

***“To understand the evolution of law and society in Alberta is to understand our past...***

***The Legal Archives Society of Alberta is your link to this understanding.”***

## **Society Profile**

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The Legal Archives Society of Alberta (LASA) is dedicated to preserving, promoting and understanding the evolution of law and society in Alberta by establishing and preserving a complete and accurate historical record of the legal profession in Alberta. Incorporated under the *Societies Act of Alberta* in 1990, LASA is governed by an independent Board of Directors.

In fulfillment of its mission, LASA operates a legal heritage program and facility for the private sector legal community. LASA’s principle objectives are to:

- preserve the documentary heritage of lawyers, judges, and legal organizations in Alberta
- provide services for the legal community to identify, retain, and use their archival records
- provide source material for legal and public research in the history of law and society in Alberta
- enhance awareness of and celebrate the role of the law in Alberta’s history

LASA’s seven program areas are:

- Archives
- Legal History Library
- Exhibits and Interpretation
- Publications
- Research Services
- Oral History
- Records and Archives Consulting

# President's Report

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The Legal Archives Society of Alberta (LASA) continues to preserve and promote the history of the legal profession in Alberta through several programs. Interest in the Society continues to increase as we assist more researchers and accept more records into our holdings.

The Society staff continues to show enthusiasm and commitment to the preservation and interpretation of Alberta's legal history. The core staff members; Tanya Barber, Myrene Hayes, Brenda McCafferty, and Kirsten Olson (maternity leave) were assisted throughout the year by summer students Derek Rogers, Stacy Kaufeld and contract archivist David Mittelstadt.

LASA's core funding was provided by the Law Society of Alberta. Our annual campaign, fundraising events, and the generosity of our donors provided the financial assistance that allowed us to meet our project goals. The Society would like to thank everyone who shares an interest in legal history for helping to make the past year a successful one.



Graham Price, Q.C.  
President

# Executive Director's Report

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In the past year, LASA has overcome quite a few challenges. The new FOIPP laws have affected LASA in the accessibility of its records, and specifically LASA's holdings of the Law Society of Alberta's (LSA) records, to researchers as well as for other users. However, LASA is working closely with the LSA to form an agreement which will allow for use of their records in a safe and legal manner. It has always been a struggle to keep LASA's operations within its limited budget; however LASA again met this challenge with the help of new fundraising opportunities, such as, the Theatre Calgary gala event.

The Legal Archives Society of Alberta operates with one full-time and two part-time staff members totaling 87.5 hours, however, these hours decreased to 57.5 hours when the Executive Director commenced her maternity leave in May 2004.

Our goals for the coming year include two new publications; one to celebrate the upcoming 100 year anniversary of the LSA, and the other is the second edition of the *Lords of the Western Bench*, as well as preserving more historical records from the profession, completing more oral histories and assisting more researchers.

Tanya Barber,  
Acting Executive Director

# Key Statistics

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## Administration and Finances

- received \$110,000 from the Law Society of Alberta in operating grants
- \$60,729 netted through fundraising – includes Annual Campaign, Historical Dinner and Theatre Calgary gala event
- \$764 in publication revenue
- received \$6,492 in Endowment fund income
- received \$20,475 in special project donations

## Archives

- acquired 39 accessions amounting to approximately 7.53 metres of textual records
- holdings consisted of 515 metres of records by end of the year
- LASA's archives consulting services was utilized by the Calgary Court House Education Society

## Exhibits and Interpretation

- LASA contributed to or participated in "Law Day" in Calgary, Edmonton and Red Deer.
- Two new displays were completed in 2004 and background research was completed for a proposed exhibit highlighting the Supreme Court of Canada Justices who originated from Alberta.
- LASA's website ([www.legalarchivessociety.ab.ca](http://www.legalarchivessociety.ab.ca)) is continually updated to include upcoming events.
- LASA participated in the ASA virtual display 'Women who made a difference'. The display can be viewed at [www.albertaarchives.org](http://www.albertaarchives.org)

## Research Services

- received 148 requests for information

## Historical Publications

- LASA's courthouse book, *Foundations of Justice: Early Courthouses of Alberta* by David Mittelstadt will be released in 2005 published by University of Calgary Press.
- Book sales continue for LASA's previous publications; *Lords of the Western Bench* and *In the Name of Justice* as well as publications LASA has helped to distribute; *Law West of the Bay*, written by Justice J. W. McClung and *Milt Harradence: The Western Flair* published by Durance Vile Publications Ltd.

## Oral History

- 6 oral histories submitted to LASA from Edmonton
- 18 oral histories completed in Calgary

## Library

- 37 titles were added to the library

# **Administration and Finances**

In 2003/2004, LASA operated on a budget of \$227,500. The Law Society of Alberta provided the core grant of \$110,000, which offset 48% of operating costs. The balance of operating funds came from fundraising efforts which included the annual campaign, Theatre Calgary gala and the silent auction at the Historical Dinners. The audited financial statement reflects a year-end operating surplus of \$6,879.

This year the accounting method was changed from the deferral no-fund method to deferral fund accounting. This one time change in reporting required an adjustment for accumulated net amounts incurred by the casino fund on behalf of the restricted fund.

LASA is a registered charity and holds category “A” status under the Cultural Properties Export and Import Act.

## **2004 Fundraising Campaign**

The purpose of the fundraising campaign is to raise enough funds to cover operating expenses for the current and next fiscal year. Staff and volunteer supporters set out to achieve the 2003/2004 goal of \$55,000 through three major drives: a direct mail campaign and membership, the 2004 Historical Dinners and auctions, and the Theatre Calgary gala event. The net total for the 2004 fund-raising campaign was \$60,729.

### *Direct Mail Campaign*

LASA mailed out over 8,500 appeal letters and donor cards to the Alberta legal community in May 2004. Combined with other contributions throughout the year, the profession responded with \$39,400 in direct donations.

### *2004 Historical Dinners*

Historical dinners were held in both Calgary (September 29th) and Edmonton (September 30th). Our guest speaker, Hon Justice Ian Binnie provided humorous insights and anecdotes on the history of legal humour. Ticket sales for both dinners reached \$27,306 and \$7,350 was raised at the Silent Auctions, making it our most successful to date.

### *2004 Theatre Calgary*

LASA participated in a gala event with Theatre Calgary on May 6, 2004. LASA sold tickets to the production of Counsellor-at-Law, and held a private pre-show reception which included a silent auction. The fundraising event raised \$24,881 for operations.



Poster for Counsellor-At-Law Theatre Calgary gala event

# Alberta Legal Heritage Fund

In 1997 LASA established the Alberta Legal Heritage Fund in the Edmonton Community Foundation, The Calgary Foundation and the Medicine Hat Community Foundation. In 1998, funds were established in the Community Foundations of Red Deer, Lethbridge and Grande Prairie. Funds from casinos held in 1998, 1999, 2000, 2002 and 2003 were also added to the Alberta Legal Heritage Fund in each community. The income from the fund will be used to ensure the future preservation of legal archives in Alberta. In the past year \$6,492 was received in Endowment Income.

## Casino

The balance of funds from the 2003 casino was used this year for computer upgrades, the Calgary Oral History Program and special archival equipment. A Budget Review Committee determined that funds from the next casino will be used for operations of the Society. LASA has another casino scheduled for May 2005 and our hopes are to meet or exceed the \$60,000 we made in 2003.

## Membership

LASA had 221 members this year, a decrease from last year's total of 252.

Revenue from membership and donations for 2003/2004 was \$39,400, an increase from last year's amount of \$32,079. The average donation, including membership, in 2002/2003 was nearly \$155; in 2003/2004, it was \$181.

Contributions were distributed among the following categories:

Supporters (up to \$74) - 9	Advocates (\$500-\$999) - 7
Contributors (\$75 - \$124) - 70	Patrons (\$1,000 - \$4,999) - 2
Friends (\$125 - \$249) - 90	Benefactor (\$5,000 – \$9,999) - 1
Sustainers (\$250 - \$499) - 35	

A listing of donors above the Supporter level for 2003/2004 can be found on the back pages of the Annual Report.

## Annual General Meeting

On March 10, 2004, LASA held its Annual General Meeting at the Provincial Archives of Alberta in Edmonton. Members of the current Board, Graham Price, Q.C., Gordon Hoffman, Q.C., Janice Agrios, Sandra Petersson, Donald Bishop, Q.C., and Garth Fryett, Q.C. allowed their names to stand. Laura Stevens, Q.C. and Michael Swanson were elected to the Board.

Guests were then treated to a tour of the Provincial Archives of Alberta's new facilities.

# Archives

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LASA operates a province-wide archives program and facility based in the Law Society of Alberta offices in Calgary. The main components of the archives function are:

- acquiring and appraising records of the legal community
- arranging, describing, and constructing finding aids for records
- storing and conserving records

## Facilities and Conservation

LASA's administrative and research office and storage vault have been reduced in space by about 25% since 1995. Currently, approximately 40 metres of unprocessed records are now stored in warehouse conditions at the Law Society's off-site storage space. LASA is in increasing need of additional environment-controlled facilities. LASA's offsite storage facility relocated in 2004 from the 2<sup>nd</sup> to 3<sup>rd</sup> floor at the Herald Building.

LASA transferred 50 metres of its holdings to Iron Mountain storage facility in Calgary in 2003 to make room in the offsite storage space for future donations. The present onsite environmentally controlled storage vault is filled to capacity.

## Acquisitions

LASA acquired 39 accessions in 2004, amounting to nearly 8 linear metres of textual records, 146 photographs, 41 sound disks, 29 videos, 5 art pieces, and 11 cultural histories. Currently LASA's holdings exceed 500 metres. Noteworthy acquisitions in 2004 include:

*Justices Ernest B. Wilson and son William E. Wilson.* Dates of material: 1952 - 2000

Congratulatory correspondence received by Ernest B. Wilson following his 1952 appointment to the Supreme Court of Alberta, Trial Division in Edmonton. Several letters emanating from prominent law firms and individuals associated with the law in Alberta and with politics are included. Many noteworthy letterheads can be found within this accession. Correspondence received from J. H. Sissons, W. E. Huckvale (Lethbridge), H. S. Patterson, J. J. Saucier (Calgary), J. T. Costigan (Stettler), W. O. Turner (Hanna), Norman Macleod (Edmonton), T. W. Lawlor (Grande Prairie), Clarence Campbell (Montreal), and John W. Hugill (Victoria) are just a few of the letters of congratulation included. Second accrual of records included judge's note books containing the hand written notes made by the Honourable Mr. Justice William E. Wilson of the Court of Queen's Bench in Edmonton.

**Donated by Justice William E. Wilson**

*Association of Women Lawyers.* Dates of material: 1994-1999

Photographs and administrative records from the Association of Women Lawyers (successor of the Calgary Women Lawyers Association). Papers include bylaws, meeting minutes, records relating to the inaugural reception, correspondence, meeting minutes, membership lists, financial statements, newsletters, photographs, and special event information. The Association of Women Lawyers (AWL) was established in 1994 to promote the advancement, equality, interests and well-being of women in the legal profession and supports networking among its members.

**Donated by Gwen K. Randall, Q.C.**

*Justice Frans F. Slatter.* Dates of material: 1980-2003

Consists of photographs and biographical information assembled by Justice Slatter on the following Alberta Masters in Chambers: Archibald Young Blain, K. C. (1913-1933), Lewis Frederick Clarry, K.C. (1914-1933), Louis Davies Hyndman, Q.C. (1968-1979), Michael B. Funduk (1980-2003), William J. Quinn (1980-2003), Walter H. Breitzkreuz, Q.C. (1984 - ), Lorne Allen Smart, Q.C. (2003 - ), and Roderick Philip Wacowich, Q.C. (2003 - ).

**Donated by Justice Frans F. Slatter**

*Roger Philip Kerans.* Dates of material: 1970-1996

An expandable file case containing background material relating to the merger and amalgamation of the District and Supreme Courts of Alberta in 1979. Includes several papers relating to the history of the courts, and pros and cons regarding amalgamation. Notes, correspondence and articles were collected and assembled by Roger P. Kerans. Correspondence from several prominent individuals is included: William A. Stevenson, James Valentine Hogarth Milvain, and John N. Decore to name a few.

**Donated by Roger Philip Kerans**

## **Arrangement and Description**

The activity of arranging and describing archives involves: accessioning the records to gain physical control; completing a preliminary listing of the material to facilitate access to the holdings; storing material for long-term preservation; and producing finding aids compliant with the *Rules of Archival Description* to aid researchers. A group of records from one person or organization is described in archival terms as a Fonds. Detailed descriptions of all acquisitions received by LASA are available on the automated ACCESSION database. Approximately 75% of LASA's holdings are archivally arranged and described at the fonds and series level on the FONDS database. Of the 111 fonds described, most are processed to the file and item level and include a finding aid available for researchers.

Contract archivist David Mittelstadt completed the arrangement and description of the Arthur Bessemer papers in March 2004. Funding for this project was provided by the Archives Society of Alberta, Access to Holdings grant program. Many preliminary inventories were also completed for acquisitions received in 2004.

## Reference Services

LASA maintains an automated reference system which provides access to information on lawyers, legal organizations, and judges in the province and supports research projects such as family histories, case law, and biographies. Staff perform limited searches and interpretation of material in response to reference inquiries.

LASA received 148 requests for information relating to or taken directly from its holdings. Some of these requests involved extensive in-house research of archival material over a period of weeks; others were simple requests for information provided in a matter of minutes over the telephone. The information has been used for locating practice files, to complete genealogical research, or to produce historical publications. The types of researchers were broken down as follows: Donor/Depositor - 20; Legal Community - 42; Academic Community - 28; Private Researchers - 48; Media - 2; Other Archives/Libraries - 8.



Inside a 1930s law office – Abner Gladstone Virtue (left) and Gilbert C. Paterson (right) of Virtue Paterson Law Firm enjoy a conversation in their Lethbridge, Alberta office. LASA Photo No. 61-G1. Included in the Passion, Politics and Poverty – Lawyers in the 30s exhibit.



# Other Heritage Programs

## Exhibits and Interpretation

LASA has developed a province-wide system of touring interpretive exhibits in Alberta's courthouses which make use of documents and artefacts to educate the public about the role of the legal community in the history of Alberta. Displays can be viewed at the Edmonton and Red Deer Courthouses, the Court of Queen's Bench in Calgary and the Provincial Court Building in Calgary.

In 2004 LASA created two new exhibits: Passion, Politics and Poverty – Lawyers in the 30s and Legal Humour Past and Present. LASA plans to place the new displays in the Court of Queen's Bench in Calgary and the Edmonton Courthouse this spring. LASA also participated in the ASA virtual display 'Women who made a difference' which can be seen at [www.albertaarchives.org](http://www.albertaarchives.org)

## Publications

Work continues on the following historical publications. LASA and the University of Calgary Press will publish *Foundations of Justice: Alberta's Early Courthouses* in April 2005. Other projects include a book celebrating the 100<sup>th</sup> Anniversary of the Law Society of Alberta, the second edition of *Lords of the Western Bench*, a book explaining the court system in Alberta complete with sketches by a local artist, and *The Middle Kingdom: Prince Rupert's Land, The Northwest Territories and Prairie Provinces, 1670 - 1940*, a collection of essays resulting from a conference held at the University of Calgary in 1997.

### *Archetypes*

Two issues of LASA's newsletter, *Archetypes*, were distributed to all members of the Society throughout the year. Volume 12 Issue II featured Edward Adolphe, Q.C.'s book review of *Courtroom Sketches* by Sharon Graham Sargent as well as an article on Arthur Daniel Bessemer. The Bessemer records were processed earlier in the year by contract archivist David Mittelstadt. Volume 13 Issue I included a review of LASA's annual Historical Dinners and an article by LASA's archivist Brenda McCafferty on the fathers and sons who had become Alberta justices. The article featured Justices A McGillivray and W. A. McGillivray.

# Oral History

LASA has initiated a province-wide series of recorded interview projects preserving the memory of the legal community for posterity.

## *Calgary Project*

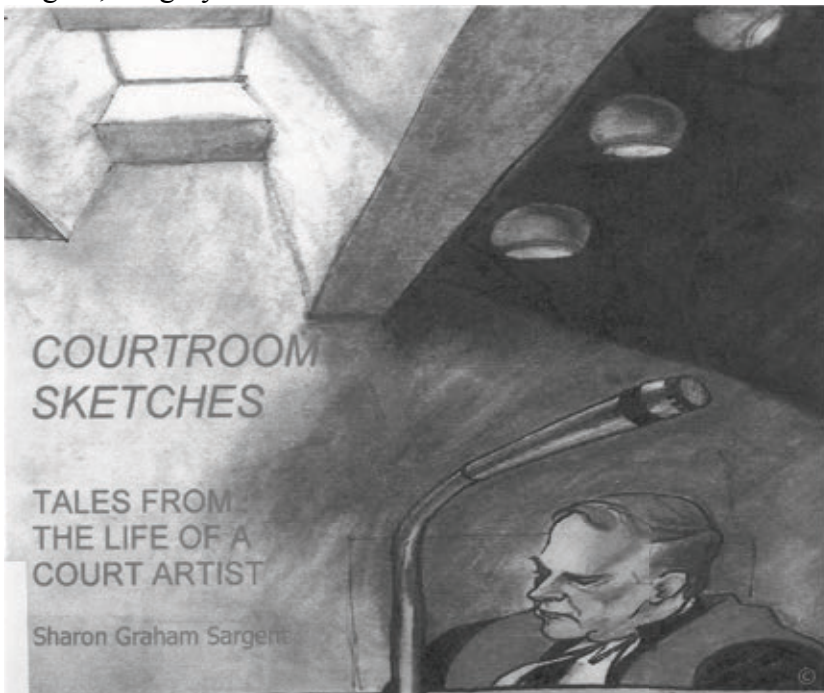
Funding for Calgary's Oral History program has come from casino funds and this past fiscal year 18 interviews were completed. This year interviews were expanded to include court reporters along with judges and lawyers. Ken Mills continues in his role as Chair of the Calgary Committee and Myrene Hayes is the Oral Historian.

## *Edmonton Project*

With continued commitment and support from the Edmonton Bar Association work continues in Edmonton led by Garth Fryett, Q.C. with the interviews conducted by historian Ken Tingley. This past fiscal year six interviews were submitted to LASA.

# Legal History Library

Thirty-seven titles were added to LASA's library, most of which were donated. Notable new items include *Without Reservations: flying around the world* written by Campbell McLaurin, Calgary; *Mobsters & Rumrunners of Canada: crossing the line* by Gord Steinke, Edmonton: Folklore Publishing; *Justice on the Peace* by Justice Ernest A. Marshall, Edmonton: Juriliber Press; and *Courtroom Sketches: tales from the life of a court artist* by Sharon Graham Sargent, Calgary.



Cover of the *Courtroom Sketches* publication by Sharon Graham Sargent.

**LEGAL ARCHIVES SOCIETY OF ALBERTA**

**FINANCIAL STATEMENTS**

**YEAR ENDED OCTOBER 31, 2004**

Auditors' Report

Statement of Financial Position

Statement of Operations and Changes in Fund Balances

Notes to Financial Statements

# GRAY & GRAY

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## AUDITORS' REPORT

To the Members of  
Legal Archives Society of Alberta

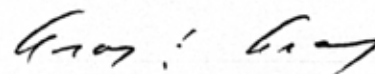
We have audited the statement of financial position of Legal Archives Society of Alberta as at October 31, 2004 and the statements of operations and changes in fund balances for the year then ended. These financial statements are the responsibility of the Society's management. Our responsibility is to express an opinion on these financial statements based on our audit.

We conducted our audit in accordance with Canadian generally accepted auditing standards. Those standards require that we plan and perform an audit to obtain reasonable assurance whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation.

In our opinion, these financial statements present fairly, in all material respects, the financial position of the Society as at October 31, 2004 and the results of its operations for the year then ended in accordance with Canadian generally accepted accounting principles.

The previous year's financial statements were reported on by another accountant and are presented for comparative purposes only.

CALGARY, Alberta  
January 18, 2005



Chartered Accountants.



MEMBERS, INSTITUTE OF CHARTERED ACCOUNTANTS OF ALBERTA

**LEGAL ARCHIVES SOCIETY OF ALBERTA**

**STATEMENT OF FINANCIAL POSITION**

**AS AT OCTOBER 31, 2004**

	<u>Operating Fund</u>	<u>Restricted Fund</u>	<u>Casino Fund</u>	<u>2004 Total</u>	<u>2003 Total</u>
<b>CURRENT ASSETS</b>					
Cash and cash equivalents	\$ 25,120	\$ 66,000	\$ 21,384	\$ 112,504	\$ 129,241
Accounts receivable	<u>9,922</u>	<u>1,564</u>	<u>911</u>	<u>12,397</u>	<u>-</u>
	\$ <u>35,042</u>	\$ <u>67,564</u>	\$ <u>22,295</u>	\$ <u>124,901</u>	\$ <u>129,241</u>
<b>CURRENT LIABILITIES</b>					
Accounts payable	\$ 3,671	\$ -	\$ -	\$ 3,671	\$ 3,724
Due to the Law Society of Alberta (Note 7)	1,650	-	-	1,650	( 3,253 )
Deferred revenue - Casino (Note 3)	-	-	17,347	17,347	29,924
Deferred revenue - other	<u>-</u>	<u>4,671</u>	<u>-</u>	<u>4,671</u>	<u>10,142</u>
	<u>5,321</u>	<u>4,671</u>	<u>17,347</u>	<u>27,339</u>	<u>40,537</u>
<b>DEFERRED CONTRIBUTIONS</b> (Note 4)	<u>-</u>	<u>66,845</u>	<u>-</u>	<u>66,845</u>	<u>66,820</u>
<b>FUND BALANCES</b>					
Unrestricted	29,721	-	-	29,721	47,825
Externally restricted	<u>-</u>	<u>( 3,952 )</u>	<u>4,948</u>	<u>996</u>	<u>( 25,941 )</u>
	<u>29,721</u>	<u>( 3,952 )</u>	<u>4,948</u>	<u>30,717</u>	<u>21,884</u>
	\$ <u>35,042</u>	\$ <u>67,564</u>	\$ <u>22,295</u>	\$ <u>124,901</u>	\$ <u>129,241</u>

Approved On Behalf of The Board of Directors

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**LEGAL ARCHIVES SOCIETY OF ALBERTA**  
**STATEMENT OF OPERATIONS AND CHANGES IN FUND BALANCES**  
**FOR THE YEAR ENDED OCTOBER 31, 2004**

	<u>Operating Fund</u>		<u>Restricted Fund</u>		<u>Casino Fund</u>	
	<u>2004</u>	<u>2003</u>	<u>2004</u>	<u>2003</u>	<u>2004</u>	<u>2003</u>
<b>REVENUES</b>						
Grants						
- Law Society of Alberta (Note 7)	\$ 110,000	\$ 110,000	\$ -	\$ 1,251	\$ -	\$ -
- Other	7,000	2,781	12,784	14,502	-	-
Fundraising	104,070	68,169	-	-	46,656	13,706
Contributions	837	1,965	19,782	-	-	-
Investment & sundry income	12,214	6,279	693	-	912	-
Publications	<u>764</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Total Revenue</b>	<b><u>234,885</u></b>	<b><u>189,194</u></b>	<b><u>33,259</u></b>	<b><u>15,753</u></b>	<b><u>47,568</u></b>	<b><u>13,706</u></b>
<b>EXPENSES</b>						
Salaries & benefits	116,919	116,355	-	-	-	-
Premises	38,486	36,460	-	-	-	-
General Administration	23,386	22,925	-	-	702	6,706
Bronze busts	-	-	19,782	-	-	-
Fundraising	43,341	26,886	-	-	-	-
Projects	2,642	-	12,434	14,156	5,955	-
Contributions to community foundations (Note 5)	-	-	-	-	40,000	7,000
Publications and acquisitions	<u>3,232</u>	<u>3,300</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>Total Expenses</b>	<b><u>228,006</u></b>	<b><u>205,926</u></b>	<b><u>32,216</u></b>	<b><u>14,156</u></b>	<b><u>46,657</u></b>	<b><u>13,706</u></b>
Excess (Deficiency) of Revenue over Expenses	6,879	(16,732)	1,043	1,597	911	-
Fund balances, beginning of year	47,825	43,116	-	( 6,097)	( 25,941)	-
Interfund transfers (Note 6)	<u>( 24,983)</u>	<u>21,441</u>	<u>( 4,995)</u>	<u>4,500</u>	<u>29,978</u>	<u>( 25,941)</u>
<b>Fund balances, end of year</b>	<b><u>\$ 29,721</u></b>	<b><u>\$ 47,825</u></b>	<b><u>\$( 3,952)</u></b>	<b><u>\$ -</u></b>	<b><u>\$ 4,948</u></b>	<b><u>\$( 25,941)</u></b>

# LEGAL ARCHIVES SOCIETY OF ALBERTA

## NOTES TO FINANCIAL STATEMENTS

YEAR ENDED OCTOBER 31, 2004

### 1. PURPOSE OF THE ORGANIZATION

The Society is a non-profit organization incorporated on January 18, 1990. The purpose of the Society is to preserve, promote and understand the evolution of law and society in Alberta. The Society meets the qualifications of a non-profit organization and is a registered charity under the Income Tax Act.

### 2. SIGNIFICANT ACCOUNTING POLICIES

Legal Archives Society of Alberta follows the deferral method of accounting for contributions.

#### Fund Accounting

The Operating Fund accounts for the organization's program delivery and administrative activities.

The Restricted Fund reports revenue and expenses that are to be used for special archival projects including:

- cataloguing and preserving archival records
- researching and documenting oral histories
- commissioning bronze busts of individuals who have contributed significantly to legal history in Alberta.

The Casino Fund reports only funds raised from casino activities. These funds are not for general use. The majority of these funds must be used for qualifying activities in accordance with the Alberta Gaming Control guidelines and may be distributed to specified community trusts.

#### Archival Collection

The archival collection has not been capitalized in the statement of financial position. Any purchases of collection items are expensed in the period in which the items are acquired. Contributions of collection items are reported as revenue and expenses at their fair value. When fair value cannot be determined, the contribution is not recognized in the financial statements.

#### Capital Assets

Capital assets are expensed on acquisition. Capital assets include leasehold improvements related to the Calgary office, furniture and office equipment. No capital assets were purchased during the year.

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# LEGAL ARCHIVES SOCIETY OF ALBERTA

## NOTES TO FINANCIAL STATEMENTS

YEAR ENDED OCTOBER 31, 2004

### 2. SIGNIFICANT ACCOUNTING POLICIES (continued)

#### Revenue Recognition

Restricted contributions are recognized as revenue of the appropriate fund in the year in which the related expenses are incurred. Unrestricted contributions are recognized as revenue of the operating fund when received or receivable if the amount to be received can be reasonably estimated and collection is reasonably assured. Restricted investment income is recognized as revenue of the appropriate fund in the year in which the related expenses are incurred. Unrestricted investment income is recognized as revenue when earned.

#### Use of Estimates

The preparation of the financial statements in accordance with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities as at the date of the financial statements and the reported amount of revenue and expenses during the period. Actual results could differ from these estimates.

#### Financial Instruments

The financial instruments of the Society are cash and cash equivalents, due to (from) the Law Society of Alberta and accounts payable. The fair market value of these financial instruments approximate their book value due to their short term nature.

### 3. CASINO

Revenues of the Casino are recognized when the related expenses or distributions are incurred, with the balance of Casino proceeds recorded as deferred revenue - Casino.



# LEGAL ARCHIVES SOCIETY OF ALBERTA

## NOTES TO FINANCIAL STATEMENTS

YEAR ENDED OCTOBER 31, 2004

### 4. DEFERRED CONTRIBUTIONS

During the year, the Society received contributions externally restricted for the purpose of creating bronze busts of judges to be displayed in courthouses.

	<u>2004</u>	<u>2003</u>
Balance, beginning of year	\$ 66,820	\$ -
Contributions during the year	20,500	66,820
Amounts spent during the year	( 20,475 )	-
Balance, end of year	\$ <u>66,845</u>	\$ <u>66,820</u>

### 5. CONTRIBUTIONS TO COMMUNITY FOUNDATIONS

Since 1995, the Society has contributed to various provincial community foundations as a means of fulfilling its mandate. The balances in the various foundations are as follows:

	<u>2004</u>	<u>2003</u>
Edmonton Community Foundation	\$ 115,679	\$ 92,386
The Calgary Foundation	110,098	87,156
Community Foundation of Greater Grande Prairie	4,982	4,983
Lethbridge Community Foundation	5,441	5,102
Medicine Hat Community Foundation	6,151	6,177
Red Deer and District Community Foundation	<u>5,567</u>	<u>5,563</u>
	\$ <u>247,918</u>	\$ <u>201,367</u>

Funds contributed are held in trust indefinitely. Income distributions to the Society are at the discretion of the various foundations. Distributions are recognized as income in the year received or receivable if the amount to be received can be reasonably estimated.

# LEGAL ARCHIVES SOCIETY OF ALBERTA

## NOTES TO FINANCIAL STATEMENTS

YEAR ENDED OCTOBER 31, 2004

### 6. INTERFUND TRANSFERS

During the year, the Society's board of directors have approved the following interfund transfers:

- in 2003, \$ 24,983 of casino revenue was deposited in the general bank account. In 2004, this amount was transferred from the operating fund back to the casino fund.

- in order to adjust for accumulated net amounts incurred by the casino fund on behalf of the restricted fund, \$ 4,995 was transferred from the restricted fund.

### 7. ECONOMIC INFLUENCE

The Society receives a significant portion of its funding from the Law Society of Alberta. The Society's by-laws make provision for a representative of the Law Society to be a member of its board of directors.

The Society has a deposit agreement regarding the administration of the Law Society's archival records. No fee is assessed by the Society for this service.

Premises occupied by the Society are sublet on a month to month basis from the Law Society. This transaction is in the normal course of business and is measured at exchange value which is the amount of consideration established and agreed to by the parties.

The Law Society provides bookkeeping and administrative services to the Society without charge. Because of the difficulty in determining the fair value, contributed services are not recognized in the financial statements.

### 8. STATEMENT OF CASH FLOWS

A statement of cash flows has not been prepared as it would not provide further meaningful information.

### 9. COMPARATIVE FIGURES

Certain 2003 comparative figures have been reclassified in order to conform with the financial statement presentation for 2004.

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