

LAW SOCIETY OF PRINCE EDWARD ISLAND

**ARTICLING CHECKLIST**

**APPROVED - DECEMBER, 2007**

To the Principal and the Articled Clerk

Where circumstances do not permit completing a requirement/requirements in conjunction with an active file, it is acceptable for the Articled Clerk to work from or use a precedent file or a hypothetical fact situation for purposes of meeting the requirements set out hereunder.

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## PROFESSIONAL CONDUCT

**\*Please note that Articled Clerks are subject to the Code of Professional Conduct and this section must be completed at the commencement of the articling period.**

### Integrity

1. Has the clerk reviewed the Rules relating to Integrity? \_\_\_\_\_
2. Is the clerk aware of the potential consequences of dishonorable or questionable conduct? \_\_\_\_\_
3. Can the clerk name examples of conduct that would infringe the Rule? \_\_\_\_\_

### Competence and Quality of Service

1. Has the clerk reviewed the Rules relating to Competence? \_\_\_\_\_
2. Does the clerk understand the distinction between the ethical duty and the civil standard of care owed to a client? \_\_\_\_\_
3. Can the clerk name some examples of conduct that does not meet the quality of service required under the Rule? \_\_\_\_\_
4. Is the clerk aware of the consequences of incompetence? \_\_\_\_\_

### Advising Clients

1. Has the clerk reviewed the Rules about Advising Clients? \_\_\_\_\_
2. Can the clerk describe the scope of advice that should be provided to a client? \_\_\_\_\_
3. Is the clerk aware of the lawyer's duty to give advice where there has been an error or omission on the part of the lawyer? \_\_\_\_\_
4. Discuss the duty relating to Independent Legal Advice? \_\_\_\_\_

### Confidential Information

1. Has the clerk reviewed the Rules about Confidential Information? \_\_\_\_\_
2. Is the clerk aware of when a lawyer may disclose confidential information? \_\_\_\_\_

3. Is the clerk aware of the lawyer's duties with regard to confidential information and how long the duty lasts? \_\_\_\_\_

### Impartiality and Conflict of Interest Between Clients

1. Has the clerk reviewed the Rules about Conflicts of Interest? \_\_\_\_\_
2. Can the clerk give examples of a conflict of interest between clients? \_\_\_\_\_

### Conflict of Interest Between Lawyer and Client

1. How does this Rule differ from the Rule relating to conflicts between clients? \_\_\_\_\_
2. Can the clerk advise as to when a person is considered a client? \_\_\_\_\_

### Outside Interests and Practice of Law

1. Has the clerk reviewed the Rules about Outside Interests? \_\_\_\_\_
2. Define an outside interest for the purposes of this Rule? \_\_\_\_\_
3. Describe some specific requirements to allow involvement in an outside interest while practicing law? \_\_\_\_\_

### Preservation of Clients' Property

1. Has the clerk reviewed the Rule relating to Clients' property? \_\_\_\_\_
2. Describe the lawyer's duty in relation to the property of a client? \_\_\_\_\_
3. What are the minimum standards to be applied by a lawyer in relation to the property of a client? \_\_\_\_\_
4. Discuss the issue of privilege and how that relates to a client's property? \_\_\_\_\_

### The Lawyer as Advocate

1. Has the clerk reviewed the Rule relating to lawyer as advocate? \_\_\_\_\_
2. Can the clerk name some examples of prohibited conduct in the courtroom or before a Tribunal? \_\_\_\_\_
3. Can the clerk describe some issues facing the Lawyer who becomes a witness? \_\_\_\_\_

4. Discuss the differences between the duties of a Prosecutor and the duties of a Defence counsel? \_\_\_\_\_
5. Discuss the guidelines respecting communication with witnesses who are giving evidence? \_\_\_\_\_

### The Lawyer in Public Office

1. Has the clerk reviewed the rule relating to Public Office? \_\_\_\_\_
2. Can the clerk describe some of the conflict of interest issues facing a lawyer in public office? \_\_\_\_\_

### Fees

1. Has the clerk reviewed the Rule relating to fees? \_\_\_\_\_
2. Can the clerk name some factors to consider in a fair and reasonable fee? \_\_\_\_\_

### Withdrawal

1. Has the clerk reviewed the Rule relating to withdrawal? \_\_\_\_\_
2. Can the clerk state when a lawyer has an obligation to withdraw? \_\_\_\_\_
3. Can the clerk describe the duties of a lawyer after withdrawal? \_\_\_\_\_
4. Discuss the issue of withdrawal for non-payment of fees. \_\_\_\_\_

### The Lawyer and the Administration of Justice

1. Has the clerk reviewed the Rule relating to the Administration of Justice? \_\_\_\_\_
2. Discuss the lawyer's responsibilities in the administration of justice. \_\_\_\_\_
3. Name some guidelines regarding public comment upon proceedings before a Tribunal. \_\_\_\_\_

### Advertising, Solicitation and Making Legal Services Available

1. Has the clerk reviewed the Rule relating to advertising etc? \_\_\_\_\_
2. Discuss a lawyer's duty in assisting a person to find a lawyer? \_\_\_\_\_
3. Discuss some issues relating to advertisement of lawyer's services. \_\_\_\_\_

Responsibility to the Profession Generally

- 1. Discuss the lawyer's obligations to the Profession. \_\_\_\_\_

Responsibility to Lawyers Individually

- 1. Discuss the concept of "sharp practice". \_\_\_\_\_
- 2. Describe the lawyer's duty in relation to undertakings. \_\_\_\_\_

Practice by Unauthorized Persons

- 1. Discuss the issues facing the lawyer in supervision of employees and legal assistants. \_\_\_\_\_

Public Appearances and Public Statements by Lawyers

- 1. Discuss the standards of conduct to be exercised by a lawyer when making public statements. \_\_\_\_\_
- 2. Discuss the issues facing a lawyer in contact with the media. \_\_\_\_\_

Avoiding Questionable Conduct

- 1. Describe the lawyer's obligation to un-represented persons. \_\_\_\_\_
- 2. Discuss the issues facing a lawyer or Judge who retires from public service. \_\_\_\_\_

**DATE COMPLETED:** \_\_\_\_\_



## THE OFFICE

Reviewed the following issues at the commencement of the articling period

\_\_\_\_\_

### 1. Principal, Partners and Associates

- (a) Does the clerk have a general understanding of his or her responsibilities and assignments? \_\_\_\_\_
- (b) Does the clerk know to whom to take work and to whom to report? \_\_\_\_\_
- (c) Does the clerk have an understanding as to
- whom to consult about current work? \_\_\_\_\_
  - when to see him, her or them? \_\_\_\_\_
  - on what matters the clerk is to consult them? \_\_\_\_\_
- (d) Is it understood that some person or persons (the principal or others) are available for consultation as to
- ethical issues? \_\_\_\_\_
  - personal problems? \_\_\_\_\_
  - the general state and progress of the clerk's education? \_\_\_\_\_
  - when and on what matters they are to be consulted? \_\_\_\_\_
- (e) Is there some system for the periodic review and evaluation of the clerk's work? \_\_\_\_\_

### 2. Office Personnel

- (a) Has the clerk met all the support staff, and does he/she have a clear understanding of their individual responsibilities and functions? \_\_\_\_\_
- (b) Has the clerk clearly understood how (with respect to each department or task to be assigned) he or she is to work with secretarial and other staff? \_\_\_\_\_
- (c) Is there an office manager that the clerk can check office procedure with? \_\_\_\_\_
- (d) Is there an accountant or accounting department, and does the clerk fully understand how to report time and other records or information? \_\_\_\_\_

**3. Office Procedure**

(a) Files, time records, and billings

Files:

- (i) Does the clerk know when, how, by what form (name and number) files are opened? \_\_\_\_\_
- (ii) Does the clerk know and observe the procedures of the firm to avoid possible conflicts of interest when new files are opened? \_\_\_\_\_
- (iii) Does the clerk know how to close a file? \_\_\_\_\_
- (iv) Does the clerk know where closed files are kept? \_\_\_\_\_
- (v) Does the clerk understand and observe the firm's practices with respect to the location, tracing, return and indexing of files? \_\_\_\_\_

(b) Time Records:

Does the clerk keep time records, and, with respect thereto, follow the firm's practice with respect to form, detail, file reference, and reporting? \_\_\_\_\_

(c) Billing Procedure:

- (i) Is the clerk aware of the firm's practice with respect to billing procedure -
  - frequency?
  - who does it?
  - method of charging?
  - how assigned or credited within firm's records of members' performance?
  - receipting fee payments? \_\_\_\_\_
- (ii) Is the clerk fully aware of the provisions in the *Legal Profession Act* and its Regulations with respect to trust accounts, and, generally, of the methods followed by your firm to maintain accounts accordingly? \_\_\_\_\_

## ADMINISTRATIVE LAW

1. Be familiar with and attend at an administrative hearing which may include any of the following:

(a) the Island Regulatory and Appeals Commission-Appeals Tribunal; \_\_\_\_\_

(b) an Arbitration hearing; \_\_\_\_\_

(c) other administrative hearing such as Labour Relations Board, Worker's Compensation Board, Worker's Compensation Appeal Board, Rentalsman Hearing, Liquor Control Commission, Professional Disciplinary Hearing, etc. \_\_\_\_\_

## CIVIL PROCEDURE

1. Draft a Statement of Claim
  - (a) Contract \_\_\_\_\_
  - (b) Negligence \_\_\_\_\_
2. Issue a Statement of Claim and attend to the requirements of service \_\_\_\_\_
3. Be familiar with how to accept service of a Statement of Claim \_\_\_\_\_
4. Draft and enter a Notice of Intent to Defend and Statement of Defence (and Counterclaim, if applicable) \_\_\_\_\_
5. Draft a
  - (a) Cross-Claim \_\_\_\_\_
  - (b) Third Party Claim \_\_\_\_\_
6. Assist in the preparation of an Affidavit of Documents and become familiar with the Solicitor's Requirement \_\_\_\_\_
7. Attend at an interview with a witness \_\_\_\_\_
8. Assist in the preparation for an Examination for Discovery \_\_\_\_\_
9. Attend an Examination for Discovery \_\_\_\_\_
10. Prepare a summary of an Examination for Discovery or pleadings \_\_\_\_\_
11. Prepare a Pre-Trial Conference Memorandum \_\_\_\_\_
12. Attend a Pre-Trial Conference \_\_\_\_\_
13. (a) Draft a Motion and prepare a Motion Record and Factum  
Or  
Draft and prepare a Notice of Application and Application Record and Factum \_\_\_\_\_
  - (b) Draft an Affidavit for the Motion or Application \_\_\_\_\_
  - (c) Draft an Order \_\_\_\_\_
  - (d) Attend a contested Motion or Application \_\_\_\_\_

14. Prepare an Offer to Settle \_\_\_\_\_
15. Attend a Judicial Review Application or Appeal in the Court of Appeal \_\_\_\_\_
16. Prepare a Release to be executed by a Plaintiff when an action is settled and a Memorandum of Settlement to be executed by either a Plaintiff or Defendant \_\_\_\_\_
17. Small Claims Matter
  - (a) Interview and advise a client regarding a Small Claims Court claim \_\_\_\_\_
  - (b) Draft either a Notice of Claim or a Dispute Note \_\_\_\_\_
  - (c) Prepare for and attend at a Small Claims Pretrial and Trial \_\_\_\_\_
18. Prepare a Note of Default Judgment, Minute of Judgment, Requisition for Default Judgment and Judgment, and attend at the Prothonotary's Office/ Sheriff's Office to file the Default Judgment and Writ of Execution \_\_\_\_\_
19. Debtor/Creditor
  - (a) Prepare and file a Mechanics' Lien \_\_\_\_\_
  - (b) Prepare materials to commence an action to enforce a Mechanics' Lien \_\_\_\_\_
  - (c) Prepare a collection letter on behalf of a client or the firm \_\_\_\_\_
  - (d) Prepare a Statement of Claim (Debt Recovery) \_\_\_\_\_
20. Review Rules of Civil Procedure, Forms & Practice Notes \_\_\_\_\_

## CORPORATE AND COMMERCIAL LAW

### Incorporation

1. Assist with or take the following steps in connection with the incorporation and organization of a company under the Canada Business Corporations Act (Canada) and the Companies Act (P.E.I.):
  - (a) Obtain approval for the corporate name with the appropriate government department or prepare legal opinion re use of proposed name. \_\_\_\_\_
  - (b) Draft application for letters patent/articles of incorporation \_\_\_\_\_
  - (c) Draft organizing by-laws and resolutions (including borrowing and banking documents) \_\_\_\_\_
  - (c) Draft shareholders' resolutions \_\_\_\_\_
  - (e) Prepare common share certificate \_\_\_\_\_
  - (f) Prepare the minute book, including registers of directors, officers, shareholders and transfers \_\_\_\_\_
  - (g) Consider registrations that might be required under other statutes \_\_\_\_\_
  - (h) Draft report to client \_\_\_\_\_

### Arrangements Among Shareholders

2. Draft a shareholders' agreement, including provisions dealing with:
  - (a) control of the company; and \_\_\_\_\_
  - (b) events giving rise to a sale of shares such as first rights of refusal, buy-sells, puts, calls \_\_\_\_\_

### Purchase and Sale of a Business

3.
  - (a) Where possible, attend negotiations between solicitor and client resulting in offer to purchase or sell a business \_\_\_\_\_
  - (b) Consider the tax and commercial advantages and disadvantages of purchasing (or selling) shares rather than assets \_\_\_\_\_
  - (c) Consider alternate forms of business arrangements \_\_\_\_\_
  - (d) Become familiar with considerations involved in the purchase and sale of a business \_\_\_\_\_

- (e) Draft agreement of purchase and sale of shares \_\_\_\_\_
- (g) Draft agreement of purchase and sale of assets \_\_\_\_\_
- (g) Conduct searches under:
  - Personal Property Security Act \_\_\_\_\_
  - Bankruptcy Act (Canada) \_\_\_\_\_
  - Bank Act (Canada) \_\_\_\_\_
  - Registry Act \_\_\_\_\_
  - Revenue Tax Act \_\_\_\_\_
  - Workers' Compensation Act \_\_\_\_\_
  - Employment Standards Act \_\_\_\_\_
  - Income Tax Act (Canada) \_\_\_\_\_
  - Excise Tax Act (Canada) \_\_\_\_\_
  - Municipal By-Laws for Zoning etc. \_\_\_\_\_
- (h) Check Judgments/Executions \_\_\_\_\_
- (i) Assist with the corporate steps necessary to carry through a transaction for the purchase or sale of a business \_\_\_\_\_
- (j) Review and become familiar with section 69 of the *Companies Act*. \_\_\_\_\_

Financial Arrangements

- 4. (a) Be familiar with, and participate in, the filing of a general security agreement under the PPSA \_\_\_\_\_
- (b) Draft a real property mortgage and attend to its registration \_\_\_\_\_
- (c) Prepare a corporate borrowing resolution \_\_\_\_\_

**CRIMINAL PROCEDURE**

1. Attend a docket day in Provincial Court. \_\_\_\_\_
2. Attend a criminal trial. \_\_\_\_\_
3. Attend a Preliminary Hearing (if available) \_\_\_\_\_
4. Consider the implications of an election re: indictable charges \_\_\_\_\_



**ESTATE PLANNING**

1. Attend initial consultation with client at which instructions for a Will, Power of Attorney and Health Care Directive are given \_\_\_\_\_
2. Draft a  
(a) Will; \_\_\_\_\_  
  
(b) General Power of Attorney; and \_\_\_\_\_  
  
(c) Health Care Directive \_\_\_\_\_
3. Attend at first interview with personal representative of a testator to assemble all information re assets and business interests of the deceased \_\_\_\_\_
4. (a) Prepare application for letters probate; or \_\_\_\_\_  
  
(b) Prepare application for letters of administration \_\_\_\_\_
5. Draft releases by beneficiaries for executor \_\_\_\_\_

## FAMILY LAW

### Separation Agreements

1. (a) Attend at conference when client is taking advice and giving instructions on the terms for a proposed separation agreement \_\_\_\_\_
- (b) Consider income tax implications to husband and wife entering into a separation agreement \_\_\_\_\_
- (c) Draft a separation agreement \_\_\_\_\_
- (c) Attend with counsel on review and execution of separation agreement \_\_\_\_\_

### Family Litigation

2. (a) Draft claims under the *Family Law Act* for:
  - (i) division of property \_\_\_\_\_
  - (ii) exclusive possession of family home \_\_\_\_\_
  - (iii) support \_\_\_\_\_
- (b) Prepare appropriate financial statements \_\_\_\_\_
- (c) Draft claim under *Custody, Jurisdiction and Enforcement Act* for custody \_\_\_\_\_
- (d) Draft orders under above-noted Acts for a motion for interim relief or trial \_\_\_\_\_
- (e) Attend a Pre-Trial Conference \_\_\_\_\_
- (f) Prepare an application to vary maintenance payments \_\_\_\_\_
- (g) Calculate child support pursuant to the Child Support Guidelines \_\_\_\_\_

### Divorce

3. (a) Attend at conference for taking instructions from either the husband or the wife on the facts to allege in a Petition for Divorce, including corollary relief \_\_\_\_\_
- (b) Consider how a solicitor should carry out the duty imposed in

Section 9 of the *Divorce Act* \_\_\_\_\_

(c) Prepare Petition for Divorce and letter to Director of Child Welfare \_\_\_\_\_

(d) Draft affidavit and judgment for obtaining uncontested divorce judgment \_\_\_\_\_

(e) Attend with counsel on a motion for interim relief \_\_\_\_\_

(f) Be familiar with an application for interim relief \_\_\_\_\_

Maintenance Enforcement

4. (a) Become familiar with workings of Maintenance Enforcement Office \_\_\_\_\_

Pensions

5. (a) Review legislation relating to pension division

(i) federal legislation \_\_\_\_\_

(ii) provincial legislation \_\_\_\_\_

(b) Review provisions of the Canada Pension Plan regarding division of CPP Credits \_\_\_\_\_

## REAL ESTATE

### Purchases and Sales

- 1.(a) Draft an Agreement of Purchase and Sale \_\_\_\_\_
  
- (b) Review the terms of an Agreement of Purchase and Sale and consult  
with client:
  - (i) on behalf of purchaser \_\_\_\_\_
  - (ii) on behalf of vendor \_\_\_\_\_
  
- (c) Search a title and generally know the basic procedures under the Prince Edward  
Island Registry system \_\_\_\_\_
  
- (d) Examine a survey and plot plan to ascertain whether building and zoning by-laws  
are complied with, and to ensure description of property agrees with survey  
\_\_\_\_\_
  
- (e) Draft documents, including
  - (i) agreement of purchase and sale \_\_\_\_\_
  - (ii) deed and legal description \_\_\_\_\_
  - (ii) mortgage \_\_\_\_\_
  - (iii) satisfaction of mortgage \_\_\_\_\_
  - (iv) right-of-way agreement \_\_\_\_\_
  - (v) boundary line agreement \_\_\_\_\_
  
- (f) Draft other documents for closing, including
  - (i) statement of adjustments \_\_\_\_\_
  - (ii) directions \_\_\_\_\_
  - (iii) undertakings \_\_\_\_\_
  - (iv) mortgage payout statement \_\_\_\_\_
  
- (g) Requisitions on title \_\_\_\_\_
  - (i) prepare requisitions on title \_\_\_\_\_
  - (ii) reply to requisitions on title \_\_\_\_\_
  
- (h) Close transaction, including subsearch if applicable, and attend to the  
registration of documents in the Registry Office \_\_\_\_\_
  
- (i) Draft reporting letter \_\_\_\_\_
  - (i) for purchaser, including Certificate \_\_\_\_\_
  - (ii) for vendor \_\_\_\_\_
  - (iii) for mortgagee \_\_\_\_\_
  
- (j) Draft 'Conflict of Interest' Letter \_\_\_\_\_

Carriage of Transaction

- 2. (a) Under supervision, carry through a real estate transaction from beginning to end, on behalf of
  - (i) a purchaser \_\_\_\_\_
  - (ii) a vendor \_\_\_\_\_

Title Insurance

- 3. (a) Understand the difference between a Solicitor's Certificate of Title and Title Insurance \_\_\_\_\_
- (b) Review a Title Insurance Policy \_\_\_\_\_

IRAC

- 4. Obtain approval required under the *Lands Protection Act* \_\_\_\_\_

Semi-Detached

- 5. Be familiar with basic terminology, common elements, common expenses, party-wall agreements when dealing with semi-detached property.  
\_\_\_\_\_

Mobile Homes

- 6. Review Agreement of Purchase and Sale  
\_\_\_\_\_
- 7. Consider additional searches and items to be checked when purchasing mobile home (i.e. PPSA searches) \_\_\_\_\_

Independent Legal Advice

- 8. Attend an ILA consultation \_\_\_\_\_
- 9. Review ILA Checklist provided by CLIA  
\_\_\_\_\_

## **STATUTES & REGULATIONS**

There are a number of statutes & accompanying regulations that the articulated clerk should review and have a general knowledge of the contents thereof, as follows:

- \_\_\_ *Adoption Act*
- \_\_\_ *Adult Protection Act*
- \_\_\_ *Affidavits Act*
- \_\_\_ *Appeals Act*
- \_\_\_ *Arbitration Act*
- \_\_\_ *Business Practices Act*
- \_\_\_ *Change of Name Act*
- \_\_\_ *Charlottetown Area Municipalities Act*
- \_\_\_ *Child Protection Act*
- \_\_\_ *Child Status Act*
- \_\_\_ *City of Summerside Act*
- \_\_\_ *Companies Act*
- \_\_\_ *Condominium Act*
- \_\_\_ *Consent to Treatment and Health Care Directives Act*
- \_\_\_ *Consumer Protection Act*
- \_\_\_ *Consumer Reporting Act*
- \_\_\_ *Contributory Negligence Act*
- \_\_\_ *Crown Proceedings Act*
- \_\_\_ *Custody, Jurisdiction & Enforcement Act*
- \_\_\_ *Dependents of a Deceased Person's Relief Act*
- \_\_\_ *Defamation Act*
- \_\_\_ *Direct Sellers Act*
- \_\_\_ *Divorce Act (Canada)*
- \_\_\_ *Employment Standards Act*
- \_\_\_ *Environmental Protection Act*
- \_\_\_ *Evidence Act*
- \_\_\_ *Extra-Provincial Corporations Reg. Act*
- \_\_\_ *Family Law Act*
- \_\_\_ *Fatal Accidents Act*
- \_\_\_ *Frauds on Creditors Act*
- \_\_\_ *Garnishee Act*
- \_\_\_ *Garage Keepers Lien Act*
- \_\_\_ *Human Rights Act*
- \_\_\_ *Highway Traffic Act*
- \_\_\_ *Insurance Act*
- \_\_\_ *Interjurisdictional Support Orders Act*
- \_\_\_ *Interpretation Act*
- \_\_\_ *Island Regulatory and Appeals Commission Act*
- \_\_\_ *Investigation of Titles Act*
- \_\_\_ *Judgment and Execution Act*
- \_\_\_ *Judicature Act*
- \_\_\_ *Judicial Review Act*
- \_\_\_ *Labour Act*
- \_\_\_ *Landlord and Tenant Act*
- \_\_\_ *Lands Protection Act*
- \_\_\_ *Legal Professions Act*
- \_\_\_ *Limited Partnership Act*
- \_\_\_ *Maintenance Enforcement Act*
- \_\_\_ *Mechanics' Lien Act*
- \_\_\_ *Medical Act*
- \_\_\_ *Mental Health Act*
- \_\_\_ *Municipalities Act*
- \_\_\_ *Occupiers' Liability Act*
- \_\_\_ *Partnership Act*
- \_\_\_ *Personal Property Securities Act*
- \_\_\_ *Planning Act*
- \_\_\_ *Powers of Attorney Act*
- \_\_\_ *Probate Act*
- \_\_\_ *Public Trustee Act*
- \_\_\_ *Quieting Titles Act*
- \_\_\_ *Real Property Act*
- \_\_\_ *Real Property Tax Act*
- \_\_\_ *Real Property Transfer Tax Act*
- \_\_\_ *Registry Act*
- \_\_\_ *Rental of Residential Property Act*
- \_\_\_ *Revenue Tax Act*
- \_\_\_ *Sale of Goods Act*
- \_\_\_ *Securities Act*
- \_\_\_ *Statute of Frauds*
- \_\_\_ *Statute of Limitations*
- \_\_\_ *Summary Proceedings Act*
- \_\_\_ *Survival of Actions Act*
- \_\_\_ *Trustee Act*
- \_\_\_ *Unconscionable Transactions Relief Act*
- \_\_\_ *Vendors and Purchasers Act*
- \_\_\_ *Victims of Crime Act*
- \_\_\_ *Victims of Family Violence Act*
- \_\_\_ *Warehousemen's Lien Act*

## **CERTIFICATION BY PRINCIPAL AND CLERK**

The attached certificate **MUST** be completed by the articled clerk's principal and the clerk, and forwarded to the Law Society with the clerk's petition for admission to the bar.

The purpose of this certificate is to make certain that the principal and clerk review regularly the education process of the clerk to ensure that the clerk is exposed to a broad spectrum of the legal system on Prince Edward Island.

It is suggested that the principal and clerk review this checklist every three months to ensure that the requirements are being covered.

The section dealing with the office should be discussed with the clerk as soon as possible after admission as an articled clerk in order to permit the clerk to operate effectively within your firm.

## CERTIFICATION BY PRINCIPAL AND CLERK

We certify that during the articling period we adhered to the Regulations governing articles and the Bar Admission Course, and the *Code of Professional Conduct*.

We further certify that this Articling Checklist has been reviewed periodically by us, and that the articulated clerk has fully completed each and every mandatory item as noted and checked herein.\*

\_\_\_\_\_  
[Signature of Principal]

\_\_\_\_\_  
[Principal: Please print name]

\_\_\_\_\_  
[Date]

\_\_\_\_\_  
[Signature of Articled Clerk]

\_\_\_\_\_  
[Articled Clerk: Please print name]

\_\_\_\_\_  
[Date]

\* Work completed by the clerk for the principal, while the clerk is working as a summer student, may be considered when completing this certificate