

Name of Firm.....
Law Society licensee number

**Form 1: Annual Report to The Law Foundation of Ontario**  
(effective January 1, 2009)  
For Reporting Year: 20\_\_

You may file this report electronically at: <https://eforms.lsuc.on.ca>. If you need assistance completing this Form, call The Law Foundation of Ontario at (416) 598-1550.

To be completed by all licensees (lawyers and paralegals) responsible for client trust monies in a mixed trust account at any time during this reporting year.

Form 1 must be filed even if a “Form 2: Report on Opening a Mixed Trust Account” and/or a “Form 3: Report on Closing a Mixed Trust Account” have been submitted for the account for this year.

1. Are you a Sole Practitioner or the Designated Financial Filing Licensee?  
If “Yes”, proceed to question 3 to report on all mixed trust accounts. Yes  No   
If “No”, proceed to question 2.

2. At any time in this year, were you responsible for any mixed trust accounts which will not be included in the Designated Financial Filing Licensee’s report(s)? Yes  No   
If “Yes”, proceed to question 3 to report on all mixed trust accounts for which you are responsible.  
If “No”, you do not need to file a Form 1.

3. **Note: You must complete a separate question 3 for all mixed trust accounts for which you are responsible.**

a. Name of Financial Institution where mixed trust account is held: \_\_\_\_\_  
Branch Address of Financial Institution: \_\_\_\_\_  
Transit number: \_\_\_\_\_  
Account number: \_\_\_\_\_  
Name in which account is held: \_\_\_\_\_

b. Has this financial institution (at any time) been directed to pay interest on this account to The Law Foundation of Ontario? Yes  No

c. Was this account opened this year? Yes  No   
If “Yes”, indicate the month the account was opened  
Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec

d. Was this account closed this year? Yes  No   
If “Yes”, indicate the month the account was closed.  
Jan  Feb  Mar  Apr  May  Jun  Jul  Aug  Sep  Oct  Nov  Dec

Was the balance of the closed account transferred to the Law Society of Upper Canada’s Unclaimed Trust Fund? Yes  No

e. Was there at least one transaction in this account during this year? Yes  No

Licensee’s Signature

Date

**Mail to:** The Law Foundation of Ontario  
20 Queen Street West  
Box No.19, Suite 3002  
Toronto ON M5H 3R3

**On-Line Filing is available at:** <https://eforms.lsuc.on.ca>