



April 13, 2022

VIA E-MAIL: cory.regier@amitytrust.ca

Cory Regier
c/o Amity Trust
Box 40
Waldheim, SK S0K 4R0

Dear Cory Regier,

RE: Letter of Agreement to Participate in Limited Licensing Pilot

Thank you for applying to the Limited Licensing Pilot. As the granting of a limited license to practice law is a novel approach to legal regulation in Canada, a new licensing system needs to be developed through consultation and pilots to support the advancement of appropriate rules and regulation. This process will take time. The overall goal of a Limited License framework is to enhance access to legal services for underserved Saskatchewan individuals balanced with ensuring public protection.

The Law Society of Saskatchewan Future of Legal Services Committee has reviewed your Application dated March 15, 2022 to provide legal services and has agreed to issue this letter to you.

1. Services

You have applied to provide the following services which are approved for participation in the Pilot:

- Preparation of Wills and Power of Attorney documents

You will maintain referral relationships with lawyers and financial professionals and when necessary, refer clients for additional services and advice.

2. Agreement Conditions

Based on your Application, the Law Society of Saskatchewan agrees not to prosecute or seek an injunction against you or your organization for the unauthorized practice of law in relation to the Services, provided the following conditions are met:

- A. The information in your Application is complete and accurate.
- B. Only you will provide the Services.
- C. The provision of Services does not change and no increase in the risk of harm to the public is identified, including calling into disrepute the administration of justice.
- D. You will not hold yourself out as a lawyer, barrister, solicitor, attorney, nor member of the Law Society and will disclose to clients in writing that:
 - i. you are not a member regulated by the Law Society of Saskatchewan and the Law Society does not supervise your education, training and qualifications, apply a Code

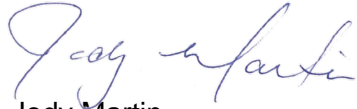
- of Conduct and ethical standards (e.g. solicitor client privilege does not apply), provide a complaints and discipline process, nor mandate professional liability insurance with respect to your services; and
- ii. a [Consumer Review Form](#) is available to help the Law Society understand consumer experiences when accessing legal services through the Pilot.
- E. You will not take funds in advance, operate a trust account, nor charge contingency fees in relation to the Services.
 - F. You will provide information to the Law Society regarding the Services in attached Annex I every 3 months (quarterly beginning July 1, 2022) or more frequently if requested.
 - G. As may be requested, you will cooperate in all respects with the Law Society of Saskatchewan in relation to your provision of the Services.
 - H. You will indemnify and save harmless the Law Society of Saskatchewan, its Benchers, officers, agents and employees from all claims, demands, losses, damages, costs, fines, penalties and expenses that the Law Society of Saskatchewan, its Benchers, officers, agents or employees may sustain, incur, suffer, or be put to at any time, either before or after this Agreement ends, which are based upon, arise out of or occur, directly or indirectly, by reason of any act or omission in your provision of the Services.

3. Disclaimers

- A. In the event of a change in the perceived risk associated with your activities or material information comes to light that you did not disclose, or you fail to meet a condition of this Letter, the Law Society reserves the right to withdraw this Letter.
- B. This Letter does not mean that the Law Society or its affiliates have agreed to insure your services for errors or omissions nor endorse your services.
- C. This Letter is intended to cover the period from now until the coming into force of a Limited License regime unless earlier amended or rescinded in writing.
- D. This Letter is not to be taken as an assurance that you will receive formal status with the Law Society as a Limited Licensee. Under Bill No. 163, an Act to amend *The Legal Profession Act, 1990*, the Law Society has responsibility for Rules with respect to the issuance of limited licences and the regulation of limited licensees, including the following matters: (a) the eligibility of persons who are not students-at-law or lawyers to be limited licensees, including the following: (i) the criteria for considering an application for a limited licence; (ii) the training or education of an applicant for a limited licence; (b) the fees to be paid by an applicant for a limited licence; (c) any insurance to be maintained by a limited licensee; (d) terms and conditions to which a limited licensee may be subject; (e) the eligibility of limited licensees to vote at an election of benchers; (f) the eligibility of limited licensees as candidates in an election of benchers; (g) the competency and discipline provisions that apply to limited licensees.

If you have any questions or inquiries regarding your status or the Limited Licensing Pilot, please email us at: consultation@lawsociety.sk.ca.

Sincerely,

A handwritten signature in blue ink that reads "Jody Martin". The signature is written in a cursive style with a large initial "J" and a long, sweeping underline.

Jody Martin
Director of Regulation