

# Law Society of Upper Canada

## Referral Fee Agreement



This **Referral Agreement** confirms the referral by [Referrer Name] of [Client Name] to [Referree Name] and the related referral fee payment terms.

### **Referral Recommendation:**

[Client Name] wishes to obtain legal services with respect to [briefly describe the legal matter].

[Referrer Name] has recommended [Referree Name] to Client because [reasons for referral].

ADD IF there is a relationship between the Referrer and the Referree:

[Referrer Name] has disclosed to Client that [Referrer Name] and [Referree Name] have the following relationship: [describe any legal, financial or other relationship between Referrer and Referree].

[Referrer Name] also recommended the following two [lawyers and/or paralegals] to [Client Name]: [names]. OR It has not been reasonably possible for [Referrer Name] to recommend any other [lawyer(s) or paralegal(s)] to [Client Name] because [reasons for not providing other names].

### **Explanation of Referral Fees and Client Rights:**

[Client Name] has been provided with the **Law Society's Requirements for Referral Fees** (attached). [Client Name] has had the opportunity to review and consider the requirements.

[Client Name] has been advised and understands that there is **no obligation to retain** [Referree Name] or any of the other lawyers [or paralegals] referred by [Referrer Name]. [Client Name] is free to retain another lawyer [or paralegal] of his/her choice.

After signing this Referral Agreement, [Client Name] understands that [Client Name] has the **right to terminate the retainer with [Referree Name]** at any time and for any reason.

[Client Name] has no obligation either to [Referrer Name] or [Referree Name] as a result of this Referral Agreement.

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## Acceptance of Referral and Referral Fee Payment Terms:

[Client Name] has accepted the referral to [Referree Name].

For this referral, [Referree Name] agrees to pay [Referrer Name] a referral fee:

- in the amount of [insert set dollar value]; OR
- in an amount equal to •% of the fees paid by [Client Name] to [Referree Name] for the legal matter referred; OR
- [such other basis as may be agreed]

In any event, the referral fee will not exceed the amount permitted by the *Rules of Professional Conduct* or the *Paralegal Rules of Conduct*. A sample calculation is set out in the Law Society's Requirements for Referral Fees.

This referral fee will not be paid or payable until [Referree Name] is paid his or her fees in the matter.

The referral fee will be noted on the account sent to [Client Name] at the time the referral fee is paid.

This referral fee is the responsibility of [Referree Name] and not [Client Name]. The referral fee will not increase the total amount of the fee charged to [Client Name].

By signing below, [Client Name], [Referrer Name], and [Referree Name] confirm that they understand and agree to the terms outlined above.

Date:

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**[Referrer Name]**

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**[Referree Name]**

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**[Client Name]**