing legal services - practice management  | 81(L-R) | 5.1 |
| Technology - posting on forums - advertising legal services | 81(L-R) | 5.1 |
| Technology - providing legal services | 81(L-R) | 5.1 |
| Technology - spamming - advertising legal services | 81(L-R) | 5.1 |
| Technology - use to make legal service available  | 81(L-R) | 5.1 |
| Confidentiality - technology - use of technology in providing services | 81(L-R) | 5.1 |
| Conflict of interest - technology - use of technology in providing services | 81(L-R) | 5.1 |
| Technology - confidentiality - providing legal services through electronic media | 81(L-R) | 5.1 |
| Technology - conflicts of interest - providing legal services through electronic media | 81(L-R) | 5.1 |
| Practice management - technology | 81(L)-82(R) | 5-5.3 |
| Technology - use in practice - management | 81(L)-82(R) | 5-5.3 |
| Analysis support software - technology - assist in practice management | 81(R) | 5.2 |
| Database management systems - technology - assist in practice management | 81(R) | 5.2 |
| Document management systems - technology - assist in practice management | 81(R) | 5.2 |
| Duty - technology systems and software - use in practice management | 81(R) | 5.2 |
| Electronic legal research tools - assist in practice management | 81(R) | 5.2 |
| Legal research - electronic methods - assist in practice management | 81(R) | 5.2 |
| Practice management - technology - use to assist practice management | 81(R) | 5.2 |
| Practice management - use of technology systems and software - examples | 81(R) | 5.2 |
| Systems to support practice management - technology | 81(R) | 5.2 |
| Technology - analysis support software - assist in practice management | 81(R) | 5.2 |
| Technology - communications tools - assist in practice management | 81(R) | 5.2 |
| Technology - database management systems - assist in practice management | 81(R) | 5.2 |
| Technology - document management systems - assist in practice management  | 81(R) | 5.2 |
| Technology - legal research tools - assist in practice management | 81(R) | 5.2 |
| Technology - practice area specific software - assist in practice management | 81(R) | 5.2 |
| Technology - practice management - examples of systems and software | 81(R) | 5.2 |
| Technology - software - assist in practice management | 81(R) | 5.2 |
| Technology - use in practice management - examples of systems and software | 81(R) | 5.2 |
| Technology - word processing - assist in practice management | 81(R) | 5.2 |
| Technology - calendaring and scheduling systems - assist in practice management | 81(R) | 5.2 |
| Technology - time docketing and accounting - assist in practice management | 81(R) | 5.2 |
| Technology - time docketing and accounting systems - assist in practice management | 81(R) | 5.2 |
| Backup - technology | 82(L-R) | 5.3 |
| Disaster management - technology - practice management | 82(L-R) | 5.3 |
| Duty - practice management - technology - backup | 82(L-R) | 5.3 |
| Duty - practice management - technology - security measures | 82(L-R) | 5.3 |
| Duty - practice management - technology - special considerations | 82(L-R) | 5.3 |
| Duty - practice management - technology - update | 82(L-R) | 5.3 |
| Duty - technology - backup | 82(L-R) | 5.3 |
| Duty - technology - security measures | 82(L-R) | 5.3 |
| Duty - technology - special considerations | 82(L-R) | 5.3 |
| Duty - technology - update | 82(L-R) | 5.3 |
| Email - technology - duties regarding | 82(L-R) | 5.3 |
| Practice management - technology - backup | 82(L-R) | 5.3 |
| Practice management - technology - security measures | 82(L-R) | 5.3 |
| Practice management - technology - special considerations | 82(L-R) | 5.3 |
| Practice management - technology - update | 82(L-R) | 5.3 |
| Security - technology - practice management | 82(L-R) | 5.3 |
| Technology - backup - client files | 82(L-R) | 5.3 |
| Technology - competent use of - practice management | 82(L-R) | 5.3 |
| Technology - disaster management - practice management | 82(L-R) | 5.3 |
| Technology - email - use of to deliver legal services | 82(L-R) | 5.3 |
| Technology - must use competently - delivering legal services | 82(L-R) | 5.3 |
| Technology - obsolescence - systems and software - use in practice management | 82(L-R) | 5.3 |
| Technology - preventing hackers - security measures - delivering legal services | 82(L-R) | 5.3 |
| Technology - security measures - delivering legal services | 82(L-R) | 5.3 |
| Technology - special considerations - delivering legal services | 82(L-R) | 5.3 |
| Technology - update - systems and software - delivering legal services | 82(L-R) | 5.3 |
| Update - technology - practice management | 82(L-R) | 5.3 |
| Duty - financial responsibilities - practice management | 82(R) | 6 |
| Duty - practice management - financial responsibilities | 82(R) | 6 |
| Financial responsibilities - practice management | 82(R) | 6 |
| Practice management - financial responsibilities | 82(R) | 6 |
| Client - financial responsibilities on behalf of client - r. 7.1-2  SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Client - retain third party on behalf of - financial responsibilities - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Duty - client - financial responsibilities - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Duty - client - retain third party on behalf of - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Duty - financial responsibilities - on behalf of client - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Duty - financial responsibilities - retain third party on behalf of client - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Duty - payments on behalf of client - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Duty - practice management - financial responsibilities - on behalf of client - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Duty - retain third party on behalf of client - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Expert - retain on behalf of client - financial responsibilities - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Fees - to third parties - lawyer’s duty - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Financial responsibilities - on behalf of client - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Financial responsibilities - retain third party on behalf of client - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Payment - on behalf of client - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Practice management - financial responsibilities - on behalf of client - r. 7.1-2 SEE ALSO: Duty - financial obligations | 82(R)-83(L)64(R) | 6.13.5 |
| Practice management - financial responsibilities - retain third party on behalf of client - r. 7.1-2 | 82(R)-83(L) | 6.1 |
| Financial responsibilities - to operate a law practice  | 83(L) | 6.2 |
| Law practice - financial responsibilities  | 83(L) | 6.2 |
| Lawyer - financial responsibilities - practice management  | 83(L) | 6.2 |
| Lawyer - practice management - financial responsibilities | 83(L) | 6.2 |
| Legal practice - financial responsibilities | 83(L) | 6.2 |
| Operate a law practice - financial responsibilities | 83(L) | 6.2 |
| Practice management - financial responsibilities - operating a law practice | 83(L) | 6.2 |
| Responsibilities - financial - operating a law practice | 83(L) | 6.2 |
| Compliance and reporting requirements - financial responsibilities - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Duty - financial reporting and compliance - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Duty - practice management - financial reporting and compliance - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Duty - reporting and compliance - financial responsibilities - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Financial responsibilities - reporting and compliance requirements - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Practice management - financial responsibilities - reporting and compliance requirements - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Reporting - and compliance - financial responsibilities - By-Laws 8 and 9; Law Society Act, s. 57 | 83(R) | 6.3 |
| Articling student - supervision of - r. 6.2-2 | 83(R) | 7 |
| Duty - articling students - supervision - r. 6.2-2 | 83(R) | 7 |
| Duty - supervision - support staff - ss. 6.1-6.2; By-Law 7.1, Part I | 83(R) | 7 |
| Duty - supervision - articling students - r. 6.2-2 | 83(R) | 7 |
| Managing supervisory responsibilities - practice management - ss. 6.1-6.2; By-Law 7.1, Part I | 83(R) | 7 |
| Practice management - articling students - supervision - r. 6.2-2 | 83(R) | 7 |
| Practice management - supervision - support staff - ss. 6.1-6.2; By-Law 7.1, Part I | 83(R) | 7 |
| Practice management - supervision of articling students - r. 6.2-2 | 83(R) | 7 |
| Supervision - articling students - r. 6.2-2 | 83(R) | 7 |
| Supervision - duty - support staff - ss. 6.1-6.2; By-Law 7.1, Part I | 83(R) | 7 |
| Assistance - support staff - hiring - considerations | 83(R)-84(L) | 7.1 |
| Duty - hiring support staff - practice management | 83(R)-84(L) | 7.1 |
| Duty - practice management - hiring support staff  | 83(R)-84(L) | 7.1 |
| Employee - hiring - considerations - practice management | 83(R)-84(L) | 7.1 |
| Hiring support staff - considerations - practice management | 83(R)-84(L) | 7.1 |
| Practice management - hiring support staff - considerations | 83(R)-84(L) | 7.1 |
| Staff - hiring - practice management  | 83(R)-84(L) | 7.1 |
| Supervision - hiring support staff - practice management | 83(R)-84(L) | 7.1 |
| Support staff - hiring - practice management | 83(R)-84(L) | 7.1 |
| Delegation - non-lawyer employees | 84(L-R) | 7.3 |
| Duty - delegation - non-lawyers and support staff | 84(L-R) | 7.3 |
| Duty - practice management - supervision of support staff | 84(L-R) | 7.3 |
| Duty - supervision - non-lawyers and support staff | 84(L-R) | 7.3 |
| Employee - delegation | 84(L-R) | 7.3 |
| Employee - supervision | 84(L-R) | 7.3 |
| Non-lawyer employees - supervision, delegation | 84(L-R) | 7.3 |
| Practice management - delegation to support staff - what allowed to do and what not allowed to do | 84(L-R) | 7.3 |
| Practice management - supervision of support staff | 84(L-R) | 7.3 |
| Responsibility - for support staff - supervision | 84(L-R) | 7.3 |
| Staff - delegation - what allowed to do and what not allowed to do | 84(L-R) | 7.3 |
| Staff - supervision  | 84(L-R) | 7.3 |
| Supervision - non-lawyer employees  | 84(L-R) | 7.3 |
| Support staff - delegation - what allowed and not allowed to do | 84(L-R) | 7.3 |
| Support staff - supervision | 84(L-R) | 7.3 |
| Assistance - support staff - training, supervision, delegation | 84(L) | 7.2 |
| Duty - practice management - training support staff | 84(L) | 7.2 |
| Duty - training support staff | 84(L) | 7.2 |
| Education and training - non-lawyer staff | 84(L) | 7.2 |
| Employee - training | 84(L) | 7.2 |
| Non-lawyers - education and training | 84(L) | 7.2 |
| Office manual - training - support staff | 84(L) | 7.2 |
| Practice management - training support staff | 84(L) | 7.2 |
| Staff - training | 84(L) | 7.2 |
| Supervision - training support staff | 84(L) | 7.2 |
| Support staff - training | 84(L) | 7.2 |
| Training support staff | 84(L) | 7.2 |
| Duty - supervision - in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| E-Reg - supervision of employees - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Electronic registration of title documents - supervision of employees - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Employee - supervision in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Non-lawyer employees - supervision in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Practice management - supervision in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Real estate matters - supervision of employees - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Staff - supervision in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Supervision - in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2  | 84(R)-85(L) | 7.4 |
| Support staff - supervision in real estate matters - r. 6.1-1 and rr. 6.1-5 - 6.1-6.2 | 84(R)-85(L) | 7.4 |
| Administrative and business aspects of practice - practice management | 85(L-R) | 8 |
| Business and administrative aspects of practice - practice management | 85(L-R) | 8 |
| Contingency plans - practice management | 85(L-R) | 8 |
| Continuity plans - practice management | 85(L-R) | 8 |
| Continuing professional development - administrative requirements of law society | 85(L-R) | 8 |
| Insurance - liability insurance - required | 85(L-R) | 8 |
| Law Society - administrative requirements of practice - practice management | 85(L-R) | 8 |
| Law Society - annual fee | 85(L-R) | 8 |
| Law Society - annual report | 85(L-R) | 8 |
| Law Society - continuing professional development | 85(L-R) | 8 |
| Law Society - professional liability insurance requirement | 85(L-R) | 8 |
| Liability insurance - required - administrative requirements of practice | 85(L-R) | 8 |
| LSUC - administrative requirements - practice management | 85(L-R) | 8 |
| LSUC - annual fee | 85(L-R) | 8 |
| LSUC - annual report | 85(L-R) | 8 |
| LSUC - continuing professional development | 85(L-R) | 8 |
| LSUC - professional liability insurance requirement | 85(L-R) | 8 |
| Managing administrative and business aspects of practice | 85(L-R) | 8 |
| Practice management - administrative requirements of law society | 85(L-R) | 8 |
| Practice Management - managing administrative and business aspects of practice | 85(L-R) | 8 |
| Professional development - required - administrative requirements of law society | 85(L-R) | 8 |
| Professional liability insurance - required - administrative requirements of law society | 85(L-R) | 8 |
| Suspension of license - failure to meet administrative requirements | 85(L-R) | 8 |
| Practice management - contingency plans | 85(L-R) | 8 |
| Practice management - continuity plans | 85(L-R) | 8 |
| Officer - privacy - PIPEDA | 85(L-R) | 9.2.1 |
| Duty - paralegals - supervision | 85(L) | 7.5 |
| Duty - supervision - paralegals | 85(L) | 7.5 |
| Paralegal - supervision of | 85(L) | 7.5 |
| Practice management - paralegals - supervision | 85(L) | 7.5 |
| Practice management - supervision of paralegals | 85(L) | 7.5 |
| Supervision - paralegals | 85(L) | 7.5 |
| Affiliation - delegation to and supervision of | 85(L) | 7.6 |
| Delegation - affiliated entities  | 85(L) | 7.6 |
| Duty - affiliated entities - delegation | 85(L) | 7.6 |
| Duty - delegation - affiliated entities | 85(L) | 7.6 |
| Practice management - affiliated entities - delegation to and supervision of | 85(L) | 7.6 |
| Practice management - delegation to affiliated entities | 85(L) | 7.6 |
| Practice management - supervision of affiliated entities | 85(L) | 7.6 |
| Supervision - affiliated entities | 85(L) | 7.6 |
| Client - privacy  SEE: Privacy | 85(R) | 9 |
| Duty - practice management - privacy SEE: Privacy | 85(R) | 9 |
| Duty - privacy SEE: Privacy | 85(R) | 9 |
| Law practice - privacy | 85(R)-86(L) | 9.1 |
| Office of the Privacy Commissioner - PIPEDA | 85(R)-86(L) | 9.1 |
| PIPEDA - Personal Information Protection and Electronic Documents Act - based on 10 principles | 85(R)-86(L) | 9.1 |
| Practice management - PIPEDA  | 85(R)-86(L) | 9.1 |
| Practice management - privacy - law practice | 85(R)-86(L) | 9.1 |
| Privacy - law practice | 85(R)-86(L) | 9.1 |
| Privacy - PIPEDA and law practice | 85(R)-86(L) | 9.1 |
| Practice management - privacy - application of PIPEDA | 86(L-R) | 9.2.1 |
| Privacy - application of PIPEDA | 86(L-R) | 9.2.1 |
| Practice management - privacy - privacy policy | 86(L-R) | 9.2.1 |
| Privacy - privacy policy required | 86(L-R) | 9.2.1 |
| Privacy - officer - PIPEDA | 86(L-R) | 9.2.1 |
| Client - referral - privacy concerns | 86(R)-87(L) | 9.2.2 |
| Collection of personal info - privacy - PIPEDA | 86(R)-87(L) | 9.2.2 |
| Personal information - collection of - PIPEDA | 86(R)-87(L) | 9.2.2 |
| Practice management - privacy - collection of personal information | 86(R)-87(L) | 9.2.2 |
| Privacy - collection of personal information | 86(R)-87(L) | 9.2.2 |
| Privacy - referrals from other lawyers | 86(R)-87(L) | 9.2.2 |
| Referral - privacy concerns | 86(R)-87(L) | 9.2.2 |
| Disclosure - personal information - privacy | 87(L) | 9.2.3 |
| Personal information - use and disclosure of | 87(L) | 9.2.3 |
| Practice management - privacy - use and disclosure of personal information | 87(L) | 9.2.3 |
| Privacy - use and disclosure of personal info | 87(L) | 9.2.3 |
| Use of personal information - privacy | 87(L) | 9.2.3 |
| Access to personal information - privacy | 87(R) | 9.2.4 |
| Personal information - access to  | 87(R) | 9.2.4 |
| Practice management - privacy - access to personal info | 87(R) | 9.2.4 |
| Privacy - access to personal info | 87(R) | 9.2.4 |
| Personal information - retention of | 87(R)-88(L) | 9.2.5 |
| Personal information - security of | 87(R)-88(L) | 9.2.5 |
| Practice management - privacy - retention of personal info | 87(R)-88(L) | 9.2.5 |
| Practice management - privacy - security of personal info | 87(R)-88(L) | 9.2.5 |
| Privacy - retention and security of personal info | 87(R)-88(L) | 9.2.5 |
| Privacy - security and retention of personal info | 87(R)-88(L) | 9.2.5 |
| Retention - of personal information - privacy | 87(R)-88(L) | 9.2.5 |
| Security - of personal information - privacy | 87(R)-88(L) | 9.2.5 |
| Destruction - of personal information | 88(L-R) | 9.2.6 |
| Personal information - destruction of | 88(L-R) | 9.2.6 |
| Practice management - privacy - destruction of personal info | 88(L-R) | 9.2.6 |
| Privacy - destruction of personal info | 88(L-R) | 9.2.6 |
| Law practice - bank account - general account | 90(L) | 3 |
| Accounting - advantages and disadvantages of various systems | 89(B) | Chart |
| Law practice - accounting SEE: Accounting | 89(L) | 1 |
| Accounting - in law practice  | 89(L) | 1 |
| Accounting - types of systems | 89(R)-90(L) | 1.1 |
| Bookkeeping - types of accounting systems | 89(R)-90(L) | 1.1 |
| Types - of accounting systems | 89(R)-90(L) | 1.1 |
| Account - general account - By-Law 9  | 90(L-R) | 3 - 3.2 |
| Bank account - general account - By-Law 9 | 90(L-R) | 3 - 3.2 |
| Account - bank accounts - law practice - general vs. trust  | 90(L) | 2 |
| Bank account - law practice - general vs. trust | 90(L) | 2 |
| General account - vs. trust account | 90(L) | 2 |
| Law practice - bank account - general vs. trust | 90(L) | 2 |
| Trust account - vs. general account | 90(L) | 2 |
| Account - general account | 90(L) | 3 |
| Bank account - general account | 90(L) | 3 |
| General account  | 90(L) | 3 |
| By-Law 9 - General account | 90(L)-91(L) | 3 - 3.2 |
| General account - By-Law 9 | 90(L)-91(L) | 3 - 3.2 |
| Law practice - bank account - general account - By-Law 9  | 90(L)-91(L) | 3 - 3.2 |
| Account - general account - deposits | 90(R) | 3.1 |
| Bank account - general account - deposit | 90(R) | 3.1 |
| Billing - clients - general account | 90(R) | 3.1 |
| Billing - disbursements - general account | 90(R) | 3.1 |
| Client - billing - general account | 90(R) | 3.1 |
| Deposit - general account | 90(R) | 3.1 |
| Disbursement - billing | 90(R) | 3.1 |
| Disbursement - lawyer repays herself | 90(R) | 3.1 |
| Fees - billing - general account | 90(R) | 3.1 |
| Fees - disbursements - billing - general account | 90(R) | 3.1 |
| General account - deposit | 90(R) | 3.1 |
| General receipts - depositing to general account | 90(R) | 3.1 |
| Law practice - bank account - general account - deposit | 90(R) | 3.1 |
| Law practice - billing - general account | 90(R) | 3.1 |
| Account - general account - withdrawal  | 90(R)-91(L) | 3.2 |
| Bank account - general account - withdrawal | 90(R)-91(L) | 3.2 |
| General account - withdrawal | 90(R)-91(L) | 3.2 |
| General disbursements - withdrawing from general account | 90(R)-91(L) | 3.2 |
| Law practice - bank account - general account - withdrawal | 90(R)-91(L) | 3.2 |
| Withdrawal - general account | 90(R)-91(L) | 3.2 |
| Account - trust account - opening, fees | 91(L-R) | 4.1 |
| Bank account - trust account - opening, fees | 91(L-R) | 4.1 |
| Banking fees - trust account | 91(L-R) | 4.1 |
| Fees - banking fees - trust account | 91(L-R) | 4.1 |
| Law practice - bank account - trust account - opening, fees | 91(L-R) | 4.1 |
| Opening - trust account  | 91(L-R) | 4.1 |
| Trust account - banking fees | 91(L-R) | 4.1 |
| Trust account - opening | 91(L-R) | 4.1 |
| Account - general account - withdrawal - HST | 91(L) | 3.3 |
| Bank account - general account - withdrawal - HST | 91(L) | 3.3 |
| General account - withdrawal - HST | 91(L) | 3.3 |
| HST - collection and remittance of  | 91(L) | 3.3 |
| HST - paid from general account | 91(L) | 3.3 |
| Law practice - bank account - general account - withdrawal - HST | 91(L) | 3.3 |
| Law practice - bank account - HST | 91(L) | 3.3 |
| Law practice - HST | 91(L) | 3.3 |
| Withdrawal - general account - HST | 91(L) | 3.3 |
| Account - trust account | 91(L) | 4 |
| Bank account - trust account | 91(L) | 4 |
| Client funds - i.e. trust funds | 91(L) | 4 |
| Law practice - bank account - trust account | 91(L) | 4 |
| Trust account | 91(L) | 4 |
| Trust account - used only for purposes related to provision of legal services (r. 3.2-7.3) | 91(L) | 4 |
| Trust funds | 91(L) | 4 |
| Account - trust account - By-Law 9  | 91(L)-94(L) | 4-4.3.2 |
| Bank account - trust account - By-Law 9 | 91(L)-94(L) | 4-4.3.2 |
| Law practice - bank account - trust account - By-Law 9  | 91(L)-94(L) | 4-4.3.2 |
| Trust account - By-Law 9 | 91(L)-94(L) | 4-4.3.2 |
| Account - trust account - types  | 91(R)-92(L) | 4.1.1 |
| Bank account - trust account - types  | 91(R)-92(L) | 4.1.1 |
| By-Law 9 - Trust account - separate interest-bearing accounts | 91(R)-92(L) | 4.1.1 |
| Law practice - bank account - trust account - types  | 91(R)-92(L) | 4.1.1 |
| Mixed trust account - trust account | 91(R)-92(L) | 4.1.1 |
| Separate interest-bearing trust account | 91(R)-92(L) | 4.1.1 |
| Trust account - mixed trust account | 91(R)-92(L) | 4.1.1 |
| Trust account - separate interest-bearing trust account | 91(R)-92(L) | 4.1.1 |
| Trust account - types  | 91(R)-92(L) | 4.1.1 |
| Types - of trust accounts | 91(R)-92(L) | 4.1.1 |
| Account - trust account - financial institutions  | 92(L) | 4.1.2 |
| Bank - for trust accounts | 92(L) | 4.1.2 |
| Bank account - trust account - financial institutions  | 92(L) | 4.1.2 |
| By-Law 9 - Trust account - financial institutions | 92(L) | 4.1.2 |
| Financial institutions - for trust accounts | 92(L) | 4.1.2 |
| Law practice - bank account - trust account - financial institutions | 92(L) | 4.1.2 |
| Trust account - financial institutions | 92(L) | 4.1.2 |
| Account - trust account - sharing with another lawyer or paralegal | 92(R) | 4.1.3 |
| Bank account - trust account - sharing with another lawyer or paralegal | 92(R) | 4.1.3 |
| Law practice - bank account - trust account - sharing with another lawyer or paralegal | 92(R) | 4.1.3 |
| Sharing - trust account with another lawyer or paralegal | 92(R) | 4.1.3 |
| Trust account - sharing with another lawyer or paralegal | 92(R) | 4.1.3 |
| Account - trust account - deposits | 92(R)-93(L) | 4.2 |
| Bank account - trust account - deposit | 92(R)-93(L) | 4.2 |
| Deposit - mixed trust account | 92(R)-93(L) | 4.2 |
| Deposit - trust account | 92(R)-93(L) | 4.2 |
| Law practice - bank account - trust account - deposit | 92(R)-93(L) | 4.2 |
| Mixed trust account - deposits | 92(R)-93(L) | 4.2 |
| Trust account - deposit | 92(R)-93(L) | 4.2 |
| Trust account - trust receipts (deposits) | 92(R)-93(L) | 4.2 |
| Trust receipts - depositing to trust account | 92(R)-93(L) | 4.2 |
| Deposit - trust account - methods for depositing | 93(L) | 4.2.1 |
| Methods - for depositing to trust account | 93(L) | 4.2.1 |
| Trust account - deposit - methods for depositing | 93(L) | 4.2.1 |
| Misappropriation of trust funds  | 93(L) | 4.3 |
| Trust account - misappropriation of trust funds | 93(L) | 4.3 |
| Trust disbursements (withdrawals) | 93(L) | 4.3 |
| Trust funds - misappropriation | 93(L) | 4.3 |
| Deposit - trust account - when to deposit | 93(L) | 4.2.2 |
| Trust account - deposit - when to deposit | 93(L) | 4.2.2 |
| When to deposit to trust account | 93(L) | 4.2.2 |
| Account - trust account - withdrawal | 93(L)-94(R) | 4.3-4.3.4 |
| Bank account - trust account - withdrawal | 93(L)-94(R) | 4.3-4.3.4 |
| Law practice - bank account - trust account - withdrawal | 93(L)-94(R) | 4.3-4.3.4 |
| Trust account - withdrawal | 93(L)-94(R) | 4.3-4.3.4 |
| Withdrawal - trust account | 93(L)-94(R) | 4.3-4.3.4 |
| Reasons for withdrawal from trust account | 93(R)-93(L) | 4.3.1 |
| Trust account - withdrawal - reasons for | 93(R)-93(L) | 4.3.1 |
| Withdrawal - trust account - reasons for | 93(R)-93(L) | 4.3.1 |
| By-Law 9 - withdrawing trust funds - by electronic transfer | 93(R)-94(L) | 4.3.2 |
| Trust account - withdrawal - electronic transfer (By-Law 9) | 93(R)-94(L) | 4.3.2 |
| Trust account - withdrawal - methods  | 93(R)-94(L) | 4.3.2 |
| Withdrawal - trust account - electronic transfer (By-Law 9) | 93(R)-94(L) | 4.3.2 |
| Withdrawal - trust account - methods | 93(R)-94(L) | 4.3.2 |
| Methods - for withdrawal from trust account | 93(R)-94(L) | 4.3.2 |
| Individuals authorized to withdraw from trust account | 94(L) | 4.3.3 |
| Trust account - withdrawal - individuals authorized to withdraw | 94(L) | 4.3.3 |
| Withdrawal - trust account - individuals authorized to withdraw | 94(L) | 4.3.3 |
| Corrections - to errors in withdrawal - trust account | 94(R) | 4.3.4 |
| Error - in withdrawal from trust account - corrections | 94(R) | 4.3.4 |
| Trust account - withdrawal - error in withdrawal; corrections | 94(R) | 4.3.4 |
| Withdrawal - trust account - error in withdrawal; corrections | 94(R) | 4.3.4 |
| Account - trust account - unclaimed trust funds | 94(R)-95(L) | 4.4 |
| Bank account - trust account - unclaimed trust funds | 94(R)-95(L) | 4.4 |
| Cheques - stale dated - trust account | 94(R)-95(L) | 4.4 |
| Law practice - bank account - trust account - unclaimed trust funds | 94(R)-95(L) | 4.4 |
| Stale dated cheques - trust account | 94(R)-95(L) | 4.4 |
| Trust account - stale dated cheques | 94(R)-95(L) | 4.4 |
| Trust account - unclaimed trust funds | 94(R)-95(L) | 4.4 |
| Trust funds - unclaimed - trust account  | 94(R)-95(L) | 4.4 |
| Unclaimed trust funds - trust account  | 94(R)-95(L) | 4.4 |
| By-Law 10 - Law Society’s Unclaimed Trust Fund | 94(R)-95(L) | 4.4 |
| Law Society - Trustee Services Department - administers Unclaimed Trust Fund (By-Law 10) | 94(R)-95(L) | 4.4 |
| Law Society - Unclaimed Trust Fund (By-Law 10) | 94(R)-95(L) | 4.4 |
| Trustee Services Department - Law Society - administers Unclaimed Trust Fund (By-Law 10) | 94(R)-95(L) | 4.4 |
| Unclaimed Trust Fund - Law Society (By-Law 10) | 94(R)-95(L) | 4.4 |
| Accounting - receiving money from clients | 95(L) | 5 |
| Client - receiving money from | 95(L) | 5 |
| Fees - receiving money from client | 95(L) | 5 |
| Law practice - receiving money from clients | 95(L) | 5 |
| Methods - of receiving payment from clients | 95(L) | 5 |
| Money - receiving from client | 95(L) | 5 |
| Payment - receiving money from clients | 95(L) | 5 |
| Receiving money from clients | 95(L) | 5 |
| Accounting - cash - receiving from clients - restrictions | 95(L)-96(L) | 5.1 |
| Accounting - receiving money from clients - cash - restrictions  | 95(L)-96(L) | 5.1 |
| By-Law 9 - restrictions on accepting cash from clients  | 95(L)-96(L) | 5.1 |
| Cash - receiving from client - restrictions | 95(L)-96(L) | 5.1 |
| Client - receiving money from - cash - restrictions | 95(L)-96(L) | 5.1 |
| Fees - receiving money from client - cash - restrictions | 95(L)-96(L) | 5.1 |
| Law practice - cash - receiving from clients - restrictions  | 95(L)-96(L) | 5.1 |
| Law practice - receiving money from clients - cash - restrictions | 95(L)-96(L) | 5.1 |
| Money - receiving from client - cash - restrictions | 95(L)-96(L) | 5.1 |
| Payment - cash - receiving from clients - restrictions | 95(L)-96(L) | 5.1 |
| Payment - receiving money from clients - cash | 95(L)-96(L) | 5.1 |
| Receiving cash from clients - restrictions  | 95(L)-96(L) | 5.1 |
| Receiving money from clients - cash - restrictions | 95(L)-96(L) | 5.1 |
| Restrictions on accepting cash from clients (By-Law 9) | 95(L)-96(L) | 5.1 |
| Cash - refund to client  | 95(L)-96(L) | 5.1 |
| Client - refund - cash payment | 95(L)-96(L) | 5.1 |
| Refund - to client - cash payment | 95(L)-96(L) | 5.1 |
| Account - credit and debit payment from clients | 96(L) | 5.2 |
| Accounting - receiving money from clients - credit and debit card payments | 96(L) | 5.2 |
| Bank account - credit and debit card payments from clients | 96(L) | 5.2 |
| Client - receiving money from - credit and debt card | 96(L) | 5.2 |
| Credit and debit card payments - receiving money from client | 96(L) | 5.2 |
| Debit and credit card payments - receiving money from client | 96(L) | 5.2 |
| Fees - receiving money from client - credit and debit card payments | 96(L) | 5.2 |
| General account - credit or debit payments from client - for services rendered | 96(L) | 5.2 |
| Law practice - receiving money from clients - credit and debit card payments | 96(L) | 5.2 |
| Money - receiving from client - credit and debit card payments | 96(L) | 5.2 |
| Payment - receiving money from clients - credit and debit cards | 96(L) | 5.2 |
| Point of sale (POS) machines - credit and debit card payment from clients | 96(L) | 5.2 |
| Receiving money from clients - credit and debit card payments | 96(L) | 5.2 |
| Trust account - credit or debit payments from client - for future fees/disbursements | 96(L) | 5.2 |
| Accounting - receiving money from clients - clearance periods | 96(R)-97(L) | 5.3 |
| Clearance periods - receiving money from client | 96(R)-97(L) | 5.3 |
| Client - receiving money from - clearance periods | 96(R)-97(L) | 5.3 |
| Client trust ledger account - overdrawn or short | 96(R)-97(L) | 5.3 |
| Fees - receiving money from client - clearance periods | 96(R)-97(L) | 5.3 |
| Funds - clearance periods | 96(R)-97(L) | 5.3 |
| Law practice - receiving money from clients - clearance periods  | 96(R)-97(L) | 5.3 |
| Misused or misapplied funds - trust account overdrawn and short | 96(R)-97(L) | 5.3 |
| Money - receiving from client - clearance periods | 96(R)-97(L) | 5.3 |
| Non-sufficient funds (NSF) - receiving money from client - clearance periods | 96(R)-97(L) | 5.3 |
| Overdrawn - client trust ledger account - insufficient funds in trust account | 96(R)-97(L) | 5.3 |
| Overdrawn - trust account | 96(R)-97(L) | 5.3 |
| Payment - receiving money from clients - clearance periods  | 96(R)-97(L) | 5.3 |
| Receiving money from clients - clearance periods  | 96(R)-97(L) | 5.3 |
| Shortage - client trust ledger account - insufficient funds in trust account | 96(R)-97(L) | 5.3 |
| Trust account - banking fees - clearance periods | 96(R)-97(L) | 5.3 |
| Trust account - clearance periods - receiving money from client | 96(R)-97(L) | 5.3 |
| Trust account - client has insufficient funds in account - overdrawn | 96(R)-97(L) | 5.3 |
| Trust account - insufficient funds | 96(R)-97(L) | 5.3 |
| Trust account - overdrawn | 96(R)-97(L) | 5.3 |
| Trust account - receiving money from client - clearance periods | 96(R)-97(L) | 5.3 |
| Trust account - withdrawal - clearance periods | 96(R)-97(L) | 5.3 |
| Account - record keeping requirements - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| Accounting - record keeping requirements - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| Bank account - record keeping requirements - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| General account - record keeping requirements - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| Law practice - record keeping requirements - current, permanent, and available in paper copy | 97(L-R) | 6-6.1 |
| Record keeping requirements - bank accounts - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| Trust account - record keeping requirements - current, permanent, available in paper copy | 97(L-R) | 6-6.1 |
| By-Law 9 - Record keeping requirements - general and trust accounts | 97(L-R) | 6.6.1 |
| General account - required journals and records | 97(R) | 6.2 |
| General cash journal - consists of - general receipts and general disbursements journals | 97(R) | 6.2 |
| Journal - general account - general cash journal | 97(R) | 6.2 |
| General account - general receipts journal (6 years) | 97(R) | 6.2.1 |
| General receipts journal - general account  | 97(R) | 6.2.1 |
| Journal - general account - general receipts journal (6 years) | 97(R) | 6.2.1 |
| Receipts journal - general account  | 97(R) | 6.2.1 |
| Record keeping requirements - general account - general receipts journal (6 years) | 97(R) | 6.2.1 |
| Disbursement journal - general account | 98(L) | 6.2.2 |
| General account - general disbursements journal (6 years) | 98(L) | 6.2.2 |
| General disbursements journal (6 years) - general account | 98(L) | 6.2.2 |
| Journal - general account - general disbursements journal (6 years) | 98(L) | 6.2.2 |
| Record keeping requirements - general account - general disbursements journal (6 years)  | 98(L) | 6.2.2 |
| Account - record keeping requirements - general account | 97(R)-98(R) | 6.2-6.2.5 |
| Accounting - record keeping requirements - general account  | 97(R)-98(R) | 6.2-6.2.5 |
| Bank account - record keeping requirements - general account  | 97(R)-98(R) | 6.2-6.2.5 |
| General account - record keeping requirements  | 97(R)-98(R) | 6.2-6.2.5 |
| Law practice - record keeping requirements - general account | 97(R)-98(R) | 6.2-6.2.5 |
| Record keeping requirements - general account  | 97(R)-98(R) | 6.2-6.2.5 |
| General account - optional records - client general ledger and monthly general reconciliation | 98(L-R) | 6.2.4-6.2.5 |
| Optional records - general account - client general ledger and monthly general reconciliation | 98(L-R) | 6.2.4-6.2.5 |
| Client general ledger (optional) - general account | 98(L-R) | 6.2.4 |
| General account - client general ledger (optional) | 98(L-R) | 6.2.4 |
| General client ledger (optional) - general account | 98(L-R) | 6.2.4 |
| Ledger - general client ledger (optional) | 98(L-R) | 6.2.4 |
| Record keeping requirements - general account - client general ledger (optional) | 98(L-R) | 6.2.4 |
| Fees book - general account | 98(L) | 6.2.3 |
| General account - fees book (6 years) | 98(L) | 6.2.3 |
| Record keeping requirements - general account - fees book (6 years)  | 98(L) | 6.2.3 |
| Journal - trust account - trust cash journal | 98(R) | 6.3 |
| Trust account - required journals & records | 98(R) | 6.3 |
| Trust cash journal - consists of - trust receipts and trust disbursements journals  | 98(R) | 6.3 |
| General account - monthly general reconciliation (optional) | 98(R) | 6.2.5 |
| Monthly general reconciliation (optional) - general account | 98(R) | 6.2.5 |
| Reconciliation - general account - monthly general reconciliation (optional)  | 98(R) | 6.2.5 |
| Record-keeping requirements - general account - monthly general reconciliation (optional) | 98(R) | 6.2.5 |
| Account - record keeping requirements - trust account | 98(R)-100(R) | 6.3-6.3.5 |
| Accounting - record keeping requirements - trust account  | 98(R)-100(R) | 6.3-6.3.5 |
| Bank account - record keeping requirements - trust account | 98(R)-100(R) | 6.3-6.3.5 |
| Law practice - record keeping requirements - trust account | 98(R)-100(R) | 6.3-6.3.5 |
| Record keeping requirements - Trust account  | 98(R)-100(R) | 6.3-6.3.5 |
| Trust account - record keeping requirements  | 98(R)-100(R) | 6.3-6.3.5 |
| Journal - trust account - trust receipts journal (10 years) | 98(R)-99(L) | 6.3.1 |
| Receipts journal - trust account | 98(R)-99(L) | 6.3.1 |
| Record keeping requirements - trust account - trust receipts journal (10 years)  | 98(R)-99(L) | 6.3.1 |
| Trust account - trust receipts journal (10 years) | 98(R)-99(L) | 6.3.1 |
| Trust receipts journal (10 years) - trust account  | 98(R)-99(L) | 6.3.1 |
| Journal - trust account - trust transfer journal (6 years) | 99(R) | 6.3.4 |
| Record keeping requirements - trust account - trust transfer journal (6 years) | 99(R) | 6.3.4 |
| Transfer - trust accounts - between clients’ trust accounts | 99(R) | 6.3.4 |
| Trust account - transfers between clients’ trust ledger accounts | 99(R) | 6.3.4 |
| Trust account - trust transfer journal (6 years) | 99(R) | 6.3.4 |
| Trust transfer journal (6 years) - trust account | 99(R) | 6.3.4 |
| Disbursement journal - trust account  | 99(L) | 6.3.2 |
| Journal - trust account - trust disbursements journal (10 years)  | 99(L) | 6.3.2 |
| Record keeping requirements - trust account - trust disbursements journal (10 years)  | 99(L) | 6.3.2 |
| Trust account - Electronic Trust Transfer Requisition Form (Form 9A)SEE ALSO: Sample Form 9A  | 99(L)109 | 6.3.2Figure 8 |
| Trust account - trust disbursements journal (10 years) | 99(L) | 6.3.2 |
| Trust account - withdrawal - electronic transfer (Electronic Trust Transfer Requisition Form) (Form 9A)SEE ALSO: Sample Form 9A | 99(L)109 | 6.3.2Figure 8 |
| Trust disbursements journal (10 years) - trust account | 99(L) | 6.3.2 |
| Withdrawal - trust account - electronic transfer (Electronic Trust Transfer Requisition Form) (Form 9A)SEE ALSO: Sample Form 9A | 99(L)109 | 6.3.2Figure 8 |
| Client trust ledger (10 years) - trust account  | 99(L) | 6.3.3 |
| Ledger - client trust ledger (10 years) | 99(L) | 6.3.3 |
| Record keeping requirements - trust account - clients’ trust ledger (10 years)  | 99(L) | 6.3.3 |
| Trust account - clients’ trust ledger (10 years) | 99(L) | 6.3.3 |
| Trust account - trust ledger (10 years) | 99(L) | 6.3.3 |
| Trust ledger - trust account (10 years) | 99(L) | 6.3.3 |
| Monthly trust comparison (10 years) - trust account | 99(R) | 6.3.5 |
| Record keeping requirements - trust account - monthly trust comparison (10 years) | 99(R) | 6.3.5 |
| Trust - comparison - monthly - trust account | 99(R) | 6.3.5 |
| Trust - monthly comparison (10 years) - trust account | 99(R) | 6.3.5 |
| Trust account - monthly trust comparison (10 years) | 99(R) | 6.3.5 |
| Monthly trust reconciliation - trust account | 99(R)-100(L) | 6.3.5 (a) |
| Reconciliation - trust account | 99(R)-100(L) | 6.3.5 (a) |
| Record keeping requirements - trust account - trust reconciliation | 99(R)-100(L) | 6.3.5 (a) |
| Trust account - trust reconciliation | 99(R)-100(L) | 6.3.5 (a) |
| Trust reconciliation - trust account | 99(R)-100(L) | 6.3.5 (a) |
| Client liabilities - trust account | 99(R)-100(L) | 6.3.5 (a) |
| Liabilities - client liabilities - trust account | 99(R)-100(L) | 6.3.5 (a) |
| Reconciliation - trust account - steps in process | 99(R)-100(L) | 6.3.5 (a) |
| Trust account - client liabilities | 100(L-R) | 6.3.5 (b) |
| Trust reconciliation - steps in process | 100(L) | 6.3.5 (a) |
| Client trust listing - trust account | 100(L-R) | 6.3.5 (b) |
| Record keeping requirements - trust account - client trust listing | 100(L-R) | 6.3.5 (b) |
| Trust - client trust listing | 100(L-R) | 6.3.5 (b) |
| Trust account - client trust listing | 100(L-R) | 6.3.5 (b) |
| Client trust listing - steps in process | 100(L-R) | 6.3.5 (b) |
| Reconciliation - trust bank account statement | 100(L-R) | 6.3.5 (b) |
| Supporting documentation - trust reconciliation | 100(L-R) | 6.3.5 (b) |
| Trust bank account statement - trust reconciliation | 99(R)-100(L) | 6.3.5(a) |
| Trust comparison - supporting documentation | 100(R) | 6.3.5(c) |
| Trust reconciliation - supporting documentation | 100(R) | 6.3.5(c) |
| Trust reconciliation - trust bank account statement | 100(R) | 6.3.5(c) |
| By-Law 9 - Other record keeping requirements | 101(L)-102(R) | 6.4-6.4.3 |
| Cheque imaging - source documents | 101(L-R) | 6.4.1 |
| Source documents - cheque imaging | 101(L-R) | 6.4.1 |
| Source documents - general and trust accounts | 101(L-R) | 6.4.1 |
| Source documents - Form 9A (Electronic Trust Transfer Requisition Form) - withdrawal from trust via electronic transfer | 101(L-R) | 6.4.1 |
| Account - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Accounting - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Bank account - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Deposit slips - detailed duplicate deposit slips - source documents (10 years) | 101(L-R) | 6.4.1 |
| Detailed duplicate deposit slips - source documents (10 years) | 101(L-R) | 6.4.1 |
| General account - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| General account - source documents (10 years) | 101(L-R) | 6.4.1 |
| Imaging - cheque imaging - source documents | 101(L-R) | 6.4.1 |
| Law practice - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Source documents - detailed duplicate deposit slips | 101(L-R) | 6.4.1 |
| Source documents (10 years) - record keeping requirements  | 101(L-R) | 6.4.1 |
| Trust account - record keeping requirements - source documents (10 years) | 101(L-R) | 6.4.1 |
| Trust account - source documents (10 years) | 101(L-R) | 6.4.1 |
| Source documents - copies of invoices paid from general account (optional) | 101(L-R) | 6.4.1 |
| Account - record keeping requirements - duplicate cash receipts book (6 years) | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Accounting - record keeping requirements - duplicate cash receipts book (6 years) | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Bank account - record keeping requirements - duplicate cash receipts book (6 years) | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Cash - receipts book - duplicate (6 years) - record keeping requirements | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Duplicate cash receipts book (6 years) - record keeping requirements | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Law practice - record keeping requirements - duplicate cash receipts book (6 years)  | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Receipts book - duplicate cash receipts book (6 years) - record keeping requirements | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Record keeping requirements - duplicate cash receipts book (6 years) | 101(R)-102(L)108 (T) | 6.4.2Figure 6 |
| Account - record keeping requirements - valuable property record (10 years) | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Accounting - record keeping requirements - valuable property record (10 years) | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Bank account - record keeping requirements - valuable property record (10 years) | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Client property - valuable property record (10 years) - record keeping requirements | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Law practice - record keeping requirements - valuable property record (10 years) | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Property - valuable property record (10 years) - record keeping requirements | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Property record - valuable property record (10 years) | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Record - valuable property record (10 years) - record-keeping requirements  | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Valuable property record (10 years) - record keeping requirements | 102(L-R)108 (B) | 6.4.3Figure 7 |
| Sample Documents - list – figure numbers  | 102 (R) | 7 |
| Disbursement journal - general account - sample | 103 | ChartFigure 1  |
| Fees book - sample | 103 | ChartFigure 1 |
| General account - fees book - sample | 103 | ChartFigure 1 |
| General account - general disbursements journal - sample | 103 | ChartFigure 1 |
| General account - general receipts journal - sample | 103 | ChartFigure 1 |
| General disbursements journal - sample  | 103 | ChartFigure 1 |
| General receipts journal - sample  | 103 | ChartFigure 1 |
| Journal - general account - general disbursements journal - sample | 103 | ChartFigure 1 |
| Journal - general account - general receipts journal - sample | 103 | ChartFigure 1 |
| Receipts journal - general account - sample  | 103 | ChartFigure 1 |
| Record keeping requirements - general account - fees book - sample  | 103 | ChartFigure 1 |
| Record keeping requirements - general account - general disbursements journal - sample  | 103 | ChartFigure 1 |
| Record keeping requirements - general account - general receipts journal - sample  | 103 | ChartFigure 1 |
| Client general ledger - general account - sample | 104 | ChartFigure 2 |
| General account - client general ledger - sample | 104 | ChartFigure 2 |
| General client ledger - general account - sample | 104 | ChartFigure 2 |
| Ledger - general client ledger - sample | 104 | ChartFigure 2 |
| Record keeping requirements - general account - client general ledger - sample | 104 | ChartFigure 2 |
| Disbursement journal - trust account - sample  | 105 | ChartFigure 3 |
| Journal - trust account - trust disbursements journal - sample | 105 | ChartFigure 3 |
| Journal - trust account - trust receipts journal - sample | 105 | ChartFigure 3 |
| Journal - trust account - trust transfer journal -sample  | 105 | ChartFigure 3 |
| Receipts journal - trust account - sample  | 105 | ChartFigure 3 |
| Record keeping requirements - trust account - trust disbursements journal - sample  | 105 | ChartFigure 3 |
| Record keeping requirements - trust account - trust receipts journal - sample  | 105 | ChartFigure 3 |
| Record keeping requirements - trust account - trust transfer journal - sample  | 105 | ChartFigure 3 |
| Trust account - trust disbursements journal - sample | 105 | ChartFigure 3 |
| Trust account - trust receipts journal - sample | 105 | ChartFigure 3 |
| Trust account - trust transfer journal - sample  | 105 | ChartFigure 3 |
| Trust disbursements journal - sample  | 105 | ChartFigure 3 |
| Trust receipts journal - sample  | 105 | ChartFigure 3 |
| Trust transfer journal - trust account - sample  | 105 | ChartFigure 3 |
| Client trust ledger - trust account - sample | 106 | ChartFigure 4 |
| Ledger - client trust ledger - sample | 106 | ChartFigure 4 |
| Record keeping requirements - trust account - clients’ trust ledger - sample  | 106 | ChartFigure 4 |
| Trust account - clients’ trust ledger - sample | 106 | ChartFigure 4 |
| Trust account - trust ledger - sample | 106 | ChartFigure 4 |
| Trust ledger - trust account - sample  | 106 | ChartFigure 4 |
| Monthly trust comparison - trust account - sample | 107 | ChartFigure 5 |
| Monthly trust reconciliation - trust account - sample | 107 | ChartFigure 5 |
| Reconciliation - trust - sample | 107 | ChartFigure 5 |
| Record keeping requirements - trust account - monthly trust comparison - sample | 107 | ChartFigure 5 |
| Record keeping requirements - trust account - trust reconciliation - sample | 107 | ChartFigure 5 |
| Trust - comparison - monthly - sample | 107 | ChartFigure 5 |
| Trust - monthly comparison - trust account - sample | 107 | ChartFigure 5 |
| Trust account - monthly trust comparison - sample | 107 | Chart Figure 5 |
| Trust reconciliation - trust account - sample | 107 | ChartFigure 5 |
| Duplicate cash receipt - sample | 108 (T) | ChartFigure 6 |
| Record keeping requirements - duplicate cash receipt - sample | 108 (T) | ChartFigure 6 |
| Valuable property record - sample | 108 (B) | ChartFigure 7 |
| Electronic Trust Transfer Requisition Form (Form 9A) - sample | 109 | ChartFigure 8  |
| Form 9A - Electronic Trust Transfer Requisition Form - sample | 109 | ChartFigure 8 |
| Sample Electronic Trust Transfer Requisition Form (Form 9A) | 109 | Chart Figure 8 |
| Trust account - withdrawal - Electronic Trust Transfer Requisition Form (Form 9A) - sample | 109 | ChartFigure 8 |
| Withdrawal - trust account - Electronic Trust Transfer Requisition Form (Form 9A) - sample | 109 | ChartFigure 8 |