

Representative Capacity Undertaking

Instructions:

This form must be completed when a lawyer acts in a representative capacity, pursuant to Rule 134. It must be completed and submitted to the Law Society within 14 days of the lawyer commencing to act in a representative capacity.

Please submit this form to info@lawsociety.nt.ca.

1. The representative capacity I acted under was a:

Personal Matter

Professional Matter (as a Barrister & Solicitor)

2. The representative capacity I acted under was:

Personal representative, executor or administrate of the estate of a deceased person

A trustee of a trust appointed under a trust instrument creating the trust

A trustee of the property of another person under a court appointment

An attorney of a person under a power of attorney

A de facto trustee

Other – please explain

The client I am representing is: _____

I, _____, undertake to provide, on demand:

- particulars relating to my acting in a representative capacity;
- a list of the beneficiaries of the estate or trust, together with their last known address;
- to the extent of my lawful ability, the books, records, accounts and documents of the estate or trust, in a form sufficient to accommodate an examination, review, audit or investigation ordered by the Executive Director, and
- to cooperate with the Society's auditor or investigator in the conduct of any examination, review, audit or investigation so ordered.all pursuant to subrule 134(3).

Date _____

Signature of Member _____