



Canadian Lawyers Liability Assurance Society

2022/2023 Renewal Application for  
Excess Professional Liability Insurance

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This application is made by the undersigned member (the "Firm") of the Canadian Lawyers Liability Assurance Society ("CLLAS") for issuance by CLLAS to the Firm of policies of professional liability insurance.

***Note: The policies applied for are "claims made" policies and only provide coverage for claims first made against the Insured during the policy period.***

Please answer **ALL** questions. Where space to answer is insufficient, attach a separate sheet.

1. Name of Firm (Named Insured): Cassels Brock & Blackwell LLP

2. Address of principal office: 2100-40 King Street West  
Toronto, ON M5H 3C2

Phone: (416) 869-5300 Fax: (416) 360-8877

3. Address, phone, and fax numbers of other office(s):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. Management or service companies, date(s) established, and services provided:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Is the Firm a multi-disciplinary partnership ("MDP")? ☐ yes ☐ no

If "yes", provide date MDP was established and name the non-lawyer partners and their respective disciplines.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_



6. Since last year's CLLAS application, has the name of the Firm been changed, or has any firm merged into the Firm? If so, give full particulars (including the number of lawyers merged into the Firm in each such situation) unless previously provided.

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7. Attached, as Appendix A, is a list of the Firm's predecessor firms resulting from mergers since July 1, 1987. Is the list complete?

☐ yes      ☐ no

If "no", please provide update.

Note: A predecessor firm is one a) which has undergone dissolution; and b) in which more than 50% of the partners and employed lawyers became partners and employed lawyers of the Firm.

8. Please complete Appendices B and C to provide the following details as of February 15, 2022:
- a) Number of lawyers (including partners, employed lawyers, counsels/of counsels, and lawyer consultants).
  - b) Number of patent & trademark agents (who are not lawyers).
  - c) Number of other non-lawyer consultants.
  - d) Number of paralegals.
  - e) Number of other employees.
  - f) If applicable, the number of lawyers who are not partners, employed lawyers, counsels/of counsels, or lawyer consultants of the Firm who, directly or indirectly, provide services to professional corporations which are partners of the Firm. Please identify such individuals and professional corporations as requested in Appendix B.

Note: A common professional corporation structure is one where the lawyer remains a partner of the firm but the firm contracts with a professional corporation to provide the services of the partner to the firm via the professional corporation. Those lawyers would be accounted for in a) above. Question f) is intended to address an alternative structure whereby the professional corporation itself is a partner of the firm and it contracts directly or via another professional corporation with a lawyer to provide professional services.



9. Please show the Firm's practice split by indicating the approximate percentage of billings for the following areas of law:

	<u>This Year</u>	<u>Last Year</u>
a) Corporate and Commercial Law	_____ %	33.253 %
b) Criminal Law	_____ %	0 %
c) Family Law	_____ %	0 %
d) Intellectual Property	_____ %	3.343 %
e) Labour Law	_____ %	1.47 %
f) Litigation	_____ %	9.302 %
g) Real Estate	_____ %	7.352 %
h) Securities Law	_____ %	16.177 %
i) Tax Matters	_____ %	2.205 %
j) Wills, Estates, Trust	_____ %	0.217 %
k) Other (please specify)	_____ %	29.681 %

10. Have any of the lawyers, or non-lawyer consultants listed in Appendices B and C, or former lawyers, or former non-lawyer consultants of the Firm been the subject of disciplinary proceedings, suspended, or disbarred from practice since last year's CLLAS application?

☐ yes ☐ no

If "yes", please provide full details:

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11. Attached, as Appendix D, is a description of the "Associated Firms" and "Umbrella Firms" which are identified in the Associated Firm Endorsement (Endorsement No. 1) of the current CLLAS Primary Policy. Please verify and update where appropriate and advise CLLAS of any anticipated changes.
12. Canadian law society programs may restrict coverage if Professional Services are provided outside of Canada or if the Professional Services relate to non-Canadian law. The CLLAS Primary Policy also excludes, coverage for lawyers providing Professional Services from a U.S. office, as well as the practice of non-Canadian law. Please provide details of such services in Appendix E.
13. Attached, as Appendix F, is a schedule of claims and notices which have been given to the applicable law society and CLLAS as of December 31, 2021. Please verify and provide any changes in status. All known claims or notices that are not on the schedule, including those reported to any underlying insurance carrier, should be reported up to the date of this application. **Notices on this application are not considered proper notice of a claim.**

If applicable, CLLAS will also require an update on claims of your predecessor firms which were reported prior to any merger which are paid or currently reserved in excess of \$500,000.



Note: All claims or notices require the following details: name of lawyer, name of claimant, date claim reported, error date, date claim closed (if applicable), a brief description of the claim including damages sought, amount paid (legal & indemnity, and amount reserved (legal & indemnity).

14. Will the Firm purchase coverage under the CLLAS optional excess layer?

☐ yes ☐ no

If "yes", please indicate preferred limit option:

☐ \$10M xs \$160M ☐ \$20M xs \$160M  
☐ \$30M xs \$160M ☐ \$40M xs \$160M  
☐ \$50M xs \$160M ☐ \$60M xs \$160M

If you currently buy the maximum limits available (i.e., \$250MM including the umbrella layer) would you be interested in purchasing an additional umbrella layer of \$30MM?

☐ yes ☐ no

We are  
interested,  
please give  
pricing.

15. Under Appendix G, please provide a full description of the Firm's most current risk management policies and procedures or, if appropriate, an update to your response to Appendix G of last year's renewal application.

16. Please complete Appendix H to provide underwriting information with respect to cyber liability.

17. Please attach, with Appendix I, a copy of the Firm's 2022 Professional Liability Insurance Application and Exemption Form submitted to LawPro.

The undersigned hereby declares that the above statements and particulars, including those set forth in Appendices A through I, are true and that no material facts have been omitted, suppressed or misstated and that this application, which is deemed to include the information from any previous applications completed by the Firm for CLLAS, shall be the basis of each of the insurance contracts with CLLAS.

Signature: \_\_\_\_\_

(Must be signed by a Partner of the Firm)

Name of Signatory: \_\_\_\_\_

(Who shall be the designated contact person between CLLAS & the Firm as respects this insurance.)

Date: \_\_\_\_\_

## APPENDIX A

### Predecessor Firms

## Name of Firm

Cassels Brock & Blackwell LLP

Note: A predecessor firm is one a) which has undergone dissolution; and b) in which more than 50% of the partners and employed lawyers became partners and employed lawyers of the Firm.

[illegible]

# APPENDIX B

Active Members of the Firm as of February 15, 2022

Name of Firm

Cassels Brock & Blackwell LLP

Updated as of (Enter Date):

February 15, 2022

	CANADA						OUTSIDE OF CANADA <sup>/5</sup>				
	B.C.	Alberta	Ontario	Quebec	Nova Scotia	Other Provinces (Please specify, change heading)	U.S.	China	South Africa	Other Countries (Please specify, change heading)	Other Countries (Please specify, change heading)
a) No. of Lawyers <sup>/1</sup>	34	12	145								
b) No. of Patent & Trademark Agents <sup>/2</sup>	0	0	0								
c) No. of Non-lawyer Consultants <sup>/3</sup>	1	0	0								
d) No. of Paralegals	18	4	39								
e) No. of Other Employees	34	17	250								
f) No. of lawyers who are not employees of the Firm who, directly or indirectly, provide services to professional corporations which are partners of the Firm <sup>/4</sup>	10	12	55								

/1 Including partners, employed lawyers, counsels/of counsels and lawyer consultants

/2 These are not lawyers.

/3 Please complete Appendix C if individuals are reported under this category

/4 Lawyers reported here should not be included under a).(See note at Question 8.f) of the application.].

/5 Please complete Question 3 of Appendix E to provide further information on lawyers reported under these columns

Please attach a list of the lawyers reported under a) above, showing in each case their full name, date of call, date joined the Firm and, if applicable, date became partner.

Please attach a list of the names of the individuals reported under f) above, together with the names of the professional corporations to which they provide services.

If underlying insurance is purchased outside any Canadian mandatory law society program for lawyers, please provide full details under Appendix E, Question 4.

If members of the Firm, either alone or with others, engage in the conduct of any profession or business other than the practice of law (e.g. financial management, mortgage brokering or other consulting; underwriting or brokering of securities or investment banking activities; real estate appraisal; actuarial analysis) either directly or indirectly as an agent, employee or partner of any organization, please provide full particulars such as percentage of practice other than Law.

Tkpr Number	Timekeeper Name	Status	Office Description	Department Description	Title Description	Count
06402	Arnason, Jocelyn	ACTIVE	Calgary CBB	Business Law	Associate	1
06454	Bach, David	ACTIVE	Calgary CBB	Business Law	Associate	1
06177	Berkman, Viviana	ACTIVE	Calgary CBB	Business Law	Associate	1
06405	Davis, Kara N.	ACTIVE	Calgary CBB	Financial Services	Associate	1
06164	Hamilton, Robert	ACTIVE	Calgary CBB	Business Law	Associate	1
06277	Neville, Thomas	ACTIVE	Calgary CBB	Financial Services	Associate	1
06406	Norman, John D.M.	ACTIVE	Calgary CBB	Business Law	Associate	1
06419	Surani, Alyshea	ACTIVE	Calgary CBB	Advocacy	Associate	1
09218	Bond, Kurtis	ACTIVE	Calgary CBB	Business Law	Counsel	1
						9

06189	Barretto, Jeremy	ACTIVE	Calgary CBB	Business Law	Partner	1
06414	Elliott, Derek R.	ACTIVE	Calgary CBB	Financial Services	Partner	1
06276	Grigoriu, Corinne	ACTIVE	Calgary CBB	Business Law	Partner	1
05977	Hinman, Pamela J.	ACTIVE	Calgary CBB	Advocacy	Partner	1
05969	Hocher, Josef W.	ACTIVE	Calgary CBB	Business Law	Partner	1
05990	Holowachuk, Jason M.	ACTIVE	Calgary CBB	Advocacy	Partner	1
06516	Hurley, Eamon	ACTIVE	Calgary CBB	Business Law	Partner	1
05991	Low, Evan D.	ACTIVE	Calgary CBB	Business Law	Partner	1
05933	Marechal, Danielle	ACTIVE	Calgary CBB	Financial Services	Partner	1
06198	McLelland, Chris	ACTIVE	Calgary CBB	Business Law	Partner	1
05932	Oliver, Jeffrey	ACTIVE	Calgary CBB	Financial Services	Partner	1
06415	Prince, Tamara	ACTIVE	Calgary CBB	Advocacy	Partner	1
06032	Richardson, Doug	ACTIVE	Calgary CBB	Business Law	Partner	1
06135	Zuniga, Daniel A.	ACTIVE	Calgary CBB	Business Law	Partner	1
05935	Templeton, Keith	ACTIVE	Calgary CBB	Business Law	Senior Counsel	1
						15
					Total Alberta	24
					Less Professional	
					Corporations	-12
						12

Tkpr Number	Timekeeper Name	Status	Office Description	Department Description	Title Description	Count
05841	Anand, Gaurav	ACTIVE	Toronto CBB	Business Law	Associate	1
06358	Bates, Christie	ACTIVE	Toronto CBB	Business Law	Associate	1
06493	Beck-Watt, Sebastian D.	ACTIVE	Toronto CBB	Business Law	Associate	1
05896	Blair, Lucas	ACTIVE	Toronto CBB	Financial Services	Associate	1
06182	Blom, Randall	ACTIVE	Toronto CBB	Business Law	Associate	1
05773	Blumberg, Robyn	ACTIVE	Toronto CBB	Advocacy	Associate	1
06232	Brydon, Joseph	ACTIVE	Toronto CBB	Financial Services	Associate	1
06233	Burnstein, Beth	ACTIVE	Toronto CBB	Advocacy	Associate	1
05668	Byers, Kate	ACTIVE	Toronto CBB	Advocacy	Associate	1
06109	Capmare, Corina	ACTIVE	Toronto CBB	Financial Services	Associate	1
06234	Chamberlain, Elissa	ACTIVE	Toronto CBB	Business Law	Associate	1
06006	Chiu, Tiffany	ACTIVE	Toronto CBB	Business Law	Associate	1
06496	Christodoulou, Maria	ACTIVE	Toronto CBB	Business Law	Associate	1
05843	Ciarlariello, Marco	ACTIVE	Toronto CBB	Business Law	Associate	1
06236	De Pompa, Alexander	ACTIVE	Toronto CBB	Business Law	Associate	1
06237	Dhaliwal, Hardeep	ACTIVE	Toronto CBB	Advocacy	Associate	1
06219	Di Francesco, Stefanie	ACTIVE	Toronto CBB	Advocacy	Associate	1
06238	Dreksler, Simone	ACTIVE	Toronto CBB	Financial Services	Associate	1
06285	Dykstra, Lindsay E.	ACTIVE	Toronto CBB	Business Law	Associate	1
06497	Elich, Holly	ACTIVE	Toronto CBB	Business Law	Associate	1
06112	Elliott, Nico	ACTIVE	Toronto CBB	Business Law	Associate	1
06239	Ells, Olivia	ACTIVE	Toronto CBB	Business Law	Associate	1
06424	Evola, Jennifer	ACTIVE	Toronto CBB	Advocacy	Associate	1
06530	Fusco, Alessandra	ACTIVE	Toronto CBB	Advocacy	Associate	1
06113	Gaertner, Thea	ACTIVE	Toronto CBB	Business Law	Associate	1
06254	Garraway, Stephanie	ACTIVE	Toronto CBB	Advocacy	Associate	1
05776	Goodis, Benjamin	ACTIVE	Toronto CBB	Financial Services	Associate	1
06346	Gorys, Andrea	ACTIVE	Toronto CBB	Advocacy	Associate	1
05777	Grossman, Lauren	ACTIVE	Toronto CBB	Financial Services	Associate	1
06007	Hamaliuk, Joseph	ACTIVE	Toronto CBB	Advocacy	Associate	1
06080	Hojilla, Pamela	ACTIVE	Toronto CBB	Business Law	Associate	1

06242	Jung, Ashley	ACTIVE	Toronto CBB	Business Law	Associate	1
06114	Karbi, Jacqueline	ACTIVE	Toronto CBB	Business Law	Associate	1
05695	Kelman, David	ON_LEAVE	Toronto CBB	Advocacy	Associate	1
06473	Kuczynski, Kyle L.	ACTIVE	Toronto CBB	Advocacy	Associate	1
05897	Lau, Florence	ACTIVE	Toronto CBB	Business Law	Associate	1
06009	Lee, Kelly	ACTIVE	Toronto CBB	Business Law	Associate	1
05778	Leszcz, Noah	ACTIVE	Toronto CBB	Business Law	Associate	1
05957	Li Parizeau, Tera	ACTIVE	Toronto CBB	Business Law	Associate	1
05779	Lyle, James	ACTIVE	Toronto CBB	Business Law	Associate	1
06243	Makhzoumi, Layla	ACTIVE	Toronto CBB	Business Law	Associate	1
06244	Mckenzie, Cecile	ACTIVE	Toronto CBB	Financial Services	Associate	1
05850	Moher, Sophie	ON_LEAVE	Toronto CBB	Financial Services	Associate	1
06428	Mukkar, Manraj (Manny) S	ACTIVE	Toronto CBB	Financial Services	Associate	1
05781	Murphy, Alexandra	ON_LEAVE	Toronto CBB	Advocacy	Associate	1
05899	Ngo, Richard	ACTIVE	Toronto CBB	Financial Services	Associate	1
05900	O'Brien, Tegan	ACTIVE	Toronto CBB	Advocacy	Associate	1
06245	Onyeaju, William	ACTIVE	Toronto CBB	Financial Services	Associate	1
06002	Phillips, Jackson	ACTIVE	Toronto CBB	Business Law	Associate	1
06168	Politano, Stefan	ACTIVE	Toronto CBB	Business Law	Associate	1
06494	Poremba, Monica	ACTIVE	Toronto CBB	Advocacy	Associate	1
05901	Qin, Jasmine	ACTIVE	Toronto CBB	Business Law	Associate	1
06453	Rosenbloom, Michael	ACTIVE	Toronto CBB	Business Law	Associate	1
05902	Rourke, Meghan	ACTIVE	Toronto CBB	Advocacy	Associate	1
06120	Sarsangi, Reza	ACTIVE	Toronto CBB	Business Law	Associate	1
05569	Schaefer, Brittany	ACTIVE	Toronto CBB	Business Law	Associate	1
05852	Scolieri, Amanda	ON_LEAVE	Toronto CBB	Financial Services	Associate	1
06122	Scrocchi, Shannon	ACTIVE	Toronto CBB	Business Law	Associate	1
06011	Shepherd, Jonathan	ACTIVE	Toronto CBB	Advocacy	Associate	1
06547	Shortt, Kassandra	ACTIVE	Toronto CBB	Business Law	Associate	1
06246	Smith, Kayla	ACTIVE	Toronto CBB	Advocacy	Associate	1
06121	Sniderman, Robert	ACTIVE	Toronto CBB	Advocacy	Associate	1
05904	Sokoloff, Sam	ACTIVE	Toronto CBB	Business Law	Associate	1
05784	Tabi, Kwaku	ACTIVE	Toronto CBB	Financial Services	Associate	1
06223	Tombs, Anna	ACTIVE	Toronto CBB	Business Law	Associate	1
06247	Weltman, Stacey	ACTIVE	Toronto CBB	Business Law	Associate	1
06249	Zittell, Zachary	ACTIVE	Toronto CBB	Business Law	Associate	1
06534	Augustinovic, Danijel	ACTIVE	Toronto CBB	Financial Services	Counsel	1
05952	Lai, Kristen	ACTIVE	Toronto CBB	Advocacy	Counsel	1
04641	Gray, Tilly	ACTIVE	Toronto CBB	FourLines	Director	1

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00259	Abramson, Lanning J.	ACTIVE	Toronto CBB	Financial Services	Partner	1
05086	Abudulai, Suhuyini	ACTIVE	Toronto CBB	Financial Services	Partner	1
04515	Accursi, Chad	ACTIVE	Toronto CBB	Business Law	Partner	1
06504	Akman, Davit	ACTIVE	Toronto CBB	Business Law	Partner	1
05559	Alter, Matthew	ACTIVE	Toronto CBB	Advocacy	Partner	1
04757	Arbuck, Jason	ACTIVE	Toronto CBB	Financial Services	Partner	1
06264	Arnone, Frank P.	ACTIVE	Toronto CBB	Business Law	Partner	1
04536	Bellissimo, Joseph J.	ACTIVE	Toronto CBB	Financial Services	Partner	1
00264	Bennett, Mark T.	ACTIVE	Toronto CBB	Business Law	Partner	1
00302	Birch, John N.	ACTIVE	Toronto CBB	Advocacy	Partner	1
04974	Blackburn, Jed	ACTIVE	Toronto CBB	Advocacy	Partner	1
04531	Boivin, Andre	ACTIVE	Toronto CBB	Business Law	Partner	1
05485	Bornstein, Jeremy	ACTIVE	Toronto CBB	Financial Services	Partner	1
06191	Brown, Graham	ACTIVE	Toronto CBB	Advocacy	Partner	1
00745	Bullen, Jason K.S.	ACTIVE	Toronto CBB	Business Law	Partner	1
04649	Chisick, Casey M.	ACTIVE	Toronto CBB	Business Law	Partner	1
04551	Chummar, Noble	ACTIVE	Toronto CBB	Business Law	Partner	1
06034	Cipollone, Daniel P.	ACTIVE	Toronto CBB	Financial Services	Partner	1
04924	Clements, Lindsay	ACTIVE	Toronto CBB	Business Law	Partner	1
00236	Cohen, Robert B.	ACTIVE	Toronto CBB	Advocacy	Partner	1
06092	Constantine, Maria	ACTIVE	Toronto CBB	Advocacy	Partner	1
05237	Da Costa, Richard	ACTIVE	Toronto CBB	Financial Services	Partner	1
06537	Davis, Mark	ACTIVE	Toronto CBB	Business Law	Partner	1



05762	Dietrich, Jane	ACTIVE	Toronto CBB	Financial Services	Partner	1
00284	Dominique, Brian P.	ACTIVE	Toronto CBB	Business Law	Partner	1
00783	Fitzgerald, Andrea	ACTIVE	Toronto CBB	Business Law	Partner	1
04999	Fleisher, Jonathan	ACTIVE	Toronto CBB	Financial Services	Partner	1
05285	Frankel, Ted	ACTIVE	Toronto CBB	Advocacy	Partner	1
05509	Freeman, Jonathan	ACTIVE	Toronto CBB	Financial Services	Partner	1
05239	Gardos, David	ACTIVE	Toronto CBB	Business Law	Partner	1
05965	Geary, Nicola	ACTIVE	Toronto CBB	Business Law	Partner	1
05912	Gibson, Christie E.	ON_LEAVE	Toronto CBB	Advocacy	Partner	1
00283	Glickman, Leonard	ACTIVE	Toronto CBB	Business Law	Partner	1
06470	Gogal, Sandra	ACTIVE	Toronto CBB	Business Law	Partner	1
05071	Goldman, Jay	ACTIVE	Toronto CBB	Business Law	Partner	1
00216	Goodman, Gordon P.	ACTIVE	Toronto CBB	Financial Services	Partner	1
00213	Gotlieb, Maxwell	ACTIVE	Toronto CBB	Business Law	Partner	1
05027	Ground, Colin	ACTIVE	Toronto CBB	Business Law	Partner	1
05727	Hayman, Alison	ACTIVE	Toronto CBB	Business Law	Partner	1
05564	Henderson, Stephen	ACTIVE	Toronto CBB	Business Law	Partner	1
05082	Hogan, Greg	ACTIVE	Toronto CBB	Business Law	Partner	1
05234	Holland, Stefanie	ACTIVE	Toronto CBB	Advocacy	Partner	1
05380	Horkins, Christopher	ACTIVE	Toronto CBB	Advocacy	Partner	1
00317	Iliopoulos, Alexandra	ACTIVE	Toronto CBB	Business Law	Partner	1
05612	Jackson, Lara	ACTIVE	Toronto CBB	Advocacy	Partner	1
05761	Jacobs, Ryan	ACTIVE	Toronto CBB	Financial Services	Partner	1
06100	Jakibchuk, Adrian	ACTIVE	Toronto CBB	Advocacy	Partner	1
05280	Jessome, Laurie	ACTIVE	Toronto CBB	Advocacy	Partner	1
05521	Jimeno, Natasha	ON_LEAVE	Toronto CBB	Financial Services	Partner	1
04720	Kapsales, Tom	ACTIVE	Toronto CBB	Financial Services	Partner	1
04533	Karn, Bernice	ACTIVE	Toronto CBB	Business Law	Partner	1
06224	Keating, Marisa	ACTIVE	Toronto CBB	Advocacy	Partner	1
05595	Kennedy, Steven	ACTIVE	Toronto CBB	Business Law	Partner	1
06299	Khajetoorian, Armen	ACTIVE	Toronto CBB	Financial Services	Partner	1
06282	Khan, Tayyaba	ACTIVE	Toronto CBB	Business Law	Partner	1
04643	King, Jay	ACTIVE	Toronto CBB	Business Law	Partner	1
05759	Kukulowicz, Shayne	ACTIVE	Toronto CBB	Financial Services	Partner	1
06226	Kuredjian, Jessica L.	ACTIVE	Toronto CBB	Advocacy	Partner	1
04557	Leisk, Signe	ACTIVE	Toronto CBB	Advocacy	Partner	1
06216	Leith, Ben	ACTIVE	Toronto CBB	Financial Services	Partner	1
05763	Levine, Natalie	ACTIVE	Toronto CBB	Financial Services	Partner	1
05527	Litchen, Jamie	ACTIVE	Toronto CBB	Business Law	Partner	1
05094	Lungu, Michael	ACTIVE	Toronto CBB	Business Law	Partner	1
05084	Lysy, Robert	ACTIVE	Toronto CBB	Financial Services	Partner	1
05078	Maniaci, Sean	ACTIVE	Toronto CBB	Business Law	Partner	1
00211	Manzer, Alison R.	ACTIVE	Toronto CBB	Financial Services	Partner	1
05385	Martin, Jeremy	ACTIVE	Toronto CBB	Advocacy	Partner	1
05244	Mayzel, Eric	ACTIVE	Toronto CBB	Advocacy	Partner	1
06503	McKenzie, Jennifer	ACTIVE	Toronto CBB	Business Law	Partner	1
00255	Mercer, Cathy L.	ACTIVE	Toronto CBB	Business Law	Partner	1
04736	Mercier, Marc	ACTIVE	Toronto CBB	Financial Services	Partner	1
06484	Merskey, Alan	ACTIVE	Toronto CBB	Advocacy	Partner	1
05529	Mikelberg, Jeffrey	ACTIVE	Toronto CBB	Business Law	Partner	1
04506	Mingay, Cameron A.	ACTIVE	Toronto CBB	Business Law	Partner	1
05461	Mohajer, Ardy	ACTIVE	Toronto CBB	Financial Services	Partner	1
04737	Newman, Charles	ACTIVE	Toronto CBB	Financial Services	Partner	1
05918	Nicholas, A. Chandimal	ACTIVE	Toronto CBB	Business Law	Partner	1
06527	Nurmohamed, Zahra	ACTIVE	Toronto CBB	Business Law	Partner	1
06102	Osborne, W. Michael G.	ACTIVE	Toronto CBB	Advocacy	Partner	1
05305	Pendrith, Colin	ACTIVE	Toronto CBB	Advocacy	Partner	1
05976	Picone, John M.	ACTIVE	Toronto CBB	Advocacy	Partner	1
05746	Pilkington, Adrianna	ACTIVE	Toronto CBB	Advocacy	Partner	1
00053	Pinos, J.D. Timothy	ACTIVE	Toronto CBB	Advocacy	Partner	1
05133	Pizale, Alexander	ACTIVE	Toronto CBB	Business Law	Partner	1
00064	Plener, Sheldon	ACTIVE	Toronto CBB	Business Law	Partner	1
05465	Potter, Carla	ACTIVE	Toronto CBB	Financial Services	Partner	1
06053	Ramgoolam, Ross R.	ACTIVE	Toronto CBB	Financial Services	Partner	1
00309	Reback, Andrew	ACTIVE	Toronto CBB	Business Law	Partner	1

00197	Redmond, David A.	ACTIVE	Toronto CBB	Financial Services	Partner	1
00162	Reeve, J. Brian	ON_LEAVE	Toronto CBB	Financial Services	Partner	1
06020	Rich, Chuck	ACTIVE	Toronto CBB	Financial Services	Partner	1
06036	Roberts, Stephanie	ACTIVE	Toronto CBB	Business Law	Partner	1
04983	Robinson, Frank	ACTIVE	Toronto CBB	Business Law	Partner	1
05447	Ronde, Derek	ACTIVE	Toronto CBB	Advocacy	Partner	1
04507	Roy, Jeffrey P.	ACTIVE	Toronto CBB	Business Law	Partner	1
05466	Russell, Caitlin	ACTIVE	Toronto CBB	Advocacy	Partner	1
05691	Salem, Andrew	ACTIVE	Toronto CBB	Financial Services	Partner	1
05471	Sassi, Monique	ACTIVE	Toronto CBB	Financial Services	Partner	1
05486	Selby, Christopher	ACTIVE	Toronto CBB	Advocacy	Partner	1
04605	Selznick, Stephen	ACTIVE	Toronto CBB	Business Law	Partner	1
00130	Shaw, Geoffrey B.	ACTIVE	Toronto CBB	Advocacy	Partner	1
05676	Sherman, Jonathan	ACTIVE	Toronto CBB	Business Law	Partner	1
00095	Silver, Lorne S.	ACTIVE	Toronto CBB	Advocacy	Partner	1
05571	Simpson, Kyle	ACTIVE	Toronto CBB	Business Law	Partner	1
05530	Somani, Aly	ACTIVE	Toronto CBB	Business Law	Partner	1
05758	St. Cyr, Mark	ACTIVE	Toronto CBB	Advocacy	Partner	1
00257	Stein, Paul M.	ACTIVE	Toronto CBB	Business Law	Partner	1
00321	Steinhart, Gary	ACTIVE	Toronto CBB	Business Law	Partner	1
05536	Sullivan, Peter	ACTIVE	Toronto CBB	Financial Services	Partner	1
06165	Swick, Brenda C.	ACTIVE	Toronto CBB	Business Law	Partner	1
06037	Tallim, Mike R.	ACTIVE	Toronto CBB	Financial Services	Partner	1
05663	Taylor, Kristin	ACTIVE	Toronto CBB	Advocacy	Partner	1
05626	Uukkivi, Raivo	ACTIVE	Toronto CBB	Advocacy	Partner	1
06505	Valo, Rebecca	ACTIVE	Toronto CBB	Business Law	Partner	1
00265	Vettese, John P.	ACTIVE	Toronto CBB	Business Law	Partner	1
05484	Voudouris, Stephanie	ACTIVE	Toronto CBB	Advocacy	Partner	1
05307	Wasyluk, Jennifer	ACTIVE	Toronto CBB	Financial Services	Partner	1
00186	Watterworth, Ann L.	ACTIVE	Toronto CBB	Business Law	Partner	1
00308	Weinberg, Lawrence M.	ACTIVE	Toronto CBB	Business Law	Partner	1
05162	Winch, Melissa	ACTIVE	Toronto CBB	Advocacy	Partner	1
05575	Woodman, Bryan	ACTIVE	Toronto CBB	Financial Services	Partner	1
04795	Woolford, Luke	ACTIVE	Toronto CBB	Business Law	Partner	1
06389	Wowk, George A.	ACTIVE	Toronto CBB	Business Law	Partner	1
05760	Wunder, Michael	ACTIVE	Toronto CBB	Financial Services	Partner	1
00254	Young, Mark I.	ACTIVE	Toronto CBB	FourLines	Partner	1
05103	Zagar, Jessica	ACTIVE	Toronto CBB	Advocacy	Partner	1
00119	Burden, William J.	ACTIVE	Toronto CBB	Advocacy	Senior Counsel	1
00258	Craig, John H.	ACTIVE	Toronto CBB	Business Law	Senior Counsel	1
00221	Peterson, David R.	ACTIVE	Toronto CBB	Business Law	Senior Counsel	1
06426	Revin, Rissa	ACTIVE	Toronto CBB	Administration	Senior Counsel	1
						130
					Total Ontario	200
					Less Professional Corporations	-55
						145

Tkpr Number	Timekeeper Name	Status	Office Description	Department Description	Title Description	Count
06014	Baraich, Sean	ACTIVE	Vancouver CBB	Business Law	Associate	1
05842	Chandler, Jonathan	ACTIVE	Vancouver CBB	Business Law	Associate	1
06138	Chapman, Sam	ACTIVE	Vancouver CBB	Business Law	Associate	1
06110	Chherawala, Aamir	ACTIVE	Vancouver CBB	Business Law	Associate	1
05785	Clark, Jenna	ACTIVE	Vancouver CBB	Financial Services	Associate	1
06235	Clarke, Shayna L.	ACTIVE	Vancouver CBB	Advocacy	Associate	1
06517	Cox, Emilie	ACTIVE	Vancouver CBB	Advocacy	Associate	1
06111	Cressman, Aaron	ACTIVE	Vancouver CBB	Advocacy	Associate	1
05844	Dipardo, Danielle	ACTIVE	Vancouver CBB	Advocacy	Associate	1
06066	Hansford, David	ACTIVE	Vancouver CBB	Business Law	Associate	1
06241	He, Angela	ACTIVE	Vancouver CBB	Financial Services	Associate	1
06363	Hellrung, Layne	ACTIVE	Vancouver CBB	Advocacy	Associate	1
05786	Hoekstra, Arend	ACTIVE	Vancouver CBB	Business Law	Associate	1
06463	Lee, Stephanie	ACTIVE	Vancouver CBB	Business Law	Associate	1
06070	Lewis, Jessica L.	ACTIVE	Vancouver CBB	Advocacy	Associate	1
06325	Manhas, Brandon	ACTIVE	Vancouver CBB	Business Law	Associate	1

05851	O'Donnell, Aimee	ACTIVE	Vancouver CBB	Business Law	Associate	1
06425	Overall, David	ACTIVE	Vancouver CBB	Business Law	Associate	1
06119	Pelech, Nathan	ACTIVE	Vancouver CBB	Financial Services	Associate	1
06549	Rogers, Logan	ACTIVE	Vancouver CBB	Advocacy	Associate	1
06490	Teichreb, Pat	ACTIVE	Vancouver CBB	Business Law	Associate	1
06248	White, Lauren	ACTIVE	Vancouver CBB	Financial Services	Associate	1
06107	Wu, Grace	ACTIVE	Vancouver CBB	Business Law	Associate	1

23

06355	Bassi, Randy	ACTIVE	Vancouver CBB	Financial Services	Partner	1
04524	Budd, David	ACTIVE	Vancouver CBB	Financial Services	Partner	1
06464	Burris, Morgan	ACTIVE	Vancouver CBB	Advocacy	Partner	1
06018	Buttery, Mary I.A.	ACTIVE	Vancouver CBB	Financial Services	Partner	1
05599	Chambers, Gordon R.	ACTIVE	Vancouver CBB	Business Law	Partner	1
05733	Christian, John T.C.	ACTIVE	Vancouver CBB	Business Law	Partner	1
05862	Cole, Sam	ACTIVE	Vancouver CBB	Business Law	Partner	1
06539	Cytrynbaum, Jordanna	ACTIVE	Vancouver CBB	Advocacy	Partner	1
06131	Dilts, Andrew	ACTIVE	Vancouver CBB	Business Law	Partner	1
05859	Durno, Jeff	ACTIVE	Vancouver CBB	Business Law	Partner	1
06035	Enns, Jared	ACTIVE	Vancouver CBB	Financial Services	Partner	1
05624	Gill, Deepak	ACTIVE	Vancouver CBB	Business Law	Partner	1
05241	Hansen, Jen	ACTIVE	Vancouver CBB	Business Law	Partner	1
05949	Isaac, Thomas	ACTIVE	Vancouver CBB	Business Law	Partner	1
06124	Lahaie, Emilie N.	ACTIVE	Vancouver CBB	Business Law	Partner	1
05765	Podowski, Darrell	ACTIVE	Vancouver CBB	Business Law	Partner	1
05809	Redford, David	ACTIVE	Vancouver CBB	Business Law	Partner	1
06469	Snell, Peter V.	ACTIVE	Vancouver CBB	Business Law	Partner	1
06260	Towriss, Shauna	ACTIVE	Vancouver CBB	Financial Services	Partner	1
00784	Traub, Jennifer	ACTIVE	Vancouver CBB	Business Law	Partner	1
06538	Veinotte, Carey	ACTIVE	Vancouver CBB	Advocacy	Partner	1

21

Total BC 44

Less Professional  
Corporations -10

34

First Name	Last Name	Province of Em	Professional Corporation - Full Legal Name, if applicable	Count
Jeremy	Barretto	Alberta	Jeremy Barretto Professional Corporation	1
Derek	Elliott	Alberta	Derek R Elliott Professional Corporation	1
Corinne	Grigoriu	Alberta	C Grigoriu Professional Corporation	1
Josef	Hocher	Alberta	Josef W. Hocher Professional Corporation	1
Jason	Holowachuk	Alberta	J.M. Holowachuk Professional Corporation	1
Evan D.	Low	Alberta	Evan Low Professional Corporation	1
Danielle	Marechal	Alberta	Danielle Marechal Professional Corporation	1
Jeffrey	Oliver	Alberta	Jeffrey Oliver Professional Corporation	1
Tamara	Prince	Alberta	•Tamara R. Prince Professional Corporation	1
Doug	Richardson	Alberta	Doug Richardson Professional Corporation	1
Keith	Templeton	Alberta	Keith Templeton Professional Corporation	1
Daniel	Zuniga	Alberta	Daniel A Zuniga Professional Corporation	1
				12
David	Budd	British Columbia	David R. Budd Law Corporation	1
Gordon	Chambers	British Columbia	Gordon R. Chambers Law Corporation	1
John	Christian	British Columbia	John T. Christian Law Corporation	1
Jeff	Durno	British Columbia	Jeff W. Durno Law Corporation	1
Deepak	Gill	British Columbia	Deepak S. Gill Law Corporation	1
Tom	Isaac	British Columbia	Thomas Isaac Law Corporation	1
Darrell	Podowski	British Columbia	Darrell W. Podowski Law Corporation	1
David	Redford	British Columbia	David Redford Law Corporation	1
Peter	Snell	British Columbia	Peter Snell Law Corporation	1
Jennifer	Traub	British Columbia	Jennifer J. Traub Law Corporation	1
				10
Lanning	Abramson	Ontario	Lanning J. Abramson Professional Corporation	1
Chad	Accursi	Ontario	Chad Accursi Professional Corporation	1
Davit	Akman	Ontario	Akman Law Professional Corporation	1
Matthew	Alter	Ontario	Matthew R. Alter Professional Corporation	1
Jason	Arbuck	Ontario	S. Jason Arbuck Professional Corporation	1
Joseph	Bellissimo	Ontario	Joseph J. Bellissimo Professional Corporation	1
Mark	Bennett	Ontario	Mark T. Bennett Professional Corporation	1
John	Birch	Ontario	John N. Birch Professional Corporation	1
Jed	Blackburn	Ontario	Jed Blackburn Professional Corporation	1
Jason	Bullen	Ontario	Jason Bullen Professional Corporation	1
Bill	Burden	Ontario	William Burden Professional Corporation	1
Casey	Chisick	Ontario	Casey M. Chisick Professional Corporation	1
Noble	Chummar	Ontario	Noble Chummar Professional Corporation	1
Rick	Da Costa	Ontario	Richard Da Costa Professional Corporation	1

First Name	Last Name	Province of Em	Professional Corporation - Full Legal Name, if applicable	Count
Jane	Dietrich	Ontario	Jane O. Dietrich Professional Corporation	1
Andrea	FitzGerald	Ontario	Andrea FitzGerald Professional Corporation	1
Jonathan	Fleisher	Ontario	Jonathan E. Fleisher Professional Corporation	1
Jonathan	Freeman	Ontario	Jonathan Freeman Professional Corporation	1
Leonard	Glickman	Ontario	Leonard Glickman Professional Corporation	1
Jay	Goldman	Ontario	Jason I. Goldman Professional Corporation	1
Gordon	Goodman	Ontario	Gordon P. Goodman Professional Corporation	1
Maxwell	Gotlieb	Ontario	Maxwell Gotlieb Professional Corporation	1
Ryan	Jacobs	Ontario	Ryan Jacobs Professional Corporation	1
Laurie	Jessome	Ontario	Laurie B. Jessome Professional Corporation	1
Bernice	Karn	Ontario	Bernice M. Karn Professional Corporation	1
Armen	Khajetoorian	Ontario	Armen Khajetoorian Professional Corporation	1
Natalie	Levine	Ontario	Natalie E Levine Professional Corporation	1
Jamie	Litchen	Ontario	Jamie Litchen Professional Corporation	1
Robert	Lysy	Ontario	Robert Lysy Professional Corporation	1
Sean	Maniaci	Ontario	Sean Maniaci Professional Corporation	1
Alison	Manzer	Ontario	Alison R. Manzer Professional Corporation	1
Jennifer	McKenzie	Ontario	Jennifer McKenzie Professional Corporation	1
Marc	Mercier	Ontario	Marc Mercier Professional Corporation	1
Cam	Mingay	Ontario	Cameron A. Mingay Professional Corporation	1
Chandimal	Nicholas	Ontario	A. Chandimal Nicholas Professional Corporation	1
Sheldon	Plener	Ontario	Sheldon Plener Professional Corporation	1
Carla	Potter	Ontario	Carla Potter Professional Corporation	1
David	Redmond	Ontario	David A. Redmond Professional Corporation	1
Chuck	Rich	Ontario	Charles Rich Professional Corporation	1
Frank	Robinson	Ontario	FSR Professional Corporation	1
Geoffrey	Shaw	Ontario	Geoffrey B. Shaw Professional Corporation	1
Jonathan	Sherman	Ontario	Jonathan Sherman Professional Corporation	1
Lorne	Silver	Ontario	Lorne S. Silver Professional Corporation	1
Kyle	Simpson	Ontario	Kyle Simpson Professional Corporation	1
Paul	Stein	Ontario	Paul Stein Professional Corporation	1
Gary	Steinhart	Ontario	Gary Steinhart Professional Corporation	1
Peter	Sullivan	Ontario	Peter J Sullivan Professional Corporation	1
Raivo	Uukkivi	Ontario	Raivo Uukkivi Professional Corporation	1
Jennifer	Wasylyk	Ontario	Jennifer A Wasylyk Professional Corporation	1
Ann	Watterworth	Ontario	Ann L. Watterworth Professional Corporation	1
Larry	Weinberg	Ontario	Lawrence M. Weinberg Professional Corporation	1
George	Wowk	Ontario	George A. Wowk Professional Corporation	1
Michael	Wunder	Ontario	Michael Wunder Professional Corporation	1
Mark	Young	Ontario	Mark I. Young Professional Corporation	1
Brian	Reeve	Ontario	J. Brian Reeve Professional Corporation	1

## APPENDIX C

Active Non-Lawyer Consultants Of The Firm As Of February 15, 2022  
(Excluding Patent & Trademark Agents)

Name of Firm

Cassels Brock & Blackwell LLP

Updated as of (Enter Date):

February 15, 2022

SECTION A

[illegible]

/1 If underlying insurance is purchased, please complete Section B.

/2 Please complete this column ONLY for individuals who are not acting under the supervision of a lawyer AND FOR THAT PORTION OF TIME THE INDIVIDUAL IS NOT ACTING UNDER THE SUPERVISION OF A LAWYER.

# APPENDIX C

Active Non-Lawyer Consultants Of The Firm As Of February 15, 2022  
(Excluding Patent & Trademark Agents)

**Name of Firm**

Cassels Brock & Blackwell LLP

**Updated as of (Enter Date):**

February 15, 2022

**SECTION B**

Please provide the following details on the underlying insurances purchased and attach a copy of the policies:

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	






## Professional Services Provided Relating to Non-Canadian Law &amp; Professional Services Provided In the U.S. &amp; Outside of Canada

**Name of Firm**  
Cassels Brock & Blackwell LLP

**Updated as of (Enter Date):**  
February 15, 2022

## 1 Professional Services Provided by Canadian Lawyers Relating to Non-Canadian Law

Please provide the following information on lawyers primarily resident in Canada who provide Professional Services relating to non-Canadian law (not including those which are incidental to the practice of Canadian law). Please only report on lawyers with more than 5% of docketed time in this category.

Name of Lawyer	Province the Canadian Lawyer is based out of	Location of Office (Non-Canadian)	% of Docketed Time Relating to Non-Canadian Law
Ryan Jacobs	Ontario		Up to 5%

## 2 Professional Services Provided by Canadian Lawyers from a U.S. Office

Please provide the following information on lawyers primarily resident in Canada who provide Professional Services part time in an office or branch of the Firm located in the United States. Please only report on lawyers with more than 5% of docketed time in this category.

[illegible]

For lawyers practicing both Canadian and Non-Canadian Law, please provide a split between Canadian and Non-Canadian. Note that in cases where a split is not available, a 50% 50% split will be assumed.

### 3 Professional Services Provided by Offices Outside of Canada

Please provide the following information on all lawyers reported in Appendix B under the “Outside of Canada” column.

[illegible]

# APPENDIX E

## Professional Services Provided Relating to Non-Canadian Law & Professional Services Provided In the U.S. & Outside of Canada

**Name of Firm**  
Cassels Brock & Blackwell LLP

**Updated as of (Enter Date):**  
February 15, 2022

### 4 Other Insurance

For the exposures identified in Questions 1, 2 and 3 above, please provide details of specific insurance protection (e.g. coverage provided for a non-Canadian office or by a non-Canadian law society) as well as a copy of the policies.

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	

Type of Exposure:	
Insurance Carrier:	
Policy Number:	
Period of Insurance:	
Retroactive Date:	
Limit (Per Claim):	
Limit (Aggregate):	

# APPENDIX E

## Professional Services Provided Relating to Non-Canadian Law & Professional Services Provided In the U.S. & Outside of Canada

**Name of Firm**

Cassels Brock & Blackwell LLP

**Updated as of (Enter Date):**

February 15, 2022

# APPENDIX F

Schedule of Claims and Notices As of December 31, 2021

**Name of Firm**

Cassels Brock & Blackwell LLP

**Updated as of (Enter Date):**

December 31, 2021

Please attach separately with the email

**As at: December 31, 2021**

Claim No	LS File #	Report Date	Error Date	Insured	Claimant	Close Date	Law Society						CLLAS										
							LS Indemnity Paid	LS Other Paid	LS Legal Paid	LS Indemnity Reserve	LS Legal Reserve	LS Total Incurred	CLLAS Indemnity Paid	CLLAS Legal Paid	CLLAS Adjusting Paid	CLLAS Recov Other Paid	CLLAS Adjusting Reserve	CLLAS Indemnity Reserve	CLLAS Legal Reserve	CLLAS Recov Other Reserve	CLLAS Total Incurred		
CLLAS1993-159	R1285	31-May-1993	31-Oct-1990	David Redmond	MARGO BOURQUE	30-Jun-1996	\$ -	\$ -	\$ 7,180	\$ -	\$ -	\$ 7,180	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1993-160	R2061	30-Jun-1993	31-Oct-1990	Anne Marie WIDNER	COLE BUILDING LIMITED	4-Apr-1995	\$ -	\$ -	\$ 2,973	\$ -	\$ -	\$ 2,973	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1993-161	R1563	31-May-1993	30-Apr-1993	S. JOHN PAGE	HAYWARD BURRY LIMITED	29-May-1998	\$ -	\$ 1,075	\$ 22,667	\$ -	\$ -	\$ 23,742	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1993-163	R1563-A	31-May-1993	30-Apr-1993	S. JOHN PAGE	HAYWARD BURRY LIMITED	29-May-1998	\$ -	\$ 1,375	\$ 21,292	\$ -	\$ -	\$ 22,667	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-077	R3701-S	11-Feb-1994	10-Jan-1989	PATRICIA A. VAKIL	ROYAL PRECISION TOOLING LTD.	2-May-1994	\$ -	\$ 1,752	\$ 3,527	\$ -	\$ -	\$ 5,279	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-103	R2928	26-Aug-1993	1-Jan-1991	James M. BUTSON	YORKE TOWNE DOCORATING	26-May-1994	\$ -	\$ 859	\$ -	\$ -	\$ -	\$ 859	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-104	R2392	17-Aug-1993		HARVEY KIRSH	HOWARD SHAIN	28-Mar-1994	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-105	R3396-A	13-Oct-1993	1-Aug-1993	Ken C. Cancellara	IONA GROUP OF COMPANIES	1-Feb-1999	\$ -	\$ -	\$ 3,819	\$ -	\$ -	\$ 3,819	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-106	R2978	30-Aug-1993		Stephen LEDREW	JAMES SKELTON	3-Dec-1993	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-107	R3597	29-Oct-1993	1-Jan-1993	DONALD ARTHURS	ROYAL TRUST AND LAURENTIAN, ET AL	24-Jun-1994	\$ -	\$ 417	\$ -	\$ -	\$ -	\$ 417	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-108	R3884	23-Nov-1993	1-Nov-1991	MAXWELL GOTTLIEB	DIGIAMMARINO	21-Nov-1994	\$ -	\$ 1,238	\$ -	\$ -	\$ -	\$ 1,238	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-109	R1991	6-Nov-1993		SANFORD WORLD	S. WOODLEY	25-Mar-1994	\$ -	\$ -	\$ 606	\$ -	\$ -	\$ 606	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-110	R3703	8-Nov-1993		DONALD ARTHURS	D. SANDERS	31-Mar-1994	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-111	S0849	17-Mar-1994	1-Jun-1985	Kenneth CANCELLARA	Ridolphi, Frank	8-Mar-1995	\$ -	\$ 1,465	\$ -	\$ -	\$ -	\$ 1,465	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-112	NFO	1-Mar-1994		William H. Steele	MARCO JELKIK	1-Jun-1995	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-113	S0375	8-Feb-1994	1-May-1992	KAREN BELL	CIBC	14-Apr-1998	\$ -	\$ 2,526	\$ -	\$ -	\$ -	\$ 2,526	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-114	R3657	13-Nov-1993	1-Apr-1991	Grace Ann WESTCOTT	248221 ONTARIO LIMITED/Turner, Smart	11-Mar-1996	\$ -	\$ -	\$ 1,588	\$ -	\$ -	\$ 1,588	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-115	S1086	11-Apr-1994	1-Aug-1991	Kenneth CANCELLARA	DELLA TORRE, Louis	10-Aug-1994	\$ -	\$ 552	\$ -	\$ -	\$ -	\$ 552	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-116	S1098	12-Apr-1994	1-May-1988	TREVOR BARTRAM	DELLA TORRE, Louis	31-Jul-1996	\$ -	\$ 3,140	\$ 12,351	\$ -	\$ -	\$ 15,491	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-117	S905	22-Mar-1994	1-Feb-1994	William BURDEN	ONTARIO HOSPITAL ASSOCIATION	3-Oct-1995	\$ -	\$ -	\$ 10,534	\$ -	\$ -	\$ 10,534	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-143	S1986	30-Jun-1994	1-Jul-1993	David A. Redmond	Cdn. Premier Property Investments	26-Oct-1994	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-144	S2010-N	30-Jun-1994	1-May-1994	James Parks	Kate Kostiw and the Kodarics	31-Mar-1996	\$ 40,000	\$ 1,565	\$ 13,169	\$ -	\$ -	\$ 54,734	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-145	S2018-R	30-Jun-1994	1-Jul-1989	Aubrey Russell	Sweda Farms et al	30-Jun-1996	\$ -	\$ 2,029	\$ 8,366	\$ -	\$ -	\$ 10,395	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-146	S1987-P	30-Jun-1994	1-Dec-1992	Aubrey Russell	Michael & Susan Douglas	31-Dec-1994	\$ -	\$ -	\$ 1,365	\$ -	\$ -	\$ 1,365	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-181	S1640	31-May-1994	1-Feb-1994	Frank Monteleone	Elaine Cuddington	6-Feb-1995	\$ -	\$ 696	\$ -	\$ -	\$ -	\$ 696	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1994-182	S1125-R	14-Apr-1994	1-Feb-1994	Frank Monteleone	Cambridge Suites Hotel	31-Dec-1994	\$ 4,000	\$ 1,984	\$ -	\$ -	\$ -	\$ 5,984	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-003-01	2nd Fil	20-Jul-1994	20-Jul-1988	Lorne H. Saltman	Con Drain Company et al	30-Jun-1996	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-009	S2542-J	31-Aug-1994	1-Feb-1993	Anne-Marie Widner	Scotia Mortgage Corp./St. John's Polish Nat'l	31-Jul-1996	\$ -	\$ 883	\$ -	\$ -	\$ -	\$ 883	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-066	S3710	31-Dec-1994	1-Jul-1991	Sheldon/John Plener/Doe	Bob Reiger	31-Dec-1996	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-067	S3707	31-Dec-1994	1-Sep-1994	Frederick Pinos	Timothy Pinos	10-Jul-1997	\$ -	\$ 1,226	\$ -	\$ -	\$ -	\$ 1,226	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-080	S2239-E	28-Jul-1994	1-Jan-1992	D.R. Arthurs	T.R. Turbitt	2-Feb-1995	\$ -	\$ 523	\$ -	\$ -	\$ -	\$ 523	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-093	S3846	31-Dec-1994	1-Oct-1994	William H. Steele	ACM General Contracting - Dibco	9-Mar-2004	\$ -	\$ -	\$ 19,147	\$ -	\$ -	\$ 19,147	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-094	T0446	30-Mar-1995	1-May-1992	Anne-Marie Widner	Robert and Martine Celej	12-Dec-1996	\$ 16,000	\$ 994	\$ 4,377	\$ -	\$ -	\$ 21,371	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-096	T0435	28-Mar-1995	1-Mar-1978	Bruce/Kennet McNeely/Canc	Lidda Yonge Holdings Ltd/ 337147 Ontario Ltd/KLS	13-May-1997	\$ -	\$ -	\$ 1,179	\$ -	\$ -	\$ 1,179	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-117	T0561	30-Apr-1995	1-Jun-1992	Robert Law	L.B. Sheppard Estate/ D. Sheppard and G.S Sheppard	11-Jan-2001	\$ 10,000	\$ -	\$ 25,855	\$ -	\$ -	\$ 35,855	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1995-150	T-0930	27-Jun-1995	1-Jun-1995	Mark V. Ellis	Mentor Networks Inc.	10-Apr-1996	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1996-003	T1054	18-Jul-1995	1-May-1995	Michael MacKay	Dakota Marketing	31-Oct-1996	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1996-008	T1183	15-Aug-1995	19-Jan-1995	Howard Kohn	Royal Insurance Company of Canada	17-Mar-1997	\$ -	\$ -	\$ 8,784	\$ -	\$ -	\$ 8,784	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1996-103	U0572	14-May-1996	22-Mar-1989	Ian L. McCulloch	Great-West Life Assurance Company	13-Dec-1996	\$ -	\$ 197	\$ -	\$ -	\$ -	\$ 197	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1997-066	V0142	17-Feb-1997	9-Nov-1994	Paul Stein	Gaming Lottery Corporation/Bank Leu AG	14-Nov-2002	\$ -	\$ -	\$ 259,811	\$ -	\$ -	\$ 259,811	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-018	V0667	4-Jun-1997	3-Oct-1994	Gregory Greatrex	John William Cowan	20-Jan-1998	\$ -	\$ 1,357	\$ 1,845	\$ -	\$ -	\$ 3,202	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-019	V1113	29-Aug-1997	1-Jun-1996	Donald G. Gray	Aircraft Group Services (Asia) Inc.	31-Dec-2008	\$ -	\$ -	\$ 369,587	\$ -	\$ -	\$ 369,587	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-091	W0453	20-Apr-1998	14-Aug-1996	Lawrence D. Wilder	Natraceuticals Inc.	14-May-1999	\$ -	\$ 736	\$ -	\$ -	\$ -	\$ 736	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-101	U1798	11-Mar-1997	3-Apr-1996	Rui Fernandes	Transcon Recycling Inc.	10-Jan-2001	\$ -	\$ -	\$ 2,159	\$ -	\$ -	\$ 2,159	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-102	V0136	17-Feb-1997	6-Apr-1996	Lori A. Roth	Nekison Engineering & Contractors Ltd.	3-Jul-1997	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-103	T0930	27-Jun-1995	1-Jun-1995	Mark Ellis	Mentor Networks	23-Jan-1998	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-104	V0704	5-Jun-1997	1-Apr-1994	Paul M. Stein	Linda Stein	8-May-1998	\$ -	\$ 787	\$ -	\$ -	\$ -	\$ 787	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-106	V1056	1-Aug-1997	19-Jan-1981	Robert Armstrong	Lansing Building Supply (Ontario) Ltd.	22-May-1998	\$ 28,000	\$ -	\$ 1,741	\$ -	\$ -	\$ 29,741	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-107	V1061	19-Aug-1997	22-Mar-1991	Peter Trebuss	Solness Inc. and Judith Edler	22-Jan-1998	\$ -	\$ -	\$ 1,232	\$ -	\$ -	\$ 1,232	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-108	V1506	26-Nov-1997	30-Oct-1997	Lorne Silver	Shirley Schwartz & Estate of Larry Schwartz	21-Aug-2001	\$ 330,000	\$ 5,000	\$ 43,226	\$ -	\$ -	\$ 368,226	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS1998-109	V1541	1-Dec-1997	1-Jan-1995	Claire E. Walker	Lorena Kerr/John Hepworth/Marc Paquette	24-Apr-1998	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -











[illegible]

Claim No	LS File #	Report Date	Error Date	Insured	Claimant	Close Date	Law Society						CLLAS									
							LS Indemnity Paid	LS Other Paid	LS Legal Paid	LS Indemnity Reserve	LS Legal Reserve	LS Total Incurred	CLLAS Indemnity Paid	CLLAS Legal Paid	CLLAS Adjusting Paid	CLLAS Recov Other Paid	CLLAS Adjusting Reserve	CLLAS Indemnity Reserve	CLLAS Legal Reserve	CLLAS Recov Other Reserve	CLLAS Total Incurred	
CLLAS2020-013	19E1573	21-Aug-2019	31-May-2019	Signe Blanka Leisk	Brampton Areas 52, 53 Landowners Group Inc.	30-Sep-2019	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-018	19E1714	28-Aug-2019	2-Jan-2019	Stephanie Voudouris	Sophia Phillips	8-Sep-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-024	19-0802	12-Sep-2019		Sam Cole	RavenQuest BioMed Inc.		\$ -	\$ -	\$ -	\$ -	\$ 25,000	\$ 25,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-029	20-0150	24-Sep-2019	5-Sep-2019	Jason Holowachuk	Brock White Canada ULC	26-Feb-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-042	19E2616	28-Oct-2019	21-Feb-2019	Laurie Lapalme	Various	26-Aug-2021	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-045	19E2147	29-Oct-2019	17-Jan-2012	David Redmond	Centurion Apartment REIT	1-May-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-060	19E2572	13-Dec-2019	1-Apr-2013	Cameron Mingay	LBP Holdings Ltd.	16-Sep-2020	\$ -	\$ -	\$ 19,770	\$ -	\$ -	\$ 19,770	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-061	19E2471	6-Dec-2019	17-Jun-2015	Matthew Peters	Fieldhouse Capital Management Inc.	28-Jan-2020	\$ -	\$ -	\$ 5,290	\$ -	\$ -	\$ 5,290	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-064	19E2681	20-Dec-2019	28-Aug-2019	Melissa Winch	TDL Group Corp.	8-Apr-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-070	19E2722	7-Jan-2020	30-Oct-2018	Colin Ground	Polaris Infrastructure Inc.	26-Apr-2021	\$ -	\$ -	\$ 3,480	\$ -	\$ -	\$ 3,480	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-071	19E2679	30-Dec-2019	13-Sep-2019	Larry Ellis	3070 Ellesmere Developments Inc.	26-Mar-2020	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2020-072	19E2691	6-Jan-2020	31-Oct-2019	Kwaku Tabi	Haventree Bank	6-Mar-2020	\$ -	\$ -	\$ 3,342	\$ -	\$ -	\$ 3,342	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2021-039	20E1923	4-Nov-2020	11-Jun-2018	Max Gottlieb	Kenneth Rotenberg Estate,Virginia Shanker		\$ -	\$ -	\$ 44,380	\$ 5,000	\$ 5,620	\$ 55,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2021-072	21E0211	9-Feb-2021	8-Dec-2020	Lauren Grossman	Bank of Montreal (BMO)		\$ -	\$ -	\$ -	\$ 5,000	\$ 5,000	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2021-095	No CST / 21E0502	23-Mar-2021	27-Feb-2018	Paul Muchnik	MCAP Financial Corporation	21-Sep-2021	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2021-104	21E0665	14-Apr-2021	6-Apr-2021	Stefan Politano	Ikanik Farms Inc.		\$ -	\$ -	\$ -	\$ 1,000	\$ -	\$ 1,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2021-119	21-0463	28-May-2021		Randeep (Randy) Bassi	TDL Group Corp.	9-Dec-2021	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2022-011	TBA	18-Aug-2021		James Rossiter	Martti Paloheimo,Howard Hurst		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2022-023	21-0871	15-Oct-2021	8-Oct-2021	Hui Ling (Stephanie) Lee	Ryan Kalt		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2022-060	TBA	3-Dec-2021	27-Aug-2020	Colin Pendrith	Scott Milburn, Eaton Equipment Ltd.		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2022-061	TBA	18-Nov-2021	4-Mar-2021	Jedidiah Montegu Blackburn	Labrador Recycling, Inc.		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
CLLAS2022-062	TBA	27-Oct-2021		John Vettese	James Parker		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total							\$ 4,293,273	\$ 22,376	\$ 9,162,407	\$ 1,139,955	\$ 1,428,209	\$ 16,046,220	\$ 45,674,187	\$ 6,051,676	\$ -	\$ -	\$ -	\$ 3,250,000	\$ 5,000,000	\$ -	\$ 59,975,862	

# APPENDIX G

## Risk Management Policies and Procedures

### Name of Firm

Cassels Brock & Blackwell LLP

Please provide a full description of the Firm's most current risk management policies and procedures or, if appropriate, an update to your response to Appendix G of last year's renewal application.

**Please attach separately with the email**

**CLLAS Renewal Application**  
**Appendix G — Risk Management Policies and Procedures**  
(originally filed in 2009; reviewed February 2022)

**Name of Firm: Cassels Brock and Blackwell LLP**

1. Please advise if there is a committee or partner with overall responsibility for professional liability risk management of your firm.

**Audit & Risk Management Committee (ARMC), full-time Conflicts and Risk Officer (Monica Pak) and General Counsel (Rissa Revin – (currently on medical leave) whose functions are being carried out on an interim basis by John Birch (former General Counsel), Gordon Goodman (ARMC member) and Kristin Taylor (Managing Partner).**

**The ARMC is responsible for the administration of the various insurance policies maintained by the Firm. This Committee includes at least one litigation lawyer who monitors claims made against the professional liability policy. This Committee also includes at least one lawyer with direct insurance industry experience who helps monitor our overall insurance limits and exposure to risk.**

**The ARMC is also responsible for maintaining standards of practice and ethics within the Firm. It also deals with matters involving conflicts or potential conflicts of interest, complaints from clients and a variety of other matters.**

**The firm also has a full-time Conflicts and Risk Officer who is the primary point of contact for identifying and resolving conflict issues and overseeing protective measures such as confidentiality screens and client consents.**

2. Please provide a full description of the firm's risk management policies and procedures and include the following:

**The Firm has written policies and procedures dealing with a number of risk management areas, including conflicts of interest, trust funds, lawyers acting as directors and officers, ownership of significant interests in a client, audit enquiries, professional conduct, ethics and standards, professional development, confidentiality and security, pre-clearance of securities trades, file intake and retainers. The firm also provides guidance to lawyers regarding opinions and outside counsel guidelines.**

- (a) A list of the firm's written risk management policies and procedures (e.g. with respect to client intake, conflict checking, lawyers acting as directors or officers) and how these policies and procedures are communicated (e.g. internal practice policy or policy manual, seminars, etc.).

**The Firm's risk management policies and procedures are documented in the Firm's policy manual and stand-alone policies, which include the following:**

- **client intake**
- **conflict checking**
- **directors and officers**
- **professional errors and omissions**

- securities trading
- ownership interest in clients

New lawyers and other employees receive instruction regarding the Firm's risk management policies and procedures during orientation sessions that are carried out at the commencement of their employment. The Firm's risk management policies are readily accessible on-line at all times on the Firm's intranet and in the document management system. Lawyers and staff are advised of updates to the Firm's risk management policies and procedures as they occur and appropriate amendments are reflected in the policy manual and document management system.

Lawyers are also instructed to reach out to the Audit & Risk Management Committee, General Counsel, and/or Conflicts and Risk Officer in the event that they have any risk-related questions.

- (b) The firm's procedure for opening or starting work on a file (e.g. use of a standard new client form, retainer letter, conflict check, approval process, etc.).

### **File Openings**

For all new client file-opening forms that are received, the client and matter name is searched on both client and matter levels. If any potential conflict is found, the initiating lawyer/assistant is notified. If the Accounting Department is advised that there is no conflict, the file is opened. If the Accounting Department is advised that there is a conflict, the file is not opened.

For all new matters (for existing clients), the client and matter name are searched on both client and matter levels.

The Daily Open Client & Matter report is circulated to all lawyers and assistants. As stated in the opening statement of that report, it is the responsibility of each lawyer to review the report and act immediately if a potential conflict is disclosed.

### **Conflict Inquiries**

For all prospective clients and all new matters for existing clients, unless in the latter case it is absolutely clear that there is no opposite party or, if so, that it is absolutely clear that, for whatever reason, there could be no conflict, the initiating lawyer sends a conflict inquiry using the Conflict Search form.

When a conflict inquiry is received, the File Opening Clerk does a systems search of the client database (open and closed). The data includes recorded opposite parties. If any potential conflict is revealed, a conflict report printout is produced and sent to the initiating lawyer to discuss/resolve with any other lawyers involved, if that can be done without revealing confidential information. In situations where it may be necessary to reveal confidential information in order to assess and resolve a potential conflict, the Conflicts and Risk Officer receives this confidential information separately from each side and provides guidance regarding the conflict (without revealing the confidential information).

**The Conflicts and Risk Officer is responsible for overseeing the establishment of any confidentiality screens that are established, whether precautionary or because of an actual conflict (where client consent has been provided to permit the firm to act). Notice of a confidentiality screen is circulated to all affected parties. At this point the client file security measures are put in place immediately.**



## **Retainer Letter**

The firm's policy is that there must be an engagement letter in place with a client to cover all files for that client (even for existing clients). Typically, engagement letters are issued for each matter. The engagement letter generally addresses the following issues:

- Scope of work
- Name of the lawyer(s) providing the services
- Name of the principal lawyer
- Fees
- Out-of-pocket expenses
- Retainer and trust deposit
- Billing arrangements and terms of payment
- Termination of representation (withdrawal circumstances, etc.)

In addition, standard terms and conditions (contained in a separate document that is sent with the engagement letter) are incorporated by reference into most engagements.

## **Tickler/Follow-Up Systems**

It is the responsibility of each lawyer to select and maintain his/her own tickler system (computerized or manual) to remind him/her to deal with a particular issue within a specific time frame. Lawyers are asked to familiarize themselves with the tickler system used by other lawyers in their Practice Group, and ensure matters are brought forward in a timely manner.

The intellectual property sub-group of the Business Law Group has a separate, specific system for diarizing trademark-related deadlines.

# APPENDIX H

## Cyber Liability

### Name of Firm

Cassels Brock & Blackwell LLP

1	Personnel	Enter Yes or No
a)	Do you have a Chief Security Officer or Chief Information Security Officer or equivalent?	Yes
	If "no", who within the Firm is responsible for the management of and compliance with the Firm's Security Policies?	
	Chief Financial Officer, Chief Information Officer	
b)	Do you have a Chief Privacy Officer or equivalent?	Yes
	If "no", who within the Firm is responsible for the management of and compliance with the Firm's Privacy Policies?	
2	Protection	Enter Yes or No
a)	Do you use encryption tools to enhance the integrity and confidentiality of confidential information?	Yes
	If you use encryption tools, in which scenarios is data encrypted? (Check all statements that you believe are applicable.)	
	- Data at rest	Yes
	- Data in transit	Yes
	- Data transferred to removable media (laptops, CD's, backup tapes, USB devices, etc.)	Yes
	- None of the above	
b)	Do you use and regularly update industry-standard antivirus software?	Yes
c)	Do you install the latest software updates to reduce security vulnerabilities?	Yes
d)	Do you require that passwords be a minimum length and contain alpha and numeric characters?	Yes
	Do you require that passwords be regularly updated?	
e)		No
f)	Do you check to make sure that no spyware or adware resides on your computers?	Yes
g)	Do you use and regularly update industry-standard firewall protection systems to prevent unauthorized access to internal networks and computer systems?	Yes
h)	Is the data on your servers encrypted?	Yes
i)	Is the data on your desktop and laptop computers encrypted?	Yes
j)	Is the data on your mobile devices encrypted?	Yes

# APPENDIX H

## Cyber Liability

### Name of Firm

Cassels Brock & Blackwell LLP

k)	Have predesignated computer system/application access rights and privileges been set for all authorized users?	Yes
l)	Is there hourly or daily automatic backup of documents and emails?	Yes
m)	Is there hourly or daily automatic backup of your firm-wide tickler system and/or your lawyers' own personal tickler systems?	No
n)	Are backups stored off-site at a secure location?	Yes
o)	Do you use software that can be used to wipe laptops and mobile devices clean if they are misplaced or stolen?	Yes
p)	Do you use software that can detect unauthorized transfers of personal information and unauthorized copying of files?	No
q)	Do you use a metadata scrubber on documents that you transmit to clients or third parties such as opposing counsel?	Yes

3	Incident Report	Enter Yes or No
	Do you have a written network security incident response plan?	Yes

If "yes":

a)	Does it include alternative options should a critical third party outsourcing provider's operations be incapacitated?	Yes
b)	Does it include procedures to alert your clients that their data may have been compromised?	Yes

4	Policies	Enter Yes or No
a)	Do you maintain a comprehensive information security and privacy policy that is updated and enforced on a continuous basis?	Yes
b)	Do you advise your lawyers of the risks of using unencrypted email?	No
c)	Does your firm advise your lawyers of the dangers of metadata?	Yes
d)	Do you purchase insurance other than CLLAS coverage to protect you in the case of privacy breaches?	Yes
e)	Do you purchase insurance other than CLLAS coverage to protect you in the case of cyber-attacks?	Yes

# APPENDIX I

2022 Professional Liability Insurance Application and  
Exemption Form Submitted to LAWPRO

Name of Firm

Cassels Brock & Blackwell LLP

Please attach separately with the email

**\*\*\* FIRM SUMMARY \*\*\***

LAW SOCIETY OF ONTARIO

Page 1 of 7

To: CASSELS BROCK & BLACKWELL LLP  
SCOTIA PLAZA  
#2100 - 40 KING ST WEST  
TORONTO, ON M5H 3C2

Invoice Date: 25 NOV 2021  
Policy Effective/Due Date: 01 JAN 2022  
Total Amount: \$617,922.00  
Account: A034880

Attention: Accounts Payable

**\*\*\* PREMIUM DETAIL \*\*\***

Description	Amount
CLAIMS HISTORY LEVY SURCHARGE	\$7,500.00
ADJUSTED BASE-RATED PREMIUM	\$564,650.00
PST	\$45,772.00
	=====
*** TOTAL ***	\$617,922.00

**\*\*\* INSTALMENT SUMMARY \*\*\***

Instalment Date	Original Amount	Paid Amount	Open Amount
** PAYABLE 01 JAN 2022 **	\$617,922.00	\$0.00	\$617,922.00
	=====	=====	=====
*** TOTAL ***	\$617,922.00	\$0.00	\$617,922.00

Early payment discount: Before 05 FEB 2022, pay only:	\$607,014.00
After 05 FEB 2022, pay:	\$617,922.00
Save:	\$10,908.00

(Detach and return with payment)

Account: A034880	Due Date:	01 JAN 2022
CASSELS BROCK & BLACKWELL LLP	Instalment Total:	\$617,922.00
	Balance:	\$617,922.00
Pay To: Law Society of Ontario	Amount Enclosed:	
c/o Lawyers' Professional Indemnity Company		
250 Yonge Street		
Suite 3101, P.O. Box 3		
Toronto, ON M5B 2L7		

\* Please attach a copy of the Firm Summary to your cheque \*

### \*\*\* FIRM SUMMARY \*\*\*

Firm: A034880

Page 2 of 7

The following members are covered on this summary:

Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A011660O	PETERSON, DAVID ROBERT	\$3,240.00	\$3,240.00	\$3,240.00
A013475H	CRAIG, JOHN HUNTER	\$3,240.00	\$3,240.00	\$3,240.00
A015550F	BURDEN, WILLIAM JOHNSON	\$3,240.00	\$3,240.00	\$3,240.00
A016589I	ABRAMSON, LANNING JAY	\$3,348.00	\$3,348.00	\$3,348.00
A016808H	GOTLIEB, MAXWELL	\$3,240.00	\$3,240.00	\$3,240.00
A017904B	PLENER, SHELDON	\$3,240.00	\$3,240.00	\$3,240.00
A018514A	MANZER, ALISON ROSEMARY	\$3,348.00	\$3,348.00	\$3,348.00
A018593C	SELZNICK, STEPHEN IRA	\$3,348.00	\$3,348.00	\$3,348.00
A019947K	KLIGMAN, ROBERT DAVID	\$3,240.00	\$3,240.00	\$3,240.00
A020027U	PINOS, JOSEPH DAVID TIMOTHY	\$3,240.00	\$3,240.00	\$3,240.00
A020135M	YOUNG, MARK IAN	\$3,240.00	\$3,240.00	\$3,240.00
A021142G	STEINHART, GARY	\$3,240.00	\$3,240.00	\$3,240.00
A021789J	MINGAY, CAMERON ARTHUR	\$3,240.00	\$3,240.00	\$3,240.00
A022845E	NORTON, CHRISTOPHER BRIAN	\$3,240.00	\$3,240.00	\$3,240.00
A022897M	SNIDER, KENNETH JUDD	\$3,240.00	\$3,240.00	\$3,240.00
A023256T	STEIN, PAUL MICHAEL	\$5,940.00	\$5,940.00	\$5,940.00
A024238L	SILVER, LORNE STEPHEN	\$3,240.00	\$3,240.00	\$3,240.00
A025356I	GLICKMAN, LEONARD	\$3,240.00	\$3,240.00	\$3,240.00
A025675Q	ROY, JEFFREY PAUL	\$3,240.00	\$3,240.00	\$3,240.00
A025728B	MERCER, CATHY LEE	\$3,240.00	\$3,240.00	\$3,240.00
A025846K	KARN, BERNICE MABELLE	\$3,240.00	\$3,240.00	\$3,240.00
A026367J	SHAW, GEOFFREY BRACKLEY	\$3,240.00	\$3,240.00	\$3,240.00
A026798Q	ALTER, MATTHEW RICHARD	\$3,348.00	\$3,348.00	\$3,348.00
A027474Q	REDMOND, DAVID ANTHONY	\$6,048.00	\$6,048.00	\$6,048.00
A027732S	SWICK, BRENDA CAROL	\$3,240.00	\$3,240.00	\$3,240.00
A029476H	FLEISHER, JONATHAN EMMANUEL	\$3,240.00	\$3,240.00	\$3,240.00
A029730C	WATTERWORTH, ANN LOUISE	\$3,240.00	\$3,240.00	\$3,240.00
A029839C	DOMINIQUE, BRIAN PATRICK	\$3,348.00	\$3,348.00	\$3,348.00
A030156D	WEINBERG, LAWRENCE MARK	\$3,348.00	\$3,348.00	\$3,348.00
A030670L	GOLDMAN, JASON IRA	\$3,240.00	\$3,240.00	\$3,240.00
A030729S	KUKULOWICZ, ROBERT SHAYNE	\$3,240.00	\$3,240.00	\$3,240.00
A030938T	ARNONE, FRANCESCO PIETRO	\$3,240.00	\$3,240.00	\$3,240.00
A031351O	WUNDER, MICHAEL JOHN	\$3,348.00	\$3,348.00	\$3,348.00
A032187D	COHEN, ROBERT BRIAN	\$5,940.00	\$5,940.00	\$5,940.00
A032266J	GOODMAN, GORDON PETER	\$3,240.00	\$3,240.00	\$3,240.00

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Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A032433T	REVIN, RISA HEATHER	\$3,240.00	\$3,240.00	\$3,240.00
A032748J	BERMAN, WENDY RUTH	\$3,240.00	\$3,240.00	\$3,240.00
A035009R	MERCIER, RONALD JOSEPH MARCUS	\$3,348.00	\$3,348.00	\$3,348.00
A035302P	REBACK, ANDREW MAXWELL	\$3,240.00	\$3,240.00	\$3,240.00
A035994I	MCKENZIE, SUSAN JENNIFER	\$3,240.00	\$3,240.00	\$3,240.00
A036620P	BENNETT, MARK TORRANCE	\$3,240.00	\$3,240.00	\$3,240.00
A036951J	VETTESE, JOHNNY PAUL	\$3,240.00	\$3,240.00	\$3,240.00
A037339O	TAYLOR, KRISTIN RACHELL	\$3,240.00	\$3,240.00	\$3,240.00
A038968U	BIRCH, JOHN NICHOLAS	\$3,348.00	\$3,348.00	\$3,348.00
A039215F	NEWMAN, JOHN CHARLES ROSS	\$3,348.00	\$3,348.00	\$3,348.00
A040502Q	KAPSALES, TOMMY	\$3,348.00	\$3,348.00	\$3,348.00
A040901D	ILIOPOULOS, ALEXANDRA	\$3,240.00	\$3,240.00	\$3,240.00
A040976K	OSBORNE, WILLIAM MICHAEL GRANT	\$3,240.00	\$3,240.00	\$3,240.00
A041014R	SALEM, ANDREW EMILE	\$3,348.00	\$3,348.00	\$3,348.00
A041377I	MERSKEY, ALAN BERNARD	\$3,240.00	\$3,240.00	\$3,240.00
A041824A	BOIVIN, ANDRE MARCEL	\$3,348.00	\$3,348.00	\$3,348.00
A041858M	JACKSON, LARA MARY BESS	\$3,240.00	\$3,240.00	\$3,240.00
A042178M	ARBUCK, SIDNEY JASON	\$3,348.00	\$3,348.00	\$3,348.00
A042203S	BULLEN, JASON KENNETH SPERO	\$3,240.00	\$3,240.00	\$3,240.00
A042258O	HOGAN, GREGORY JOSEPH	\$3,240.00	\$3,240.00	\$3,240.00
A042930L	RICH, CHARLES BRADLEY	\$3,348.00	\$3,348.00	\$3,348.00
A042973V	FITZGERALD, ANDREA CATHERINE	\$3,240.00	\$3,240.00	\$3,240.00
A044274R	AKMAN, DAVIT DARCY MICHAEL	\$3,240.00	\$3,240.00	\$3,240.00
A044483S	ACCURSI, GARY CHAD	\$3,240.00	\$3,240.00	\$3,240.00
A044563U	GROUND, COLIN WILLIAM	\$3,240.00	\$3,240.00	\$3,240.00
A044616F	MANIACI, SEAN ANTHONY SAL	\$3,240.00	\$3,240.00	\$3,240.00
A045362J	CLEMENTS, LINDSAY ANN	\$3,240.00	\$3,240.00	\$3,240.00
A045455Q	LEISK, SIGNE BLANKA	\$3,348.00	\$3,348.00	\$3,348.00
A045616Q	CHUMMAR, NOBLE CYRIL	\$3,240.00	\$3,240.00	\$3,240.00
A045862F	LYSY, ROBERT MICHAEL	\$3,240.00	\$3,240.00	\$3,240.00
A046555R	BELLISSIMO, JOSEPH JAMES	\$3,348.00	\$3,348.00	\$3,348.00
A046572R	CHISICK, CASEY MARK	\$3,240.00	\$3,240.00	\$3,240.00
A046978W	RONDE, DEREK BART CHARLES	\$3,240.00	\$3,240.00	\$3,240.00
A048080W	JESSOME, LAURIE BRIDGET	\$3,240.00	\$3,240.00	\$3,240.00
A048716Q	HAYMAN, ALISON JEAN	\$3,240.00	\$3,240.00	\$3,240.00
A048930I	GEARY, NICOLA ELIZABETH	\$3,240.00	\$3,240.00	\$3,240.00

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Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A049302U	DIETRICH, JANE OLIVE	\$3,348.00	\$3,348.00	\$3,348.00
A049559L	GRAY, TILLY	\$3,240.00	\$3,240.00	\$3,240.00
A049784Q	FRANKEL, THEODORE BLOCH	\$3,240.00	\$3,240.00	\$3,240.00
A049821I	KING, JAY FRANCIS	\$3,240.00	\$3,240.00	\$3,240.00
A049932L	UUKKIVI, RAIVO	\$3,348.00	\$3,348.00	\$3,348.00
A050708C	CHOI, NANCY	\$3,240.00	\$3,240.00	\$3,240.00
A051289L	FREEMAN, JONATHAN	\$3,348.00	\$3,348.00	\$3,348.00
A051709J	GOGAL, SANDRA ANN	\$3,240.00	\$3,240.00	\$3,240.00
A052626H	NICHOLAS, ALOYSIUS CHANDIMAL	\$3,240.00	\$3,240.00	\$3,240.00
A052723J	WOOLFORD, LUKE STEPHEN	\$3,240.00	\$3,240.00	\$3,240.00
A052864R	JAKIBCHUK, ADRIAN DANIEL	\$3,240.00	\$3,240.00	\$3,240.00
A053817A	PIZALE, JOHN ALEXANDER	\$3,240.00	\$3,240.00	\$3,240.00
A055767C	BLACKBURN, JEDIDIAH MONTEGU	\$3,348.00	\$3,348.00	\$3,348.00
A055875R	LEITH, BENJAMIN DARRYL	\$3,348.00	\$3,348.00	\$3,348.00
A055957L	ROBINSON, FRANK SAUL	\$3,348.00	\$3,348.00	\$3,348.00
A056576I	KENNEDY, STEVEN NOEL	\$3,186.00	\$3,186.00	\$3,186.00
A057154K	KHULLAR, SHAUNIK	\$3,132.00	\$3,132.00	\$3,132.00
A057297K	WINCH, MELISSA ERICA	\$3,348.00	\$3,348.00	\$3,348.00
A057305Q	ZAGAR-DRISCOLL, JESSICA ANNE	\$3,240.00	\$3,240.00	\$3,240.00
A057316G	ABUDULAI, SUHUYINI HADIA	\$3,240.00	\$3,240.00	\$3,240.00
A057488P	LUNGU, MICHAEL MOSHE	\$3,240.00	\$3,240.00	\$3,240.00
A058204S	HOLLAND, STEFANIE ANN	\$3,240.00	\$3,240.00	\$3,240.00
A058282B	GORYS, ANDREA JOSEFA	\$3,240.00	\$3,240.00	\$3,240.00
A058406N	PICONE, JOHN MICHAEL	\$3,240.00	\$3,240.00	\$3,240.00
A058577D	GARDOS, DAVID PETER	\$3,240.00	\$3,240.00	\$3,240.00
A058605U	HORNBY, RYAN CHRISTOPHER	\$3,240.00	\$3,240.00	\$3,240.00
A058663P	MAYZEL, ERIC ALAN	\$3,186.00	\$3,186.00	\$3,186.00
A058865K	DA COSTA, RICHARD JOSEPH	\$3,240.00	\$3,240.00	\$3,240.00
A059037T	PILKINGTON, ADRIANNA MONIQUE	\$3,348.00	\$3,348.00	\$3,348.00
A059510J	JACOBS, RYAN COREY	\$3,240.00	\$3,240.00	\$3,240.00
A059912H	PENDRITH, COLIN DAVID	\$3,348.00	\$3,348.00	\$3,348.00
A060137J	JIMENO, NATASHA LEI	\$3,348.00	\$3,348.00	\$3,348.00
A060619J	WASYLYK, JENNIFER ASHLEY	\$3,240.00	\$3,240.00	\$3,240.00
A061177T	SULLIVAN, PETER JOSEPH GREGORY	\$3,240.00	\$3,240.00	\$3,240.00
A061421U	BROWN, GRAHAM RICHARD	\$3,348.00	\$3,348.00	\$3,348.00
A061610K	MARTIN, JEREMY MICHAEL	\$3,240.00	\$3,240.00	\$3,240.00



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Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A061877S	HOJILLA, PAMELA GAY M.	\$3,240.00	\$3,240.00	\$3,240.00
A061880R	HORKINS, CHRISTOPHER BRINDLEY	\$3,240.00	\$3,240.00	\$3,240.00
A061984O	RAMGOOLAM, ROSSI RYAN	\$3,348.00	\$3,348.00	\$3,348.00
A062390D	ST. CYR, MARK ANDRE	\$3,240.00	\$3,240.00	\$3,240.00
A063638L	SASSI, MONIQUE	\$3,348.00	\$3,348.00	\$3,348.00
A063748S	LI PARIZEAU, MING-LAI TERA	\$3,240.00	\$3,240.00	\$3,240.00
A063778A	MIKELBERG, JEFFREY PHILLIP	\$3,240.00	\$3,240.00	\$3,240.00
A063847M	RUSSELL, CAITLIN ANNE	\$3,240.00	\$3,240.00	\$3,240.00
A064160R	MOHAJER-ASHJAI, ARDAVAN	\$3,348.00	\$3,348.00	\$3,348.00
A064186E	PAK, MONICA	\$3,240.00	\$3,240.00	\$3,240.00
A064239M	SOMANI, ALY-KHAN	\$3,240.00	\$3,240.00	\$3,240.00
A064355G	COHEN, CARLY ELYSE	\$3,240.00	\$3,240.00	\$3,240.00
A064583W	ROBERTS, STEPHANIE KATHRYN-MAY	\$3,240.00	\$3,240.00	\$3,240.00
A064743D	POTTER, CARLA ELIZABETH	\$3,348.00	\$3,348.00	\$3,348.00
A064908K	LEVINE, NATALIE ELAINE	\$3,348.00	\$3,348.00	\$3,348.00
A064915Q	LITCHEN, JAMIE ALEXANDRA	\$3,240.00	\$3,240.00	\$3,240.00
A065231J	OMOKHODION, PATIENCE NWANNE	\$3,240.00	\$3,240.00	\$3,240.00
A065384D	SIMPSON, KYLE JOSEPH	\$3,240.00	\$3,240.00	\$3,240.00
A065425C	BORNSTEIN, JEREMY DAVID	\$3,132.00	\$3,132.00	\$3,132.00
A065457W	CONSTANTINE, MARIA CATHERINE	\$3,240.00	\$3,240.00	\$3,240.00
A065534N	HENDERSON, STEPHEN JAMES BURRO	\$3,240.00	\$3,240.00	\$3,240.00
A065642F	MUKKAR, MANRAJ SINGH	\$3,348.00	\$3,348.00	\$3,348.00
A065702T	SELBY, CHRISTOPHER CARL	\$3,240.00	\$3,240.00	\$3,240.00
A065741W	TOMBS, ANNA LESLIE ROBINSON	\$3,240.00	\$3,240.00	\$3,240.00
A065752M	VOUDOURIS, STEPHANIE STELLA	\$3,348.00	\$3,348.00	\$3,348.00
A065857F	DI FRANCESCO, STEFANIE ANNE	\$3,240.00	\$3,240.00	\$3,240.00
A066020E	SCHAEFER, BRITTANY ALEXANDRA	\$2,592.00	\$2,592.00	\$2,592.00
A066146E	WOODMAN, BRYAN ROBERT	\$3,240.00	\$3,240.00	\$3,240.00
A066331K	KHAN, TAYYABA	\$3,240.00	\$3,240.00	\$3,240.00
A066430E	PHILLIPS, JACKSON EDWARD NIXON	\$3,240.00	\$3,240.00	\$3,240.00
A068041K	CIPOLLONE, DANIEL PHILIP	\$3,132.00	\$3,132.00	\$3,132.00
A068146D	LAI, KRISTEN SEI-TING	\$3,240.00	\$3,240.00	\$3,240.00
A068463T	KEATING, MARISA BIANCA	\$3,348.00	\$3,348.00	\$3,348.00
A068574W	SHERMAN, JONATHAN DANIEL	\$3,240.00	\$3,240.00	\$3,240.00
A068794N	KUREDJIAN, JESSICA LORRAINE	\$3,240.00	\$3,240.00	\$3,240.00
A070041V	LESZCZ, NOAH SAMUEL	\$3,348.00	\$3,348.00	\$3,348.00

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Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A070051P	LYLE, JAMES WILLIAM	\$3,240.00	\$3,240.00	\$3,240.00
A070229E	BLOM, RANDALL HARDWIN	\$3,132.00	\$3,132.00	\$3,132.00
A070230L	BLUMBERG, ROBYN ERIN	\$3,348.00	\$3,348.00	\$3,348.00
A070303H	GOODIS, BENJAMIN RYAN	\$3,348.00	\$3,348.00	\$3,348.00
A070336A	KELMAN, DAVID LEE	\$3,240.00	\$3,240.00	\$3,240.00
A070468K	TABI, KWAKU ALBERT KODIE	\$3,348.00	\$3,348.00	\$3,348.00
A070597J	GROSSMAN, LAUREN ELYSE	\$3,240.00	\$3,240.00	\$3,240.00
A071003C	MURPHY, ALEXANDRA ELIZABETH FR	\$3,240.00	\$3,240.00	\$3,240.00
A072223E	GARRAWAY, STEPHANIE REMA	\$3,348.00	\$3,348.00	\$3,348.00
A072317H	MOHER, SOPHIE HOPE	\$3,240.00	\$3,240.00	\$3,240.00
A072352D	POREMBIA, MONICA KATHERINE	\$3,240.00	\$3,240.00	\$3,240.00
A072471I	BATES, CHRISTIE JANE CLARK	\$3,240.00	\$3,240.00	\$3,240.00
A072837O	CIARLARIELLO, MARCO JOSEPH	\$3,240.00	\$3,240.00	\$3,240.00
A073009A	POLITANO, STEFAN CHRISTOPHER	\$3,240.00	\$3,240.00	\$3,240.00
A073694V	TALLIM, MICHAEL RESHAUN	\$3,240.00	\$3,240.00	\$3,240.00
A074221L	BECK-WATT, SEBASTIAN DAGE	\$2,592.00	\$2,592.00	\$2,592.00
A074651W	LAU, FLORENCE PUI YA	\$2,592.00	\$2,592.00	\$2,592.00
A074715U	NGO, RICHARD	\$2,592.00	\$2,592.00	\$2,592.00
A074885O	ANAND, GAURAV	\$2,592.00	\$2,592.00	\$2,592.00
A074914E	BLAIR, LUCAS SAMSON CLEMENT	\$2,700.00	\$2,700.00	\$2,700.00
A075184H	O'BRIEN, TEGAN ANNE	\$2,592.00	\$2,592.00	\$2,592.00
A075235A	ROURKE, MEGHAN TEDDY	\$2,592.00	\$2,592.00	\$2,592.00
A075277O	SOKOLOFF, SAM TAYLOR	\$2,700.00	\$2,700.00	\$2,700.00
A075663T	QIN, YI JASMINE	\$2,592.00	\$2,592.00	\$2,592.00
A075824T	ROSENBLOOM, MICHAEL TYLER	\$2,592.00	\$2,592.00	\$2,592.00
A077268P	CHIU, TIFFANY CAROLYN	\$2,268.00	\$2,268.00	\$2,268.00
A077270S	CHRISTODOULOU, MARIA CHRISTINA	\$2,376.00	\$2,376.00	\$2,376.00
A077366N	KUCZYNSKI, KYLE LEONID	\$2,376.00	\$2,376.00	\$2,376.00
A077482H	SHEPHERD, JONATHAN WALTER	\$2,268.00	\$2,268.00	\$2,268.00
A077712T	LEE, KELLY-ANN	\$2,376.00	\$2,376.00	\$2,376.00
A077965D	EVOLA, JENNIFER MARIA	\$2,376.00	\$2,376.00	\$2,376.00
A078000W	HAMALIUK, JOSEPH ALAN MICHAEL	\$2,268.00	\$2,268.00	\$2,268.00
A078229A	DYKSTRA, LINDSAY ELIZABETH	\$3,240.00	\$3,240.00	\$3,240.00
A078393S	KHAJETOORIAN, ARMEN	\$3,348.00	\$3,348.00	\$3,348.00
A079210H	WOWK, GEORGE ANDREW	\$3,240.00	\$3,240.00	\$3,240.00
A079314E	CAPMARE, CORINA	\$1,944.00	\$1,944.00	\$1,944.00

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Member Number	Member Name	Instalment Amount	Total Premium	Outstanding Amount
A079362F	CRESSMAN, AARON FRETZ	\$1,944.00	\$1,944.00	\$1,944.00
A079415N	ELICH, HOLLY AMANDA	\$2,376.00	\$2,376.00	\$2,376.00
A079416J	ELLIOTT-ARMSTRONG, NICO TAUPE	\$1,944.00	\$1,944.00	\$1,944.00
A079456I	GAERTNER, THEA MARISA	\$1,944.00	\$1,944.00	\$1,944.00
A079568H	KARBI, JACQUELINE VIOLET	\$1,944.00	\$1,944.00	\$1,944.00
A079781D	SCROCCHI, SHANNON KATHLEEN	\$1,944.00	\$1,944.00	\$1,944.00
A080240M	SARSANGI, MOHAMMAD REZA	\$1,944.00	\$1,944.00	\$1,944.00
A080287G	SNIDERMAN, ROBERT ELI	\$1,836.00	\$1,836.00	\$1,836.00
A081654H	DE POMPA, ALEXANDER ANTHONY	\$1,620.00	\$1,620.00	\$1,620.00
A081661N	DHALIWAL, HARDEEP KAUR	\$1,620.00	\$1,620.00	\$1,620.00
A081673W	DREKSLER, SIMONE AMALIA	\$1,620.00	\$1,620.00	\$1,620.00
A081683Q	ELLS, OLIVIA EVE	\$1,620.00	\$1,620.00	\$1,620.00
A081725L	GREEN, SPENCER COLE	\$1,620.00	\$1,620.00	\$1,620.00
A081779L	JUNG, ASHLEY YOOJIN	\$1,566.00	\$1,566.00	\$1,566.00
A081851W	MAKHZOUMI, LAYLA	\$1,620.00	\$1,620.00	\$1,620.00
A081873C	MCKENZIE, CECILE ALEXANDRA LAD	\$1,728.00	\$1,728.00	\$1,728.00
A081919E	ONYEAJU, WILLIAM TOCHI	\$1,620.00	\$1,620.00	\$1,620.00
A082069G	WELTMAN, STACEY FAY	\$1,620.00	\$1,620.00	\$1,620.00
A082092Q	ZITTELL, ZACHARY EZRA	\$1,620.00	\$1,620.00	\$1,620.00
A082156O	BRYDON, JOSEPH TIMOTHY	\$1,728.00	\$1,728.00	\$1,728.00
A082160J	BURNSTEIN, BETH ROSE	\$1,620.00	\$1,620.00	\$1,620.00
A082170D	CHAMBERLAIN, ELISSA JACQUELINE	\$1,620.00	\$1,620.00	\$1,620.00
A083402S	SMITH, KAYLA RUTH	\$1,620.00	\$1,620.00	\$1,620.00

202 members are listed on the summary

Instalment Amount:	\$617,922.00
Total Premium:	\$617,922.00
Outstanding Amount:	\$617,922.00