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Octalin Referral Guide: For Everyone Who Refers a Family

At a glance

Octalin helps a family member who has just been given legal responsibility for an adult's money. We keep the records, prepare the financial schedules for the court, and find benefits the adult may be missing. The family member stays in charge of every decision and every dollar.

This guide is for lawyers, social workers, discharge planners, care home teams, accountants, financial advisors, community organizations and families. It takes about three minutes to read.

Is this the right referral?

A referral fits when the family member has the legal authority but not the time, training or confidence to run the file.

Situation	What you may hear	How we help
A court has just granted a trusteeship order	"What do I do now?"	We set up the records in the first 30 days and prepare the financial side of the inventory.
A court review or accounting is coming	"I have a shoebox of receipts and a court date."	We rebuild the records and prepare the financial schedules. The trustee or their lawyer files them.
A family member acting under an Enduring Power of Attorney is overwhelmed	"I'm managing Mom's money from another city."	We do monthly administration from the statements and send a written summary the family can rely on.
Benefits may be going unclaimed	"Is she getting everything she should?"	We screen for benefits and prepare the applications for the trustee to sign.

Not a fit: no one has legal authority yet, the family wants someone to hold or control the money, or the main need is legal advice. Those stay with a lawyer.

Where we work: Alberta, for now.

How to refer in three steps

1. **Tell the family about us.** Give them this guide, or our name and number.

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2. **Make the introduction, or let them call.** Email Contact@octalin.com with the family member copied or have them call 587-582-3823. We never cold contact a family.
3. **We take it from there.** Within two business days we offer a free 30-minute call. If it is a fit, we send an engagement letter, confirm their authority from the court order or Enduring Power of Attorney, and begin set-up.

With the family member's written consent, we tell you when the engagement starts and how the file is going.

What this means for you

If you are	How you can use this guide	What you might say to the family
A lawyer	Give it to clients once the order is granted. Legal questions stay with you.	"A local firm can keep the records and prepare the schedules for the court. I stay your lawyer."
A social worker or discharge planner	Include us in the resource information you give families, alongside other options. We understand you may not be able to recommend one provider.	"Here are organizations that help after a court appoints a family member. Octalin is one of them."
A care home or care team member	Share it with families who manage a resident's affairs.	"If the paperwork feels like too much, this service can help with the records and benefits."
An accountant or financial advisor	Refer clients who have taken on a trustee or attorney role. We give the trustee reconciled records and organized documents to share with you.	"They can bring organized records to your next meeting with me."
A community or disability organization	Add us to your list of services for families, alongside other options.	"This service helps families once a court order is in place."
A family member	You can call or email us yourself. The first 30-minute call is free.	Call 587-582-3823. Contact@octalin.com

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What we do and do not do

We do	We do not
Keep the records and reconcile every transaction from the statements the trustee gives us	Hold, control, deposit or sign for the adult's money, or use anyone's online banking passwords
Prepare the financial schedules for the inventory, accountings and reviews	Prepare, draft or file court documents
Screen for benefits and prepare the applications for the trustee to sign	Give legal advice or recommend legal options
Explain the role in general terms and flag anything unusual early	Give investment advice or prepare tax returns
Attend family, care home and bank meetings when the trustee asks	Pay or accept referral fees

Every legal question goes back to the family's lawyer. If the family has no lawyer, we suggest they find one. We do not choose one for them.

What happens after you refer

When	What happens
Within 2 business days	We offer the family member a free 30-minute call to confirm their authority and whether we are the right fit.
Day 0	The engagement letter is signed, and the client file is opened.
Days 1 to 7	We verify their authority and set up the records and calendar.
Days 8 to 21	We build the records from the statements, prepare the financial information for the trusteeship plan and inventory, and screen for benefits.
Days 22 to 30	A review meeting covers the adult's finances, benefit findings, the filing calendar and any issues we flagged.

After that, the family receives a monthly summary, a reminder before every deadline, and the schedules prepared ahead of each accounting.

Common questions from referrers

Do you pay or charge referral fees?

No. We do not pay or accept them, and referring a family costs you nothing.

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Will you tell me how the file is going?

Yes, with the family trustee's written consent. We tell you when the engagement starts and how the file is going.

Do you give legal advice?

No. We are not a law firm. Legal questions go to the family's lawyer.

Can you help the family apply for a trusteeship?

No. The application stays with a lawyer or an application service. We offer a free 30-minute consultation and a referral to a lawyer, and our work starts once the order is granted.

What if the family disagrees?

We take instructions only from the trustee or attorney. We do not mediate family disagreements, and we refer those to the family's lawyer.

We cannot refer to private providers.

Understood. We would only ask to be included in the resource information you give families, alongside other options.

What does it cost the family?

A fixed monthly fee based on how complex the adult's finances are, plus a set-up fee and an annual fee for court accounting preparation. Every fee is in writing before work starts.

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A note you can forward to the family

Copy the text below into an email. Change only the greeting and the details in brackets.

Dear [name],

Now that [the order is granted / you have taken on this role], the day-to-day record-keeping, court accountings and benefit applications fall to you. Octalin Management supports family trustees and attorneys with exactly that work. They keep the records, prepare the financial schedules for the court, and find any benefits your [mother / father / spouse] is entitled to. You stay in charge of every decision and every dollar, and they never handle the money. Legal questions still go to your lawyer.

Their first 30-minute call is free: Femi Sobaki, 587-582-3823, [email]. I am happy to make the introduction if you prefer.

[Your name]

Contact

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Email: Contact@octalin.com
Website: Octalin.com