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Becoming a Student-at-Law

If you wish to become a member of the legal profession in Alberta, you must be of good character and reputation, meet the academic qualifications, successfully complete a bar admission course and serve a term of articles.

See sections 37(1) and 40(1) of the [Legal Profession Act](#).

You must have obtained a Canadian common law degree or an equivalent qualification, after which you may then apply for student-at-law status. If you have a foreign law degree, visit our [Internationally Trained Lawyers and Graduates](#) page for more information.

Students who intend to practice law in Alberta must first complete a 12-month articling term (15 months where part of the articling term is with a court). While many students will complete their articling year at a single firm or organization, there are other options such as [composite articles and secondments](#) that students and employers should be aware of.

Requirements

Deadlines to Submit Documentation: 30-Day Rule

The required documents listed below must be received by the Law Society at least 30 days prior to the proposed articling commencement date.

The Law Society's Executive Director may abridge the 30-day rule. To request abridgment, you must apply in writing, explaining the exceptional circumstances for not being able to comply with the 30-day rule.

This letter must be signed by the student and potential principal. For further information, consult Rule 51 of the [Rules of the Law Society of Alberta](#).

Complete and submit the following:

*Please note on June 1, 2015 the Law Society made a number of changes to the articling student application forms. View this brief [webinar](#) for more information.

For application and admission fees, please consult the [Schedule of Fees](#).

Form #	Form Name	Details
2-1	Application for Admission	Completed by student
2-4	Certification of Character and Reputation	Two required
2-5/ 2-6	Education Plan	Completed by student and principal
2-8/ 2-9	Articles of Clerkship	Completed by student and principal

Additional Submission Requirements

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Proof of Identification: provide an original notarized copy of a birth certificate, passport or driver license on which your full legal name appears. Original notarized documents must be [mailed](#), [couriered](#) or [hand-delivered](#) to the Calgary office. Official law school transcripts must also be [mailed](#) to the Calgary office.

Certificate of Standing from each governing body of which you are or have been a member, inside and/or outside of Canada.

For holders of a Canadian common law degree, an original transcript must be provided by the University showing law degree conferred.

For holders of a civil law or foreign law degree, an NCA certificate must be provided by the Federation of Law Societies.

Please send the information by [mail](#) or [email](#) to Membership Services.

Additional Information

Receipt of Transcripts

For holders of a Canadian common law degree, if you are unable to provide an official transcript confirming your law degree has been granted, the Law Society will accept written confirmation from the Dean of your law school that you have met all requirements of the degree.

For holders of a civil law or foreign law degree, if you are unable to provide an NCA certificate, the Law Society will accept written confirmation from the NCA.

Admission Disclosure

If you have responded "yes" to any of the questions listed on your application for admission, you must provide full disclosure and include all official documentation. This may include court documents, bankruptcy discharge documentation, academic misconduct information and medical reports.

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Articling for Students-at-Law

The Law Society of Alberta admission program requires completion of a 12 month articling term. There are a few ways for you to achieve this goal. While many students-at-law are familiar with the traditional article, [composite articles](#) are now a feasible alternative.

Changing Firms or Principals During Your Articling Term

If you change firms and/or principals during your articling term, you must file an Assignment of Articles of Clerkship and a new Education Plan. Your Assignment of Articles must be approved by the Law Society prior to working with your next firm or principal.

Complete and submit the following:

- [Assignment of Articles of Clerkship](#)
- [Education Plan](#)
- [Certificate of Principal](#) (to be completed by the principal you are leaving)
- [Evaluation Certificate](#) (accompanies the new education plan - to be submitted to the Law Society halfway through commencement of articles)
- [Evaluation Certificate](#) (accompanies the old education plan - to be submitted to the Law Society halfway through commencement of articles)
- Assignment of Articles fee ([Fee Schedule](#)) payable to the Law Society of Alberta

Please send the information by [mail](#) or [email](#) to Membership Services.

Evaluation Certificate

An [Evaluation Certificate](#) must be submitted to the Law Society halfway through commencement of articles.

Termination of Articles

A request to terminate articles must be made in writing to the Law Society of Alberta. There is no formal application form.

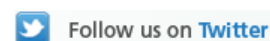
Where the principal and student-at-law jointly apply for termination, the Executive Director/Delegate of the Law Society may grant the application. This application must be signed by both the principal and student-at-law.

Where the principal and student-at-law are unable to jointly apply, the application will be considered by the Executive Director/Delegate (Rule 57.3).

Advice During Articles

The [Practice Advisors](#) are available to all students-at-law for confidential professional advice regarding legal, ethical and practice concerns.

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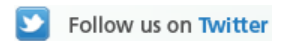
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Composite Articles



Composite articles are articles that are made up of a variety of practice settings that accumulate to fulfill the 12 month articling requirement in Alberta. They are an amalgamation of multiple short or long term articling positions.

In a *traditional article*, a student will complete the 12 month articling requirement in one setting that fulfills the education plan requirements.

In a *secondment*, a student-at-law retains the same principal for the entire 12 month articling period, though they spend a period of time in another practice setting. An example is an article with a large firm with a partner as principal where the student-at-law spends two months working in a corporate in-house setting as a secondment from the large firm. The large firm remains the primary articling setting with the partner as principal for the entire 12 months.

In a *composite article*, the student-at-law has multiple principals. Each time a student-at-law changes practice settings, the articles are assigned to a new principal. Similar to the secondment example above, the student-at-law could spend ten months in a firm setting with one principal but then assign articles to a corporate in-house setting for two months with a second principal. Additionally, a student-at-law could have five practice settings, to get exposure to five practice areas, with a new principal in each setting. This would allow a student the opportunity to work in boutique or specialized settings, receiving high quality exposure to experts in particular fields, with a different principal in each setting, where a traditional article or secondment is not feasible. This also allows for a combination of rural and urban articling settings, providing exposure to different practice demands in settings throughout the province.

Composite article come in a variety of formats, restricted only by the imagination of the student-at-law, tempered by the requirements for principals and education plans.

More information:

- [Advantages](#)
- [FAQs](#)
- [Checklist](#)

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Composite Articles: FAQs

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Who is responsible for the creation of a composite article?

The student-at-law is responsible for arranging their own articling program, however a principal is welcome to provide guidance and suggestions to a student-at-law and assist with networking.

How do I know the student-at-law is well qualified?

All students-at-law must meet the same qualifications for permission to article in Alberta. Though students may come from a variety of educational backgrounds, they all meet Canadian legal education requirements or those set by the National Committee on Accreditation for internationally trained law students and lawyers.

Who pays the student-at-law's salary?

In a composite article, each principal will pay for the portion of articles the student-at-law spends with him or her during the articling term. It is up to each student-at-law and principal to determine salary and any benefits in accordance with legal requirements.

Who pays the student-at-law's law society fees?

There is no requirement for a principal/principal's practice setting to pay for the student-at-law's law society fees, though this is the common practice with a traditional article. It would be up to the student-at-law and the principal(s) involved to reach an agreement, if any, regarding payment for law society fees.

Who pays for CPLED?

There is no requirement for a principal/principal's practice setting to pay for CPLED, though this is the common practice with a traditional article. It would be up to the student-at-law and the principal(s) involved to reach an agreement, if any, regarding payment for CPLED. Many firms agree to pay their proportionate share based on the time the student will be employed with their firm.

Do composite articles have to be continuous?

The 12 month articling requirement does not require continuous practice. The student-at-law, therefore, can have a short break between each portion of a composite article as long as they complete the 12 months set out in the requirements.

Articles must be completed within three years of admission as a student-at-law. If an extension is needed, it must be requested prior to the expiry of the student-at-law status.

How long does a portion of a composite article have to be?

There is a no minimum requirement for an articling position. Therefore, a portion of a composite article will generally range from one to eleven months to meet the 12 month total requirement (unless a portion of the articles is a clerkship at a court, in which case the total articling term must be 15 months).

What forms are required for a composite article?

In addition to the Application for Admission as a Student-at-Law (Form 2-1) and two Certificates of Character or Reputation (Form 2-4), the student-at-law is required to complete an Education Plan (Form 2-5, Form 2-6 for any court clerkship) and an Articles of Clerkship form (Form 2-8, Form 2-9 for any court clerkship).

When moving from the first articling portion to each subsequent portion a new Articles of Clerkship (Form 2-8, Form 2-9 for any court clerkship) must be submitted to the Law Society. An amended or updated education plan (Form 2-5, Form 2-6 for any court clerkship) must be completed for each articling portion.

In addition, when the student-at-law leaves each articling portion, the student and his or her principal must complete a Certificate of Principal (Form 2-12) and Evaluation Certificate (Form 2-7).

The Law Society of Alberta website contains all of [these forms](#), [fee schedules](#) and evaluation checklist guidelines for students-at-law and principals.

What do composite articles look like?

Within the existing Rules of the Law Society of Alberta, composite articles might be:

1. A one to eleven month rotation in different firms or organizations;
2. Law firms assuming the cost of a student-at-law only for the period that they work with a firm;
3. Exposure to different firm structures, cultures and practice styles;
4. An expanded network of contacts and potential job opportunities;
5. “Hands-on” exposure to some of the most demanding but satisfying areas of law; and
6. A chance to really know what area of law might be a “fit” for a new lawyer.

Paraphrased from: *Composite Articles a Win-Win for Both Employers and Students*.
The Advisory: Volume 8, Issue 2. Marie L. Gordon, QC, Gordon Zwaenepoel. (April 2010).

Additional Information

- [Articling Terminology](#)
- [Advantages](#)
- [Checklist](#)

Form 2-5 / 2-6

(Rule 57)

Education Plan

During the articling term the Principal, _____, will ensure that the Student, _____, obtains practical experience, training and mentoring in the following key competency areas:

1. **Ethics and Professionalism**
2. **Practice Management**
3. **Client Relationship Management**
4. **Conducting Matters**
5. **Adjudication/Alternative Dispute Resolution**

Learning objectives for the articling year, as well as a sample of learning activities, for each competency are set out below.

Learning objectives are at a level commensurate with entry to the profession, not at the level of mastery. This standard is derived from the *National Entry to Practice Competency Profile for Lawyers*.

The list of learning activities is intended to serve as a description of the types of actions the Principal and Student are expected to undertake to support the learning objectives. **It is not a checklist.**

In considering appropriate learning activities it should be noted that a "client" is anyone for whom a lawyer (or in this case the Student) is providing legal services and may include "clients" who are internal to the Student's employer.

Ethics and Professionalism

At the end of the articling term, the Student will be able to act ethically and professionally in accordance with the standard set by the Law Society of Alberta *Code of Conduct*.

Learning Activities to support this learning objective may include:

- Discussing ethical issues and problems that may arise in practice.
- Exploring strategies for identifying and resolving ethical issues.
- Engaging in critical thinking and discussion about ethical issues.
- Discussing strategies for making informed and reasoned decisions about ethical issues.
- Identifying potential conflict of interest issues and observing or using a client conflict management system.
- Discussing the circumstances giving rise to the need for independent legal advice and the steps to take when giving independent legal advice.

Practice Management

At the end of the articling term, the Student will be able to effectively manage time, files, finances, and professional responsibilities, as well as being able to delegate tasks and provide appropriate supervision.

Learning Activities to support this learning objective may include:

- Investigating and implementing strategies for prioritizing and managing tasks and for tracking deadlines.

- Reviewing file management practices, including opening and closing files, developing checklists, and sending files for storage or destruction.
- Discussing strategies for managing finances, including adherence to trust accounting requirements.
- Developing a plan to manage professional responsibilities, including ethical, licensing, and other professional responsibilities.
- Reviewing and learning to use:
 - time tracking, limitation reminder, and bring forward systems;
 - trust accounting and general accounting systems;
 - billing and collection systems;
 - client record and file management systems; and
 - practice checklists.
- Practicing delegating tasks while providing appropriate supervision.

Client Relationship Management

At the end of the articling term, the Student will be able to effectively manage client relationships.

Learning Activities to support this learning objective may include:

- Exploring strategies for managing client relationships, including establishing and maintaining client confidence and managing client expectations.
- Discussing methods of advising clients and developing legal strategy, keeping in mind clients' particular circumstances, including age, language, disability, socioeconomic, and cultural context.
- Observing, participating in, and conducting initial client interviews, including:
 - confirming who is represented and who will provide instructions;
 - confirming the client's identity pursuant to applicable standards/rules;
 - assessing the client's capacity and fitness (if applicable); and
 - discussing and setting fees and retainers.
- Reviewing, revising, and/or drafting a retainer letter.
- Documenting client consent, client instructions, and advice provided.
- Helping maintain regular client communication, including participating in client meetings and preparing correspondence to keep clients apprised of progress in their matter.
- Addressing outstanding client concerns.
- Reviewing, revising, and/or drafting an exit/reporting letter.

Conducting Matters

At the end of the articling term, the Student will be able to conduct a range of matters handled by lawyers on a regular basis.

Learning Activities to support this learning objective may include:

- Gathering facts through interviews, searches and other methods.
- Identifying applicable areas of law.
- Seeking additional expertise when necessary.
- Conducting legal research and analysis.
- Developing case strategy.

- Identifying mode of dispute resolution.
- Conducting due diligence (including ensuring all relevant information has been obtained and reviewed).
- Drafting documents, including:
 - opinion letters and demand letters;
 - affidavits/statutory declarations;
 - written submissions;
 - simple contracts/agreements and releases; and
 - legal accounting (e.g., statements of adjustment, marital financial statements, estate divisions, bills of costs).
- Imposing, accepting, or refusing trust conditions and/or undertakings.
- Negotiating a resolution of a dispute or legal problem.
- Reviewing financial statements and income tax returns.

Adjudication/Alternative Dispute Resolution

At the end of the articling term, the Student will be able to identify core elements of a dispute and resolve disputes through use of alternative dispute resolution or adjudication.

Learning Activities to support this learning objective may include:

- Discussing effective strategy for resolution of dispute.
- Drafting litigation documents, including pleadings, court orders, and briefs.
- Preparing list of documents or an affidavit of documents.
- Requesting and producing/disclosing documents.
- Preparing or responding to a motion or application (civil or criminal).
- Observing, participating in, and conducting interviews and briefing of witnesses.
- Attending court or tribunal to observe or to speak to routine matters.
- Conducting a simple hearing or trial before an adjudicative body.

Date: _____

Student Signature

Principal Signature

The personal information collected in this form will be used by the Law Society for one or more purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Insurance Association. The information may be used or disclosed by the Law Society, now or in the future, for regulatory purposes, including Law Society investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about the collection, use or disclosure of this information, please contact the Privacy Officer at (403) 229-4700.

Form 2-7

Evaluation Certificate

We certify that performance evaluations have been completed for each of the following learning objectives
(please see *Education Plan, Form 2-5/2-6*, for additional information):

1. Ethics and Professionalism
2. Practice Management
3. Client Relationship Management
4. Conducting Matters
5. Adjudication/Alternative Dispute Resolution

We further certify that where these learning objectives have not yet been addressed, we have developed a plan to address them in the time remaining for the articling term.

Date: _____

Student Signature

Principal Signature

Student Name
(please print)

Principal Name
(please print)

The personal information collected in this form will be used by the Law Society for one or more purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Insurance Association. The information may be used or disclosed by the Law Society, now or in the future, for regulatory purposes, including Law Society investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about the collection, use or disclosure of this information, please contact the Privacy Officer at (403) 229-4700.

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CPLED

Canadian Centre for Professional Legal Education

Students seeking admission to the Alberta Bar, must apply for admission, attend and successfully complete all of the requirements of Alberta's CPLED Program (Canadian Centre for Professional Legal Education). For more information visit www.cpled.ca and www.lesa.org.

 Follow us on [Twitter](#)

CPLED Contact Information

Ashley Iachetta (Foster)

Student Coordinator

2610-10104 103 Avenue

Edmonton, Alberta T5J 0H8

Email: ashley.iachetta@lesa.org

Phone: 780-969-3557

Fax: 780-425-0885

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Welcome to the Canadian Centre for Professional Legal Education

If you wish to practise law and become a member of the bar in Manitoba, Saskatchewan or Alberta and you are not already a member of another provincial bar, you must enroll and complete the mandated program delivered through the Canadian Centre for Professional Legal Education (CPLED).

The CPLED site provides information for the public, future and current students and the legal community interested in the licensing requirements of becoming a member of the legal profession in Manitoba, Saskatchewan or Alberta. If you are already a member of a bar elsewhere and would like to learn more about how to become licensed in Manitoba, Saskatchewan or Alberta, please contact the individual Law Societies.

- [Legal Education Society of Alberta](#)
- [The Law Society of Alberta](#)
- [The Law Society of Manitoba](#)
- [The Law Society of Saskatchewan](#)

[more about CPLED...](#)

How Does the CPLED Program Work?

The CPLED Program consists of nine modules; three one-week modules delivered face-to-face in the classroom and six modules delivered online using a course management system called Desire2Learn. Articling students will research, analyze, write, draft, debate, present and discuss a number of real life situations. The program also presents legal and ethical situations that may be encountered in practice.

Face-to-face modules are usually one week long. These modules will focus on the skills such as interviewing, negotiations and advocacy skills. There will be a combination of plenary and small learning group activities. During the face-to-face modules, articling students are not available to do any firm work. They will have considerable preparation to complete before the face-to-face modules begin. During the face-to-face modules articling students will be engaged in learning activities and competency evaluations.

During online modules articling students will spend 10 -15 hours a week on the CPLED Program. They may need more time when the area of law or skill is new to them. The CPLED program is a self-directed learning program. Resources are available to assist the students, but there is no formal instruction given (i.e. lectures).

The online modules are presented by way of a virtual law firm. Most units consist of instructions, background readings, a learning exercise, client files, an assignment or competency evaluation and assessment criteria. The background readings and learning exercise are resources that may help articling students complete the assignment or competency evaluation. The assessment criteria outline what their assignment or competency evaluation must demonstrate. The assignment or competency evaluation describes the work they must do.

Assignments and competency evaluations focus on a variety of practice skills, including:

- arguing a motion
- interviewing a client
- negotiating a dispute
- writing opinion letters
- preparing research memos
- writing opinion letters to clients
- writing letters to opposing counsel
- drafting pleadings
- drafting commercial documents

In each module, articling students are assigned to a learning group. Each learning group is assigned a learning group facilitator (LGF). These lawyers guide the articling students' learning and help them acquire the competencies they need to be successful in the practice of law. During online modules, LGFs interact with articling students by responding to their email questions, participating in discussions, and providing feedback on assignments.

Competency Based Learning

In contrast to traditional bar admission courses and law schools, the CPLED Program uses a competency based evaluation system. A competency based approach to evaluation stresses the ability to demonstrate the skills required of an entry-level general practitioner, rather than being able to achieve a particular grade on an exam or meet certain target hours of work.

What does it mean to be “Competent”?

As members of the legal profession, lawyers are held to a high standard. The public trusts that lawyers will not only know the law, but will have the skills and practical knowledge and experience to help them resolve or work through their issues and problems. A competent entry-level general practitioner should be able to meet this expectation.

To ensure consistent standards across the provinces, the CPLED Program is based on a Competency Profile for an entry level practitioner. This profile is based on the standards of competency found in the [National Entry to Practice Competency Profile for Lawyers and Quebec Notaries](#). Applicants for admission to the profession must demonstrate that they possess the core skills and knowledge necessary to practice law competently. Members of the legal profession are also expected to be of good character.

Students participating in the CPLED Program must demonstrate competency under three major categories:

1. Substantive Legal Knowledge
2. (possession of) Skills
3. (ability to perform) Tasks

National Admission Standards Project



National Entry to Practice Competency Profile for Lawyers and Quebec Notaries

September, 2012



NATIONAL ENTRY TO PRACTICE COMPETENCY PROFILE FOR LAWYERS AND QUEBEC NOTARIES

1. SUBSTANTIVE LEGAL KNOWLEDGE

All applicants are required to demonstrate a general understanding of the core legal concepts applicable to the practice of law in Canada in the following areas:

1.1. Canadian Legal System

- (a) The constitutional law of Canada, including federalism and the distribution of legislative powers
- (b) The Charter of Rights and Freedoms
- (c) Human rights principles and the rights of Aboriginal peoples of Canada and in addition for candidates in Quebec, the Quebec Charter of Human Rights and Freedoms
- (d) For candidates in Canadian common law jurisdictions, key principles of common law and equity. For candidates in Quebec, key principles of civil law
- (e) Administration of the law in Canada, including the organization of the courts, tribunals, appeal processes and non-court dispute resolution systems
- (f) Legislative and regulatory system
- (g) Statutory construction and interpretation

1.2 Canadian Substantive Law

- (a) Contracts and in addition for candidates in Quebec: obligations and sureties
- (b) Property
- (c) Torts
- (d) Family, and in addition for lawyers and notaries in Quebec, the law of persons
- (e) Corporate and commercial
- (f) Wills and estates
- (g) Criminal, except for Quebec notary candidates
- (h) Administrative
- (i) Evidence (for Quebec notaries, only as applicable to uncontested proceedings)
- (j) Rules of procedure
 - i. Civil
 - ii. Criminal, except for Quebec notary candidates
 - iii. Administrative
 - iv. Alternative dispute resolution processes

- (k) Procedures applicable to the following types of transactions:
 - i. Commercial
 - ii. Real Estate
 - iii. Wills and estates

1.3 Ethics and Professionalism

- (a) Principles of ethics and professionalism applying to the practice of law in Canada

1.4 Practice Management

- (a) Client development
- (b) Time management
- (c) Task management

2. SKILLS

All applicants are required to demonstrate that they possess the following skills:

2.1 Ethics and Professionalism Skills

- (a) Identifying ethical issues and problems
- (b) Engaging in critical thinking about ethical issues
- (c) Making informed and reasoned decisions about ethical issues

2.2 Oral and Written Communication Skills

- (a) Communicating clearly in the English or French language, and in addition for candidates in Quebec, the ability to communicate in French as prescribed by law
- (b) Identifying the purpose of the proposed communication
- (c) Using correct grammar and spelling
- (d) Using language suitable to the purpose of the communication and the intended audience
- (e) Eliciting information from clients and others
- (f) Explaining the law in language appropriate to audience
- (g) Obtaining instructions
- (h) Effectively formulating and presenting well-reasoned and accurate legal argument, analysis, advice or submissions
- (i) Advocating in a manner appropriate to the legal and factual context. This item does not apply to applicants to the Chambre des notaires du Québec
- (j) Negotiating in a manner appropriate to the legal and factual context

2.3 Analytical Skills

- (a) Identifying client's goals and objectives
- (b) Identifying relevant facts, and legal, ethical, and practical issues
- (c) Analyzing the results of research
- (d) Identifying due diligence required
- (e) Applying the law to the legal and factual context
- (f) Assessing possible courses of action and range of likely outcomes
- (g) Identifying and evaluating the appropriateness of alternatives for resolution of the issue or dispute

2.4 Research Skills

- (a) Conducting factual research
- (b) Conducting legal research including:
 - i. Identifying legal issues
 - ii. Selecting relevant sources and methods
 - iii. Using techniques of legal reasoning and argument, such as case analysis and statutory interpretation, to analyze legal issues
 - iv. Identifying, interpreting and applying results of research
 - v. Effectively communicating the results of research
- (c) Conducting research on procedural issues

2.5 Client Relationship Management Skills

- (a) Managing client relationships (including establishing and maintaining client confidence and managing client expectations throughout the retainer)
- (b) Developing legal strategy and advising client in light of client's circumstances (for example, diversity, age, language, disability, socioeconomic, and cultural context)
- (c) Advising client in light of client's circumstances (for example, diversity, age, language, disability, socioeconomic, and cultural context)
- (d) Maintaining client communications
- (e) Documenting advice given to and instructions received from client

2.6 Practice Management Skills

- (a) Managing time (including prioritizing and managing tasks, tracking deadlines)
- (b) Delegating tasks and providing appropriate supervision
- (c) Managing files (including opening/closing files, checklist development, file storage/destruction)
- (d) Managing finances (including trust accounting)
- (e) Managing professional responsibilities (including ethical, licensing, and other professional responsibilities)

3. TASKS

All applicants are required to demonstrate that they can perform the following tasks:

3.1 GENERAL TASKS

3.1.1 Ethics, professionalism and practice management

- (a) Identify and resolve ethical issues
- (b) Use client conflict management systems
- (c) Identify need for independent legal advice
- (d) Use time tracking, limitation reminder, and bring forward systems
- (e) Use systems for trust accounting
- (f) Use systems for general accounting
- (g) Use systems for client records and files
- (h) Use practice checklists
- (i) Use billing and collection systems

3.1.2 Establishing client relationship

- (a) Interview potential client
- (b) Confirm who is being represented
- (c) Confirm client's identity pursuant to applicable standards/rules
- (d) Assess client's capacity and fitness
- (e) Confirm who will be providing instructions
- (f) Draft retainer/engagement letter
- (g) Document client consent/instructions
- (h) Discuss and set fees and retainer

3.1.3 Conducting matter

- (a) Gather facts through interviews, searches and other methods
- (b) Identify applicable areas of law
- (c) Seek additional expertise when necessary
- (d) Conduct legal research and analysis
- (e) Develop case strategy
- (f) Identify mode of dispute resolution
- (g) Conduct due diligence (including ensuring all relevant information has been obtained and reviewed)
- (h) Draft opinion letter
- (i) Draft demand letter
- (j) Draft affidavit/statutory declaration
- (k) Draft written submission
- (l) Draft simple contract/agreement
- (m) Draft legal accounting (for example, statement of adjustment, marital financial statement, estate division, bill of costs)
- (n) Impose, accept, or refuse trust condition or undertaking
- (o) Negotiate resolution of dispute or legal problem
- (p) Draft release
- (q) Review financial statements and income tax returns

3.1.4 Concluding Retainer

- (a) Address outstanding client concerns
- (b) Draft exit/reporting letter

3.2 ADJUDICATION/ALTERNATIVE DISPUTE RESOLUTION

3.2.1. All applicants, except for applicants for admission to the Chambre des notaires du Québec, are required to demonstrate that they can perform the following tasks:

- (a) Draft pleading
- (b) Draft court order
- (c) Prepare or respond to motion or application (civil or criminal)
- (d) Interview and brief witness
- (e) Conduct simple hearing or trial before an adjudicative body

3.2.2 All applicants are required to demonstrate that they can perform the following tasks:

- (a) Prepare list of documents or an affidavit of documents
- (b) Request and produce/disclose documents
- (c) Draft brief

3.3. TRANSACTIONAL/ADVISORY MATTERS

3.3.1 Applicants for admission to the Chambre des notaires du Québec are required to demonstrate that they can perform the following tasks:

- (a) Conduct basic commercial transaction
- (b) Conduct basic real property transaction
- (c) Incorporate company
- (d) Register partnership
- (e) Draft corporate resolution
- (f) Maintain corporate records
- (g) Draft basic will
- (h) Draft personal care directive
- (i) Draft powers of attorney

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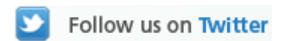
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Bar Call and Membership



General Instructions for Students-at-Law to Enrol as Members

Before Completion of your Articles: Schedule your Bar Call.

Please be advised:

Your enrolment documents can not be signed until your articles are finished. Further, your enrolment documents must be received in the Calgary office a minimum of 30 days before your call.

You may schedule your Bar call at one of the following locations:

Court of Queen's Bench (Calgary)

Katarina Duke at 403-297-8394
Calgary Court Centre
705N, 601 5 Street SW
Calgary, AB T2P 5P7

Court of Queen's Bench (Edmonton)

QBAdmin.Edmonton@gov.ab.ca
Court of Queen's Bench
Law Courts, Main Floor
1A Sir Winston Churchill Square
Edmonton, AB T5J 0R2

Court of Appeal (Edmonton)

Contact the Registry at 780-422-1585
Court of Appeal
Law Courts, Main Floor
1A Sir Winston Churchill Square
Edmonton, AB T5J 0R2

Court of Appeal (Calgary):

Contact the Registry at 403-297-6725
Court of Appeal
2600, TransCanada Tower
450 – 1st ST, SW
Calgary, AB T2P5H1

Provincial Court of Alberta (for Bar Admissions south of Red Deer)

Office of the Chief Judge (Calgary) at 403-297-6761

Provincial Court of Alberta (for bar admissions in Red Deer, Edmonton and northern Alberta)

Complete and submit a Notification of Call Ceremony

Once you have scheduled your Bar call date and you have confirmation from the Court House, please complete and submit a [Notification of Call Ceremony Form](#).

For expediency, return the completed form to Membership Services in the Calgary office by [email](#).

French Oath: As part of continuing efforts to enhance our processes, the Law Society of Alberta is pleased to introduce the opportunity for students-at-law to take the oath of office in French.

In order to accommodate individuals who request to take the oath in French, the Law Society has developed a French language oath/affirmation of office. If a student-at-law prefers to take the oath of office in French, he or she must advise the Court House when scheduling their call to the bar. Following confirmation of the call date, he or she is required to contact the Law Society to specify their language preference and complete arrangements.

After the Completion of your Articles and CPLED

Complete and submit the following enrolment application documents:

- [Application by a Student-at-Law for Enrolment as a Member](#) (please provide your full legal name in Section 1)
- [Certificate of Character and Reputation](#) (submit two certificates)
- [Certificate of Student-at-Law](#)
- [Certificate of Principal](#) (one form per principal)
- [Application for Professional Liability Insurance OR Application for Exemption from Professional Liability Insurance OR Election to Become an Inactive Member](#) (See [Membership and Insurance Status](#) section below for details)
- Proof of Identification: if not previously submitted, provide an original notarized copy of a birth certificate, passport or driver license on which your full legal name appears.
- Official Law School Transcript: if not previously submitted.
- Fees: the Law Society of Alberta will invoice you for membership and insurance fees based on the information you provided on the Notification of Call Ceremony.

Please send the information by [mail](#) or [email](#) to Membership Services.

Original notarized documents such as proof of identification must be [mailed, couriered or hand-delivered](#) to the Calgary office. Official law school transcripts must also be [mailed](#) to the Calgary office.

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Membership & Insurance Status:

You have four options from which to choose when becoming a member in Alberta:

1. Active – Insured:

An active member of the Law Society is required to have Professional Liability Insurance coverage when practising as a sole practitioner or with a law firm.

Form: [Application for Professional Liability Insurance](#)

2. Active – Exempt In-House Employment:

You may apply for an exemption from insurance if you are employed by an organization other than a law firm, and practise solely in the scope of that employment. This would include a corporate or government setting.

Form: [Application for Exemption from Professional Liability Insurance](#)

3. Active - Not Engaged in the Practise of Law:

You are not entitled to practise law or give legal advice in Alberta. If you wish to obtain practising status, you are required to notify the Law Society of Alberta and comply with the professional liability insurance requirements.

Form: [Application for Exemption from Professional Liability Insurance](#)

4. Inactive:

You are not entitled to practise law or give legal advice in Alberta. However, you are able to maintain your membership in Alberta.

Form: [Election to Become an Inactive Member](#)

Reinstatement

If you choose “Active – Not Engaged in the Practise of Law” or “Inactive” status and decide to change your status to either “Active – Insured” or “Active – Exempt In-House”, you will be required to make an [Application for Reinstatement](#).

Fees

Fees are payable to the Law Society of Alberta.

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Instructions for Completion of Certificate of Character and Reputation

1. Certificates of Character and Reputation are used in connection with applications for admission as a student-at-law or for enrolment as a member of the Society. Therefore, please mark the applicable box in paragraph 6.
2. An application for admission or enrolment must be accompanied by two certificates in Form 2-4. Only one of the certificates may be completed by a person who is a member of the same law school graduating class as the applicant.
3. Where the applicant seeks admission or enrolment on the basis of the applicant's status as a member of a law society or comparable governing body of the legal profession in a jurisdiction outside Alberta, the Certificate of Character and Reputation must be completed by
 - (a) a member in good standing of the legal profession in that jurisdiction, or
 - (b) a judge of a superior court of record in that jurisdiction.

For the purposes of (a) above, a member is in good standing in that jurisdiction if the member's right to practise law in that jurisdiction is not under suspension and if the member is not in default of:

- (i) payment of an amount to the law society or governing body, or
- (ii) the filing of any document with the law society or governing body,

if the continuation of the default could result in the suspension of that member's right to practise law in that jurisdiction.

If the applicant is unable to obtain certificates from anyone described in (a) or (b) above, the Executive Director may accept certificates from a member of the Law Society of Alberta or a judge of the Court of Appeal, Court of Queen's Bench or Provincial Court of Alberta, if the applicant, in a letter to the Executive Director, demonstrates why the applicant was unable to obtain certificates from persons described in (a) and (b) above.

Form 2-4**Certification of Character and Reputation****TO: The Executive Director of The Law Society of Alberta**

I, _____ of _____, in the
Province of _____, hereby certify that:

1. My occupation is _____
2. I have personally known _____ of _____
in the Province of _____ ("the applicant") for the last _____ years.
3. I am not related to the applicant.
4. My opportunities to observe the character and reputation of the applicant during those years were as follows:

5. I have read the applicant's completed application to the Executive Director.
6. I conscientiously believe that the character of the applicant is _____,
that the applicant's reputation is _____

and that the applicant is a fit and proper person to be:

admitted to The Law Society of Alberta as a student-at-law

OR

enrolled as a member of The Law Society of Alberta

Date: _____ Signature: _____

Address: _____

Phone: _____

The personal information collected in this form will be used by the Law Society for one or more purposes contemplated by the *Legal Profession Act*, the Rules of the Law Society, the Code of Conduct, or a resolution of the Benchers and will be accessible to all departments of the Law Society, including the Alberta Lawyers Insurance Association. The information may be used or disclosed by the Law Society, now or in the future, for regulatory purposes, including Law Society investigations and proceedings. We may contact you to obtain additional information, or to obtain clarification on the information you provided. Should you have any questions about the collection, use or disclosure of this information, please contact the Privacy Officer at (403) 229-4700.