

## LEGAL ASSISTANCE FOR MEMBERS OF THE ALBERTA PROFESSIONAL PLANNERS INSTITUTE

In co-operation with broker, BMS Canada Risk Services Ltd. (BMS) and national legal firm Gowling WLG (Canada) LLP (Gowlings), the Alberta Professional Planners Institute (APPI) are pleased to offer summary pro bono legal assistance to all planners participating in the Professional Liability Insurance Program.

Members can take advantage of this service with questions relating to matters such as:

- Privacy and confidentiality
- Conflicts of interest
- Responses to requests for information from third parties
- Inquiries from your regulatory body
- Responses to subpoenas
- Professional misconduct
- Ethical obligations
- Professional obligations

If you have a practice-related question and are participating in the APPI Professional Liability Insurance Program, please contact the number listed below.

When you make this call, a recording will ask you to leave a detailed message. Please be prepared to provide the following information:

- Name, telephone number and address
- Certificate and policy number
- A brief summary of the issue

The lawyer you speak with will provide you with free, confidential legal assistance in order to help avoid or reduce the probability of a claim or complaint. Each telephone consultation is limited to 30 minutes per inquiry. The lawyer may consider it appropriate to review the issues and jurisprudence, and then call you back. The value of the advice given will rely on the accuracy and completeness of the information you provide.

In some cases, you may be asked to contact BMS, as your issue may have already triggered coverage under your policy, in which case, legal counsel may be appointed to act on your behalf.

To ensure members are provided with superior legal defence in the event of a claim or complaint, the APPI and BMS have retained Gowlings as the sole legal provider for claims made under the Professional Liability Insurance Program.

### About Gowlings

As one of Canada's leading national legal firms, Gowlings has a long history of representing professionals on a variety of professional liability cases. The Gowlings lawyers providing services to APPI members have significant experience in professional legal issues including defending in litigation arising from services rendered; representing professionals in proceedings before provincial licensing bodies; and providing advice to clients on other administrative and regulatory issues.

#### Gowling WLG (Canada) LLP

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