

## SLR Board and Indigenous Council

### Minutes of Meeting

Meeting Date: March 18, 2026  
Meeting Time: 9:00  
Meeting Type: Hybrid  
Meeting Location: Society of Notaries Public of BC

#### Board Members in Attendance:

Bruce LeRose, KC (Chair) Elizabeth Kollias  
Johanne Blenkin Scott Simpson  
Jeevyn Dhaliwal, KC Regrets: Sarah Westwood, KC  
Regrets: Katrina Harry, KC

#### Indigenous Council Members in Attendance:

John Borrows Andrea Hilland, KC  
Regrets: Christina J. Cook, KC Regrets: Carly Teillet

#### Advisory Committee Members in Attendance:

John Mayr Adam Whitcombe, KC  
Josh Paterson, KC Paul Craven

#### Participants and Attendees:

Michael Johnston Legal Advisor to the Indigenous Council  
Jaxxen Wylie Legal Advisor to the Indigenous Council  
Cary Ann Moore Legislative Counsel  
Jamie Maclaren KC Legal Advisor to the BC Paralegal Association  
Regrets: Jared Friedman Project Management  
Lindsey Ogilvie Project Management  
Maddie Holm-Porter Project Support

#### Observers:

Name	Organization	Name	Organization
Alan Treleaven	Director, SNPBC	Lesley Small	Senior Director, LSBC
Avalon Bourne	Staff, LSBC	Marny Morin	Staff, SNPBC
Barbara Buchanan KC	Staff, LSBC	Michael Lucas KC	Staff, LSBC
Carrie Robinson	Staff, LSBC	Michael Mulhern	Staff, LIF
Claire Marchant	Co-ED, LAPBC	Michael Welsh	Bencher, LSBC
Derek LaCroix KC	Co-ED, LAPBC	Michèle Ross	Bencher, LSBC

<b>Name</b>	<b>Organization</b>	<b>Name</b>	<b>Organization</b>
Gigi Chen-Kuo	CEO, LSBC	Sara Hopkins	Bencher, LSBC
Jeanette McPhee	CFO, LSBC	Sherry Small	Staff, LSBC
Jeff Hoskins KC	Staff, LSBC	Su Forbes KC	COO, LIF
Kerry Simmons KC	ED, CBABC	Terry Becker	Okanagan College
Kerryn Holt	COO, LSBC	Thomas Spraggs KC	President, LSBC

### **1.0 Welcome and Acknowledgements**

The meeting was called to order at 9:06am.

The Chair welcomed the Board, Indigenous council, and members of the Advisory Committee and delivered a territorial acknowledgement.

### **2.0 Approval of Minutes from the previous meeting**

The February 9, 2026 meeting minutes were approved.

### **3.0 Consent Resolution: Paralegal Committee**

The transitional board and the transitional Indigenous council hereby ratify and authorize the establishment of the Paralegal Committee with the purpose of supporting the development of regulation and licensing requirements for regulated paralegal licensees

### **4.0 Update from the Project Director**

The Cascadia Partners project director delivered a brief update on Rules and Code of Professional Conduct development progress and process, as well as updates on activities of the Communications and Hiring committees.

### **5.0 Part 9 – Indemnification**

The Legislative Counsel introduced the draft rules on Indemnification for discussion:

- The Transition Team has previously expressed support for a single, unified indemnification program for all licensees of the new regulator.
- It was noted that the proposed rules are intentionally agnostic, requiring only that the regulator maintain an indemnity program, thereby allowing flexibility in how the program is ultimately designed.
- It was also noted that the Society of Notaries Public of BC currently applies a transactional insurance fee, based on models used in Newfoundland and Ontario, intended to better align insurance costs with individual volume and risk.

- The Transition Team raised a question regarding exemptions (9-1-4) for individuals who are suspended, expressing concerns that if a suspended licensee continues to practice, this could pose a risk to the public.
  - It was clarified that while suspended licensees are exempt from the requirement to maintain insurance, they are not excluded from coverage under the policy if they have already paid the applicable fee.
  - It was also noted that this would be an extremely rare occurrence, given the limited number of suspensions each year, and the additional likelihood that a suspended licensee would continue to practice and subsequently make an error that gives rise to a claim.
  - Meeting observer Su Forbes, COO of the Lawyers Indemnity Fund (LIF), was asked to speak to this issue. She noted that if a claim against a suspended licensee did arise, the licensee would be offside of the Law Society’s rules; LIF would pay the claim to fulfill its duty to protect the public and would then claim against the suspended licensee.
- The Transition Team raised a question around effect of failure to reimburse (9-1-5) and coverage in situations where a licensee is a victim of a phishing or social engineering scam.
  - SNPBC and LIF noted that in their current indemnification programs, coverage is available for social engineering funds transfer fraud, providing protection to both the licensee and the public.
- A question was raised regarding the balance between keeping the rules lean and avoiding duplication of legislative content, versus including select legislative elements to provide a more centralized and accessible reference. It was noted that, from a governance perspective, it is generally preferable not to duplicate legislation in the rules, particularly as legislative changes would require corresponding updates to the rules.

## **6.0 Part 10 – Custodianships**

The Legislative Counsel introduced the draft rules on Custodianships for discussion:

- The Transition Team raised a question around the requirement for licensees to provide an accessible list of passwords (10-1-1), specifically in instances where the licensee has signed an agreement not to divulge that password (e.g., Juricert). Concern was expressed related to the potential conflict between regulatory obligations to provide access and legal or contractual obligations restricting disclosure, and the implications of such conflicts. It was noted that in

custodianships, the custodian effectively steps into the role of the licensee, which may mitigate concerns around disclosure obligations.

- The Transition Team raised a question related to restrictions on custodians (10-1-3) that prevent the custodian from bidding on or acquiring part of the licensee's firm or practice and whether this extends to a custodian subsequently pursuing employment at that practice.
- It was noted that these types of custodianship orders typically apply to sole proprietorships or very small firms, and as such, the likelihood of a custodian later working for the practice is relatively low.
- It was also noted that the CEO has the ability to grant permission for a custodian to take over a practice. This is generally intended for external custodianships, particularly in rural or remote areas, where a custodian may wish to provide services to the affected client base. However, this could extend to situations where a custodian seeks to work for the firm.
- 7.0 Part 14 – Business Structures
- The Legislative Counsel introduced the draft rules on Business Structures for discussion:
- Clarification was sought about authorization of a limited liability partnership (14-1-1), specifically if legal professionals are prohibited from entering into partnerships with other professionals (e.g., accountants, social workers).
- It was noted that such arrangements would be addressed under the framework for alternative business structures, and permitted on a case-by-case basis.
- A question was asked about certification of names (14-1-2), specifically how the process would accommodate Indigenous names that may not conform to standard English text formats.
- The Legislative Counsel indicated they would confirm if any restrictions exist under the Business Corporations Act or the Partnership Act with respect to Indigenous names, noting that once a name is approved by the regulator, licensees must register it under the applicable legislation.
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- The Transition Team discussed establishing a permit review committee (14-1-9).
- Some members cautioned against establishing too many committees, questioning the value of a dedicated permit review committee given the likely low volume of permit reviews.
- It was noted that the CEO holds significant decision-making authority in many areas, and while judicial review is available to all licensees, it is often costly and time consuming. A permit review committee could provide a valuable avenue for

review, offering broader perspective and an intermediary step between the CEO and the courts.

- It was suggested that a general review committee could be established, rather than one limited to permit reviews, to increase applicability across multiple areas.
- The Transition Team requested that the Legislative Counsel identify other areas where a general review committee could add value to help assess whether it should be established.

## **8.0 Code of Professional Conduct**

The Advisory Committee introduced the draft Code of Professional Conduct for discussion:

- There was a discussion about the inclusion of the Canons of Legal Ethics in the Code of Professional Conduct:
  - The Canons of Legal Ethics have been in place for over 100 years and outline the overarching duties of lawyers to the state, the courts and tribunals, clients, other lawyers, and themselves. As noted by LSBC, they have formed the basis for allegations and findings of misconduct against lawyers in recent years, and continue to be relied upon as a part of the regulatory framework.
  - It was noted that while other jurisdictions in Canada have adopted variations of the Federation of Canadian Law Societies' Model Code of Conduct, no other Canadian jurisdictions incorporate the Canons of Legal Ethics.
  - Overall, the Canons provide a shorter, more general articulation of ethical expectations, whereas the balance of the Code of Professional Conduct sets out detailed rules, commentary, and associated consequences if a licensee is offside these rules..
  - It was noted that including the Canons could enhance accessibility for the public and support education, as they are more intuitive and resonate well with students.
  - It was also noted that including the Canons may help achieve ethical uniformity across different licensees in the new organization.
  - There was general support for including the Canons of Legal Ethics within the Code of Professional Conduct, subject to appropriate updates and potential renaming.
- There was a request that Section 3.1 (Competence) include provisions related to Indigenous cultural competence, referencing Doman 3 of the Western Canadian Competency Profile related to Truth and Reconciliation, which emphasizes a demonstrated understanding of the historical and current impacts that Canadian

law has on Indigenous Peoples in Canada and how reconciliation can be incorporated into practice.

- There was a discussion about extending regulatory responsibilities to conduct outside the provision of legal services.
  - It was suggested that rule 2.2-2 be divided into two parts: (1) A licensee has a duty to uphold the standards and reputation of the legal professions, and (2) A licensee has a duty to assist in the advancement of its goals, organizations and institutions.

### **9.0 Updates to the Code of Conduct**

The Advisory Committee presented the updated Code of Conduct.

- It was noted that the Code has been revised to reflect feedback from the previous board meeting.
- A few additional formatting and typographical edits were identified.
- The finalized Code of Conduct will be included on the Consent Agenda for the April 13, 2026 board meeting.

### **10.0 In Camera Session**