



LIFETIME LAWYERS RULES OF MEMBERSHIP

These rules of membership (the “Rules”) were adopted by the directors of Lifetime Lawyers Limited (“Lifetime Lawyers”) under article 18 of their articles of association on 2nd July 2025.

I GENERAL

In these Rules, references to “members” and “membership” are to the different classes of members and membership defined in these Rules and are not references to membership for the purposes of section 112 of the Companies Act 2006 (the “Act”). With the exception of references to “regional directors,” references to “directors” are to directors of Lifetime Lawyers for the purposes of the Act. These rules apply to all members of the Lifetime Lawyers.

The directors have the power under article 18 of Lifetime Lawyers’ articles of association to determine the classes of membership. Such current and future classes of members shall not be the “members” of Lifetime Lawyers for the purposes of section 112 of the Act and therefore do not have the voting or other rights bestowed upon such persons by the articles of association or the Act.

2 LIFETIME LAWYERS MEMBERSHIP

2.1 Classes of membership

- a) Accredited Members
- b) Members (pending accreditation)
- c) Longstanding Members
- d) Student Members
- e) Honorary Members
- f) Retired members

2.2 Definitions of classes of membership

2.2.1 Accredited Members (AM)

All Accredited Members are required to complete both Lifetime Lawyers accredited Awards – the Lifetime Care in Practice Award and the Lifetime Law in Practice Award.

They also need to continue to undertake relevant and sufficient ongoing training and education to be determined by the directors from time to time. They will need to certify that

they spend at least 50% of their time working on older and vulnerable client matters and will consent to random checks being undertaken to monitor compliance. At renewal, all AMs will need to upload their annual statement of competence or equivalent. All AMs will have at least 3 years' post qualification experience.

To retain the status of Accredited Member, all AMs will need to re-accredit every 5 years.

Any AM who does not re-accredit by their 5 year anniversary, will lose their accredited status and will revert to a Member and will no longer receive any of the benefits of AM membership i.e.: business referrals, use of the Lifetime Lawyers accredited logo, marketing page on the Lifetime Lawyers website, appearing in Lifetime Lawyers public member searches and Lifetime Lawyers PR packs. To return to the status of AM, they will need to re-accredit.

If an AM member retires from practice, then they cannot continue their AM membership of Lifetime Lawyers. However, they can opt for a retired membership package.

2.2.2 Members (pending accreditation)

All Members (pending accreditation) are required to complete the Lifetime Lawyers accredited award – the Lifetime Care in Practice (LCP) Award.

All new Members (pending accreditation) are also required to take the Lifetime Law in Practice (LLP) Award within 12 months of joining Lifetime Lawyers.

The period of membership as a Member (pending accreditation) cannot exceed 3 years from the date of joining.

Members (pending accreditation) must satisfy the training requirements to be determined by the directors from time to time and they must spend at least 50% of their time working on older and vulnerable client matters during this period of membership. At renewal, all Members (pending accreditation) will need to upload their annual statement of competence or equivalent.

With the exception of any members on the exception register, any Member (pending accreditation) who exceeds the 3 years of membership at the Member (pending accreditation) level, their membership fee will then increase to such sum per annum as the directors consider appropriate until they upgrade their membership.

2.2.2.1 To upgrade to Accredited Member

Members (pending accreditation) must pass the Lifetime Law in Practice Award within 12 months of gaining the Lifetime Care in Practice Award. They will also need to have at least 3 years of post-qualification experience working on older and vulnerable client matters and they must spend at least 50% of their time working on these types of matters.

2.2.3 Longstanding Members

In order to strengthen Lifetime Lawyers' position in the marketplace, Lifetime Lawyers expects all existing Longstanding Members to take the LCP Award and upgrade their membership to Accredited Member.

In order to retain the status of accredited member, all Accredited Members will need to re-accredit every 5 years.

Any existing Longstanding Members who do not wish to do this can remain as Longstanding Members but will not be eligible to receive referrals from either Lifetime Lawyers or its key partners.

All existing Longstanding Members must continue to undertake relevant and sufficient ongoing training and education to be determined by the directors from time to time. They will need to certify that they spend at least 50% of their time working on older and vulnerable client matters and will consent to random checks being undertaken to monitor compliance.

2.2.4 Student Members

Student members are required to complete the student programme within 12 months of joining Lifetime Lawyers in order to retain their student membership status.

Once a student member is qualified, they need to inform Lifetime Lawyers and begin the process of upgrading to professional membership. In order to do this, they will need to pay their upgrade fee and complete the LCP Award.

If an applicant is not on a study pathway that will qualify them as a professional member, then their application for student membership is likely to be rejected.

2.2.5 Honorary Members

People who are invited by the directors for their contributions to the field of older and vulnerable client law.

2.2.6 Retired members

Retired members can remain as members of Lifetime Lawyers. Retired members have the same benefits as Members (pending accreditation).

3 ELIGIBILITY CRITERIA FOR LIFETIME LAWYERS MEMBERSHIP

3.1 Professional members

- 1) Fully qualified solicitors holding a valid and current practising certificate and regulated by the Solicitors Regulation Authority (SRA) and Law Society of Scotland (LSS)
- 2) Fully qualified barristers holding a valid and current practising certificate and regulated by the Bar Standards Board
- 3) CILEX Fellow Members and CILEX Lawyers holding a valid and current practising certificate and regulated by CILEx Regulation

For any applicant working for a business other than Chambers, the business must be regulated by the Solicitors Regulation Authority, the Law Society of Scotland, or CILEx Regulation.

3.2 Student members

All student members need to be on a career pathway that will ultimately lead them to becoming fully qualified.

- 1) **Solicitor pathway**
 - Trainee Solicitors undertaking a period of recognised training
 - Solicitor Apprentices registered on an apprenticeship or graduate apprenticeship scheme approved by the SRA
 - Students enrolled on or who have completed the LPC
 - Students registered on SQE1 and/or SQE2 preparation courses
- 2) **Barrister pathway**
 - Pupils
 - Students enrolled on or who have completed the Bar Vocational Training Course
- 3) **Legal Executive pathway**
 - CILEX members of the following grades:
 - CILEX Student
 - CILEX Member – Paralegal (previously Associate member)
 - CILEX Member – Advanced Paralegal (previously Graduate member)
 - CILEX Affiliate Membership
- 4) **Paralegal pathway**
 - Anyone who does legal work or offers legal services who is not qualified as a solicitor, barrister, chartered legal executive, or CILEX lawyer and meets all the following criteria:
 - Works within a regulated law firm and has had some legal training

- Assists with legal work for which a solicitor, barrister or chartered legal executive is ultimately responsible and
- There is an Accredited Lifetime Lawyer within their firm
- Membership of the following organisations is preferred but not mandatory:
 - Institute of Paralegals
 - National Association of Licensed Paralegals

5) **Qualified lawyers**

It is recommended that fully qualified solicitors, barristers, Fellows of CILEX and CILEX Lawyers who are new to older and vulnerable client law including those who have transferred from another practice area, join as a student member, complete the student programme and then upgrade their membership to professional member.

For any applicant working for a business other than Chambers, the business must be regulated by the Solicitors Regulation Authority, the Law Society of Scotland, or CILEX Regulation.

3.2.1 Upgrading to professional membership

Student members shall remain in the student membership category until they are fully qualified:

- For trainee solicitors, this means that they have been admitted to the roll and are fully qualified
- For pupils, this means they have been called to the bar and are fully qualified
- For Student, Paralegal, Advanced Paralegal and Affiliate members of CILEX, this means they have become a chartered legal executive (Fellow of CILEX) or a CILEX Lawyer

As soon as Student Members are fully qualified, they will need to upgrade their membership to Member (pending accreditation).

To do this, they will need pay their upgrade fee and complete the LCP Award.

We expect all our members to move through Lifetime Lawyers' classes of membership to become an Accredited Member and consider all applications for student membership on a case-by-case basis. If an applicant is not on a pathway that will qualify them as a professional member, then their application for student membership is likely to be rejected.

At renewal, student membership will be reviewed and if an applicant is not on a pathway that will qualify them as a professional member, then their membership will likely be terminated.

3.3 Insurance

It is a requirement of membership to ensure appropriate professional indemnity insurance is in place (PII). This can either be in the name of the member or through appropriate indemnification by the business through which they provide their services.

3.4 Training records/Competencies

Members are required to keep a record of the training they have undertaken and also to upload either their CPD record or their statement of competence to the membership account on the Lifetime Lawyers website.

3.5 Eligibility checks

From time to time, Lifetime Lawyers will undertake an eligibility audit of both professional and student members.

If any member does not meet the current eligibility criteria, then their membership will likely be terminated at the end of the current membership year.

4 ADMISSION OF MEMBERS

- a) All applications for membership must be made online via the Lifetime Lawyers website
- b) Every applicant for Lifetime Lawyers membership must read, understand and accept the Lifetime Lawyers Code of Practice and the Lifetime Lawyers Rules of Membership and will be required to do this every membership year
- c) Every applicant must meet our eligibility criteria. If it found that they do not, then their application/membership may be terminated
- d) The applicant will only become a member once their annual subscription is paid.
- e) Student Members, Members (pending accreditation), Longstanding Members and Retired Members must not hold themselves out to be Accredited Members
- f) The directors may decline to accept any application for membership or renewal of membership without assigning any reason for its decision

5 SUBSCRIPTION RATES

Up to date subscription rates are available on the Lifetime Lawyers website.

The Lifetime Lawyers membership year runs from 1st October to 30th September.

5.1 Subscriptions for membership (excluding students)

- a) There is a one-off joining fee which is due when an application is made to join Lifetime Lawyers. A membership fee will also be payable on completion of the LCP Award

- b) Membership to Lifetime Lawyers is on an annual rolling basis and the Lifetime Lawyers membership subscription fee is payable annually
- c) If a member joins part way through the Lifetime Lawyers membership year, their first year's membership fee will be pro-rated to get them to 30th September of the current membership year to bring them in line with our membership year
- d) The Lifetime Lawyers membership subscription fee is due once the LCP Award has been successfully completed
- e) Payment for Lifetime Lawyers membership cannot be refunded once paid. If membership is cancelled part-way through a membership year, then no refund will be offered. This does not affect the statutory right to cancel within the 14-day cooling off period from initial application to join Lifetime Lawyers
- f) Membership renewal - a renewal reminder will be sent approximately 30 days before the membership is due to expire. The renewal fee must be paid in full by 1st October each year
- g) Lifetime Lawyers reserves the right, at its sole discretion, to charge additional fees to renew membership after the renewal date
- h) Where the membership fee is not paid by the renewal date, membership to Lifetime Lawyers shall be deemed to have lapsed and the member will lose the right to hold themselves out as a member of Lifetime Lawyers and will lose all membership benefits
- i) If a lapsed member wishes to re-instate their Lifetime Lawyers membership within the same membership year, the Lifetime Lawyers administrator will need to be informed and a re-joining fee, together with the renewal fee due from the anniversary of the renewal date, will need to be paid
- j) If a membership has not been renewed for more than one year, then in order to re-join, the Lifetime Lawyers administrator will check whether the person has completed the LCP Award within the last 5 years and if not, the person will need to complete it in order to re-join Lifetime Lawyers. Members (pending accreditation) will also be required to complete the LLP Award within 12 months of re-joining Lifetime Lawyers
- k) Lifetime Lawyers subscription rates shall be reviewed and revised annually

5.2 Subscriptions for student membership

- a) There is no joining fee for student membership.
- b) Membership to Lifetime Lawyers is on an annual rolling basis and the Lifetime Lawyers membership subscription fee is payable annually
- c) If a member joins part way through the Lifetime Lawyers membership year, their first year's membership fee will be pro-rated to get them to 30th September of the current membership year to bring them in line with our membership year
- d) Payment for Lifetime Lawyers membership cannot be refunded once paid. If membership is cancelled part-way through a membership year, then no refund will be

offered. This does not affect the statutory right to cancel within the 14-day cooling off period from initial application to join Lifetime Lawyers

- e) Membership renewal - a renewal reminder will be sent approximately 30 days before the membership is due to expire. The renewal fee must be paid in full by 1st October each year
- f) Lifetime Lawyers reserves the right, at its sole discretion, to charge additional fees to renew membership after the renewal date
- g) Where the membership fee is not paid by the renewal date, membership to Lifetime Lawyers shall be deemed to have lapsed and the member will lose the right to hold him/herself out as a member of Lifetime Lawyers and will lose all membership benefits. If a lapsed member wishes to re-instate their Lifetime Lawyers membership, the Lifetime Lawyers administrator will need to be informed and a re-joining fee, together with the renewal fee due from the anniversary of the renewal date, will need to be paid
- h) Lifetime Lawyers subscription rates shall be reviewed and, if necessary, revised annually
- i) Please note, when student members apply to upgrade their membership to Member (pending accreditation), a one-off fee will be payable (this is for Lifetime Lawyers' two externally accredited awards which Lifetime Lawyers requires its members to undertake as a part of their membership)

6 USE OF THE LOGO

Only Accredited Members may use the Lifetime Lawyers logo, and this should be the “accredited” version of the logo.

No one is permitted to use the main Lifetime Lawyers logo without the express permission of the Lifetime Lawyers Chief Executive or the Lifetime Lawyers Marketing Manager.

7 CONDUCT

- a) All members shall abide by the codes of conduct of their regulatory body i.e. as set out in the latest edition of: the SRA's Code of Conduct, the LSS Standards of Conduct, the BSB Code of Conduct, CILEX Code of Conduct and the Lifetime Lawyers' Code of Practice. All members must also abide by the Lifetime Lawyers Rules of Membership.
- b) Members must promptly inform Lifetime Lawyers immediately if they:
 - i. are convicted of a criminal offence (other than a minor traffic offence or misdemeanour or similar minor infraction)
 - ii. are notified of disciplinary action against them by another professional body to which they belong
 - iii. have a bankruptcy order made against them
 - iv. enter into a voluntary arrangement with their creditors
 - v. or are disqualified as a director, or enter into a disqualification undertaking

8 SUSPENSION/TERMINATION OF MEMBERSHIP

A member may be suspended from membership or have their membership terminated if, in the opinion of the directors, it would not be in the interests of Lifetime Lawyers for them to remain an active member.

8.1.1 Suspension of membership

A member may be suspended for any of the following:

- a) Non-payment of subscription fees
- b) When a breach of the Lifetime Lawyers' Code of Practice is being investigated by the directors and it is the directors' opinion that it would not be in the interest of Lifetime Lawyers for that member to be active whilst the investigation is ongoing
- c) When the directors have been notified of any of the matters listed at Clause 7 (b) (ii) and it is the directors' opinion that it would not be in the interest of Lifetime Lawyers for that member to be active whilst the directors decide whether it is in the best interest of Lifetime Lawyers for the member to be expelled as a member
- d) If the directors feel that the Lifetime Lawyers brand and/or reputation is at risk in any way through a member and/or their associations, they reserve the right to suspend the member with immediate effect

8.1.2 Suspension process

In any instance of suspension, the Director of Membership and Discipline (the director nominated to manage membership and discipline issues for Lifetime Lawyers) will notify the member within 7 days of the directors' decision and such notification will include confirmation of the reason for suspension and a timescale in which suspension will be reviewed.

During suspension, the member must not hold themselves out as a member of Lifetime Lawyers.

8.2.1 Termination of membership

A member will automatically cease to be a member in the following circumstances:

- a) Being struck off or suspended from legal practice
- b) Death
- c) Failure to pay the annual subscription fee within 3 months from the date from which it fell due
- d) On giving written notice of resignation to the secretary
- e) Upon being expelled by the directors due to the fact that in the directors' opinion it would not be in the interest of Lifetime Lawyers for them to remain a member so long as the relevant procedure has been followed as set out in section 8.2.2
- f) Behaving in a way that displays any form of discrimination
 - i. Discrimination because of sex or sexual orientation

- ii. Discrimination because of gender identification
- iii. Discrimination because of race
- iv. Discrimination because of religion or belief
- v. Discrimination because of disability
- vi. Discrimination because of age

or other that is deemed by the directors to risk bringing the organisation into disrepute

- g) Being subject to any order imposed by the Solicitors Regulation Authority (or appropriate regulatory body) that puts restrictions on the member unless they have the permission of the directors as to whether they can continue to be a member
- h) A member who is bankrupt will automatically have their membership terminated unless they have the permission of the directors to continue to be a member
- i) Membership will be terminated if, in the view of the directors, a member at any time fails to meet the eligibility criteria for Lifetime Lawyers. The decision of the directors shall be final
- j) If the directors feel that the Lifetime Lawyers brand and/or reputation is at risk in any way through a member and/or their associations, they reserve the right to expel the member with immediate effect
- k) Any honorary membership can be revoked by a vote of the board of directors
- l) The decision of the directors is final

8.2.2 Termination process

A member will receive written notice of the intention to expel them by the Director of Membership and Discipline and then be given a period of 14 days to appeal this decision (“Notice of Appeal”) to the Lifetime Lawyers Administrator.

The notice will detail:

- a) the complaints made against them and/or
- b) reasons why the directors do not feel it would be in the interests of Lifetime Lawyers them remaining a member

Upon receiving the Notice of Appeal, the Lifetime Lawyers Administrator shall pass the details of the case and appeal to the other directors and the report from the Director of Membership and Discipline, who shall decide between them whether to expel the member or not and they shall, within 30 days, give their decision in writing to the member concerned.

Immediate expulsion shall occur where a member has been found guilty of any criminal offence (other than a minor traffic offence or misdemeanour or similar minor infraction) or has been found guilty of discriminating on any of the grounds set out at 8.2.1(f) above.

8.3 Membership fees

Upon suspension, resignation or termination of membership the former member shall have no entitlement to any pro-rata refund or their annual subscription fee.

They must not hold themselves out to be a member or use the Lifetime Lawyers logo or any other Lifetime Lawyers' digital assets – these should all be removed within 7 days.

9 MEETINGS

All members shall be entitled to attend Lifetime Lawyers' AGM each year. However, as members are not Companies Act members of Lifetime Lawyers, they will not be entitled to vote at Lifetime Lawyers' AGM.

10 NATIONAL BOARD DIRECTORS

All board directors must either: (a) be Accredited Members and must comply with all the criteria for that level of membership or (b) provided their skills and/or experience make it appropriate for them to be board directors despite not being Accredited Members, be invited to be a director by the chair of the board.

All board directors are expected to attend all board meetings. If, for whatever reason, the board member cannot attend a board meeting, they must inform the Lifetime Lawyers chair in advance of the meeting and send in their thoughts in accordance with the agenda and any projects they are undertaking on behalf of Lifetime Lawyers.

If a board director misses more than two board meetings in a calendar year, except in exceptional circumstances, the board member will be interviewed by the Lifetime Lawyers chair to discuss their position on the board.

All board members are expected to attend the regional director and AGM meetings and attend the Lifetime Lawyers national conference.

All board members are also expected to attend their monthly subgroup meetings. If they are unable to do so, they must inform the subgroup leader and the Lifetime Lawyers administrator in advance of the meeting and send notes and any work undertaken prior the meeting.

The Lifetime Lawyers chair reserves the absolute right, at their discretion, to dismiss a board member, if they feel that they are not sufficiently committed to the board, is not a good fit with the board, is not delivering on assigned tasks or is not contributing in a positive way to board meetings or subgroup meetings.

II REGIONAL DIRECTORS

The elected chairpersons of the regional groups of Lifetime Lawyers from time to time shall be known as regional directors.

However, in accordance with the articles of association of Lifetime Lawyers, a regional director shall not be or be deemed to be a director of Lifetime Lawyers unless they have also

been appointed as such. Unless delegated to them, or as otherwise authorised in writing, by the board of directors, no regional director shall have or purport to have or to exercise or hold themselves out as having any of the powers of a director and they shall not have any authority to incur any expenditure in the name of or for the account of Lifetime Lawyers or hold themselves out as having authority to bind Lifetime Lawyers.

All regional directors must be Accredited Members and must comply with all the criteria for that level of membership. If a regional director loses their AM status, then they will be deemed to retire as a regional director.

Minimum standards which regional directors shall seek to attain shall be as follows:

- i. Organise a minimum of two meetings/training sessions per calendar year (compulsory)
- ii. Set up of a committee to help run the regional group (advised)
- iii. Produce an annual timetable of events (advised)
- iv. Apply the standard charging structure for training sessions as agreed by the directors (advised)
- v. Set up and use a marketing database to facilitate record keeping and recruitment drives (recommended)
- vi. Hold recruitment drives per year to tie in with the training sessions (recommended)
- vii. Make contact with each new member and introduce them to the regional group (advised)
- viii. Attend or send a deputy to the regional director's meetings (compulsory)
- ix. Attend or send a deputy to the National Conference and AGM (compulsory)
- x. Act as the local Lifetime Lawyers Ambassador for local Public Relations (compulsory)

If the regional director does not meet these minimum standards (compulsory) in particular the organising of two meetings/training sessions in the calendar year, the regional director will be interviewed by the Lifetime Lawyers chair to discuss the role and a forward plan for the next year. If the regional director has not got any meetings in the diary within 90 days of the interview, the regional director will be deemed to have retired.

12 AMENDMENTS OF THE RULES

The Rules may be added to, amended or rescinded by a resolution of the directors passed at a meeting convened in accordance with the provisions of Lifetime Lawyers' articles of association, provided that no such resolution shall be deemed to have been passed unless it is carried by a majority of at least two-thirds of the directors present and voting.