

Board Template for Intervener Cost Estimate and Final Costs Award Applications

Request Date: 01-Sep-18
 Party Name: Intervener XYZ
 Party to Whom Costs are Payable: Entity XYZ Inc.

Note 1: The fields highlighted in yellow are required user inputs. If a field is not applicable to the user, the entry should be marked as "N/A" unless otherwise specified.
 Note 2: For Cost Estimates, all hours are to be reported as maximum expected estimate totals.
 Note 3: If no Cost Estimate Amendments or Cost Applications have been requested, leave columns blank.

| Category | Board Staff Acknowledgement Date | Line Item | Years of Experience | Cost Estimate | | | Estimate Amendment 1 | | | Estimate Amendment 2 | | | Final Costs Application | | | Comments on Variances | |
|------------------|----------------------------------|-------------------------------|---------------------|---------------|---------------------|---------------|----------------------|---------------------|---------------|----------------------|---------------------|---------------|-------------------------|---------------------|---------------|--|---|
| | | | | 15-Jan-18 | | | 06-Feb-18 | | | 06-May-18 | | | N/A | | | | |
| | | | | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | | |
| Legal Costs | Discovery | Counsel #1 Name | 21 | 50 | 285 | \$14,250.00 | 55 | 285 | \$15,675.00 | 55 | 285 | \$15,675.00 | 52 | 285 | \$14,820.00 | N/A | |
| | | Counsel #2 Name | 7 | 75 | 140 | \$10,500.00 | 105 | 140 | \$14,700.00 | 105 | 140 | \$14,700.00 | 98 | 140 | \$13,720.00 | N/A | |
| | | Counsel #3 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | Counsel #4 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | Preparation of Evidence | Counsel #1 Name | 21 | 25 | 285 | \$7,125.00 | 35 | 285 | \$9,975.00 | 35 | 285 | \$9,975.00 | 38 | 285 | \$10,830.00 | N/A |
| | | | Counsel #2 Name | 7 | 60 | 140 | \$8,400.00 | 85 | 140 | \$11,900.00 | 85 | 140 | \$11,900.00 | 87 | 140 | \$12,180.00 | N/A |
| | | | Counsel #3 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | | Counsel #4 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | Prepare/Attend Oral Hearings | Counsel #1 Name | 21 | 75 | 285 | \$21,375.00 | 75 | 285 | \$21,375.00 | 83 | 285 | \$23,655.00 | 85 | 285 | \$24,225.00 | Budgeted initially based on 8 hearing days + preparation. Hearing was 9 hearing days. |
| | | | Counsel #2 Name | 7 | 75 | 140 | \$10,500.00 | 75 | 140 | \$10,500.00 | 83 | 140 | \$11,620.00 | 85 | 140 | \$11,900.00 | Budgeted initially based on 8 hearing days + preparation. Hearing was 9 hearing days. |
| | | | Counsel #3 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | | Counsel #4 Name | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | |
| | | Prepare Written/Oral Argument | Counsel #1 Name | 21 | 25 | 285 | \$7,125.00 | 25 | 285 | \$7,125.00 | 50 | 285 | \$14,250.00 | 51 | 285 | \$14,535.00 | Based on increased scope of issues uncovered during discovery |
| | | | Counsel #2 Name | 7 | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | 2 | 140 | \$280.00 | Needed support for final argument submission. | |
| | | | Counsel #3 Name | 12 | N/A | N/A | N/A | N/A | N/A | N/A | 1 | 190 | \$190.00 | 1 | 190 | \$190.00 | Needed support for final argument submission. |
| | | | Counsel #4 Name | 3 | N/A | N/A | N/A | N/A | N/A | N/A | 1 | 140 | \$140.00 | 3 | 100 | \$300.00 | Needed support for final argument submission. |
| | | | Sub-Total | | 385 | | \$79,275.00 | 455 | | \$91,250.00 | 498 | | \$102,105.00 | 502 | | \$102,980.00 | |
| | | Disbursements | | | | \$1,500.00 | | | \$1,500.00 | | | \$1,500.00 | | | \$1,397.25 | Office printing, and travel | |
| | | GST | | | | \$4,038.75 | | | \$4,637.50 | | | \$5,180.25 | | | \$5,218.86 | 5% GST applied to legal fees and disbursements | |
| | | PST | | | | \$6,462.00 | | | \$7,420.00 | | | \$8,288.40 | | | \$8,350.18 | 8% GST applied to legal fees and disbursements | |
| | Total Legal Costs | | | | \$91,275.75 | | | \$104,807.50 | | | \$117,073.65 | | | \$117,946.29 | | | |
| Consultant Costs | Consultant #1 Name | | 25 | | | | | | | | | | | | | | |
| | | Discovery | | 50 | 240 | \$12,000.00 | 60 | 240 | \$14,400.00 | 60 | 240 | \$14,400.00 | 57 | 240 | \$13,680.00 | N/A | |
| | | Preparation of Evidence | | 250 | 240 | \$60,000.00 | 250 | 240 | \$60,000.00 | 250 | 240 | \$60,000.00 | 260 | 240 | \$62,400.00 | N/A | |
| | | Prepare/Attend Oral Hearings | | 150 | 240 | \$36,000.00 | 150 | 240 | \$36,000.00 | 160 | 240 | \$38,400.00 | 157 | 240 | \$37,680.00 | N/A | |
| | | Prepare Written/Oral Argument | | 5 | 240 | \$1,200.00 | 5 | 240 | \$1,200.00 | 25 | 240 | \$6,000.00 | 7 | 240 | \$1,680.00 | N/A | |
| | | Sub-Total | | 455 | | \$109,200.00 | 465 | | \$111,600.00 | 495 | | \$118,800.00 | 481 | | \$115,440.00 | | |
| | | Disbursements | | | | \$3,000.00 | | | \$3,000.00 | | | \$3,800.00 | | | \$3,675.24 | Travel | |
| | | GST | | | | N/A | | | N/A | | | N/A | | | N/A | Consultant #1 is GST exempt (U.S. contractor) | |
| | | PST | | | | N/A | | | N/A | | | N/A | | | N/A | Consultant #1 is GST exempt (U.S. contractor) | |
| | | Sub-Total | | | | \$112,200.00 | | | \$114,600.00 | | | \$122,600.00 | | | \$119,115.24 | | |
| | | Consultant #2 Name | | 30 | | | | | | | | | | | | | |
| | | Discovery | | | 10 | 240 | \$2,400.00 | 25 | 240 | \$6,000.00 | 25 | 240 | \$6,000.00 | 27 | 240 | \$6,480.00 | N/A |
| | Preparation of Evidence | | | 50 | 240 | \$12,000.00 | 50 | 240 | \$12,000.00 | 50 | 240 | \$12,000.00 | 52 | 240 | \$12,480.00 | N/A | |

Board Template for Intervener Cost Estimate and Final Costs Award Applications

Request Date: 01-Sep-18
 Party Name: Intervener XYZ
 Party to Whom Costs are Payable: Entity XYZ Inc.

Note 1: The fields highlighted in yellow are required user inputs. If a field is not applicable to the user, the entry should be marked as "N/A" unless otherwise specified.
 Note 2: For Cost Estimates, all hours are to be reported as maximum expected estimate totals.
 Note 3: If no Cost Estimate Amendments or Cost Applications have been requested, leave columns blank.

| Category | Board Staff Acknowledgement Date | Line Item | Years of Experience | Cost Estimate | | | Estimate Amendment 1 | | | Estimate Amendment 2 | | | Final Costs Application | | | Comments on Variances |
|----------|----------------------------------|--|---------------------|---------------|---------------------|---------------------|----------------------|---------------------|---------------------|----------------------|---------------------|---------------------|-------------------------|---------------------|---------------------|--|
| | | | | 15-Jan-18 | | | 06-Feb-18 | | | 06-May-18 | | | N/A | | | |
| | | | | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | Hours | Tariff Rate [\$CDN] | Total [\$CDN] | |
| | | Prepare/Attend Oral Hearings | | 25 | 240 | \$6,000.00 | 25 | 240 | \$6,000.00 | 32 | 240 | \$7,680.00 | 38 | 240 | \$9,120.00 | Based on 4 hearing days + prep |
| | | Prepare Written/Oral Argument | | 2 | 240 | \$480.00 | 2 | 240 | \$480.00 | 15 | 240 | \$3,600.00 | 10 | 240 | \$2,400.00 | N/A |
| | | <i>Sub-Total</i> | | 87 | | \$20,880.00 | 102 | | \$24,480.00 | 122 | | \$29,280.00 | 127 | | \$30,480.00 | |
| | | Disbursements | | | | \$100.00 | | | \$100.00 | | | \$100.00 | | | \$50.00 | Office printing |
| | | GST | | | | N/A | | | N/A | | | N/A | | | N/A | Consultant #2 does not charge GST |
| | | PST | | | | \$1,678.40 | | | \$1,966.40 | | | \$2,350.40 | | | \$2,442.40 | Consultant #2 is subject to 8% PST on professional fees and disbursements |
| | | <i>Sub-Total</i> | | | | \$22,658.40 | | | \$26,546.40 | | | \$31,730.40 | | | \$32,972.40 | |
| | | N/A | | N/A | | | | | | | | | | | | |
| | | Discovery | | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | | Preparation of Evidence | | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | | Prepare/Attend Oral Hearings | | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | | Prepare Written/Oral Argument | | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A | N/A |
| | | <i>Sub-Total</i> | | | | | | | | | | | | | | |
| | | Disbursements | | | | N/A | | | N/A | | | N/A | | | N/A | N/A |
| | | GST | | | | N/A | | | N/A | | | N/A | | | N/A | N/A |
| | | PST | | | | N/A | | | N/A | | | N/A | | | N/A | N/A |
| | | <i>Sub-Total</i> | | | | N/A | | | N/A | | | N/A | | | N/A | |
| | | Total Consultant Costs | | | | \$134,858.40 | | | \$141,146.40 | | | \$154,330.40 | | | \$152,087.64 | |
| TOTALS | | Professional fees (legal and consultants) | | | | \$209,355.00 | | | \$227,330.00 | | | \$250,185.00 | | | \$248,900.00 | |
| | | Disbursements | | | | \$4,600.00 | | | \$4,600.00 | | | \$5,400.00 | | | \$5,122.49 | |
| | | GST | | | | \$4,038.75 | | | \$4,637.50 | | | \$5,180.25 | | | \$5,218.86 | |
| | | PST | | | | \$8,140.40 | | | \$9,386.40 | | | \$10,638.80 | | | \$10,792.58 | |
| | | Sub-Total | | | | \$226,134.15 | | | \$245,953.90 | | | \$271,404.05 | | | \$270,033.93 | Intervener's Cost Application total. |
| | | <i>Difference b/w Application and Initial Cost Estimate Amount</i> | | | | N/A | | | \$19,819.75 | | | \$45,269.90 | | | \$43,899.78 | Intervener's Cost Estimate Amendment or Final Costs Application total vs. original Cost Estimate amount. |
| | | <i>(if applicable) Difference b/w Final Costs Application and Latest Estimate Amendment Amount</i> | | | | N/A | | | N/A | | | N/A | | | -\$1,370.12 | Intervener's Final Costs Application total vs. latest Cost Estimate Amendment amount. |
| | | Total Advance of Funds Paid to Date | | | | N/A | | | N/A | | | N/A | | | \$98,563.37 | |
| | | Outstanding Amount | | | | N/A | | | N/A | | | N/A | | | \$171,470.56 | Based on Intervener's Final Costs Application totals and the total Advance of Funds paid to date. |

Board Template for Intervener Requests for Advance of Funds

Request Date: 01-Sep-18

Party Name: Intervener XYZ

Party to Whom the Advance is Payable to: Entity XYZ Inc.

Board Approved Holdback Percentage: 25%

Board Holdback Percentage Approval Date: 15-Jan-18

Note: The fields highlighted in yellow are required user inputs. If a field is not applicable to the user, the entry should be marked as "N/A" unless otherwise specified.

| Line Item | Cost Estimate | Estimate Amendment 1 | Estimate Amendment 2 | Invoice #1 [\$CDN] | Invoice #2 [\$CDN] | Invoice #3 [\$CDN] | Invoice #4 [\$CDN] | Invoice #5 [\$CDN] | Total Spent [\$CDN] | Total Remaining (or Over) [\$CDN] |
|-----------------------------|---------------------|----------------------|----------------------|--------------------|--------------------|--------------------|--------------------|--------------------|---------------------|-----------------------------------|
| Party Invoice # | N/A | N/A | N/A | 621475 | 621514 | 621841 | N/A | N/A | N/A | N/A |
| <i>Legal Costs</i> | | | | | | | | | | |
| Counsel #1 Name | \$49,875.00 | \$54,150.00 | \$63,555.00 | \$6,400.00 | \$18,500.00 | \$26,000.00 | N/A | N/A | \$50,900.00 | \$12,655.00 |
| Counsel #2 Name | \$29,400.00 | \$37,100.00 | \$38,220.00 | \$3,200.00 | \$12,000.00 | \$15,000.00 | N/A | N/A | \$30,200.00 | \$8,020.00 |
| Counsel #3 Name | \$0.00 | \$0.00 | \$190.00 | \$0.00 | \$0.00 | \$0.00 | N/A | N/A | \$0.00 | \$190.00 |
| Counsel #4 Name | \$0.00 | \$0.00 | \$140.00 | \$0.00 | \$0.00 | \$0.00 | N/A | N/A | \$0.00 | \$140.00 |
| Legal Disbursements | \$1,500.00 | \$1,500.00 | \$1,500.00 | \$75.25 | \$225.00 | \$350.00 | N/A | N/A | \$650.25 | \$849.75 |
| <i>Consultant Costs</i> | | | | | | | | | | |
| Consultant #1 Name | \$109,200.00 | \$111,600.00 | \$118,800.00 | \$10,500.00 | \$42.00 | \$9,408.05 | N/A | N/A | \$19,950.05 | \$98,849.95 |
| Consultant #2 Name | \$20,880.00 | \$24,480.00 | \$29,280.00 | \$6,000.00 | \$10,000.00 | \$0.00 | N/A | N/A | \$16,000.00 | \$13,280.00 |
| N/A | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 | N/A | N/A | \$0.00 | \$0.00 |
| Consultant Disbursements | \$3,100.00 | \$3,100.00 | \$3,900.00 | \$0.00 | \$1,785.00 | \$25.00 | N/A | N/A | \$1,810.00 | \$2,090.00 |
| GST (legal and consultants) | \$4,038.75 | \$4,637.50 | \$5,180.25 | \$483.76 | \$1,536.25 | \$2,067.50 | N/A | N/A | \$4,087.51 | \$1,092.74 |
| PST (legal and consultants) | \$8,140.40 | \$9,386.40 | \$10,638.80 | \$1,254.02 | \$3,258.00 | \$3,308.00 | N/A | N/A | \$7,820.02 | \$2,818.78 |
| Total | \$226,134.15 | \$245,953.90 | \$271,404.05 | \$27,913.03 | \$47,346.25 | \$56,158.55 | \$0.00 | \$0.00 | \$131,417.83 | \$139,986.22 |
| Holdback Amount | N/A | N/A | N/A | \$6,978.26 | \$11,836.56 | \$14,039.64 | \$0.00 | \$0.00 | \$32,854.46 | N/A |
| Total less holdback | N/A | N/A | N/A | \$20,934.77 | \$35,509.69 | \$42,118.91 | \$0.00 | \$0.00 | \$98,563.37 | N/A |

| | | | | | | | | | | |
|--|---------------------|---------------------|---------------------|--------------------|--------------------|--------------------|---------------|---------------|--------------------|---------------------|
| Board Staff Acknowledged Total (less holdback, if applicable) | \$226,134.15 | \$245,953.90 | \$271,404.05 | \$20,934.77 | \$35,509.69 | \$42,118.91 | \$0.00 | \$0.00 | \$98,563.37 | \$172,840.68 |
| Board Staff Acknowledgment Date | 15-Jan-18 | 06-Feb-18 | 06-May-18 | 01-May-18 | 03-Jun-18 | 06-Jul-18 | N/A | N/A | | |