

**Utah State Bar Commission**  
**Friday, January 27, 2023**  
**Utah State Bar - Utah Law & Justice Center**  
**Salt Lake City, Utah**

**AGENDA**

- 1. 9:00 a.m. President's Welcome and Reports: Katie Woods**
  - 05 Mins.* 1.1 Present Jennifer Huntsman the 2022 Paul Moxley Mentoring Award.
  - 05 Mins.* 1.2 Review Legislative Phone Conference Calendar
  - 05 Mins.* 1.3 Spring Convention Report: **Erik Christiansen**
  - 01 Mins.* 1.4 St. George Room Reservations Reminder (TAB 1, Page 3)
  - 01 Mins.* 1.5 1<sup>st</sup> and 3<sup>rd</sup> Division Bar Elections Reminder
  - 03 Mins.* 1.6 TAVA and Unmind Roll Out Update
  - 05 Mins.* 1.7 Judicial Council Report: **Margaret Plane**
  - 03 Mins.* 1.8 Diversity Outreach: Beth Kennedy
  
- 2. 9:45 a.m. Action Items**
  - 10 Mins.* 2.1 Nominate Bar President-elect Candidate
  - 15 Mins.* 2.2 Select Dorathy Merrill Brothers Award Recipient (TAB 2, Page 5)
  - 15 Mins.* 2.3 Select Raymond Uno Award Recipient (TAB 3, Page 21)
  - 10 Mins.* 2.4 Creation of a Well-Being Award (TAB 4, Page 32)
  
- 3. 10:00 a.m. Information Items**
  - 30 Mins.* 3.1 Bar Member Survey Report: **James Roberts and Emily Young** (TAB 5, Page 34)
  
- 4. 11:00 a.m. Executive Session**  
  
**11:30 a.m. Adjourn**

**CONSENT AGENDA**

(TAB 6, Page 67)

(Approved by policy if no objections are raised)

1. Minutes of December 16, 2022 Commission Meeting

**ATTACHMENTS**

(TAB 7, Page 71)

1. December 2022 Financial Statements

## **2023 CALENDAR**

<b>January 31</b>	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
<b>February 1</b>	Commission Election Petitions Due, each to serve a three-year term. Terms will begin in July 2023.		
	<ul style="list-style-type: none"> <li>• One member from the First Division (Box Elder, Cache, and Rich Counties),</li> <li>• Three members from the Third Division (Salt Lake, Summit, and Tooele Counties)</li> </ul>		
<b>February 1-5</b>	ABA Midyear Meeting		New Orleans, Louisiana
<b>February 7</b>	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
<b>February 14</b>	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
<b>February 21</b>	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
<b>February 28</b>	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
<b>March 16</b>	Commission Meeting	1:00 p.m.	St. George, Utah
<b>March 16-18</b>	Utah State Bar Spring Convention		St. George, Utah
<b>March 27-29</b>	ABA Day in Washington DC		
<b>March 29 – April 1</b>	Western States Bar Conference		San Diego, California
<b>April 1</b>	Bar Election - Balloting Begins		
<b>April 14</b>	Executive Committee Meeting	Noon	Telephone/Video Conference
<b>April 15</b>	Bar Election - Balloting Ends		
<b>April 21</b>	Commission Meeting	9:00 a.m.	Law & Justice Center
<b>May TBD</b>	Admission Ceremony	Noon	TBD
<b>June TBD</b>	Jackrabbit Bar		TBD, Wyoming
<b>June 2</b>	Executive Committee Meeting	Noon	Telephone/Video Conference
<b>June 9</b>	Commission Meeting	9:00 a.m.	Law & Justice Center
<b>July 19</b>	Executive Committee Meeting	Noon	Telephone/Video Conference
<b>July 26</b>	Commission Meeting	9:00 a.m.	TBD
<b>August 3-8</b>	ABA Annual Meeting		Denver, Colorado

# TAB 1

Utah State Bar.

# Spring Convention in St. George



March 16-18

Dixie Center at St. George

1835 Convention Center Drive | St. George, Utah

## 2023 "Spring Convention in St. George" Accommodations

Room blocks at the following hotels have been reserved. You must indicate that you are with the Utah State Bar to receive the Bar rate. After "release date" room blocks will revert back to the hotel general inventory.

Hotel	Rate (Does NOT include tax)	Block Size	Release Date	Miles from Dixie Center to Hotel
<b>Clarion Suites</b> (435) 673-7000	\$139	10-2Q 10-K	2/16/23	1
<b>Comfort Inn at Convention Center</b> (435) 628-8544	\$189		2/16/23	0.5
<b>Courtyard by Marriott</b> (435) 986-0555	\$259	15-Q&K	1/30/23	3.5
<b>Fairfield Inn</b> (435) 673-6066	\$199 \$179	5-2Q 10-K	2/14/23	0.3
<b>Hampton Inn</b> (435) 652-1200	\$229	15-2Q 10-K	2/16/23	4
<b>Hilton Garden Inn</b> (435) 634-4100	\$199 \$179	5-2Q 10-2K	2/14/23	0.3
<b>Holiday Inn Express &amp; Suites, St. George North</b> (435) 986-1313 x10	\$85	10-2Q 10-K	1/16/23	12
<b>Holiday Inn St. George Conv. Center</b> (435) 628-8007	\$199-2Q \$179-K	10-2Q 20-K	2/14/23	0.5
<b>Hyatt Place</b> (435) 656-8686	\$199 \$189	10-2Q 10-K	2/14/23	0.5
<b>Red Lion Conference Center</b> (435) 628-4235	\$159		2/16/23	1.5
<b>St. George Inn &amp; Suites</b> (435) 673-6661	\$179	8-2Q 7-K	2/16/23	1
<b>TownePlace Suites</b> (435) 986-0555	\$259	10-K	1/30/23	3.5
<b>Staybridge Suites</b> 435-688-8900 ext 2	20% off room rate email: mindyh@inntrusted.com to reserve		2/16/23	.75
<b>Tru by Hilton</b> 435-634-7768	\$185 \$169	5-2Q 10-K	2/16/23	.75
<b>My Place Hotel</b> 435-674-4997	\$180 \$170	10-2Q 10-Q	2/01/23	6

Visit [utahbar.org/springconvention](http://utahbar.org/springconvention)  
to book your reservation today!

# TAB 2

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: January 27, 2023

RE: AWARD RECOMMENDATION – Dorothy Merrill Brothers Award for the Advancement of Women in the Legal Profession.

**NOMINEES:**

NOMINEE	AWARD HISTORY	NOMINATOR	PUBLIC or PRIVATE	
Jill Coil	<i>No other Bar awards.</i>		Private	
		Alejandro Maynez	Public	
		Kara North	Public	
Mary Deiss Brown	<i>No other Bar awards.</i>	Rachel Pascua	Public	
Hon. Michele Christiansen-Forster	2017 Dorothy Merrill Brothers	Carolyn McHugh	Public	
Heidi Goebel	<i>No other Bar awards.</i>	Timothy Curtis	Public	
Hon. Ann Marie McIlff Allen	<i>No other Bar awards.</i>		Private	
Rachel Ortiz	<i>No other Bar awards.</i>	Christopher Kyler	Public	
Ashley Peck	<i>No other Bar awards.</i>	Melissa Reynolds WLU	Public	
Michelle Quist	<i>No other Bar awards.</i>		Private	

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on January 26, 2023 to review the nominations for the Dorothy Merrill Brothers Award. The Committee discussed the outstanding merits of each nominee and finally agreed upon recommending both **Jill Coil and Ashley Peck** to the Bar Commission for consideration.

**PAST RECIPIENTS and NOMINEES:**

	Past Recipients	Other Nominations That Year
2022	Jessica Andrew	Jill Coil, Lorie Nelson, Hon. Laura Scott, Gretta Spendlove
2021	Aida Neimarlija	Jill Coil, Amy Fowler, Elisa Harris, Angelina Tsu
2020	Jennifer Tomchak	Aida Neimarlija, Judge Laura Scott, Angelina Tsu
2019	Jacey Skinner	Ann Marie Taliaferro
2018	Ellen Maycock	Ann Marie Taliaferro
2017	Hon. Michele Christiansen	Marlesse Jones
2016	Barbara Hjelle	Joni K. Jones
2015	Patrice Arent	
2014	Terrie McIntosh	Peggy Hunt, Elaina Maragakis, Aida Neimarlija, Lori Nelson
2013	Charlotte L. Miller	Lori Nelson
2012	Hon. Sandra N. Peuller	Kelly De Hill, Elizabeth Dunning, Jennifer Lee, Lori Nelson
2011	Lauren I. Scholnick	
2010	Evelyn J. Furse Melanie J. Vartabedian Lisa A. Yerkovich	Joanna Sagers, Rashelle Perry, Kathy Dryer
2009	Hon. Carolyn B. McHugh	Lori Nelson
2008	Constance Lundberg Susan Peterson	Steven Waterman
2007	Irene Warr	Kate Toomey, Christine Fitzgerald Solits
2006	Janet H. Smith	Hon. Carolyn McHugh, Julie K. Morriss
2005	Annette W. Jarvis	Michaela D. Andruzzi; Ellen O'Hara
2004	Paul M. Warner	Commissioner Susan Bradford, Charlotte Miller
2003	Denise Dragoo	Nelda Bishop, Kristen Clayton, Bonnie Mitchell, Debra Moore and Judi Gretta Sorensen
2002	Hon. Pamela T. Greenwood	Karin Hobbs

2001	Laura M. Gray	Hon. Tina Campbell, Laura M. Gray, Patricia M. Leath, Hon. Pamela Greenwood, Charlotte Miller; and Marilu Peterson (non-lawyer)
2000	Katherine D. Pullins (non-lawyer)	Hon. David K. Winder
1999	Rosalie M. Reilly	
1998	James B. Lee	Attorney General Jan Graham, Hon. Pam Greenwood, Glenn C. Hanni; Hon. Leslie A Lewis, Patricia M. Leith, Hon. Kay Lindsay, Charlotte L. Miller, Toni Marie Sutliff, Irene Warr
1997	Anne Milne	
1996	Patricia W. Christensen	
1995	Hon. Christine M. Durham	

**Nominator Name**

**Bar Number**

**Email address**

**Date**

01/12/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Jill Coil

**Award**

Dorathy Merrill Brothers Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

I can attest to how Jill encourages my growth and development professionally while empathizing and understanding the specific challenges of being a mom. As a leader, Jill has created and nourished a culture of empathy in her firms, and stand as a steward that women should be everywhere important decisions are being made. In a male-dominated field, Jill has carved out a place for women and moms especially.

**Please select one:**

My nomination is private and should not be shared with the nominee or published, whole or in part, by the Utah State Bar.



## Christy Abad

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**From:** Matthew Page  
**Sent:** Thursday, January 12, 2023 12:33 PM  
**To:** Christy Abad  
**Subject:** FW: New submission from Nomination Bar Awards

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Date:** Thursday, January 12, 2023 at 10:18 AM  
**To:** Matthew Page <Matthew.Page@utahbar.org>  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Alejandro Maynez

**Bar Number**

07083

**Email address**

alex@coillaw.com

**Date**

01/12/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Jill Coil

**Award**

Dorothy Merrill Brothers Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Ms. Coil should receive this nomination because of her tireless efforts to mentor and encourage women to excel and advance in the law. She has personally given of her time and talents to inspire women by making herself available to answer questions from women considering a career in law as well as guiding students to consider practicing in family law. She hires lady interns from the law schools to give them an opportunity to obtain practical experience. She encourages paralegals to further their education/training and inspires them to go to law school. In her law firm she is constantly seeking ways to streamline the process, enhance the delivery of legal services by providing excellent legal representation to all her clients and for the attorneys to give back to the community through pro bono services. This weekend she volunteered to participate in the U of U Pro Bono Expungement Clinic for individuals who have been victims of human trafficking. Jill constantly trains and encourages her attorneys to stay abreast of the law and incorporate all updates in the firms processes. Her firm Moxie Law was just announced as one of the top 100 companies in Utah for champion women.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.

**Nominator Name**

Kara North

**Bar Number**

13564

**Email address**[kara@moxielawgroup.com](mailto:kara@moxielawgroup.com)**Date**

01/12/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Jill Coil

**Award**

Dorathy Merrill Brothers Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

I would like to nominate Jill Coil for the Dorathy Merrill Brothers Award due to all of the work she has done to advance the position of women within the practice of law in Utah. Jill is the founder and president of Coil Law- a family law firm in Sandy. She has instituted several policies which support women in the legal profession, including flexible work schedules, remote work options, paid maternity and paternity leave, and both full and part-time attorney work. Additionally, she's probably the only woman who has jumped head first into the sandbox, and has worked extensively to create a tech company, SimpleEnding, which is essentially attorney-quality divorce documents through a website. (When you think of SimpleEnding, think Turbo Tax for divorce). This increases access to justice and makes it less likely people will need to have modifications or attorney corrections when using "self-help" forms. She has completely funded the development of this technology, and it finally launched in Utah in December 2022. Finally, Jill launched another firm- Moxie Law Group- which is the only female-led personal injury law firm in Utah. According to the UAJ roster, there are only 52 women practicing personal injury in Utah. That means that women in this field are less than 1% of the Utah State Bar; however, it's no secret that the majority of the money and large settlements are in this sphere of work. Jill was concerned that women were being excluded from some of the more lucrative areas of law that are more heavily dominated by men, which is why she took the initiative to start this firm- to give women a safe and inclusive space in which to practice in this area of law. Finally, Jill is heavily involved in the community at large. Moxie Law Group was just recognized by the Governor's Office to be one of the Top 100 firms championing women in the work place in Utah, and she has written articles and appeared on podcasts discussing how her office policies support women. I can't think of anyone more fitting for this award than Jill Coil.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.

## Christy Abad

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**From:** Matthew Page  
**Sent:** Friday, January 20, 2023 4:49 PM  
**To:** Christy Abad  
**Subject:** Fwd: New submission from Nomination Bar Awards

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Friday, January 20, 2023 16:45  
**To:** Matthew Page <Matthew.Page@utahbar.org>; Christy Abad <christy.abad@utahbar.org>  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Melissa Reynolds

**Bar Number**

15718

**Email address**

melreynolds@hollandhart.com

**Date**

01/20/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Ashley Peck

**Award**

Dorathy Merrill Brothers Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

On behalf of the Women Lawyers of Utah ("WLU"), it is my honor to nominate Ashley Peck as the Dorathy Merrill Brothers Award recipient for 2023. Ashley's commitment to the advancement of women in the legal profession, which she pursues through professionalism, public service, and public dedication, is unwavering and makes her an excellent candidate for this award.

Ashley is an equity partner at Holland & Hart and is known as a passionate, effective advocate who strives to clear obstacles and create opportunities for other female lawyers in the broader community. She served on the board of WLU from 2013 through 2020, serving as its President from 2019 through 2020. During her time as President of WLU, Ashley played an integral role in leading efforts to commission the 2020 Study of Gender & Racial Bias in Utah's Legal Profession, as part of WLU's ongoing Initiative on the Advancement and Retention of Women in the Law. She has been deeply involved in promoting the results and recommendations of the study to the broader legal and business community, including through several media interviews with The Deseret News and The Salt Lake Tribune.

Ashley cares deeply about the advancement of women. She is committed to ensuring that women lawyers are positioned for

client opportunities and are fairly compensated and advanced to partnership. She encourages women to pursue leadership roles so that more female voices and perspectives are heard and included in decision making. Ashley is an unabashed promoter of other women's successes, ensuring they receive credit and recognition for their achievements, both within and outside of the firm. At Holland & Hart, she is a valued mentor to countless women. As an equity partner, she unapologetically uses her voice and power to effect change, by trying to eliminate systems and processes that make it harder for women lawyers to advance and by creating new pathways for success. She has engaged in tough discussions with key leaders in Holland & Hart's management to raise and examine inequity and made suggestions for concrete change. At the firm and throughout the community, she serves as a role model for other women to watch as she helps level the playing field for the current and next generation of female lawyers.

Attached, please find a formal letter containing additional detail regarding this nomination, as well as Ashley's firm biography.

**File**

- [A-Peck-Nomination-Dorathy-Merrill-Brothers-Award.pdf](#)

**File**

- [aapeck-firm-bio.pdf](#)

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.



## WOMEN LAWYERS of UTAH

### **2022-2023 Board**

**Lauren Shurman,**  
President

**Brit Merrill,**  
President Elect

**Beth Kennedy,**  
Past President

**Taylor Webb,**  
Treasurer

**Jenifer Tomchak,**  
Secretary

**Larissa Lee &  
Melissa Reynolds,**  
Career Advancement  
Committee Chairs

**Maryann Bauhs &  
Katie Hudman,**  
CLE Committee Chairs

**Grace Pusavat,**  
Community Outreach  
Committee Chair

**Allison Phillips Belnap,**  
Wellness Committee Chair

**Holly Nelson,**  
Judicial Mentoring  
Committee Chair

**Anne Freeland,**  
Membership &  
Publicity Chair

**Kate Zurcher &  
Ellie Rudolf,**  
Retreat Chairs

**Sarah Hafen,**  
Partnership Mentoring Chair

**Scarlet Smith,**  
Historian

**Naz Scott,**  
In-House Attorney Liaison

**Rachel Terry,**  
Government Attorney Liaison

**Pat Christensen,**  
WLU Advisor

**Judge Laura Scott &  
Judge Denise Porter,**  
Judicial Representatives

January 20, 2023

Utah State Bar  
c/o Christy Abad

**Re: *Nomination of Ashley Peck for the Dorathy Merrill Brothers Award***

Dear Commissioners of the Utah State Bar:

On behalf of the Women Lawyers of Utah ("WLU"), it is my honor to nominate Ashley Peck as the Dorathy Merrill Brothers Award recipient for 2023. Ashley's commitment to the advancement of women in the legal profession, which she pursues through professionalism, public service, and public dedication, is unwavering and makes her an excellent candidate for this award.

Ashley is an equity partner at Holland & Hart and is known as a passionate, effective advocate who strives to clear obstacles and create opportunities for other female lawyers in the broader community. She served on the board of WLU from 2013 through 2020, serving as its President from 2019 through 2020. During her time as President of WLU, Ashley played an integral role in leading efforts to commission the 2020 Study of Gender & Racial Bias in Utah's Legal Profession, as part of WLU's ongoing Initiative on the Advancement and Retention of Women in the Law. She has been deeply involved in promoting the results and recommendations of the study to the broader legal and business community, including through several media interviews with The Deseret News and The Salt Lake Tribune.

Ashley cares deeply about the advancement of women. She is committed to ensuring that women lawyers are positioned for client opportunities and are fairly compensated and advanced to partnership. She encourages women to pursue leadership roles so that more female voices and perspectives are heard and included in decision making. Ashley is an unabashed promoter of other women's successes, ensuring they receive credit and recognition for their achievements, both within and outside of the firm. At Holland & Hart, she is a valued mentor to countless women. As an equity partner, she unapologetically uses her voice and power to effect change, by trying to eliminate systems and processes that make it harder for women lawyers to advance and by creating new pathways for success. She has engaged in tough discussions with key leaders in Holland & Hart's management to raise and examine inequity and made suggestions for





## WOMEN LAWYERS of UTAH

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concrete change. At the firm and throughout the community, she serves as a role model for other women to watch as she helps level the playing field for the current and next generation of female lawyers.

Ashley's professional accomplishments demonstrate that she is a leader in a field typically dominated by men, which has provided her with greater opportunities to educate those around her on the importance of the advancement of women. She advises clients on complex environmental compliance, litigation, and enforcement issues with enterprise-wide financial and operational consequences. She helps clients navigate complex water and wetland compliance and permitting issues, defending Clean Water Act ("CWA") citizen suits, and civil and criminal enforcement actions brought under the CWA and related federal and state statutes. Her expertise as *the* water quality expert in Utah has been recognized by many of the legal industry's leading awards, including *Chambers USA: America's Leading Lawyers for Business*, *Best Lawyers in America*, Mountain States Super Lawyers, and Utah Business Magazine's *Legal Elite*. In 2021, Ashley was honored as one of Utah Business Magazine's 30 Women to Watch.

In compiling this nomination, we requested individual stories from women lawyers who have been lucky enough to receive Ashley's support and encouragement over the years. These stories are provided below and demonstrate Ashley's commitment to the advancement of women, both at Holland & Hart and in the broader community:

- ❖ Ashley is a passionate and outspoken advocate for women in the legal field. Holland & Hart has been successful in recruiting and retaining female lawyers in Salt Lake City in large part because of the tireless work that Ashley does in communicating with women lawyers, mentoring them, and advocating for them. She has earned their trust for good reason. Ashley will put her neck on the line in support of women and diverse lawyers by using her position as an equity partner to raise issues of critical importance on behalf of those who might not otherwise feel like they have an effective voice. Ashley's willingness to take heat and stand up for more junior women lawyers sets her apart.  
- Emily Schilling, Partner, Holland & Hart
- ❖ Ashley Peck is the consummate advocate for women in the legal profession. She has served as a diversity lieutenant on Holland & Hart's Diversity Committee, which may not be a part of her resume or generally known. Through that work she advocates for the inclusion of all diverse lawyers, including women, to have a seat at the table and participate in meaningful client representation opportunities. When I joined the firm, she immediately reached out to me, helped me join the Women's Forum and took me to dinner to help me understand the "ropes" at the firm. She was a huge advocate for my advancement to equity partnership. Ashley speaks up for women lawyers when they may not feel comfortable speaking up for themselves. She is unwavering in her commitment to not only women gaining a seat at the table, but making sure that seat is one with power and authority.  
- Mickell Jimenez, Partner, Holland & Hart
- ❖ Having immigrated to this country at a young age, everything for my family was new and my parents did not have experience with the US school system or any other system for that matter. I had to maneuver through my educational journey mostly on my own. However, through this journey, there have been certain people that have come into my life and have



## WOMEN LAWYERS of UTAH

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been huge stepping stones for me as I continued reaching my goals. One of those people has been Ashley. As I was looking for my very first law firm job, Ashley took the time to guide me, encourage me and provide me candid advice that helped me land a job at my current firm. Without Ashley's help, I would not be where I am today.

- *Karina Sargsian, Associate, Holland & Hart*

- ❖ Ashley is an amazing candidate for this award. Without a doubt, she is a fabulous attorney and a leader in her field. But, beyond that, she is a great person. I have seen her promote women in the legal profession in countless ways and will forever be grateful to her support as a colleague and friend. When I transitioned to a large law firm, I really did not know what to expect or what was expected. Ashley, though younger than me, became one of my mentors and great friends at the firm and helped me navigate the various challenges of firm life. Ashley was always willing to listen to my frustrations and questions and give me her unvarnished opinion. Her levity and no-BS attitude helped me put things in perspective to deal with challenges. I truly believe that Ashley is and will continue to be a mentor to many women - whether she knows it or not.

- *Jill Van Noord, Assistant General Counsel, Xcel Energy*

- ❖ I have known and worked with Ashley Peck for more than a few years. She is an extremely talented attorney and cares deeply about the work as well as the people. Since I have known her, she has time and again been an advocate for women in the workplace. She understands at a deep level the reality of having a multi-dimensional life where one must create and hold bandwidth – and actual time – for children, parents and a spouse while simultaneously working long hours. It is not just the working of the hours, but also being present for others while doing it. Specifically, Ashley has been a leader in holding out a hand to younger female associates as well mentoring and fostering the growth of young female clients. This takes finesse. Ashley has her own unique style that is strong, direct and not without controversy. Ashley has always provided an example of how to be successful in your own unique ways, with your own style. This has easily been accepted and applauded for male attorneys and more females playing this role makes us all better.

- *Amanda Smith, Vice President of External Affairs, AES Clean Energy*

As demonstrated, Ashley's significant efforts on behalf of the advancement of women, all while demonstrating a commitment to professionalism and public service, is unparalleled. Thank you very much for considering Ashley for this distinguished award.

Sincerely,

Melissa L. Reynolds  
Co-Chair, WLU Career Advancement  
Committee, 2022-2023

Enclosures.



## Ashley Peck

### Partner

222 South Main Street, Suite 2200, Salt Lake City, UT 84101

P 801.799.5913

[aapeck@hollandhart.com](mailto:aapeck@hollandhart.com)

**Ashley provides strategic counsel to clients ranging from Fortune 100 companies to municipalities and special service districts on complex environmental compliance, litigation, and enforcement issues.**

She has significant experience helping clients navigate complex water discharge and wetland permitting processes, defending Clean Water Act citizen suits, and defending civil and criminal enforcement actions brought under the Clean Water Act and related state statutes.

**Water Quality Advisor:** Ashley's water quality experience includes advising industrial and municipal clients on National Pollutant Discharge Elimination System (NPDES) and Section 404 wetland permitting matters. She has also represented dischargers in complex Section 401 water quality certifications, development of total maximum daily loads (TMDLs) and in water quality standards and policy development.

**Environmental Litigator:** Ashley litigates environmental disputes concerning claims under the Clean Water Act, Oil Pollution Act, Clean Air Act, Comprehensive Environmental Response Compensation and Liability Act and other environmental statutes. Ashley has substantial experience resolving environmental citizen suits, appealing or defending agency decisions before administrative tribunals, and in complex federal court litigation concerning common law claims.

Prior to practicing in Utah and joining Holland & Hart, Ashley was an associate at K&L Gates LLP in Seattle, Washington. She is admitted to practice in Utah, Utah Federal District Courts, Washington, and Washington Federal District Courts.

### PRACTICES

Climate Change  
Environmental  
Environmental Litigation  
Site Redevelopment  
Environmental Health and Safety  
Environmental Transactions

### INDUSTRIES

Conventional Power  
Mining  
Oil and Gas  
Oil and Gas Litigation  
Oil and Gas Regulatory  
Renewable Energy and Storage

### EDUCATION

University of Washington, J.D., 2007  
*Washington Law Review*  
Berman Environmental Law Clinic

Colorado State University, B.A., 2002  
*magna cum laude*

### BAR ADMISSIONS

Utah

### EXPERIENCE

#### Environmental Compliance Law

Clients look to Ashley for assistance meeting the ever-changing regulatory standards:

- Permitting and licensing processes and subsequent litigation for complex waste and energy facilities
- Obtaining or amending NPDES and groundwater discharge permits
- Obtaining Section 404 wetland permits and implementing mitigation
- Negotiating cost allocation agreements for cleanup of contaminated



sites

- Negotiating agreements for cleanup with regulatory agencies

### **Environmental Litigation**

Ashley litigates federal court cases concerning claims under regulations affecting a variety of industries:

- Defending statutory citizen suits
- Appealing or defending permits and other administrative decisions
- Defending criminal and civil enforcement actions
- Pursuing cost recovery and contribution actions

### **CLIENT RESULTS**

#### **Environmental Compliance Law**

Representation of multiple clients, including railroad, municipalities and manufacturers in Clean Water Act citizen suits regarding stormwater and wastewater discharges.

Representation of fuel supply and refining company in responding to oil spill, including in state and federal enforcement actions and coordination of public response plan.

Representation of pipeline company in action to recover costs associated with environmental cleanup and restoration following oil spill.

Representation of manufacturers in Clean Water Act criminal investigations.

Representation of municipalities in preparing and responding to agency audits of stormwater and pretreatment programs.

Representation of manufacturer in resolving multiple Clean Water Act enforcement matters in various regions and implementing company-wide environmental compliance program.

Representation of radioactive waste disposal facility in administrative appeals before state environmental agency regarding financial assurance and groundwater monitoring.

Representation coalition of sewer districts in advocacy efforts before Utah Department of Environmental Quality and Utah State Legislature.

Representation of various mining clients in large-scale cleanup of legacy contamination, including natural resource damages and cost recovery claims, and in managing legacy liability and compliance.

Representation of mining and chemical company in efforts to address legacy compliance issues related to water quality and waste management.

Representation of major power plant in implementation of coal combustion

residuals rule requirements.

Representation of railroad client in negotiations and litigation with state agencies, potentially responsible parties, and local residents and landowners on cleanup of multiple contaminated sites in Washington and Montana.

Representation developers and property owners in cleanup and cost-recovery actions related to perchloroethylene (PCE) contamination from former dry cleaners.

Representation of utility in relicensing hydropower dam before FERC, involving Federal Power Act, NEPA, CWA 401 certification and TMDL, ESA, and water rights matters.

## **PUBLICATIONS**

"Back to the Future: The Biden Administration Releases Final WOTUS Rule," *Holland & Hart Client Alert*, Co-Author, 01/05/2023

"Podcast: SCOTUS Takes on WOTUS as Oil, Gas Industry Clamors for Regulatory Clarity," *S&P Global Commodity Insights Capitol Crude: The US Energy Policy Podcast*, 10/24/2022

"More Uncertainty Ahead – WOTUS, SCOTUS and What it Means for Your Project," *Holland & Hart News Update*, Co-Author, 02/04/2022

"Is Regulatory Limbo the New Normal For WOTUS?," *Holland & Hart News Update*, Co-Author, 06/01/2021

"Policy Review Heats Up Under New EPA Administrator Regan," *Holland & Hart News Update*, Co-Author, 03/29/2021

"EPA Under Biden Signals Continuing Importance of Self-Disclosure," *Holland & Hart News Update*, Co-Author, 02/23/2021

"EPA Draft Guidance on *County of Maui, Hawaii v. Hawaii Wildlife Decision*," *Holland & Hart News Update*, Co-Author, 12/10/2020

"Keep Calm and Carry On - Self-Audits Under UDEQ's Agreement with EPA," *Holland & Hart News Update*, Co-Author, 08/31/2020

"Update on PFAS Developments and Enforcement," *Holland & Hart News Update*, Co-Author, 06/11/2020

"EPA Issues Final Rule Revising CWA Section 401 Regulation," *Holland & Hart News Update*, Co-Author, 06/08/2020

"WOTUS Debacle Likely to Continue With New Rule," *Bloomberg Law*, Co-Author, 05/21/2020

"SCOTUS Decision Provides Narrower Test for Discharges to Groundwater," *Holland & Hart News Update*, Co-Author, 04/28/2020

"EPA Issues Temporary Policy for Violations Caused By COVID-19,"

*Holland & Hart News Update*, Co-Author, 03/27/2020

"Justices Seek Balance In Clean Water Act Case Arguments," *Law360*, Co-Author, 11/12/2019

"CWA Waters of the United States Remain Murky," *Holland & Hart News Update*, Co-Author, 09/20/2019

"Spring Cleaning: Trump Administration Announces Further Changes to Clean Water Act Regulation," *Holland & Hart News Update*, Co-Author, 04/23/2019

"New Proposed Changes to Ignitable Waste Regulations May Expand Definition of Hazardous Waste," *Holland & Hart News Update*, Co-Author, 04/17/2019

"Legal Quagmire Over WOTUS Persists," *Holland & Hart News Update*, Co-Author, 09/12/2018

"Water Quality," *Environmental Regulation*, excerpted from the *Second Edition of the American Law of Mining*, Chapter 169, Co-Author, 2018

"Corps of Engineers to Streamline Section 408 Permitting Process," *Holland & Hart News Update*, Co-Author, 03/14/2018

"Feeling Underwater? A Brief Look at Recent Clean Water Act Developments," *Holland & Hart News Update*, Co-Author, 02/14/2018

## **SPEAKING ENGAGEMENTS**

"Tips and Tricks for Navigating Water Right Adjudications," *Utah Water Law & Policy Seminar*, 03/19/2021

"Water Quality Update: Murky Waters Ahead," *Industrial Minerals Association – North America Webinar*, 06/30/2020

"Lessons from the Rocky Mountain West Experience: Hot Topics in the Oil and Gas Industry," *Women's Energy Network Annual Conference*, Panelist, Denver, CO, 03/28/2019

"Operating in Uncertain Times: Staying on Top of Shifting Environmental Regulations," *Industrial Minerals Association – North America*, Napa, CA, 09/26/2018

"Litigating Contribution Claims Under the Oil Pollution Act," *Energy Industry Environmental Law Conference*, Houston, TX, 05/18/2018

## **RECOGNITION**

- *The Best Lawyers in America*®, Environmental Law, 2021-2023
- *Chambers USA*, Environment, Natural Resources & Regulatory Industries, 2017; Natural Resources & Environment, 2021-2022
- *Utah Business Magazine*, Utah Legal Elite, 2014-2021; Environmental, 2022

- *Utah Business Magazine*, 30 Women to Watch, 2021
- Mountain States Super Lawyers®, Environmental, 2022
- Mountain States Super Lawyers® Rising Stars, Environmental, 2014-2020
- Washington Super Lawyers® Rising Stars, Environmental, 2010

#### **PROFESSIONAL AND CIVIC AFFILIATIONS**

- Women Lawyers of Utah, President, 2019-2020
- Wasatch Community Gardens, Board Member, 2018-present
- ABA, Environment, Energy, and Resources Section, Member
- Utah State Bar, Energy, Natural Resources, and Environmental Law Sections, Member
- ABA, Superfund and Natural Resource Damages Litigation Committee, Vice Chair, 2011-2014
- The Foundation for Natural Resources and Energy Law, Member

# TAB 3

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: January 27, 2023

RE: AWARD RECOMMENDATION – Raymond S. Uno Award for the Advancement of Minorities in the Legal Profession.

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR	PUBLIC or PRIVATE	
Heidi Chamorro	<i>No other Bar awards.</i>		Private	
Gabriela Mena	<i>No other Bar awards.</i>		Private	
James Sorenson	<i>No other Bar awards.</i>		Private	
Sade Turner	<i>No other Bar awards.</i>	Graden Jackson	Public	
		Jack Smart	Public	
		Scarlet Smith	Public	

### RECOMMENDATION:

The Utah State Bar Awards Committee met on January 26, 2023 to consider the nominations for the 2023 Raymond S. Uno Award. The committee agreed upon recommending **Sade Turner** for the award.

### PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2022	Ross I. Romero	Abby Dizon-Maughan, Prof. Erika George, Cheryl Mori
2021	Engels Tejeda	<i>No other nominees.</i>
2020	Melinda Bowen	Hon. Lynn W. Davis, James A. Sorenson, Engels Tejeda
2019	Yvette Donosso	
2018	Hon. Augustus G. Chin	
2017	Hon. Vernice Trease	Trystan Smith
2016	Reyes Aguilar, Carl Hernandez	
2015	Andrea Martinez Griffin	
2014	Janise K. Macanas	Larry EchoHawk, Douglas Matsumori
2013	Cecilia Romero	
2012	Prof. David Dominguez	S. Grace Acosta, Augustus Chin, Hakeem Ishola, Doug Matsumori, Darold J. McDade, Sean Reyes, J. Craig Swapp, Phillip Uipi, Hon. Andrew Valdez
2011	Nathan D. Alder	
2010	Trystan Smith	Carlos Esqueda
2009	Cheryl Miyuki Mori	
2008	Su Chon	
2007	Judge Glen K. Iwasaki	Judge Glen K. Iwasaki, Sean D. Reyes
2006	Mona Burton	Douglas Matsumori
2005	Cheryl D. Luke	Filia H. "Phil" Uipi
2004	Marlene Gonzalez	Barbara Melendez, Filia H. "Phil" Uipi
2003	F. John Hill	James C. Bradshaw, Gus Chin, Barbara Dickey, Marlene Gonzalez, Darold J. McDade, Mark R. Moffat
2002	Robert L. Flores	Darold J. McDade
2001	Hon. Tyrone E. Medley	Gus Chin
2000	Sherrie Hayashi	
1999	Jimi Mitsunaga	
1998	Hon. Raymond Uno	
1997	Michael N. Martinez	
1996	John Martinez	
1995	Hon. William A. Thorne, Jr.	

**Nominator Name**

Graden Jackson

**Bar Number**

8607

**Email address**

[gjackson@strongandhanni.com](mailto:gjackson@strongandhanni.com)

**Date**

01/20/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Sade Turner

**Award**

Raymond S. Uno Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

I write on behalf of the 80+ attorneys at Strong & Hanni to nominate Sadé Turner for the Raymond S. Uno award. Sadé exemplifies the ideal candidate for this award as she has dedicated time and significant efforts throughout her career to the advancement of minorities in the legal profession. She has done so selflessly with no expectation for credit or attention.

Within our firm, Sadé serves on the board of directors and is the chair of the Diversity & Inclusion Committee. In those positions Sadé has worked to ensure the firm implements intersectionality. She has helped to include specific, quantifiable goals for increasing and retaining people from historically underrepresented groups.

As a mentor, Sadé is an overachiever. She has always mentored young attorneys and students, providing one-on-one guidance. She goes out of her way to offer opportunities to work on meaningful projects, legal proceedings and networking events. By doing so Sadé intends to show them they belong and are capable of success. The sense of belonging is something Sadé believes is crucial to success for traditionally unrepresented populations.

Her efforts extend well beyond the firm. She is actively engaged in substantial efforts in the community to advance the interests of minorities in the field of law. For example, Sadé is actively involved in the Utah Center for Legal Inclusion, where she is a co-chair of its Promoting Legal Education to Diverse Groups Everywhere program. She is also very active in the Utah Minority Bar Association ("UMBA"), the Women Lawyers of Utah Association and the Utah Family Law Clinic. Sadé is dedicated to supporting the Utah Minority Bar Association (UMBA) and always invites minority students from BYU and the UofU to be her guests at UMBA networking events. She spends her time and resources to ensure these students know they belong in the community.

This same sense of belonging is something that propelled Sadé in law school. Her maiden name is Aiyeku which means "my world is without end." While it has beautiful meaning, Sadé explains it can be difficult to pronounce. But law school was the first time in her life where her name was routinely pronounced correctly. She remembers how significant this little gesture was and how it made her feel included and valued.

Sade pushes herself to be the best example possible. Her efforts are exactly why Sadé should be awarded the Raymond S. Uno award.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee an published, whole or in part, by the Utah State Bar.

**Christy Abad**

---

**From:** Matthew Page  
**Sent:** Thursday, January 12, 2023 12:33 PM  
**To:** Christy Abad  
**Subject:** FW: New submission from Nomination Bar Awards

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**From:** info@utahbar.org <webhost@utahbar.org>  
**Date:** Thursday, January 12, 2023 at 10:17 AM  
**To:** Matthew Page <Matthew.Page@utahbar.org>  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Jack Smart

**Bar Number**

15737

**Email address**

jsmart@strongandhanni.com

**Date**

01/12/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Sade Turner

**Award**

Raymond S. Uno Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

Sade has dedicated a significant amount of time and energy to further diversity and inclusion in the Utah legal community. She has volunteered as a mentor for UCLI, volunteered to mentor law students, and led the charge for instituting diversity and inclusion initiatives for both the bar and her law firm. Her approach is a "rising tide lifts all boats," making sure that minority law students and lawyers are included on that rise. Sade may not freely admit this, but she knows that many people look up to her and takes that very seriously by engaging people and going out of her way to offer mentorship and advocacy for those from minority communities. Additionally, she demonstrates her convictions in action by taking pro bono cases and engaging with those in her communities that need help but cannot afford it. I am personally grateful for the work Sade has put in and for her example to everyone in the legal community.

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.



**Christy Abad**

---

**From:** info@utahbar.org <webhost@utahbar.org>  
**Sent:** Friday, January 20, 2023 3:17 PM  
**To:** Matthew Page; Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Scarlet Smith

**Bar Number**

15024

**Email address**

ssmith@strongandhanni.com

**Date**

01/20/2023

**I The Above, Desire to Nominate the Following**

Utah State Bar Member

**Nominee's Name**

Sade Turner

**Award**

Raymond S. Uno Award (Spring Convention)

**REFERRING TO THE AWARD CRITERIA, IN 400 WORDS OR LESS, PLEASE STATE THE REASON FOR THE NOMINATION, I.E. THE NOMINEE SHOULD RECEIVE THIS NOMINATION FOR THE FOLLOWING REASONS OR BASED UPON THE FOLLOWING FACTS OR EVENTS:**

On behalf of Women Lawyers of Utah (and myself personally, I nominate Sade Turner for the Raymond S. Uno Award. I have attached her CV and a letter of nomination.

Ms. Turner has an unwavering commitment to elevating traditionally underrepresented populations. She actively seeks and undertakes opportunities for giving her skills, time, and talents to pro bono and public service activities. Ms. Turner works with the Utah Minority Bar Association and the Utah Center for Legal Inclusion's PLEDGE program to provide diverse students access to career development.

For these reasons and those described in the attached letter, I hope you will consider Ms. Turner for this award. Thank you for your consideration.

**File**

- [Turner\\_Raymond-S.-Uno-Award-Nomination.pdf](#)

**File**

- [Turner-CV.pdf](#)

**Please select one:**

My nomination is public and I give permission for my nomination to be shared with the nominee and published, whole or in part, by the Utah State Bar.



## WOMEN LAWYERS of UTAH

### 2022-2023 Board

January 20, 2023

**Lauren Shurman,**  
President

**Brit Merrill,**  
President Elect

**Beth Kennedy,**  
Past President

**Taylor Webb,**  
Treasurer

**Jenifer Tomchak,**  
Secretary

**Larissa Lee &  
Melissa Reynolds,**  
Career Advancement  
Committee Chairs

**Maryann Bauhs &  
Katie Hudman,**  
CLE Committee Chairs

**Grace Pusavat,**  
Community Outreach  
Committee Chair

**Allison Phillips Belnap,**  
Wellness Committee Chair

**Holly Nelson,**  
Judicial Mentoring  
Committee Chair

**Anne Freeland,**  
Membership &  
Publicity Chair

**Kate Zurcher &  
Ellie Rudolf,**  
Retreat Chairs

**Sarah Hafen,**  
Partnership Mentoring Chair

**Scarlet Smith,**  
Historian

**Naz Scott,**  
In-House Attorney Liaison

**Rachel Terry,**  
Government Attorney Liaison

**Pat Christensen,**  
WLU Advisor

**Judge Laura Scott &  
Judge Denise Porter,**  
Judicial Representatives

Raymond S. Uno Award Selection Committee

c/o Christy Abad

[cabad@utahbar.org](mailto:cabad@utahbar.org)

Re: Folasade ("Sade") Aiyeku Turner Nomination

Dear Selection Committee,

On behalf of Women Lawyers of Utah, please accept this nomination of Sade Aiyeku Turner for the Raymond S. Uno Lawyer of the Year Award. Ms. Turner is a shareholder at Strong & Hanni, in which she serves on the Board of Directors and serves as the chair of the firm's Diversity & Inclusion Committee.

Sade's passion for working on diversity, equity, and inclusion is apparent in everything she has accomplished. She was raised by a single mother who instilled Sade with an incredibly strong work ethic. On her path to law school, Sade held several jobs helping people with disabilities and domestic violence. She noticed a trend among those populations—most of them were unable to access the judicial system and needed legal aid. So, in her mom's honor, Sade always has at least one pro bono client, usually a single mother.

In 2005, while attending law school, Sade reigned as Idaho's representative to the Miss USA national beauty pageant. She used the experience to bring to light the power of law in the battle for civil rights. Even though she was often referred to as Idaho's first "black" Miss Idaho, Sade made a point to draw attention to Ms. Dorothy Johnson. Miss Johnson was crowned as the first black Miss Idaho in 1964—in the heat of the civil rights movement. She used her crown to educate others about tolerance and civil rights.



## WOMEN LAWYERS of UTAH

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In law school, Sade recognized the value of feeling included and the sense of belonging. Sade graduated from the University of Utah law school in 2006. Her experience was transformed when Professor Erika George, an African American professor dedicated to human rights, began teaching at the school. As a child, Sade grew up in a very small town where she was the only black person. So, the impact of seeing a beautiful African American woman in such a leadership role served as an example and gave her a sense of belonging she would never forget.

Since law school, Sade has dedicated considerable efforts and resources to ensure that other minorities in the legal community experience the same sense of belonging. In her view, it's not enough to focus on diversity and inclusion, we must implement intersectionality—the framework for recognizing and processing people's overlapping identities and experiences to understand the discrimination and disadvantages they face.

Sade regularly mentors law students and young lawyers. She invites them to attend social events and offers advice. Importantly, Sade serves as an example, working tirelessly to show young lawyers like herself what is possible and how to make a difference.

Sade serves as the Co-Chair of UCLI's Promoting Legal Education to Diverse Groups Everywhere (PLEDGE) Program. Through this program Sade serves as a mentor to diverse students. She leads a committee dedicated to making legal careers accessible to all interested students, especially those from historically underrepresented groups. Sade has also participated in the CARA Dilley Pro Bono Project in Texas. Through this project, she provided legal representation and advocacy for families detained in the South Texas Family Residential Center. In 2020, Sade was featured on the cover of Utah Business magazine as one of the thirty women to watch.

(<https://www.utahbusiness.com/meet-2020-30-women-to-watch/>;<https://www.utahbusiness.com/utah-business-2020-archives/>).

No one can outwork Sade. She works tirelessly to promote women and minorities in the legal profession. She volunteers her time to coach local high school students in mock trial and to help her former professors teach their classes about current legal issues. A rare find in today's technology-focused society, Sade does none of these kind acts for the recognition (she does not even have a social media presence). Sade does these things to

ensure that the next generation of lawyers feel a sense of belonging and inclusion that is so valuable to traditionally unrepresented communities.

It would truly be a well-deserved honor for Sade to receive this recognition. Thank you for your consideration.

Sincerely,

*/s/ Scarlet R. Smith*

Scarlet R. Smith  
WLU Board Member

## **Curriculum Vitae Sadé A. Turner**

### ***Education***

#### **Juris Doctorate June 2006**

*S.J. Quinney College of Law, University of Utah*

#### **Bachelor of Arts June 2002**

*College of Idaho, Political Science major- emphasis in English and International Political Economy*

### ***Bar Membership***

- **Utah State Bar - 2006**
- **U.S. District Court, District of Utah - 2007**
- **10<sup>th</sup> Circuit Court of Appeals - 2008**
- **Idaho State Bar - 2010**
- **U.S. District Court, District of Idaho - 2010**

Sadé A. Turner is authorized to practice law in the state of Utah, state of Idaho, the U.S. District Court for the District of Utah, the U.S. District Court for the District of Idaho, and the 10<sup>th</sup> Circuit Court of Appeals. She is in good standing in all jurisdictions in which she is authorized to practice and is not currently and has never been subject to disciplinary proceedings in any jurisdiction.

### ***Work Experience***

#### **Shareholder, Civil Litigation June 2007 to Present**

***Strong & Hanni Law Firm Salt Lake City, UT***

- Consulting with and advising potential clients
- Conducting legal research and drafting motions, memorandums of law, and legal briefs
- Appellate briefing and oral argument
- Conducting and defending depositions
- Representing clients in hearings and at trial
- Litigating cases from date of filing through trial
- Litigating cases from date of demand through arbitration
- Preparing and arguing dispositive motions
- Participation in mediation proceedings and settlement negotiations
- Preparing settlement agreements
- Acting as both first and second chair at trial
- Conducting witness interviews
- Handling numerous pretrial issues and motions

- Handling post-trial issues and motions
- Retaining expert witnesses and working with them to analyze evidence and economic damages

**Associate, Civil Litigation** *June 2006 to May 2007*

***Bennett & McBride, Salt Lake City, UT***

- Consulting with and advising potential clients
- Conducting legal research and drafting motions, memorandums of law, and legal briefs
- Conducting and defending depositions
- Representing clients in hearings and at trial
- Preparing and arguing dispositive motions
- Preparing settlement agreements
- Handling of pretrial issues and motions
- Organizing and digesting of large amounts of documentation
- Creating timelines to assist in the course of litigation
- Interviewing of key fact witnesses

**Intern** for the Disability Law Center *January 2006 to June 2006*

***Disability Law Center, Salt Lake City, UT***

- Conducting initial client in-person and telephonic interviews
- Conducting legal research relating to procurement of Medicare/Medicaid/Social Security Disability including appealing the denial of the same, landlord/tenant law, and the Americans with Disabilities Act
- Organization of Supporting Documentation
- Legal research and writing concerning motions in both state and federal court
- Fact witness interviews

**Law Faculty Research Assistant** for Prof. Erica George *August 2005 to May 2006*

***University of Utah, Salt Lake City, UT***

- Conducting legal and research relating to information and evidence to be used in support of academic articles concerning human rights violations in Africa and Asia
- Organization of supporting research and documentation
- Creating citation references

**Summer Associate, Civil Litigation** *June 2005 to August 2005*

***Elam & Burke, Boise, ID***

- Conducting legal research and drafting motions, memorandums of law, and legal briefs
- Preparing settlement agreements
- Legal research and writing concerning numerous pretrial issues and motions
- Planning and assisting with CLE presentations

- Fact witness interviews

**Summer Associate, Corporate Governance June 2004 to August 2004**

***Washington Group International, Boise, ID***

- Conducting legal research throughout 50 States and international law concerning applicable corporate governance and compliance
- Conducting legal research throughout 50 States and international law concerning legal structuring and compliance relating to construction contracts and work performed by WGI
- Conducting legal research concerning Foreign Corrupt Practices Act for requirements of WGI in engaging in negotiations with international companies and corporations
- Conducting legal research concerning the Sarbanes-Oxley Act and research concerning corporate governance relating to duties owed to shareholders
- Conducting legal research concerning various SEC rules and regulations
- Assisting counsel with preparation of presentations concerning corporate governance and requirements

***Professional Associations and Memberships***

- 2019 present: CARA Dilley Pro Bono Project – Dilley, Texas
- 2016 to 2018: Faculty Member National Institute for Trial Advocacy Training (NITA)
- 2015 to 2016: Utah Defense Lawyers Association, Board of Directors
- 2014 to present: Member, Alta Club
  - o 2016 to present: Membership Committee
  - o 2017 to present: Membership Committee Chair, Board of Directors
  - o 2019 to present: Board of Directors Executive Committee
- 2013 to 2017: Utah State Bar Litigation Section Executive Committee
  - o 2013 to 2017: Co-Chair of Judicial Outreach Committee
  - o 2014 to 2016: Chair of Quarterly Lunch CLE presentations
- 2006 to present: Member, Utah Minority Bar Association
- 2010 to 2016: Advisory Committee Board Member, KUED Utah PBS
- 2009 to 2016: Recruiting Committee, Strong & Hanni

# TAB 4



## **Proposed Language for Utah State Bar Well-Being Award**

- The Utah Legal Well-Being Impact Award

This Award recognizes and honors outstanding contributions to the mental, physical, and emotional health and well-being of members of Utah's legal community, and may be awarded to individuals, sections, committees, or organizations.

# TAB 5

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# Utah State Bar 2022 Survey

## Topline Results

December 2022

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# Overview

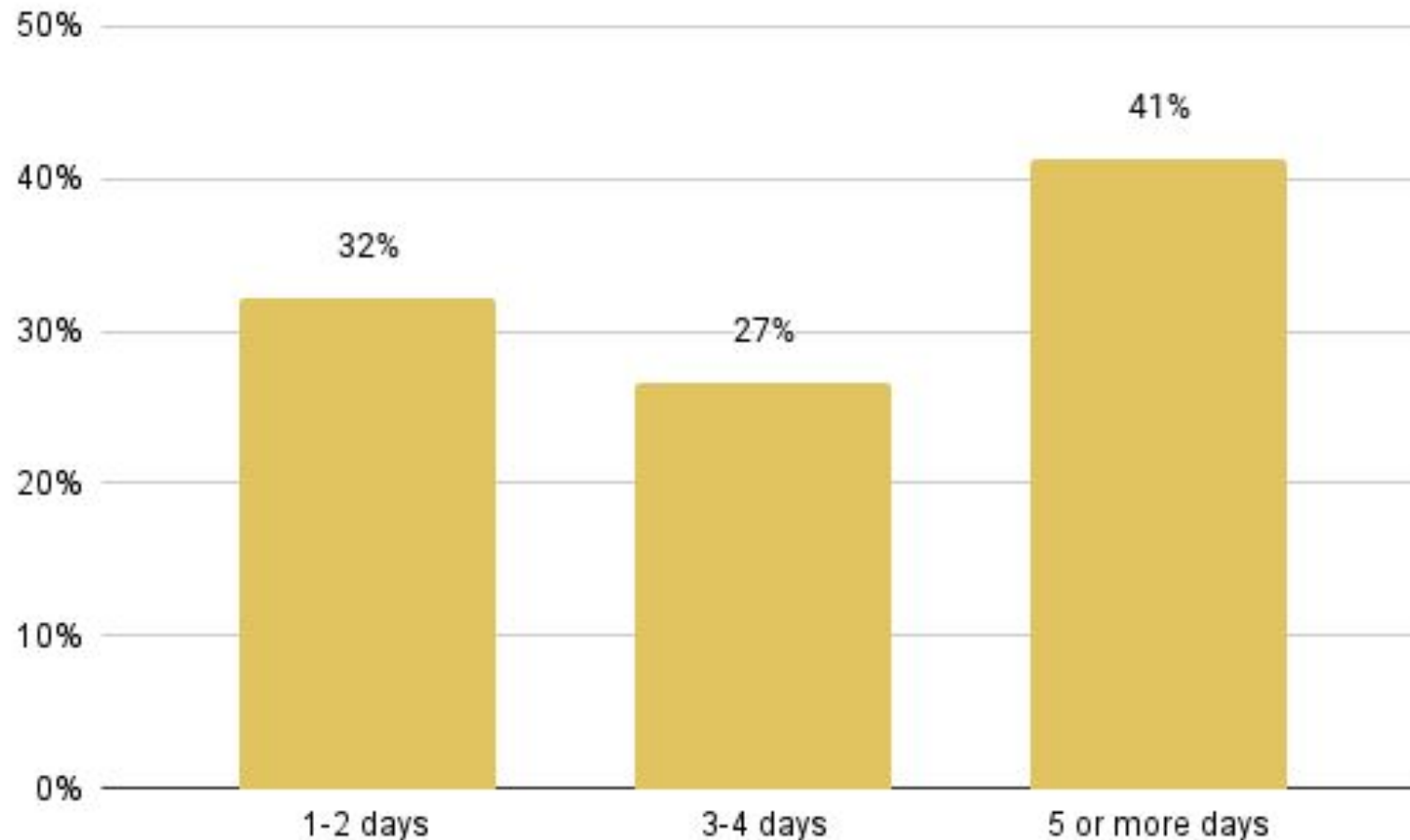
- Survey conducted between December 5 – 14, 2022
  - Sent to current member list (~8,600 contacts)
  - Anonymous
- Approximately 28% (2,400) of members participated
  - Emailed to members
  - Follow up reminders sent via email
- Additional survey promotion via social media and the e-bulletin
  - Social Media: 63 responses
  - E-Bulletin: 137 responses

# Goals

- Understand legal trends in Utah from membership perspective
- Compile member feedback about demographics, economics, and “post”-pandemic industry changes
  - Specific interest from committee around the virtual workplace and the Regulatory Sandbox
  - Improve service offerings for Utah State Bar members

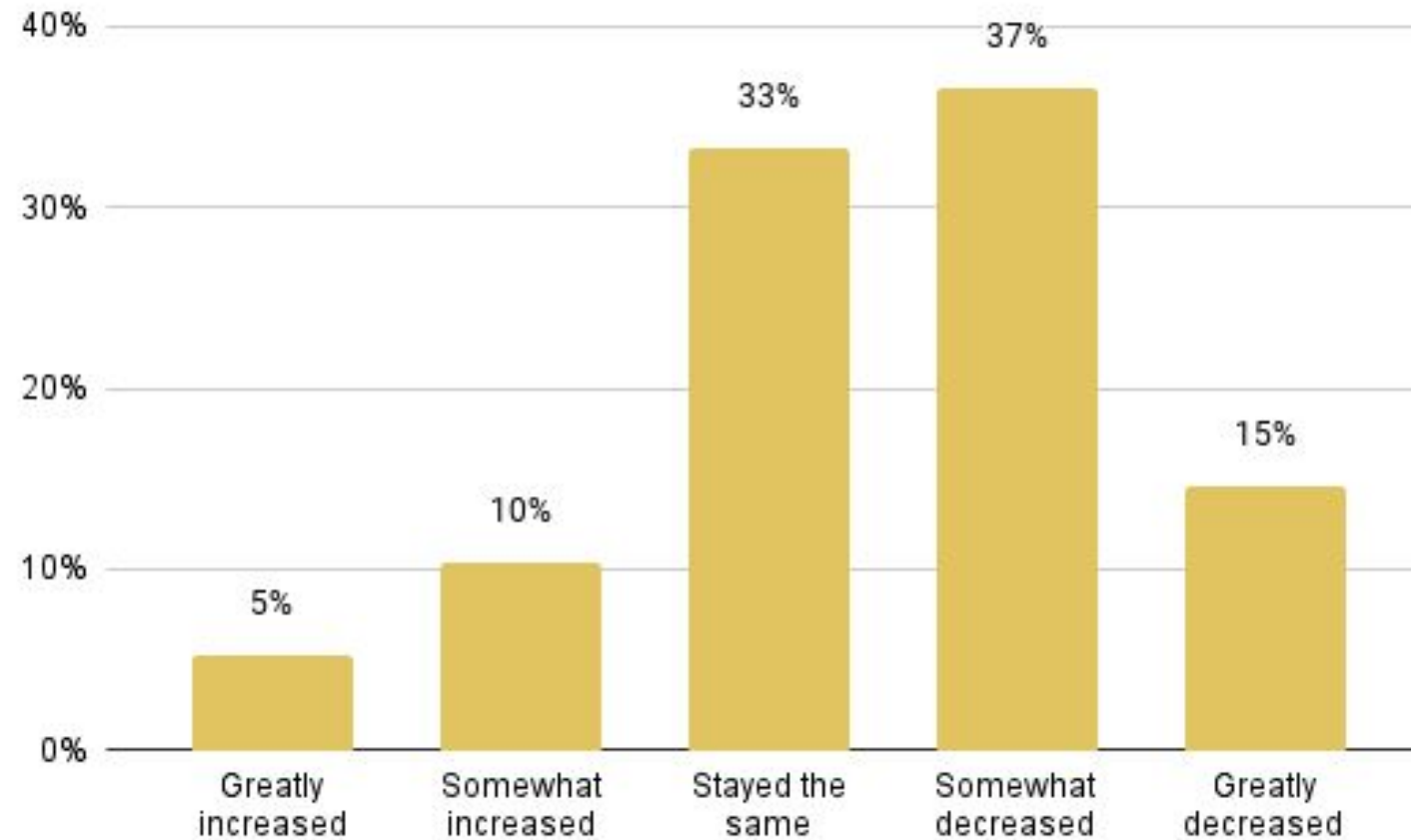
# Virtual vs In-Office Workplace

On average, how many days of the week are you working physically in-office (as opposed to virtually or remotely)?



# Collaboration and the Virtual Workplace

In your opinion, how has the virtual workplace impacted opportunities for providing and receiving mentorship in the legal profession?



# Collaboration and the Virtual Workplace

40

How could the Utah State Bar improve how you interact with your colleagues now that we are coming out of the Pandemic?

Example Answers:

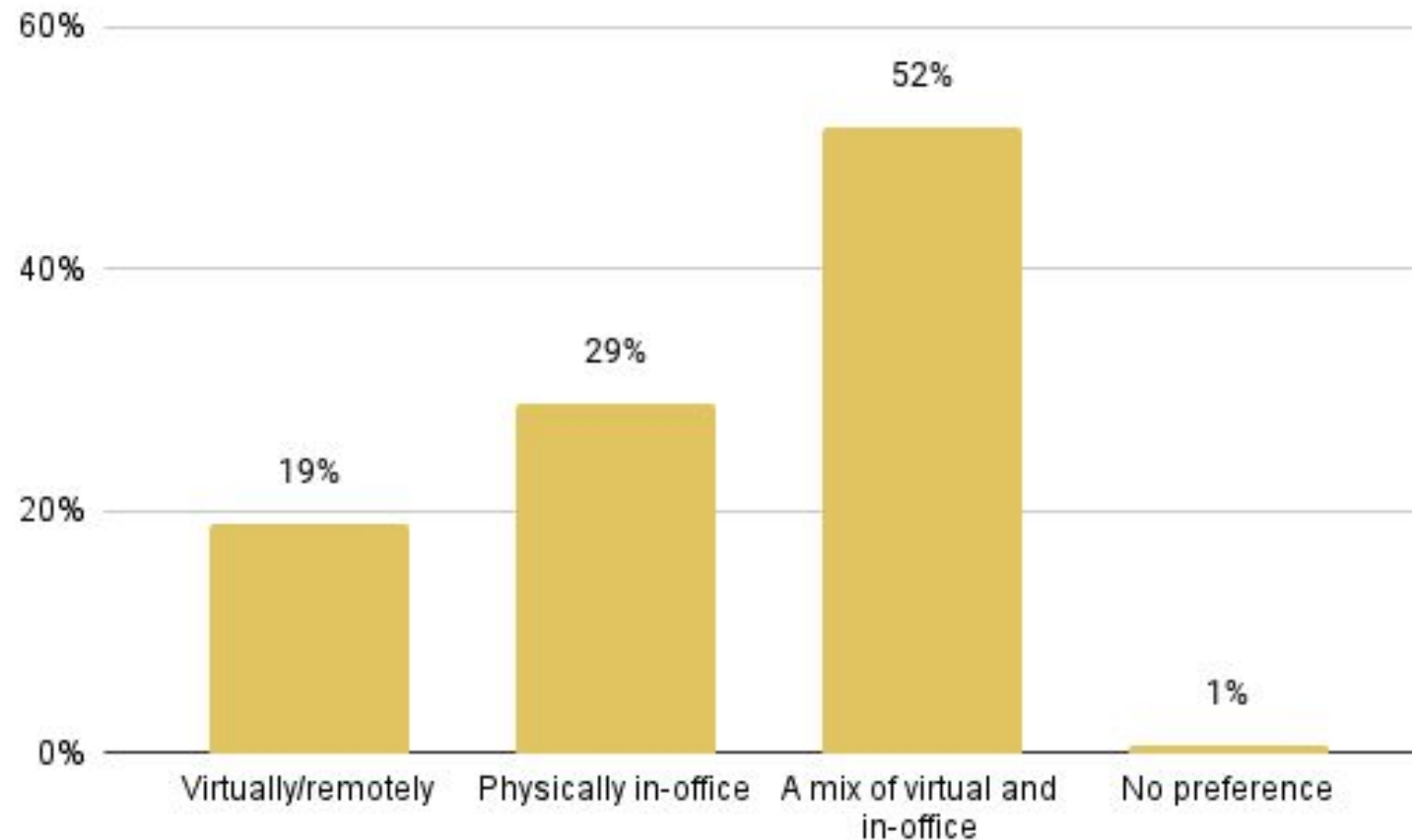
- Additional in-person events and CLEs to reconnect with legal community.
- Allow more virtual CLEs.
- More meet and greet events within bar sections
- Dual virtual and in-person options for CLE; commission meetings; and other events.
- Promoting the use of electronics and virtual hearings instead of trying to go back to the older ways of doing things
- Continue to offer a mix of in person, hybrid in person and remote, and fully remote events
- Virtual hearings have increased access to justice. As a criminal defense attorney my clients have all benefited. They are allowed to appear in court for a quick 10-15 min hearing, rather than missing half a day of work. Many of my clients are already financially struggling and usually do not have jobs that give PTO, or even all them to miss without being terminated. As an attorney I am more efficient and able to reduce my fee to my clients. I am very disappointed in how the courts have reverted back to in-person. Especially the lack of notice many courts have abruptly changed (back and forth admittedly). I do not see any reason that summary matters need to be held in-person. Many courts in more rural parts of the state are conducting hybrid hearings and they are working great. Ultimately, if the Bar could push the courts to adopt a hybrid system I believe most people would greatly benefit.
- I don't know that the Bar can do much. I think it's up to firms and attorneys. I appreciate that the bar offers virtual and in-person events and opportunities, and I think that should continue.
- More free CLE sessions provided by the employee assistance plan, to teach attorneys how to cope in healthy ways with stress, anxiety, etc.
- We should encourage digital interaction as it helps with work-life balance.
- Require at least one hour of in-person CLE per year. Host some free dinners or lunches for attorneys. Make us see each other face-to-face.
- Have more in person CLEs at a venue that can handle large crowds. We have out grown the Bar's building and parking lot.

View all answers [here](#).



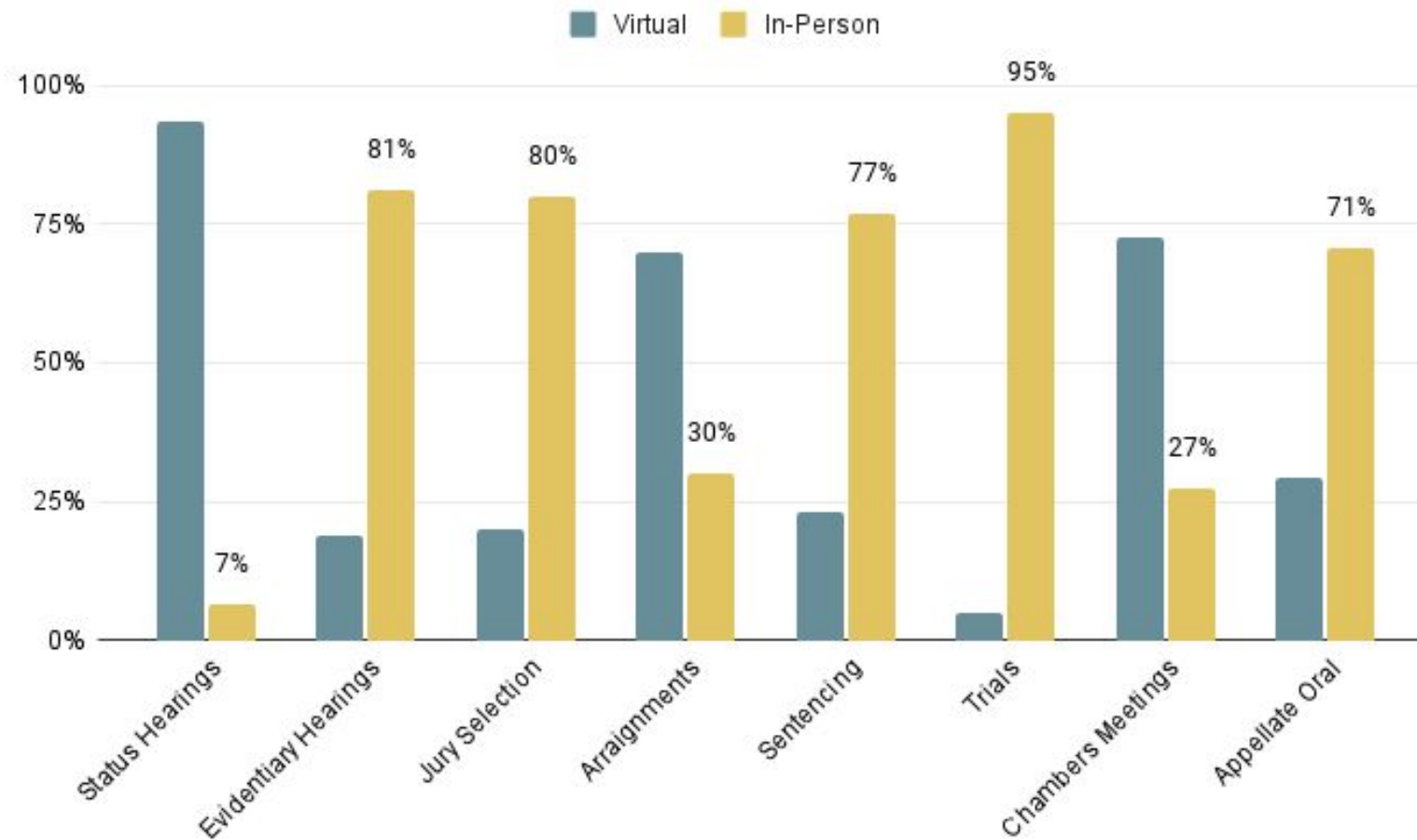
# Virtual vs In-Office Workplace

Do you prefer to work virtually/remotely or physically in-office?



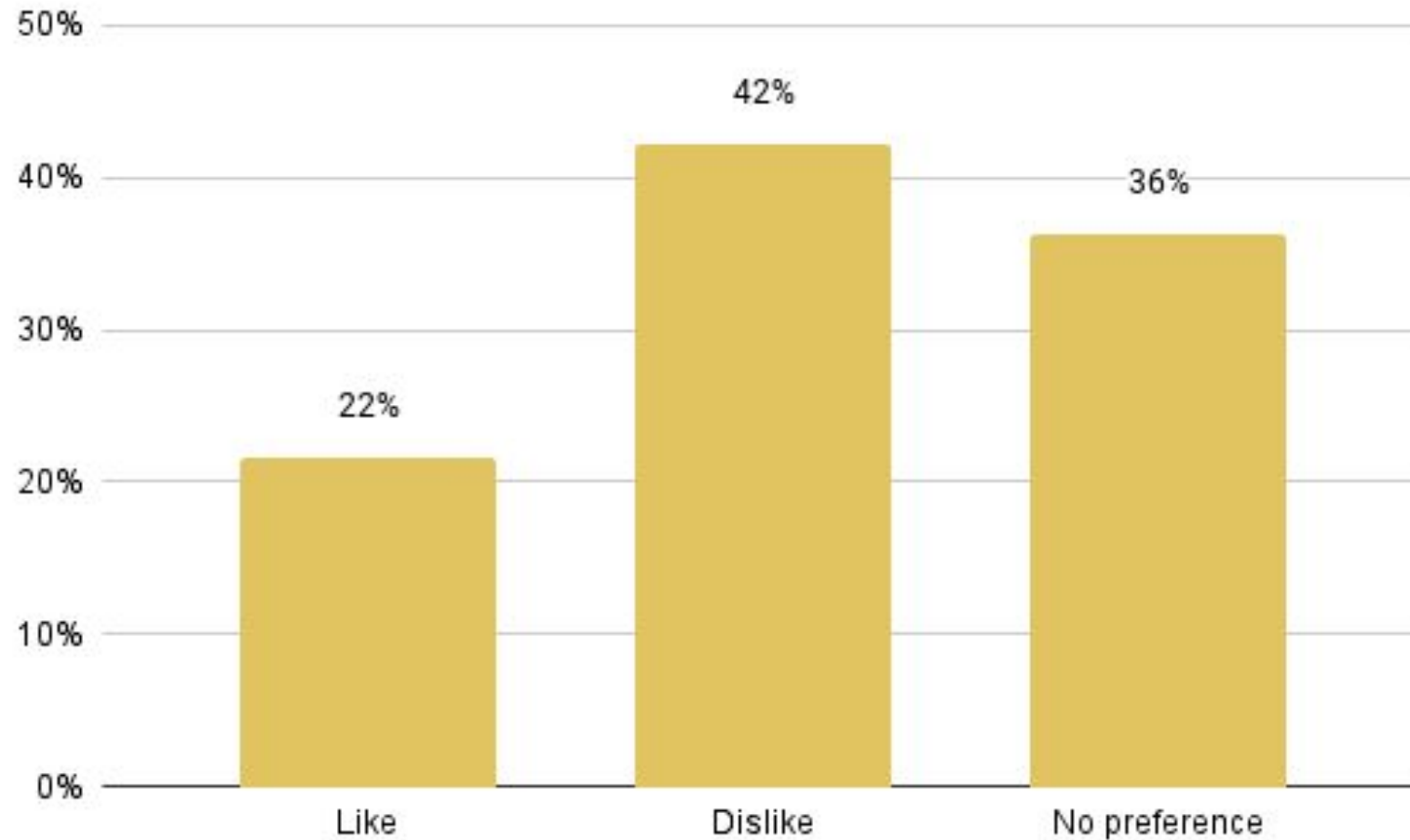
# Court Services

Thinking about the changes you have observed during the pandemic in the courts, please indicate if you think these services are best handled in a virtual environment or an in-person environment?



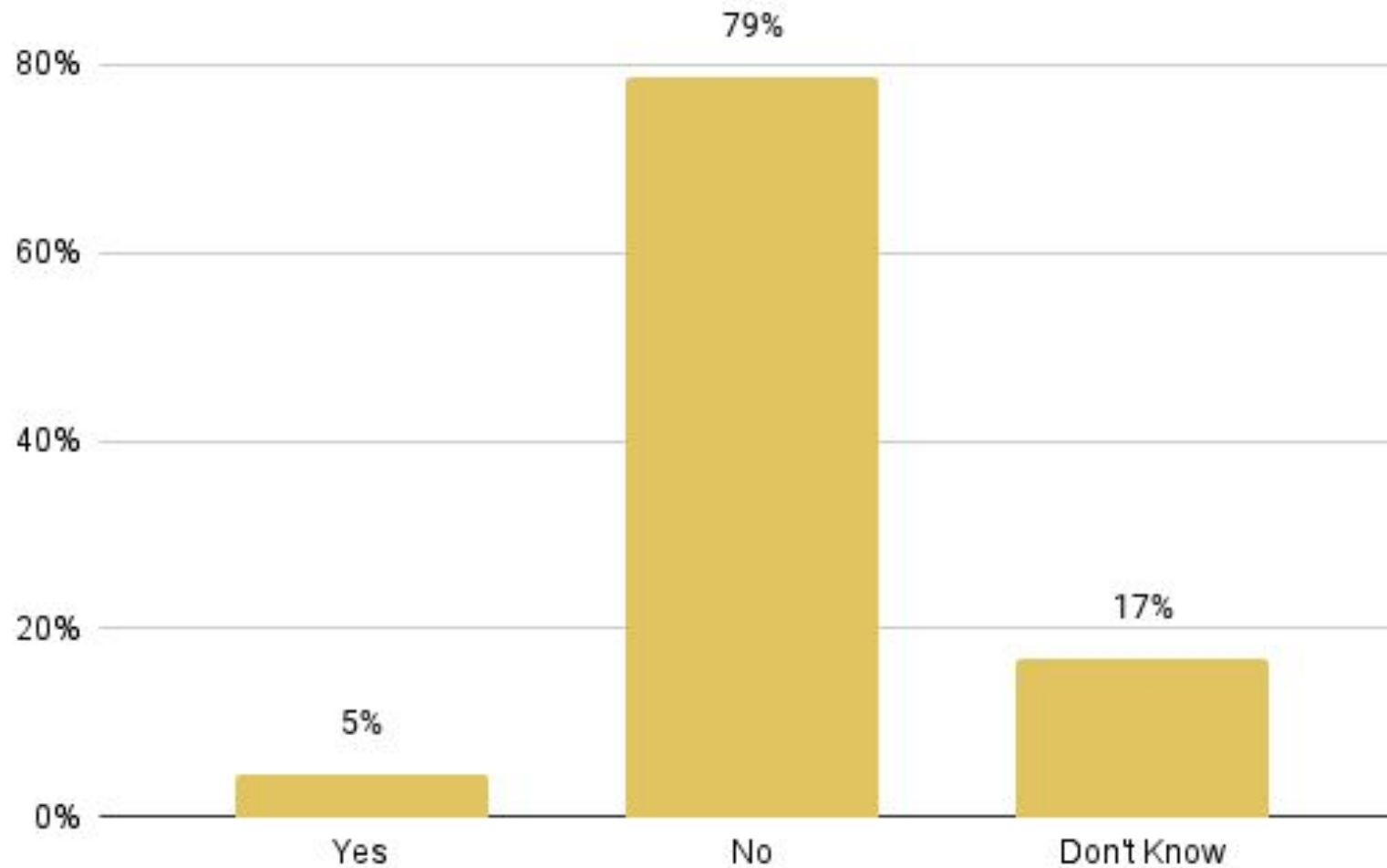
# Regulatory Sandbox

Do you like, or dislike, the idea of the Regulatory Sandbox?



# Regulatory Sandbox

Do you (or an entity you work for/with) participate in the Regulatory Sandbox?

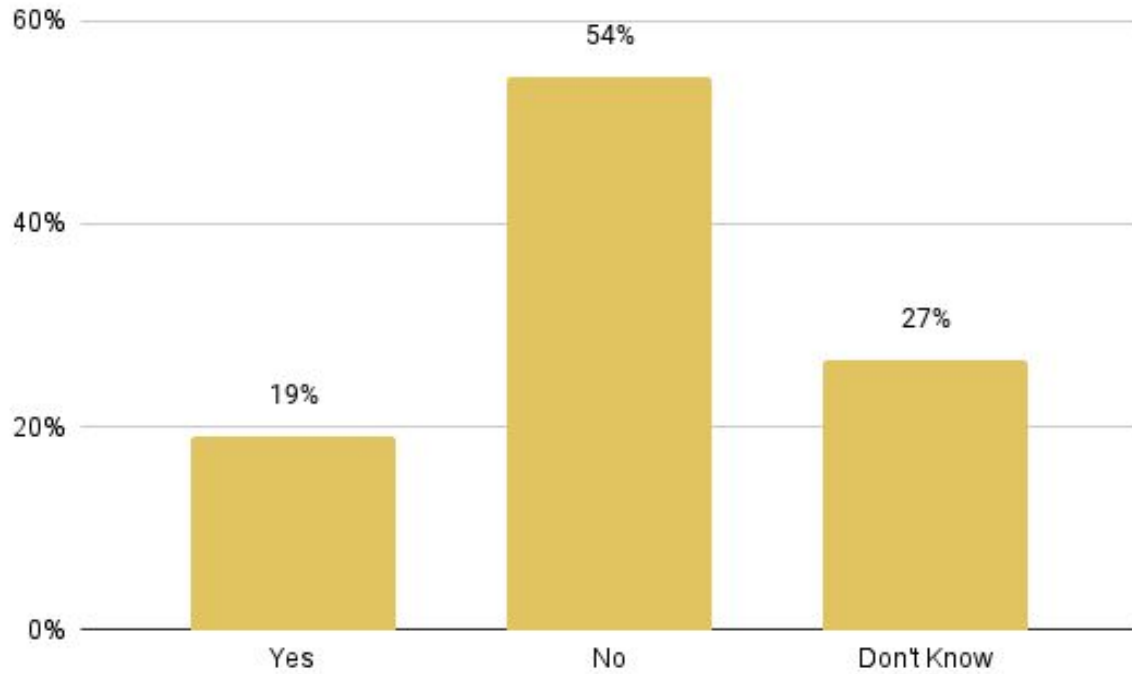


# Regulatory Sandbox

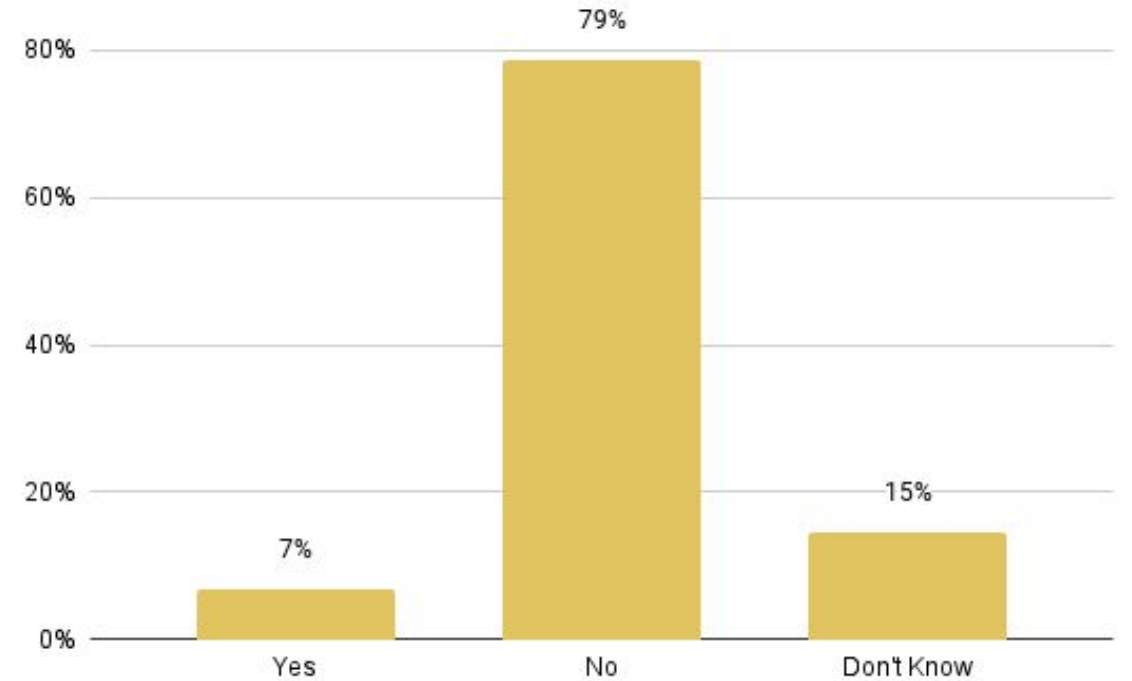
45

Would you be in favor of a portion of your licensing fee being used to pay for the operating expenses of the Regulatory Sandbox if:

Your licensing fee stayed the same?



Your licensing fee increased?



# Regulatory Sandbox

How has the Regulatory Sandbox positively or negatively affected your practice?

Example Answers:

- Deregulation of ethical rules by these non lawyers has led to more aggressive solicitation that has decreased public opinion of the bar
- Still evaluating. But overall, so far I do not like the changes. Non-attorneys do not fully understand the practice law and the rules. The changes have devalued the Juris Doctorate degree and the history of the profession.
- Positively affected. Can send clients to those entities to receive more on-point help and allow our team to focus on more complex matters.
- The flexibility has been positive
- Worried that tech companies will ruin the personal injury market. These companies will likely provide a terrible service to their clients/customers because personal injury litigation cannot be automated to be more cost effective.
- I had a negative experience. Nonlawyers inherited an interest in a prior firm I worked for; due to the sandbox they were allowed to maintain ownership interest, only to sell and cause a host of issues and people (like me) searching for new employment.
- We participate in the Sandbox and I have been able to refer my own clients within our company to the realtors, financial planners, and estate planners.
- It has the potential to create large, national firms who seek to drive out competition from the solo practitioners and small firms.
- It hasn't affected my practice, because the sandbox is meant to fill the gap for people who normally don't engage a lawyer because they can't afford it. I think this helps fill in that gap for everyday people and we have a responsibility as attorneys to support it so that we have a better justice system.
- I am not currently affected, but I see the sandbox as the best way to finance law offices, large and small, and to minimize attorney fees and costs for clients.
- To allow corporations, who are not subject to fiduciary duties/rules of professionalism and civility, to have ownership of law firms and push profits over client's best interests is a bad idea. The "data" that is being collected and used to promote this project is being interpreted by those who have a self-interest in continuing this experiment. I applaud the notion of access to justice, and there may be areas of the law where these concepts may be able to improve access/affordability to justice.
- We are able to provide a greater service to the client which is more affordable than having to have separate professionals for each aspect of a clients personal, legal and financial matters. The clients are ultimately pleased with the services provided by a sandbox firm.

View all answers [here](#).

# Utah State Bar Services

The Utah State Bar launched a new website in September 2022 (UtahBar.org). Are there any suggestions you have for the Bar's website?

Example Answers:

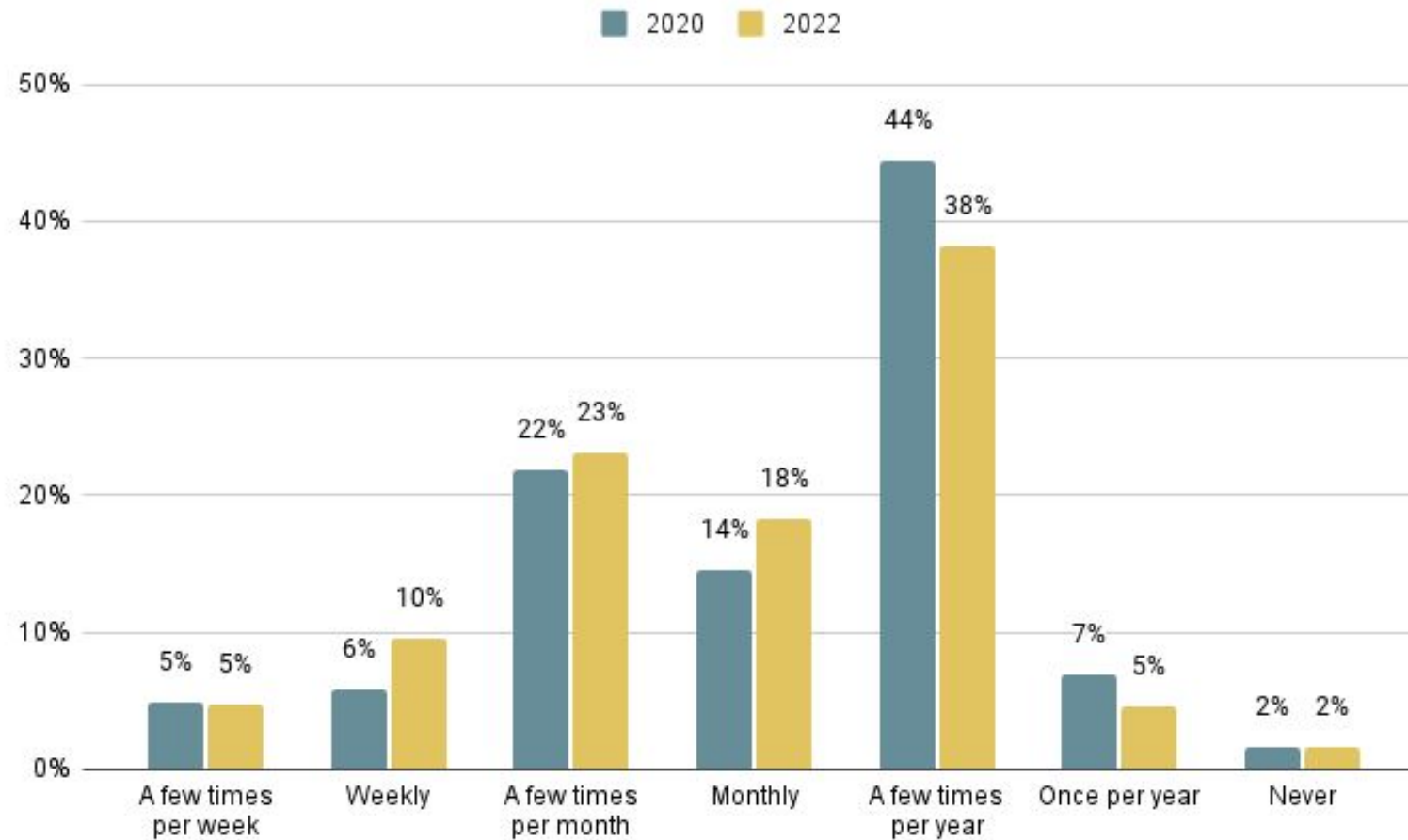
- Looks good
- I am still getting used to it.
- Keep the website as it was for bar members once we log-in to our practice portals. Had to search for a few minutes the other day just to find recent appellate opinions.
- I am thankful for the new website. I appreciate the time and effort many have devoted to making it beautiful, informative, and easy to navigate.
- My attempts to access resources through the bar's website are not always successful so it's not a resource I turn to regularly.
- Tough to navigate; some instructions are difficult to understand/follow--particularly reciprocity instructions.
- It's better than the old website. Still, the images/graphics take up too much space. It could be condensed more to make it easier to navigate.
- I would recommend not having 'blog' posts right on the first page.
- No. Honestly, I hadn't noticed the change until this survey pointed it out. But the MCLE stuff has always been super confusing.
- The interface of the home page is great- similar updates to the practice portal would be helpful.
- It's a bit wordy, so making it simpler for mobile devices could be tricky but yield high dividends. I love all the options that are easily visible now. I haven't been able to see most of these resources before. But I would say only to keep the functionality and simplify the UI.
- Would like to see CLE and MCLE credits more upfront and accessible to be able to track and make sure I'm in compliance. Seems like it's always a bit of a treasure hunt on the site with being kind of a clunky interface.
- Go back to the old website. The new website is more flashy but not more helpful.
- No. I think it is a great improvement.

View all answers [here](#).



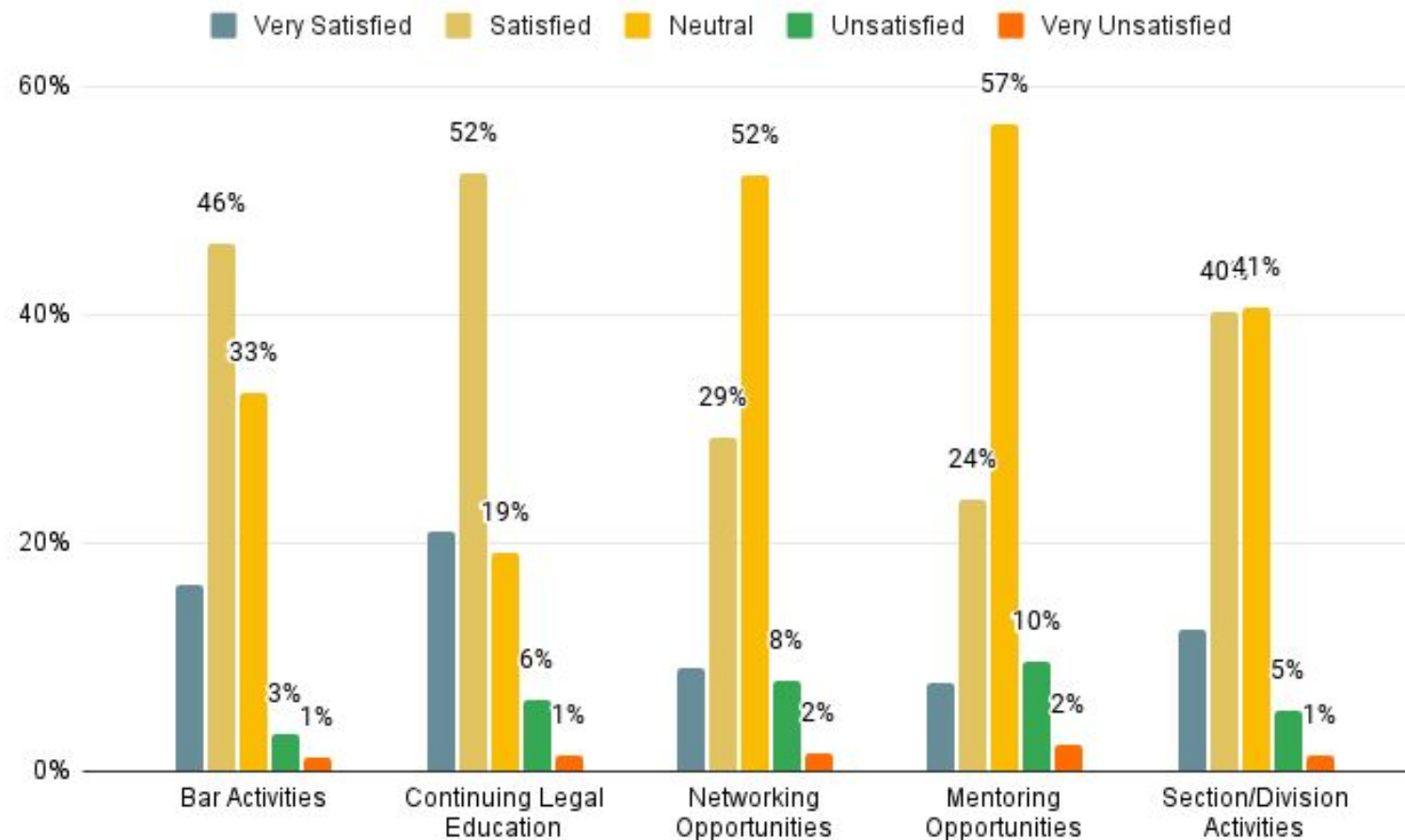
# Utah State Bar Services

Which of the following best describes how often you have visited the Bar's website (UtahBar.org) in the last year?



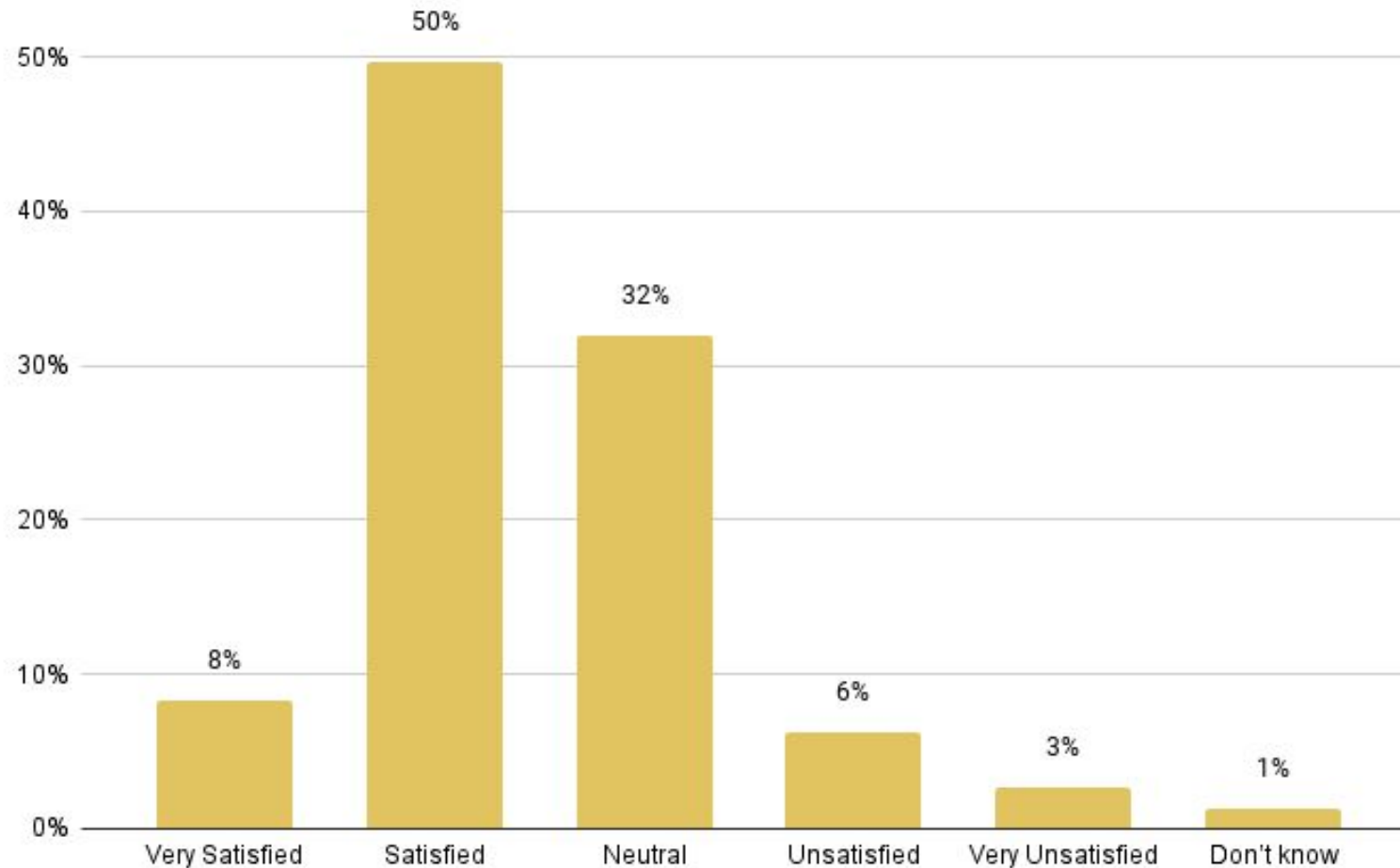
# Utah State Bar Services

Please rate your satisfaction with the Bar's communications to its members concerning the following:



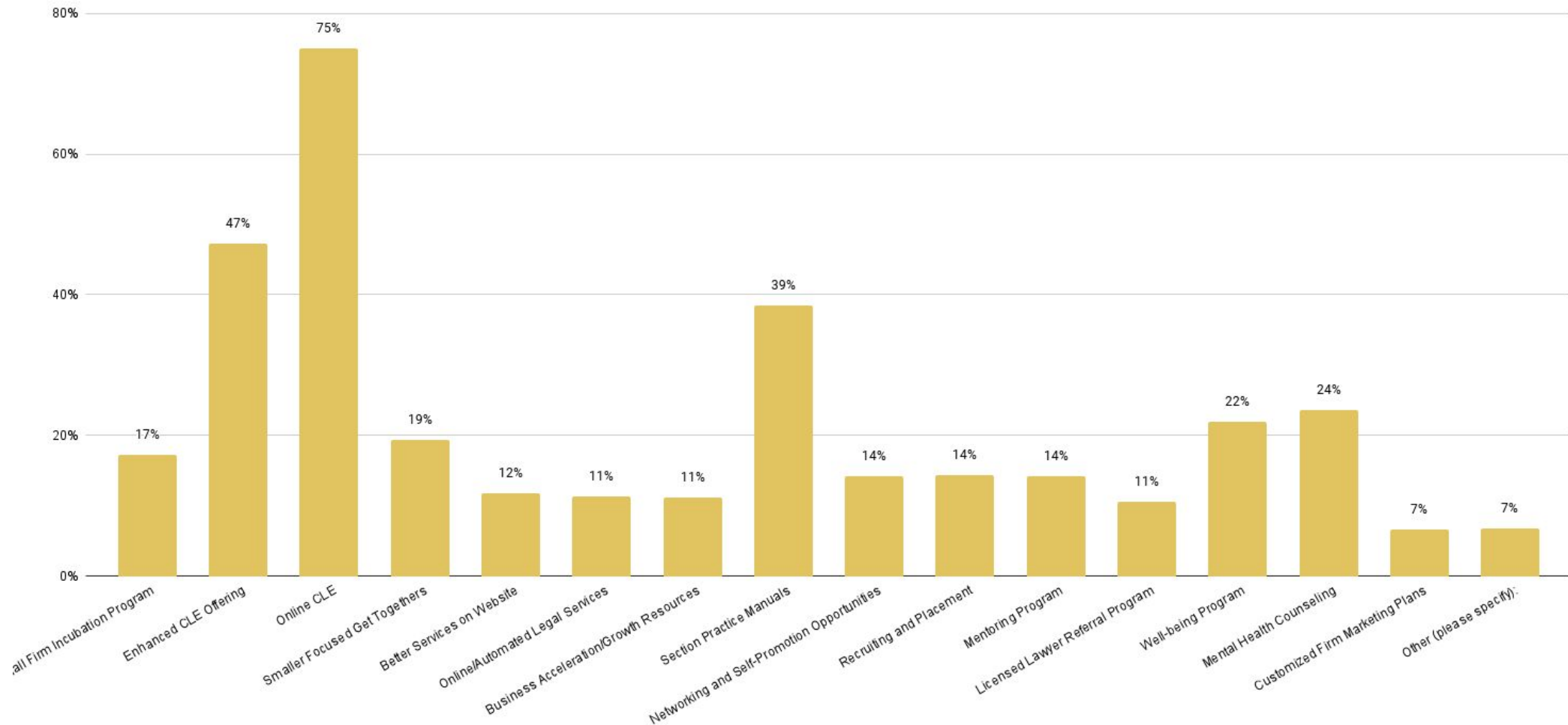
# Utah State Bar Services

Please rate your satisfaction with the Utah State Bar's current services and offerings.



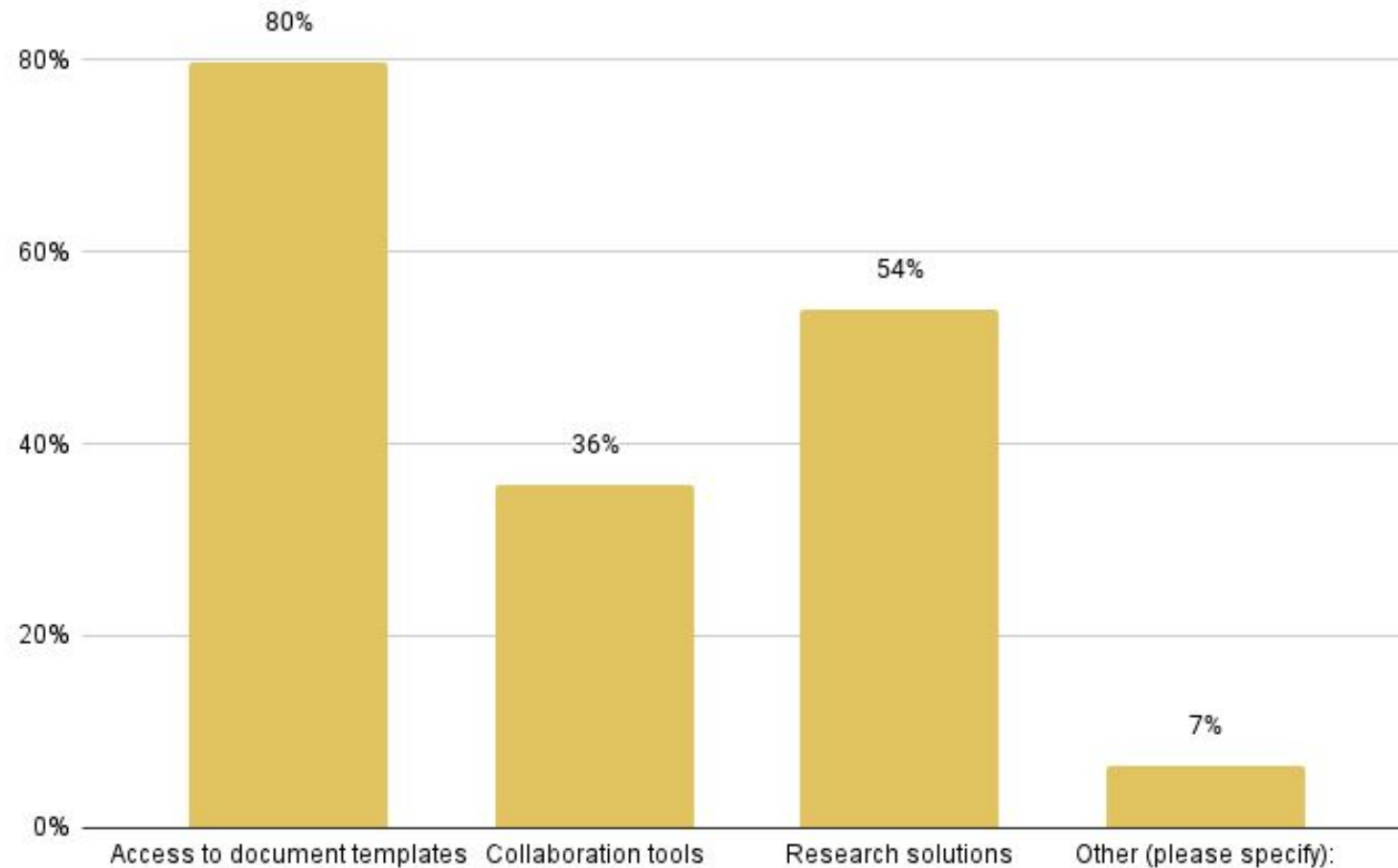
# Utah State Bar Services

Which of the following services and offerings would you be most interested in? Please select all that apply.



# Utah State Bar Services

With innovation and automation rapidly advancing in the legal profession, which services or solutions could the Bar provide to help your practice or your clients? Please select all that apply.



# Utah State Bar Services

Is there anything you would like added or changed to the Bar Journal?

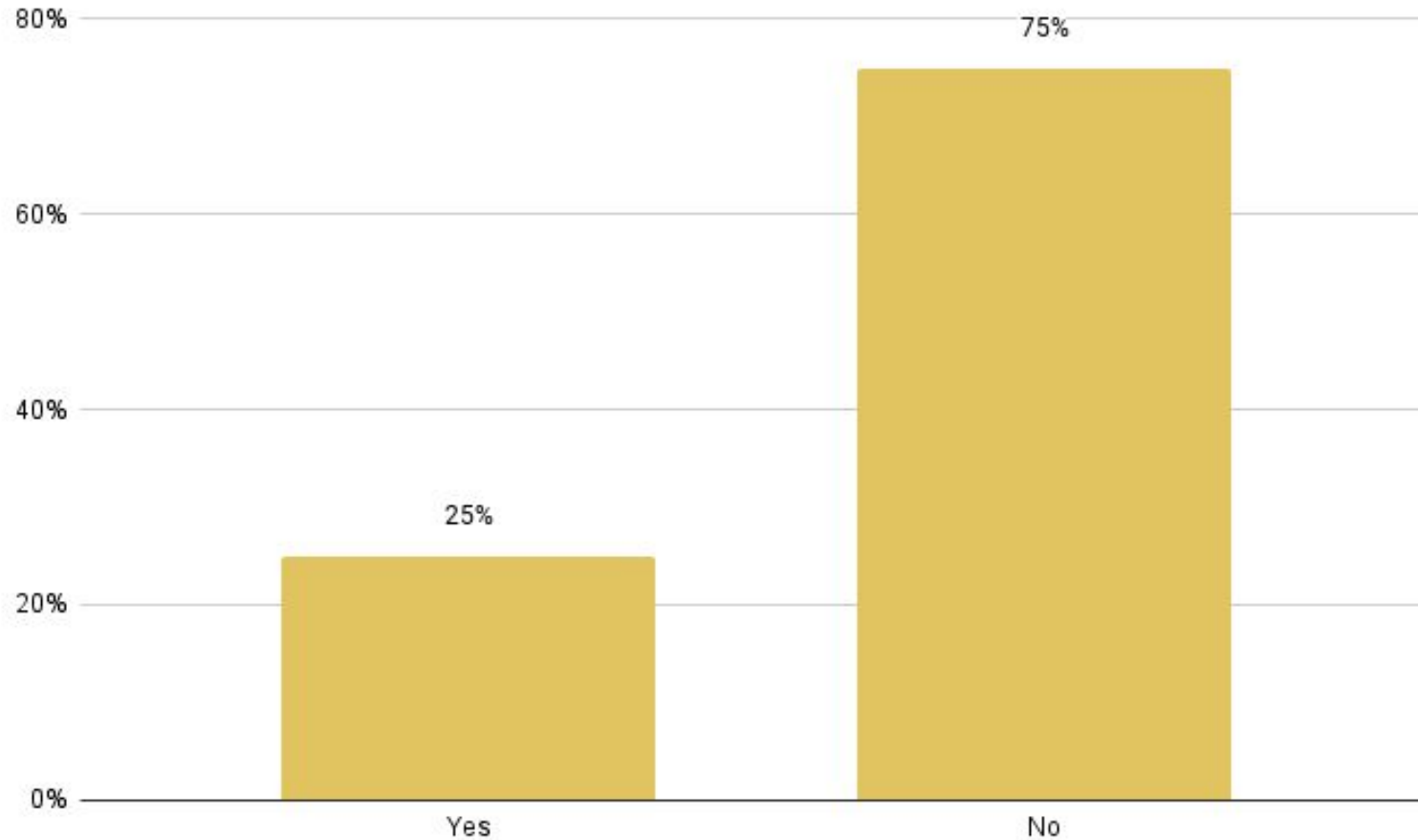
Example Answers:

- Attorney profiles
- More articles about legal issues.
- I have enjoyed the expanded focus in article topics to include more in-house content. Historically, the journal seemed heavily tilted towards litigation content.
- More Solo / small practitioner stuff
- Articles for CLE credit similar to Nevada
- An electronic version that is simple to navigate.
- Job applications availability or contract work section
- More information from the courts and judges and commissioners and cases. Lets stick to the facts. More about issues in the profession and the latest cases and how they affect each area of practice. I don't think there should be as much emphasis on non-practice areas.
- Too many ads!
- Good job on the Journal.

View all answers [here](#).

# Utah State Bar Participation

Do you regularly participate with a local Bar organization (i.e. Southern Utah Bar, Cache County Bar, etc.)?





# Utah State Bar Participation

Why have you decided to attend, or not attend, a Bar convention?

Example Answers:

- The topics do not interest me
- See colleagues and get CLE
- I don't like traveling, driving, or being in a room with lots of people.
- Because live CLE doesn't carry over to next years reporting requirements, which now make a full CLE Convention wasteful.
- Enjoy summer out-of-state conventions in Sun Valley, and enjoyed San Diego this year.
- I was a first year attorney last year, and I was advised that the convention was not particularly useful.
- I attend to see friends, but get very little value out of the event.
- cost, time, location, content
- Too expensive and topics are often interesting but not relevant to my career. I just can't justify the cost or time.
- Not aware
- They can be fun and are a good way to get CLE. But I don't always want to spend vacation time with other lawyers.
- I like the interaction with other lawyers and the programming is always good.
- Mostly for the continuing ed classes. Very good content and broad spectrum of interest
- They are expensive considering the limited amount of CLE credit you can get for attendance.
- Out-of-state bar conventions are a terrible idea for small firm practitioners. The Fall Forum & spring convention are useful.
- Subject matter and to reacquaint with fellow bar members.

View all answers [here](#).

# Utah State Bar Participation

Do you have any suggestions for how the bar could improve the Bar conventions?

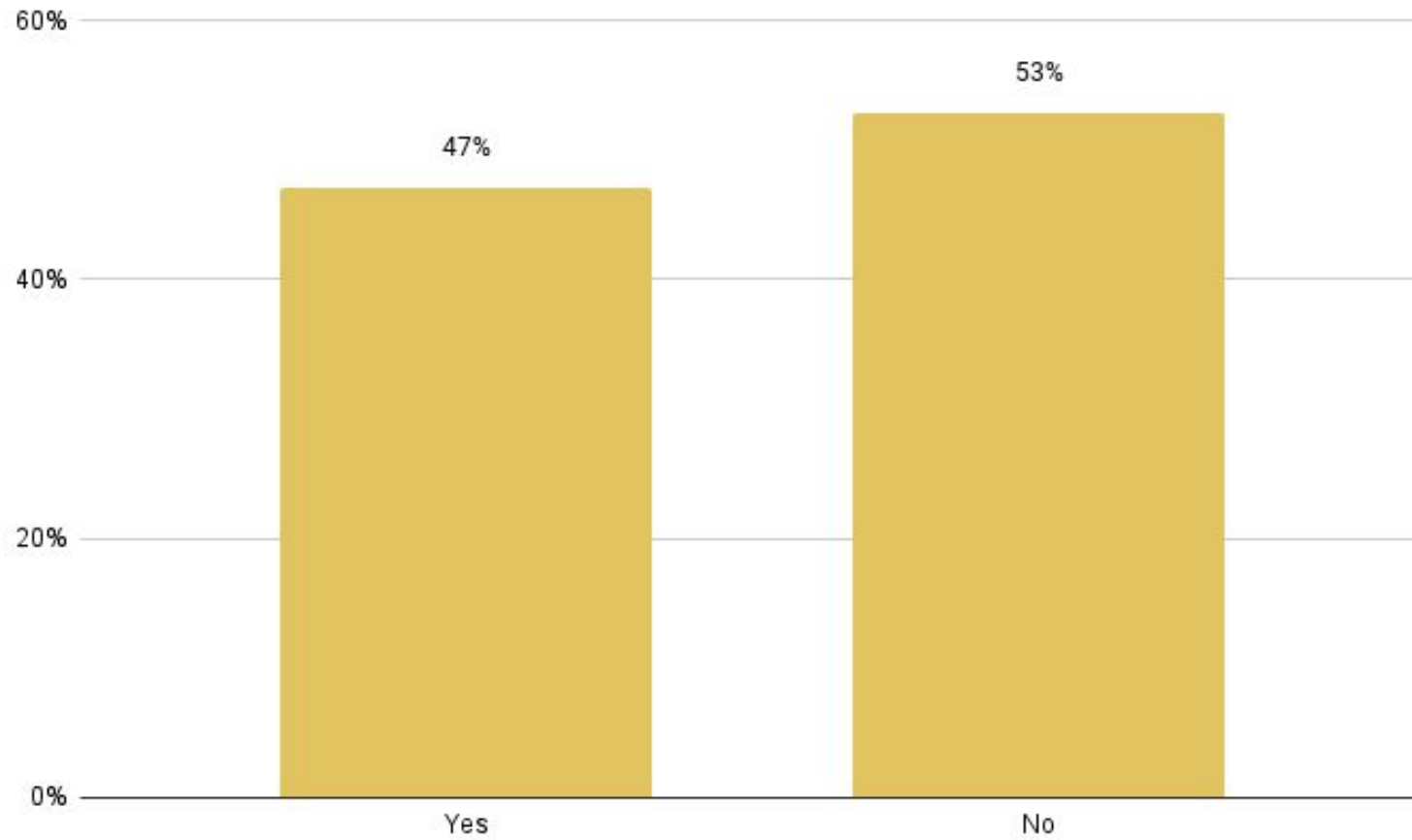
Example Answers:

- Provide more notice/details ahead of time.
- Provide the option to attend virtually.
- There should be a few sessions devoted to what might be called theory, i.e., not every session be a practice guide; something on questions of legal theory or other intellectually stimulating.
- Perhaps more central locations and shorter time.
- I think the cost of the conventions is becoming unaffordable. I believe that the convention should provide discounts to solo attorneys for them to attend. That would be an incentive to increase attendance.
- Provide more online live CLE for those who do not attend. My practice is so limited that attending a whole conference for one or two sessions just does not make sense. If I could still participate in those sessions without having to attend the conference, that would be very beneficial.
- Provide a-la-carte options; incorporate more outside and family activities.
- Improve online interaction experience and opportunities for those who either can't or do not want to participate in person with the bar conventions
- I'd suggest circulating a list of proposed topics to members of the Bar so that we can all vote on them.
- People are looking for an "experience" and not just another CLE. People can find CLE anywhere.
- Give scholarships/discounts so more public service/government attorneys can afford to attend.

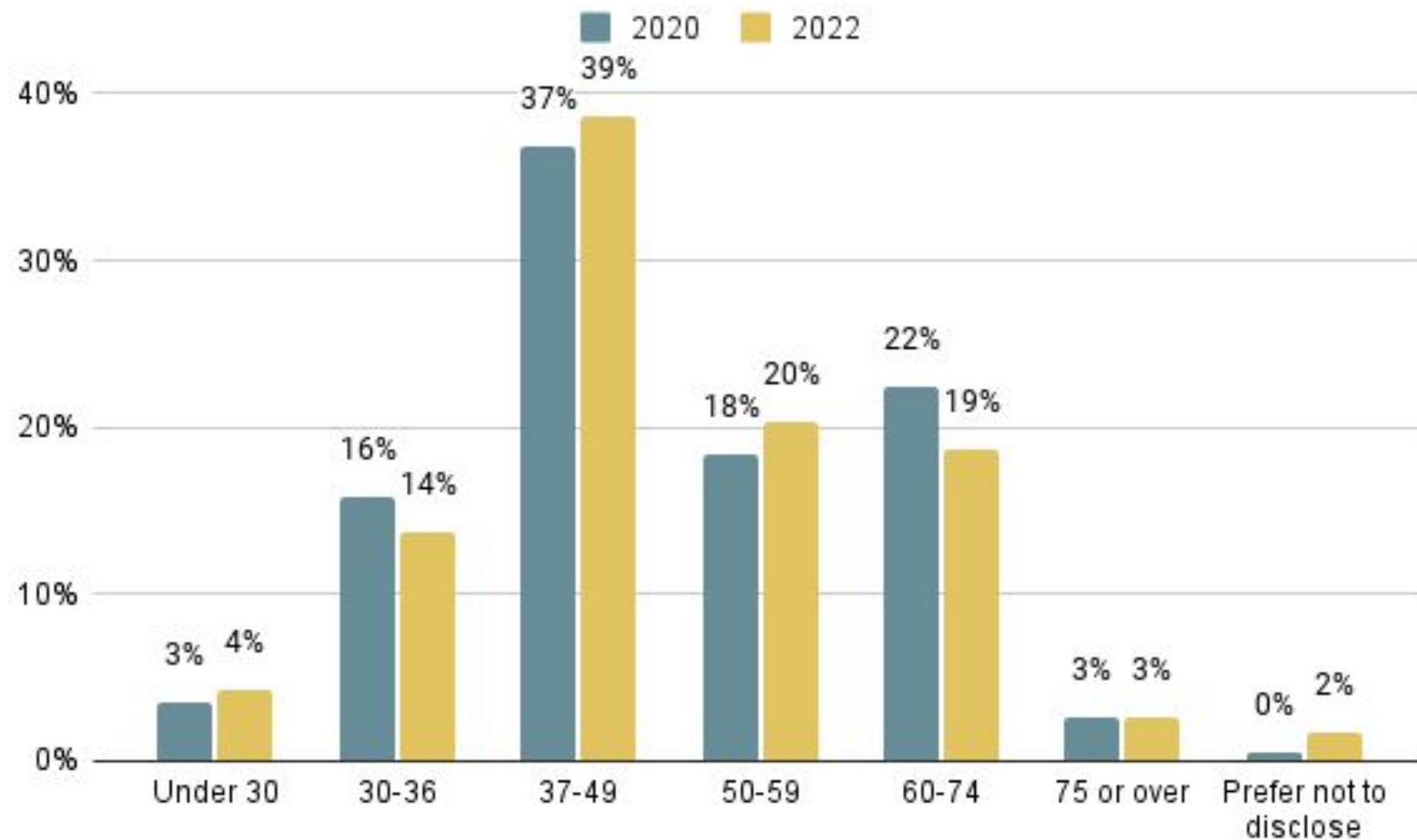
View all answers [here](#).

# Wellbeing

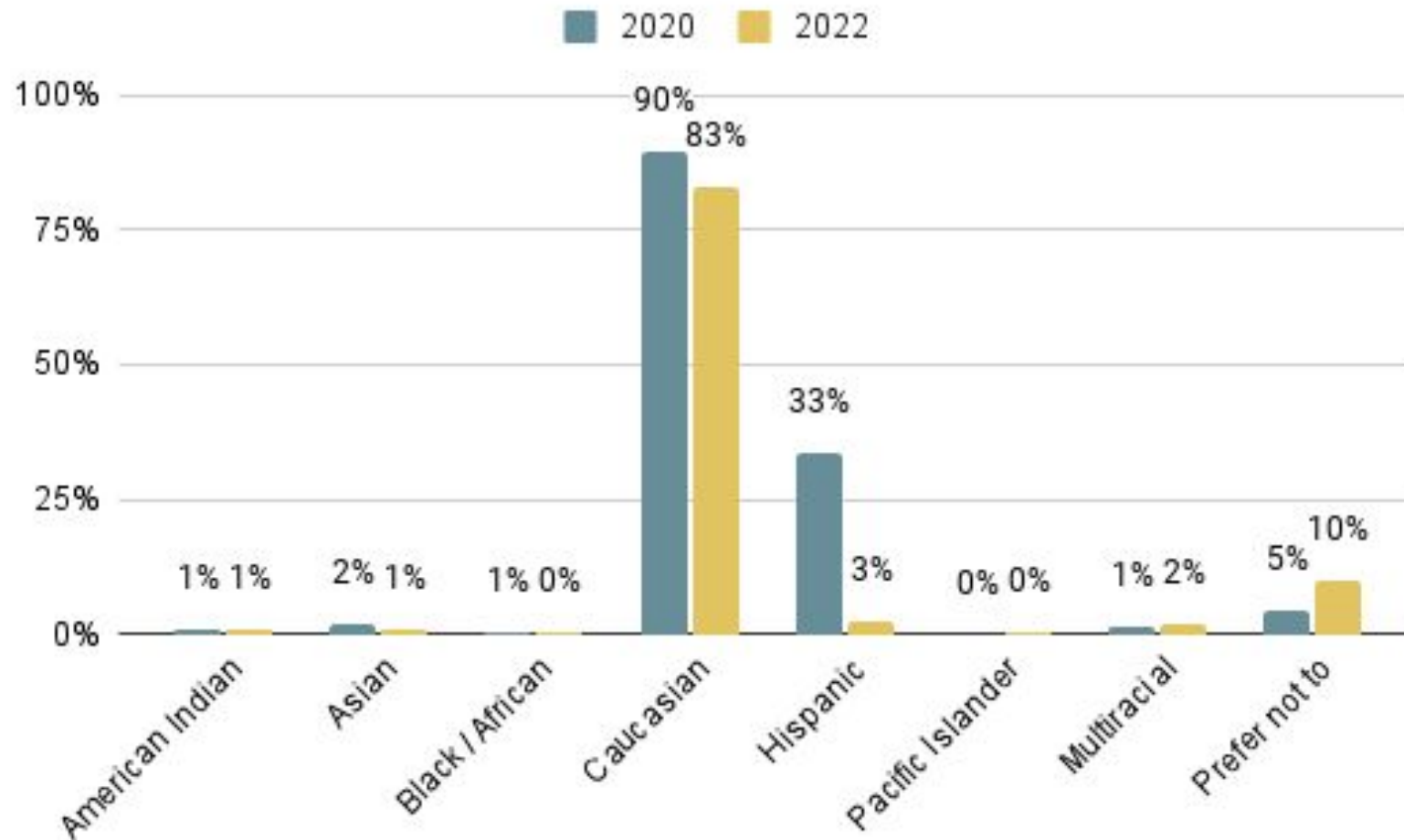
Would you regularly use a wellbeing app (providing interactive access to meditation, exercise, breathing, and other wellbeing information) if the Bar paid for it?



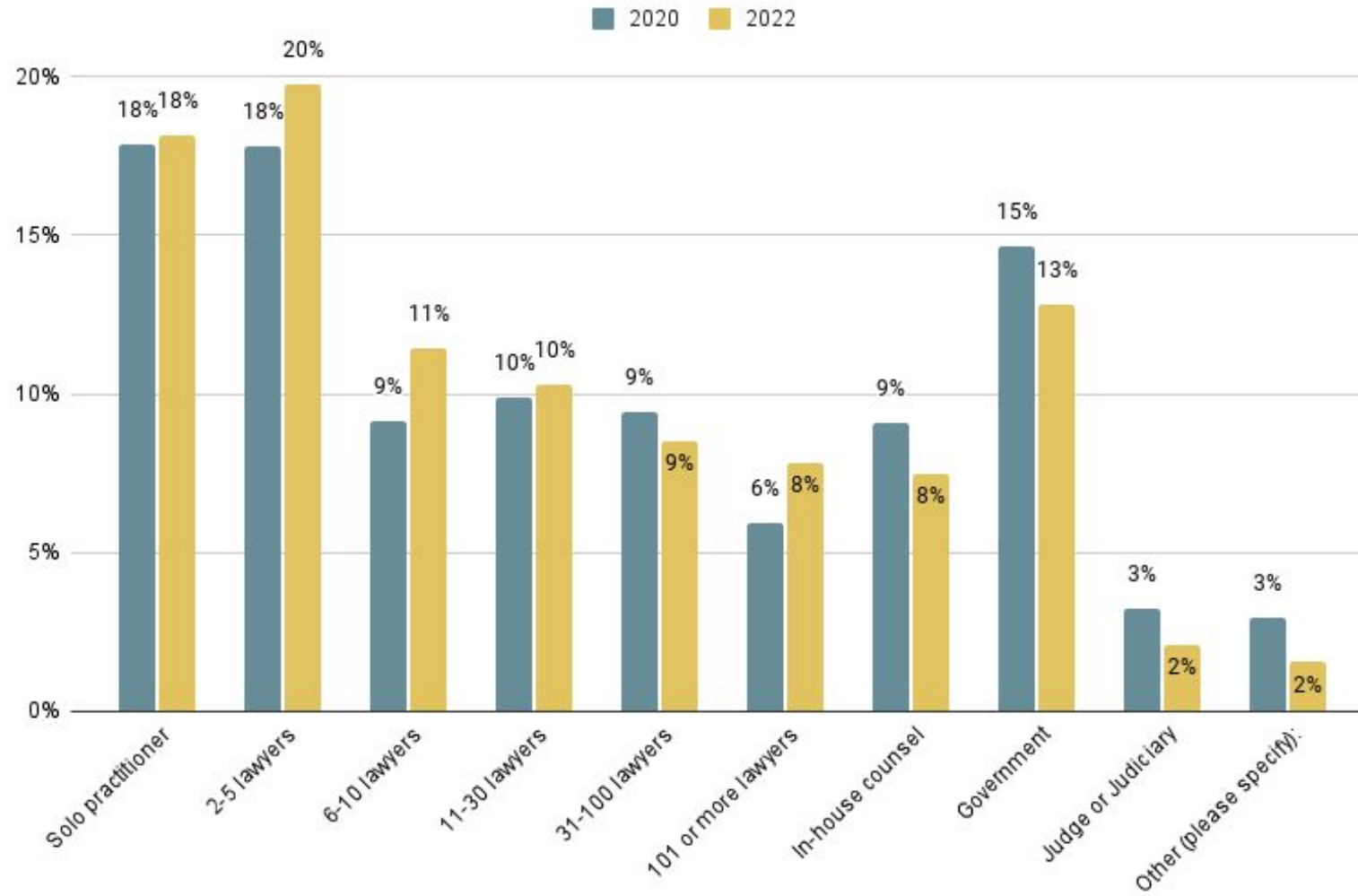
# Age of Membership



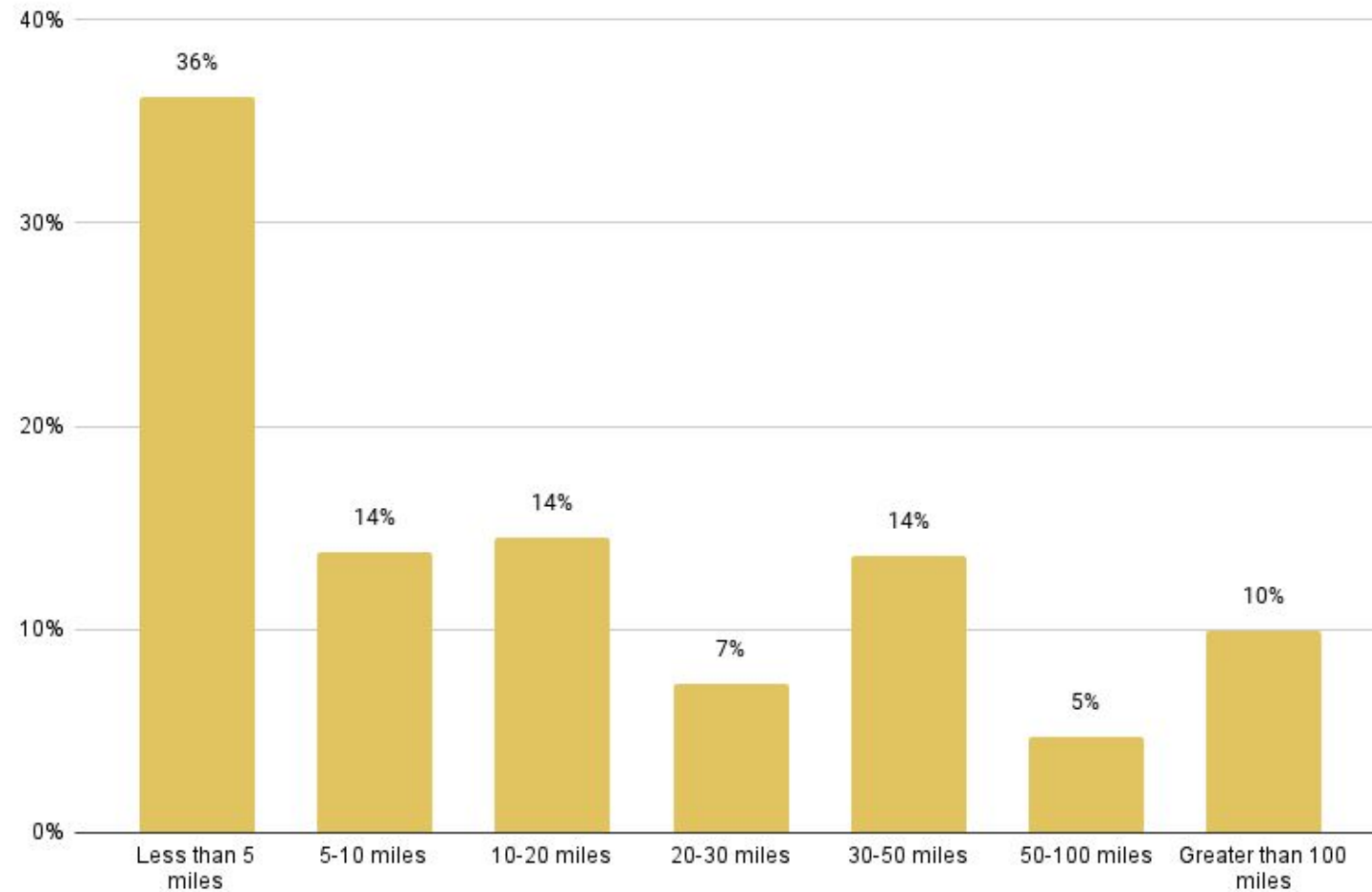
# Ethnic Background of Members



# Size of Law Firm or Organization

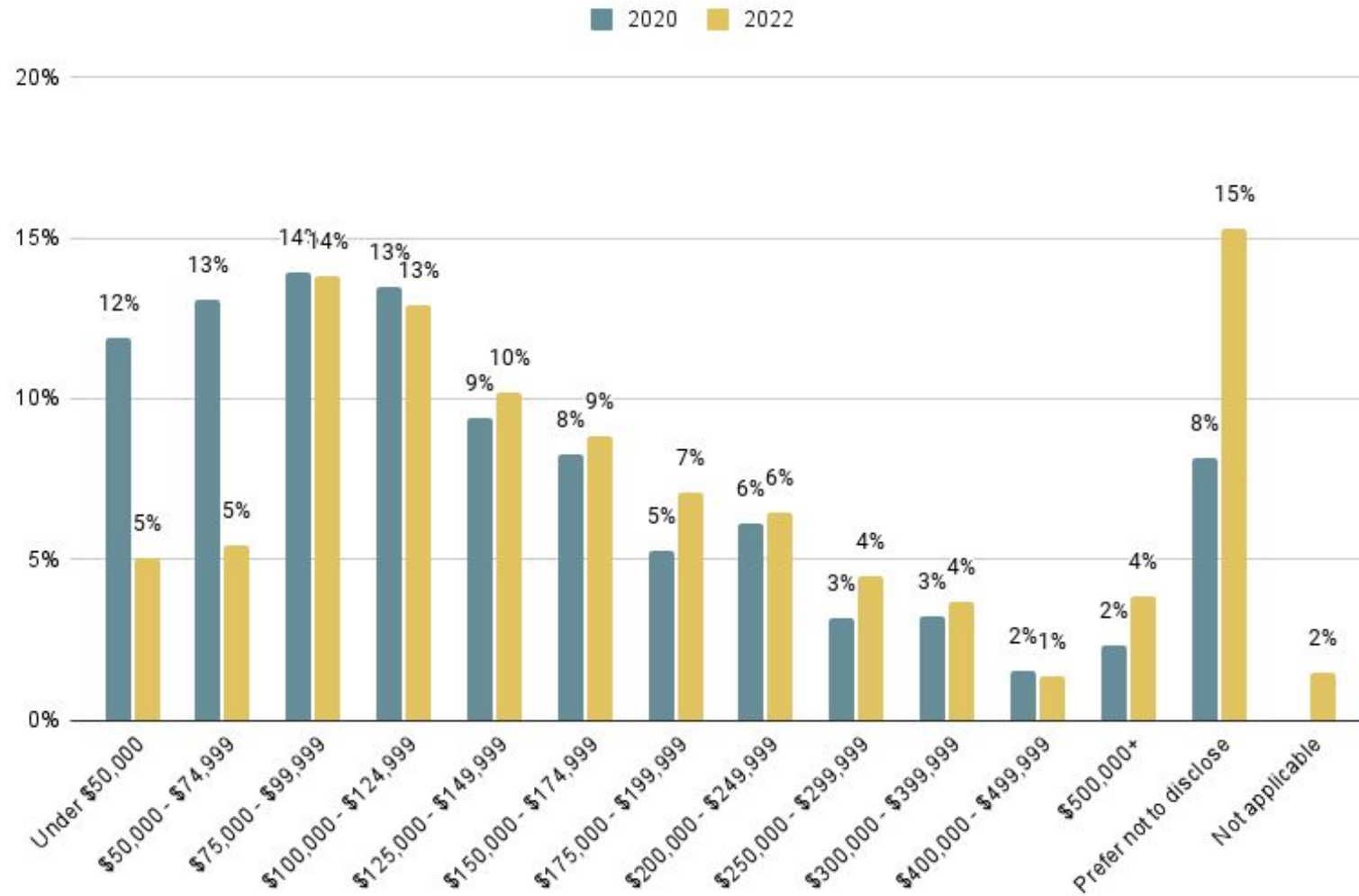


# Distance from Utah State Bar's Offices

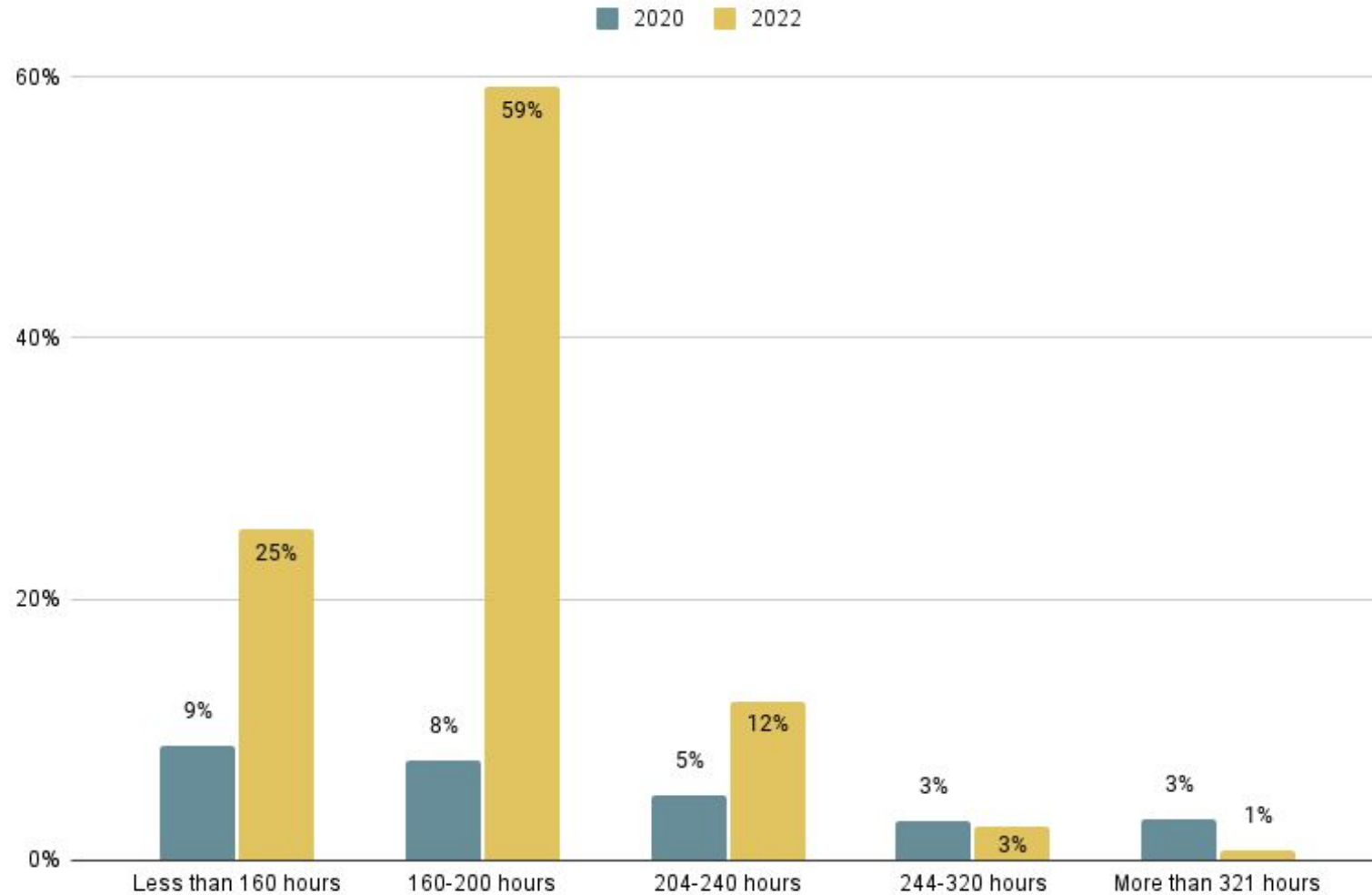




# Annual Law-Related Compensation

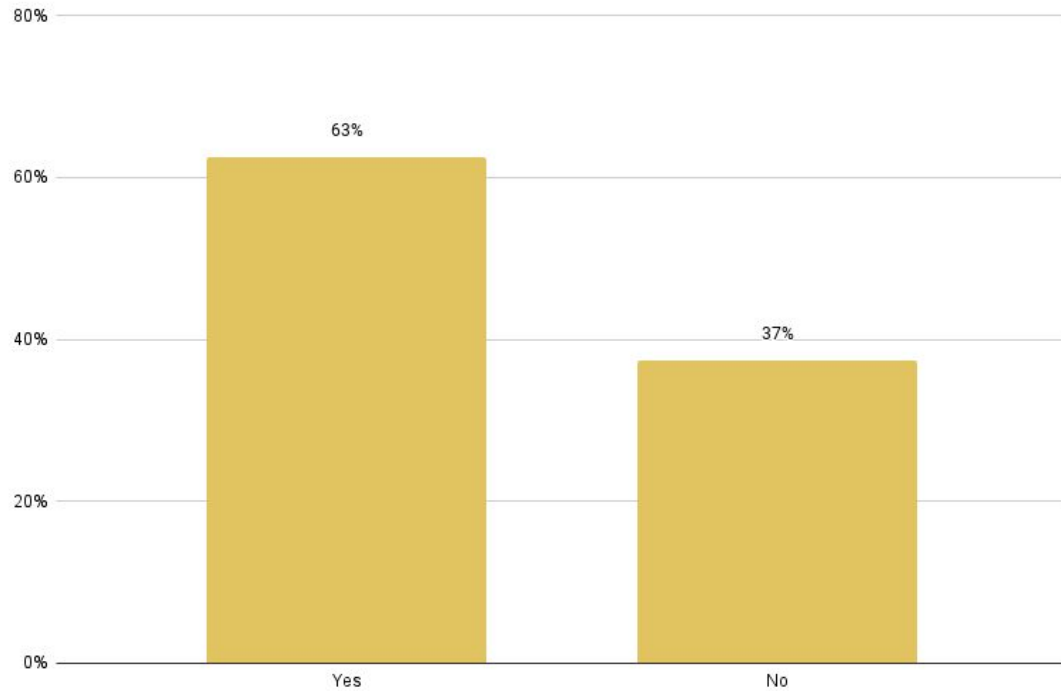


# Hours Worked per Month

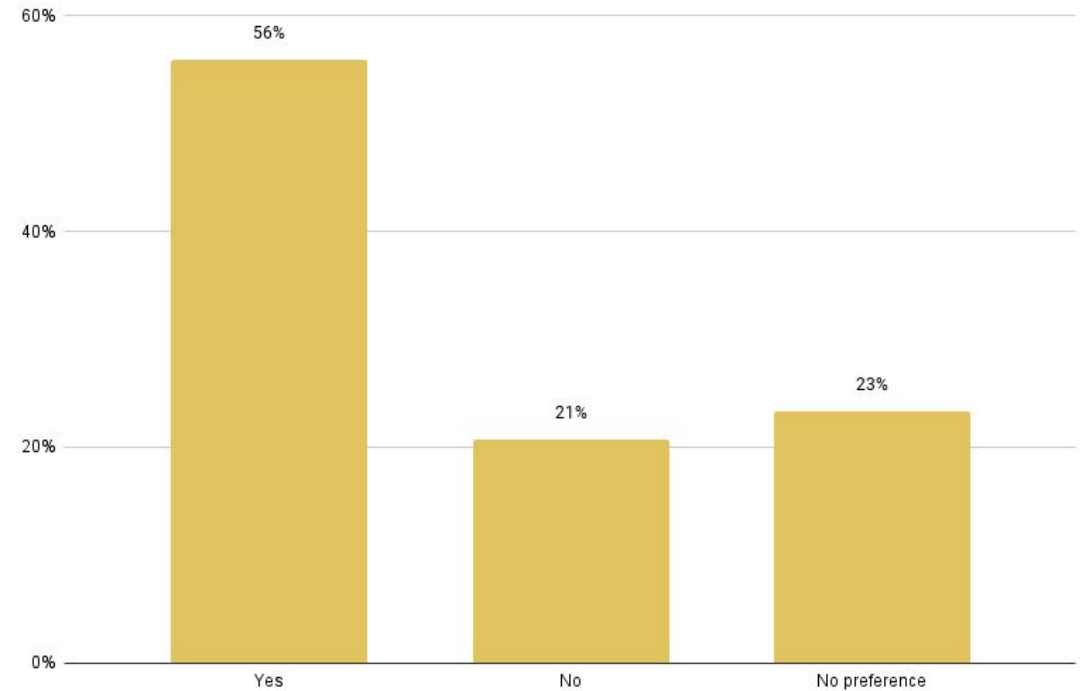


# Professional Liability Insurance

Do you have professional liability (malpractice) insurance?

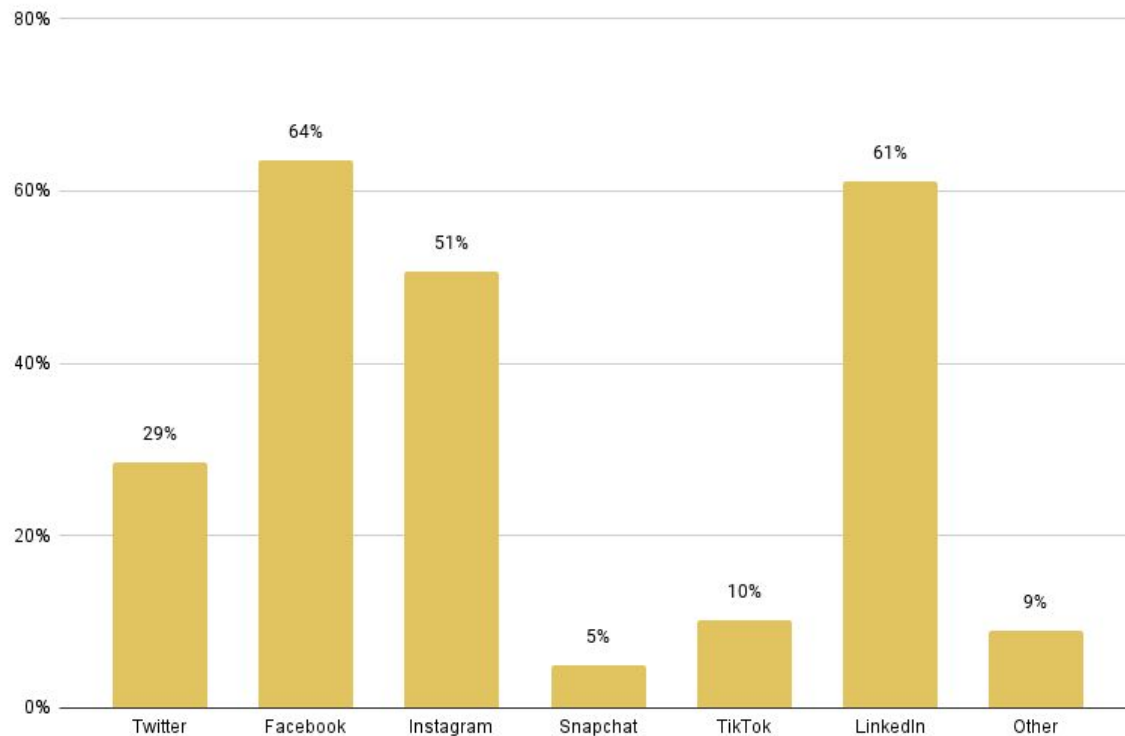


Do you think that Utah lawyers should be required to maintain some level of professional liability insurance?

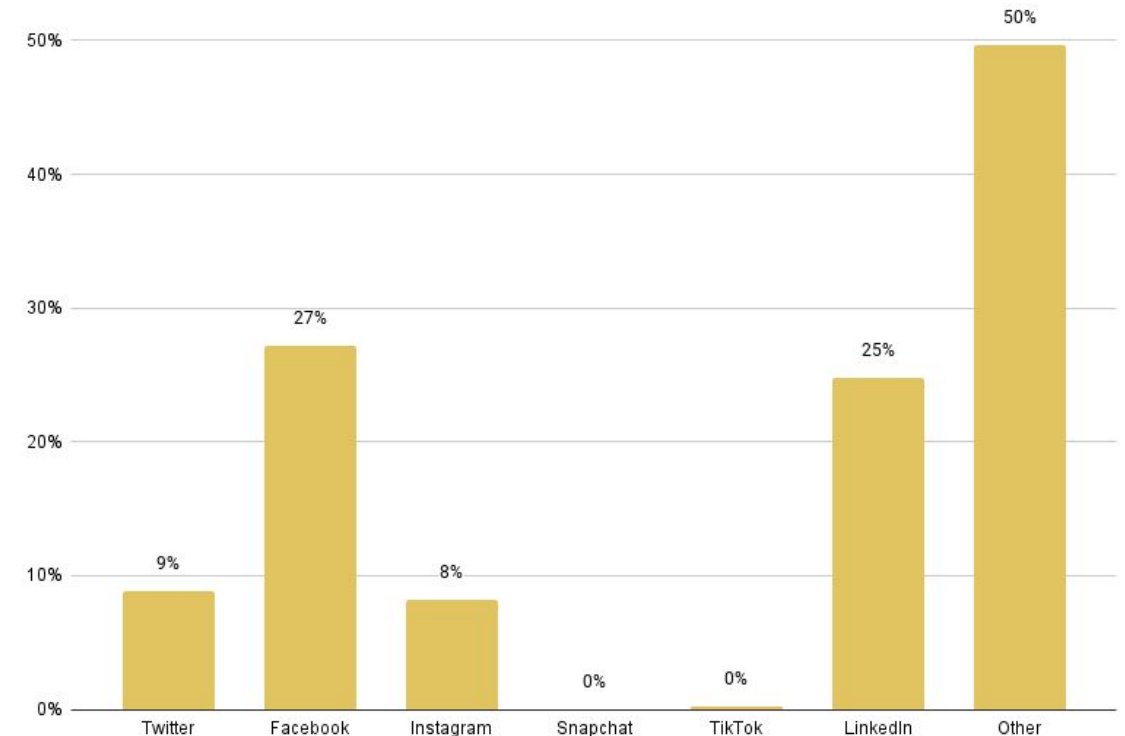


# Social Media

Which social media platforms do you use?



Which social media platforms do you follow the Utah State Bar?



# Social Media

## Question 56

Example Answers:

- Information about CLE and social activities.
- Spotlights on regulatory sandbox entities. Focus on pro bono opportunities.
- The only content I would want to see is information about upcoming events. I don't believe that the Utah State Bar should be advocating any position.
- None - I keep professional and social lives separate.
- Emails are best
- Events, volunteering, the good side of lawyering
- Just put out more content in general.
- case summaries and updates
- Diversity, Equity, Inclusion for all attorneys at all levels at the legal practice in Utah.
- Legislative updates. Maybe a summary of new laws passed. Major changes at the bar. Updates on actions of the Bar Commission.
- Not specifically but I think content marketing is the way of the future and that the Bar would do well to embrace content marketing earlier rather than later.
- I wish there was more actual education and less activism.
- It would be great to work on improving lawyers reputation in the community by holding and posting about us doing charitable work in the community.
- I would prefer to see a decrease in social media and an increase in in person events and activities in general.

View all answers [here](#).

# TAB 6

## UTAH STATE BAR COMMISSION MEETING

### MINUTES

Friday, December 16, 2022

#### Utah Law and Justice Center

**In Attendance:** President Kristin “Katie” Woods, President-Elect Erik Christiansen, and Commissioners Tom Bayles, J. Brett Chambers, Traci Gunderson, Matt Hansen, Rick Hoffman, Greg Hoole, Beth Kennedy, Andrew Morse, Shawn Newell, and Cara Tangaro, Tyler Young.

**Ex-Officio Members:** Kim Cordova, Scotti Hill, Brittany J. Merrill, Camila Moreno, and Margaret Plane.

**Not in Attendance:** President-Elect Erik Christiansen, Commissioners Chrystal Mancuso-Smith and Mark Morris, Ex-Officio members Past-President Heather Thuet, Nate Alder, Anaya Gayle, Dean Elizabeth Kronk-Warner, Shalise McKinlay, Gabriela Mena, and Dean Gordon Smith.

**Also in Attendance:** Executive Director Elizabeth A. Wright, General Counsel Nancy J. Sylvester, Utah Court Representative Nick Stiles, Well-being Director Martha Knudsen, Diana Gough, Robert Clark, and Jen Tomchak.

#### 1. President's Report: Katie Woods.

##### 1.1 Recognize Diana Gough for 20 years of employment with the Bar

Ms. Woods recognized Diana Gough for her 20 years of employment with the Bar. Ms. Gough offered remarks.

##### 1.2 Present Robert Clark with the 2022 Professionalism Award

Ms. Woods presented Robert Clark with the 2022 Professionalism Award. Mr. Clark offered remarks.

##### 1.3 January Legislative Conference Call Schedule

Ms. Woods reviewed the upcoming legislative calendar and noted that the Commission will discuss legislation affecting the Bar on Tuesdays at 4 p.m.

##### 1.4 Spring Convention Reminder - March 16 -18

Ms. Woods reminded the Commission of the Spring Convention dates and discussed accommodations.

##### 1.5 Election Reminders



Ms. Woods reminded the Commission of the following deadlines:

- President-Elect written notice is due January 2nd; and
- Commissioner petitions are due February 1st.

## **2. Action Items**

### **2.1 2023 Leadership Academy: Jen Tomchak**

Ms. Tomchak reported on the Leadership Academy. Her co-chair is Judge Clem Landau. Ms. Tomchak reported that the purpose of leadership academy is to provide emerging lawyers with leadership skills for the purpose of becoming future Bar leaders. She said the academy generally meets once a month, receiving presentations from top legal leaders in Utah and nationally. The academy also has a retreat that is designed to be an intense training and form bonds between the academy participants. She explained the different trainings that are offered, which include how to have difficult conversations, finding your leadership style, and finding your purpose. Ms. Tomchak said many incredible people applied and hard decisions needed to be made, but those who didn't make it will be asked to apply again. Ms. Tomchak noted it would be helpful for academy participants to attend the June Commission meeting. Mr. Hoole asked how the close fraternal nature of the academy benefits the Bar. Ms. Tomchak explained that the close bonds are helpful to the participants as they lead Bar programs because it creates point people upon whom the participants rely. Tyler Young moved to approve the 2023 class. Shawn Newell seconded. The motion carried.

### **2.2 Utah Dispute Resolution: Elizabeth Wright**

Ms. Wright reported that Utah Dispute Resolution's Executive Director died suddenly. The UDR Board has appointed an interim director. UDR provides free or low-cost mediation services to low income Utahns. UDR is a valuable partner with Legal Aid Society of Salt Lake because they do all the family law case mediations for the organization and are therefore a vital component to the access to justice system. A request has been made to the Bar Commission to fund half the cost of hiring a consultant to conduct an organizational assessment of UDR and to provide governance recommendations to UDR and training, coaching and mentorship to UDR's interim director. The consultant will work with UDR over the course of 6 months and the cost will be \$20,000. The Bar Foundation has offered to fund half the consultant fee. Ms. Tangaro moved to fund \$10,000 with the caveat that UDR report back about implementation of the consultant's recommendations Andrew Morse seconded the motion. The motion carried with Mr. Hoole abstaining.

## **3. Information Items.**

### **3.1 Wellbeing Update - TAVA and Unmind Kickoff Schedule: Martha Knudsen**

Ms. Knudsen thanked the Commission for voting to fund well-being projects Tava and Unmind. She provided an update on timing, noting that launches for both will be on

February 1 and that there will be a CLE launch on February 1 at noon. She said she and Matthew Page are working on a roll out plan that will start up in January. Ms. Knudsen noted that she negotiated the cost for Unmind down to \$115,000 per year, which is a savings of \$20,000 per year over the original price. Ms. Knudsen asked the commissioners for assistance in reaching their constituents about these new resources. She asked that they send a prepared email to their divisions. She also asked for help getting in the door of organizations that employ lawyers. Ms. Kennedy noted that Women Lawyers will be able to send out information to its membership. Ms. Woods asked that the commissioners also connect Martha with any large events with which they are involved, and Ms. Wright noted that the Utah State Bar will be presenting on its well-being efforts to the Western States Bar Conference.

### **3.2 2022 Lawyer Survey.**

Ms. Woods reported that the 2022 lawyer survey had closed, and the Commission will review the results with Redirect, the hired company, in January. She said there was a good turnout, with nearly 2,000 people responding, which amounts to a 20% response.

### **4. Executive Session.**

The Commission held an executive session.

### **5. Adjournment.**

The Commission adjourned at 11:40 a.m.

### **6. Consent Agenda.**

The Commission approved by consent the minutes of the November 18, 2022 Commission meeting and the Fund for Client Protection Committee recommendations.

# TAB 7

### FINANCIAL STATEMENT HIGHLIGHTS

**Year-to-Date (YTD) Net Profit – Accrual Basis:**

	<b>Actual</b>	<b>Budget</b>	<b>Fav(unfav) \$ Variance</b>	<b>Fav(unfav) % Variance</b>
YTD revenue	5,584,809	5,665,509	(80,700)	-1%
YTD expenses	3,633,509	3,540,768	(92,741)	-3%
<b>YTD net profit/(loss)</b>	<b>1,951,300</b>	<b>2,124,741</b>	<b>(173,441)</b>	<b>-8%</b>

YTD net income is \$1,951,300 and is \$173,441 less than budgeted.

**YTD Net Profit –Cash Basis:** Adding back year-to-date depreciation expense of \$77,752 and deducting capital expenditures of \$84,931, the cash basis year-to-date net profit is approximately \$7,200 lower.

**Explanations for Departments with Net Profit Variances more than \$10k and 5% Over/Under Budget:**

**Admissions:** For the first half of fiscal year 22/23, Admissions revenue overreported \$31,897, mostly due to attorney motion applications reporting significantly higher than budget. Estimating these types of application revenues can be difficult during the budget process, so the higher than budgeted revenue is not unusual or due to a predictable event. The higher than usual Admissions revenue could also be a timing issue and may even out in the remaining six months of the year.

**Summer Convention:** The Summer Convention held in July 2022 in San Diego, California was projected to break-even, thereby having attendance revenues and sponsorships revenues cover all expenses. The current financials for the first half of fiscal year 22/23 show that the Summer Convention is reporting a \$109,000 loss due mostly to the fact that registration revenue underreported by \$86,000 and expenses for the venue including food and rental accommodations overreported by more than \$49,000.

**Fall Forum:** The Fall Forum was hosted in-person in November 2022 and was budgeted to report a profit of \$7,163. However, currently the event is reporting a \$25,000 loss due to registrations underreporting compared to the budget.

**Bar Operations:** Bar Operations net spending for the first half of the year is almost \$99,000 less than budgeted, which is due to the investment income reporting significantly more than budgeted.

**Facilities:** Bar meeting room facilities for the first half of the fiscal year are reporting less net spending than budgeted. After three years of slow rental income due to the pandemic, the Bar is starting to see more demand for rental meeting space, thus the improved actual net spending compared to the budget.

### ADDITIONAL COMMENTS

**Board Designated Reserves:** In consultation with Bar management and the Budget & Finance Committee, the Commission informally targeted the following reserve amounts:

Operations Reserve (3 months' operations)	\$1,747,525
Capital Replacement Reserve (equipment)	200,000
Capital Replacement Reserve (building)	<u>600,000</u>
Total	\$2,547,525
Estimated cash reserve at December 31, 2022	<u>\$5,129,156</u>
Excess of current cash reserve over board-designated reserve	<u>\$2,581,631</u>

**Utah State Bar  
Income Statement  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
Licensing	4,581,943	4,589,973	4,723,704	(133,731)	97%	4,922,403	93%
Admissions	168,295	208,910	177,013	31,897	118%	547,370	38%
NLTP	32,700	27,300	39,795	(12,495)	69%	64,642	42%
OPC	12,055	13,146	16,760	(3,614)	78%	61,613	21%
CLE	173,390	216,810	158,546	58,264	137%	480,715	45%
Summer Convention	197,225	128,325	220,464	(92,139)	58%	220,464	58%
Fall Forum	78,165	47,275	84,215	(36,940)	56%	84,660	56%
Spring Convention	-	1,300	-	1,300	#DIV/0!	124,252	1%
Member Services	181,783	190,803	182,314	8,489	105%	310,750	61%
Public Services	31,650	6,134	5,444	690	113%	17,291	35%
Bar Operations	4,086	90,736	1,331	89,405	6817%	27,960	325%
Facilities	36,690	64,096	55,923	8,173	115%	133,994	48%
Total Revenue	5,497,982	5,584,809	5,665,509	(80,700)	99%	6,996,114	80%
<b>Expenses</b>							
Licensing	101,132	101,980	96,647	(5,333)	106%	187,839	54%
Admissions	219,954	272,611	252,850	(19,761)	108%	494,361	55%
NLTP	35,441	30,660	35,857	5,197	86%	69,146	44%
OPC	732,479	780,959	753,455	(27,504)	104%	1,534,494	51%
CLE	235,035	282,551	227,056	(55,495)	124%	519,476	54%
Summer Convention	187,127	237,329	210,584	(26,745)	113%	220,464	108%
Fall Forum	6,343	72,089	77,154	5,065	93%	84,660	85%
Spring Convention	125	118	-	(118)	#DIV/0!	124,252	0%
Member Services	290,394	319,821	312,142	(7,679)	102%	699,770	46%
Public Services	303,273	341,113	330,988	(10,125)	103%	626,761	54%
Bar Operations	895,989	1,014,642	1,024,199	9,557	99%	1,998,080	51%
Facilities	177,091	179,636	219,837	40,201	82%	430,800	42%
Total Expenses	3,184,383	\$ 3,633,509	3,540,768	(92,741)	103%	6,990,103	52%
<b>Other</b>							
<b>Net Profit (Loss)</b>	<b>\$ 2,313,599</b>	<b>\$ 1,951,300</b>	<b>\$ 2,124,741</b>	<b>\$ (173,441)</b>	<b>92%</b>	<b>\$ 6,011</b>	<b>32461%</b>
Depreciation	69,002	77,752	69,564	(8,188)	112%	145,522	
Cash increase (decrease) from operations	2,382,601	2,029,052	2,194,305	(165,253)	92%	151,533	
Changes in operating assets/liabilities	(2,283,442)	(3,028,580)	(3,028,580)	-	100%	20,000	
Capital expenditures	53,732	(84,931)	(50,000)	(34,931)	170%	(157,000)	
<b>Net change in cash</b>	<b>\$ 152,891</b>	<b>\$ (1,084,459)</b>	<b>\$ (884,275)</b>	<b>\$ (200,184)</b>	<b>123%</b>	<b>\$ 14,533</b>	<b>-7462%</b>

**Utah State Bar  
Licensing  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	17,800	17,048	18,100	(1,052)	94%	18,352	93%
4004 · Admissions - Laptop Fees	288	230	293	(63)	78%	464	50%
4006 · Transfer App Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4011 · Admissions LPP	950	1,200	605	595	198%	1,433	84%
4021 · Lic Fees > 3 Years	3,794,565	3,814,880	3,892,694	(77,814)	98%	3,932,691	97%
4020 · NLTP Fees	-	2,400	-	2,400	#DIV/0!	-	#DIV/0!
4022 · Lic Fees < 3 Years	194,250	190,430	217,268	(26,838)	88%	231,657	82%
4023 · Lic Fees - House Counsel	49,075	52,480	53,531	(1,051)	98%	56,901	92%
4025 · Pro Hac Vice Fees	96,875	85,900	102,995	(17,095)	83%	227,384	38%
4024 · Lic Fees LPP	3,600	3,850	2,874	976	134%	3,672	105%
4026 · Lic Fees - Inactive/FS	119,700	121,065	122,611	(1,546)	99%	120,987	100%
4027 · Lic Fees - Inactive/NS	221,865	223,020	226,110	(3,090)	99%	227,348	98%
4029 · Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 · Certs of Good Standing	9,680	10,080	11,917	(1,837)	85%	23,440	43%
4061 · Advertising Revenue	-	140	61	79	230%	122	115%
4081 · CLE - Registrations	-	1,035	-	1,035	#DIV/0!	-	#DIV/0!
4095 · Miscellaneous Income	45	15	52	(37)	29%	102	15%
4096 · Late Fees	73,250	66,200	74,593	(8,393)	89%	77,850	85%
Total Revenue	4,581,943	4,589,973	4,723,704	(133,731)	97%	4,922,403	93%
<b>Expenses</b>							
Program Services	9,197	14,843	14,040	(803)	106%	28,055	-
Salaries & Benefits	71,305	62,555	61,714	(841)	101%	111,445	56%
General & Administrative	15,722	18,619	15,906	(2,713)	117%	38,141	49%
Building Overhead	4,908	5,964	4,987	(977)	120%	10,198	58%
Total Expenses	101,132	101,980	96,647	(5,333)	106%	187,839	54%
<b>Net Profit (Loss)</b>	<b>\$ 4,480,810</b>	<b>\$ 4,487,993</b>	<b>\$ 4,627,057</b>	<b>\$ (139,064)</b>	<b>97%</b>	<b>\$ 4,734,564</b>	<b>95%</b>

Note: Includes LPP staff time and exam expense

**Utah State Bar**  
**Admissions**  
**December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4001 · Admissions - Student Exam Fees	14,025	17,600	14,444	3,156	122%	146,421	12%
4002 · Admissions - Attorney Exam Fees	26,650	28,900	27,315	1,585	106%	68,697	42%
4003 · Admissions - Retake Fees	16,650	19,600	19,752	(152)	99%	38,199	51%
4004 · Admissions - Laptop Fees	17,400	9,100	18,150	(9,050)	50%	82,824	11%
4005 · Admissions - Application Forms	-	4,450	-	4,450	-	(867)	-
4006 · Transfer App Fees	28,100	28,800	28,685	115	100%	65,994	44%
4008 · Attorney - Motion	40,800	75,650	41,568	34,082	182%	87,465	86%
4009 · House Counsel	13,600	15,300	16,320	(1,020)	94%	28,560	54%
4011 · Admissions LPP	-	-	306	(306)	0%	306	0%
4095 · Miscellaneous Income	2,770	2,610	2,434	176	107%	5,171	50%
4096 · Late Fees	8,300	6,900	8,039	(1,139)	86%	24,600	28%
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	-	#DIV/0!
Total Revenue	168,295	208,910	177,013	31,897	118%	547,370	31%
<b>Expenses</b>							
Program Services	62,994	100,442	72,483	(27,959)	139%	107,572	93%
Salaries & Benefits	115,210	124,254	140,780	16,526	88%	298,236	42%
General & Administrative	33,047	37,340	31,128	(6,212)	120%	70,462	53%
Building Overhead	8,703	10,575	8,459	(2,116)	125%	18,091	58%
Total Expenses	219,954	272,611	252,850	(19,761)	108%	494,361	55%
<b>Net Profit (Loss)</b>	<b>\$ (51,659)</b>	<b>\$ (63,701)</b>	<b>\$ (75,837)</b>	<b>\$ 12,136</b>	<b>-16%</b>	<b>\$ 53,009</b>	<b>-120%</b>



**Utah State Bar**  
**NLTP**  
**December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4020 · NLTP Fees	32,700	27,300	39,795	(12,495)	69%	65,535	42%
4081 · CLE - Registrations	-	-	-	-	#DIV/0!	-	#DIV/0!
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	(893)	-
Total Revenue	32,700	27,300	39,795	(12,495)	69%	64,642	42%
<b>Expenses</b>							
Program Services	-	-	3,375	3,375	0%	6,750	0%
Salaries & Benefits	22,729	18,965	20,720	1,755	92%	36,980	51%
General & Administrative	10,857	9,441	9,963	522	95%	21,560	44%
Building Overhead	1,855	2,254	1,799	(455)	125%	3,856	58%
Total Expenses	35,441	30,660	35,857	5,197	86%	69,146	44%
<b>Net Profit (Loss)</b>	<b>\$ (2,741)</b>	<b>\$ (3,360)</b>	<b>\$ 3,938</b>	<b>\$ (7,298)</b>	<b>-85%</b>	<b>\$ (4,504)</b>	<b>75%</b>

**Utah State Bar  
OPC  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4095 · Miscellaneous Income	1,050	700	840	(140)	83%	4,000	18%
4200 · Seminar Profit/Loss	11,005	12,446	15,920	(3,474)	78%	57,613	22%
Total Revenue	12,055	13,146	16,760	(3,614)	78%	61,613	21%
<b>Expenses</b>							
Program Services	1,565	4,651	2,324	(2,327)	200%	12,271	38%
Salaries & Benefits	640,221	664,939	672,019	7,080	99%	1,337,742	50%
General & Administrative	58,433	72,171	47,729	(24,442)	151%	117,414	61%
Building Overhead	32,260	39,198	31,383	(7,815)	125%	67,067	58%
Total Expenses	732,479	780,959	753,455	(27,504)	104%	1,534,494	51%
<b>Net Profit (Loss)</b>	<b>\$ (720,424)</b>	<b>\$ (767,813)</b>	<b>\$ (736,695)</b>	<b>\$ (31,118)</b>	<b>104%</b>	<b>\$ (1,472,881)</b>	<b>52%</b>

**Utah State Bar  
CLE  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4052 · Meeting - Sponsor Revenue	10,425	26,200	13,394	12,806	196%	15,000	175%
4053 · Meeting - Vendor Revenue	-	-	-	-	#DIV/0!	-	-
4054 · Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4081 · CLE - Registrations	97,546	132,958	112,139	20,819	119%	315,000	42%
4082 · CLE - Video Library Sales	45,680	53,708	32,586	21,122	165%	146,835	37%
4084 · Business Law Book Sales	-	-	-	-	#DIV/0!	-	-
4093 · Law Day Revenue	-	-	-	-	#DIV/0!	2,500	-
4095 · Miscellaneous Income	-	100	-	100	#DIV/0!	-	-
4200 · Seminar Profit/Loss	19,739	3,845	427	3,418	900%	1,380	279%
Total Revenue	173,390	216,810	158,546	58,264	137%	480,715	45%
<b>Expenses</b>							
Program Services	121,560	168,197	83,296	(84,901)	202%	219,317	77%
Salaries & Benefits	84,757	77,257	116,963	39,706	66%	242,485	32%
General & Administrative	21,307	29,663	19,088	(10,575)	155%	42,364	70%
Building Overhead	7,411	7,434	7,709	275	96%	15,310	49%
Total Expenses	235,035	282,551	227,056	(55,495)	124%	519,476	54%
<b>Net Profit (Loss)</b>	<b>\$ (61,645)</b>	<b>\$ (65,740)</b>	<b>\$ (68,510)</b>	<b>\$ 2,770</b>	<b>96%</b>	<b>\$ (38,761)</b>	<b>170%</b>

**Utah State Bar  
Summer Convention  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	142,248	82,125	168,064	(85,939)	<b>49%</b>	168,064	49%
4052 · Meeting - Sponsor Revenue	14,750	33,700	30,000	3,700	<b>112%</b>	30,000	112%
4053 · Meeting - Vendor Revenue	13,800	11,300	20,600	(9,300)	<b>55%</b>	20,600	55%
4055 · Meeting - Sp Ev Registration	13,235	1,200	1,800	(600)	<b>67%</b>	1,800	67%
4095 · Miscellaneous Income	13,192	-	-	-	-	-	-
Total Revenue	197,225	128,325	220,464	(92,139)	<b>58%</b>	220,464	58%
<b>Expenses</b>							
Program Services	166,261	228,042	179,276	(48,766)	<b>127%</b>	179,276	127%
Salaries & Benefits	15,956	2,022	23,229	21,207	<b>9%</b>	25,030	8%
General & Administrative	4,909	7,265	8,079	813	<b>90%</b>	16,158	45%
Building Overhead	-	-	-	-	<b>#DIV/0!</b>	-	-
Total Expenses	187,127	237,329	210,584	(26,745)	<b>113%</b>	220,464	108%
<b>Net Profit (Loss)</b>	<b>\$ 10,098</b>	<b>\$ (109,004)</b>	<b>\$ 9,881</b>	<b>\$ (118,884)</b>	<b>-1103%</b>	<b>\$ 0</b>	<b>-65402298%</b>

**Utah State Bar  
Fall Forum  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	77,165	42,875	75,994	(33,119)	56%	76,260	56%
4052 · Meeting - Sponsor Revenue	-	1,000	-	1,000	#DIV/0!	-	-
4053 · Meeting - Vendor Revenue	1,000	3,400	8,221	(4,821)	41%	8,400	40%
4055 · Meeting - Sp Ev Registration	-	-	-	-	#DIV/0!	-	-
Total Revenue	78,165	47,275	84,215	(36,940)	56%	84,660	56%
<b>Expenses</b>							
Program Services	1,960	67,960	69,403	1,443	98%	69,543	98%
Salaries & Benefits	2,224	2,060	3,467	1,407	59%	3,583	57%
General & Administrative	2,159	2,069	4,284	2,215	48%	11,534	18%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	6,343	72,089	77,154	5,065	93%	84,660	85%
<b>Net Profit (Loss)</b>	<b>\$ 71,822</b>	<b>\$ (24,814)</b>	<b>\$ 7,061</b>	<b>\$ (31,875)</b>	<b>-351%</b>	<b>\$ -</b>	<b>#DIV/0!</b>

**Utah State Bar  
Spring Convention  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4051 · Meeting - Registration	-	-	-	-	#DIV/0!	97,895	0%
4052 · Meeting - Sponsor Revenue	-	1,000	-	1,000	#DIV/0!	13,500	7%
4053 · Meeting - Vendor Revenue	-	300	-	300	#DIV/0!	10,950	3%
4055 · Meeting - Sp Ev Registration	-	-	-	-	#DIV/0!	1,907	0%
Total Revenue	-	1,300	-	1,300	#DIV/0!	124,252	1%
<b>Expenses</b>							
Program Services	-	-	-	-	#DIV/0!	93,276	0%
Salaries & Benefits	-	103	-	(103)	#DIV/0!	17,070	1%
General & Administrative	125	15	-	(15)	#DIV/0!	13,906	0%
Building Overhead	-	-	-	-	#DIV/0!	-	-
Total Expenses	125	118	-	(118)	#DIV/0!	124,252	0%
<b>Net Profit (Loss)</b>	<b>\$ (125)</b>	<b>\$ 1,182</b>	<b>\$ -</b>	<b>\$ 1,182</b>	<b>#DIV/0!</b>	<b>\$ -</b>	<b>#DIV/0!</b>

**Utah State Bar  
Member Services  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4010 · Section/Local Bar Support fees	83,811	85,344	85,487	(143)	<b>100%</b>	86,087	99%
4052 · Meeting - Sponsor Revenue	-	-	-	-	<b>#DIV/0!</b>	-	<b>#DIV/0!</b>
4061 · Advertising Revenue	92,087	99,662	90,905	8,757	<b>110%</b>	211,916	47%
4062 · Subscriptions	30	30	15	15	<b>200%</b>	30	100%
4071 · Mem Benefits - Lexis	656	728	643	85	<b>113%</b>	1,279	-
4072 · Royalty Inc - Bar J, MBNA, LM,M	5,200	5,067	5,264	(197)	<b>96%</b>	11,438	44%
Total Revenue	181,783	190,803	182,314	8,489	<b>105%</b>	310,750	61%
<b>Expenses</b>							
Program Services	129,413	135,233	139,275	4,042	<b>97%</b>	306,471	44%
Salaries & Benefits	75,674	84,405	85,500	1,095	<b>99%</b>	173,775	49%
General & Administrative	76,220	91,608	77,857	(13,751)	<b>118%</b>	201,043	46%
Building Overhead	9,087	8,575	9,511	936	<b>90%</b>	18,481	46%
Total Expenses	290,394	319,821	312,142	(7,679)	<b>102%</b>	699,770	46%
<b>Net Profit (Loss)</b>	<b>\$ (108,610)</b>	<b>\$ (129,018)</b>	<b>\$ (129,828)</b>	<b>\$ 810</b>	<b>99%</b>	<b>\$ (389,020)</b>	<b>33%</b>

**Utah State Bar  
Public Services  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4063 · Modest Means revenue	4,900	4,625	4,288	337	<b>108%</b>	10,000	46%
4093 · Law Day Revenue	-	-	-	-	<b>#DIV/0!</b>	-	<b>#DIV/0!</b>
4095 · Miscellaneous Income	10	10	10	-	<b>100%</b>	20	50%
4120 · Grant Income	27,178	7,500	-	7,500	<b>#DIV/0!</b>	-	<b>#DIV/0!</b>
4200 · Seminar Profit/Loss	(438)	(6,001)	1,146	(7,147)	<b>-524%</b>	7,271	-
Total Revenue	31,650	6,134	5,444	690	<b>113%</b>	17,291	35%
<b>Expenses</b>							
Program Services	102,300	109,132	108,777	(355)	<b>100%</b>	155,087	70%
Salaries & Benefits	169,403	188,610	190,217	1,607	<b>99%</b>	401,716	47%
General & Administrative	25,662	36,192	26,247	(9,945)	<b>138%</b>	57,675	63%
Building Overhead	5,908	7,179	5,747	(1,432)	<b>125%</b>	12,283	58%
Total Expenses	303,273	341,113	330,988	(10,125)	<b>103%</b>	626,761	54%
<b>Net Profit (Loss)</b>	<b>\$ (271,623)</b>	<b>\$ (334,978)</b>	<b>\$ (325,544)</b>	<b>\$ (9,435)</b>	<b>103%</b>	<b>\$ (609,470)</b>	<b>55%</b>



**Utah State Bar**  
**Bar Operations**  
**December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4031 · Enhanced Web Revenue	-	-	-	-	-	-	-
4052 · Meeting - Sponsor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4053 · Meeting - Vendor Revenue	-	-	-	-	#DIV/0!	-	#DIV/0!
4060 · E-Filing Revenue	-	-	-	-	#DIV/0!	16,741	0%
4103 · In - Kind Revenue - UDR	-	-	-	-	#DIV/0!	-	#DIV/0!
4095 · Miscellaneous Income	407	1,820	297	1,523	613%	918	198%
4200 · Seminar Profit/Loss	-	-	-	-	#DIV/0!	-	-
Investment Income	3,679	88,916	1,034	87,882	8599%	10,301	36%
Total Revenue	4,086	90,736	1,331	89,405	6817%	27,960	15%
<b>Expenses</b>							
Program Services	92,704	156,826	113,705	(43,122)	138%	201,456	78%
Salaries & Benefits	612,998	667,903	742,465	74,562	90%	1,462,204	46%
General & Administrative	165,502	158,421	144,507	(13,914)	110%	282,481	56%
In Kind	989	761	1,068	307	71%	1,836	41%
Building Overhead	23,797	30,731	22,456	(8,276)	137%	50,103	61%
Total Expenses	895,989	1,014,642	1,024,199	9,557	99%	1,998,080	51%
<b>Net Profit (Loss)</b>	<b>\$ (891,903)</b>	<b>\$ (923,906)</b>	<b>\$ (1,022,868)</b>	<b>\$ 98,962</b>	<b>90%</b>	<b>\$ (1,970,120)</b>	<b>47%</b>

**Utah State Bar  
Facilities  
December 31, 2022**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
<b>Revenue</b>							
4039 · Room Rental-All parties	15,868	26,826	21,010	5,816	<b>128%</b>	51,387	52%
4042 · Food & Beverage Rev-All Parties	10,947	27,553	24,893	2,660	<b>111%</b>	62,654	44%
4043 · Setup & A/V charges-All parties	945	201	701	(500)	<b>29%</b>	701	29%
4090 · Tenant Rent	8,930	9,516	9,319	197	<b>102%</b>	19,252	49%
4095 · Miscellaneous Income	-	-	-	-	<b>#DIV/0!</b>	-	<b>#DIV/0!</b>
4103 · In - Kind Revenue - UDR	-	-	-	-	<b>#DIV/0!</b>	-	<b>#DIV/0!</b>
Total Revenue	36,690	64,096	55,923	8,173	<b>115%</b>	133,994	48%
<b>Expenses</b>							
Program Services	12,414	25,564	22,650	(2,914)	<b>113%</b>	60,507	42%
Salaries & Benefits	76,048	76,991	89,649	12,658	<b>86%</b>	179,278	43%
General & Administrative	(6,309)	(6,581)	5,041	11,622	<b>-131%</b>	833	-790%
In Kind	6,086	7,705	4,743	(2,962)	<b>162%</b>	12,927	60%
Building Overhead	88,852	75,956	97,754	21,798	<b>78%</b>	177,255	43%
Total Expenses	177,091	179,636	219,837	40,201	<b>82%</b>	430,800	42%
<b>Net Profit (Loss)</b>	<b>\$ (140,401)</b>	<b>\$ (115,540)</b>	<b>\$ (163,914)</b>	<b>\$ 48,374</b>	<b>70%</b>	<b>\$ (296,806)</b>	<b>39%</b>

Utah State Bar  
Income Statement - Consolidated By Account  
December 31, 2022

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	14,025	17,600	14,444	3,156	122%	146,421	12%
4002 · Admissions - Attorney Exam Fees	26,650	28,900	27,315	1,585	106%	68,697	42%
4003 · Admissions - Retake Fees	16,650	19,600	19,752	(152)	99%	38,199	51%
4004 · Admissions - Laptop Fees	17,688	9,330	18,443	(9,113)	51%	83,288	11%
4005 · Admissions - Application Forms	-	4,450	-	4,450	#DIV/0!	(867)	-
4006 · Transfer App Fees	28,100	28,800	28,685	115	100%	65,994	44%
4008 · Attorney - Motion	40,800	75,650	41,568	34,082	182%	87,465	86%
4009 · House Counsel	13,600	15,300	16,320	(1,020)	94%	28,560	54%
4010 · Section/Local Bar Support fees	101,611	102,392	103,587	(1,195)	99%	104,439	98%
4011 · Admissions LPP	950	1,200	911	289	132%	1,739	69%
4012 · Admissions Military Spouse	-	-	-	-	#DIV/0!	-	#DIV/0!
4020 · NLTP Fees	32,700	29,700	39,795	(10,095)	75%	65,535	45%
4021 · Lic Fees > 3 Years	3,794,565	3,814,880	3,892,694	(77,814)	98%	3,932,691	97%
4022 · Lic Fees < 3 Years	194,250	190,430	217,268	(26,838)	88%	231,657	82%
4023 · Lic Fees - House Counsel	49,075	52,480	53,531	(1,051)	98%	56,901	92%
4024 · Lic Fees LPP	3,600	3,850	2,874	976	134%	3,672	105%
4025 · Pro Hac Vice Fees	96,875	85,900	102,995	(17,095)	83%	227,384	38%
4026 · Lic Fees - Inactive/FS	119,700	121,065	122,611	(1,546)	99%	120,987	100%
4027 · Lic Fees - Inactive/NS	221,865	223,020	226,110	(3,090)	99%	227,348	98%
4029 · Prior Year Lic Fees	-	-	-	-	#DIV/0!	-	#DIV/0!
4030 · Certs of Good Standing	9,680	10,080	11,917	(1,837)	85%	23,440	43%
4039 · Room Rental-All parties	15,868	26,826	21,010	5,816	128%	51,387	52%
4042 · Food & Beverage Rev-All Parties	10,947	27,553	24,893	2,660	111%	62,654	44%
4043 · Setup & A/V charges-All parties	945	201	701	(500)	29%	701	29%
4051 · Meeting - Registration	219,413	125,000	244,058	(119,058)	51%	342,219	37%
4052 · Meeting - Sponsor Revenue	25,175	61,900	43,394	18,506	143%	58,500	106%
4053 · Meeting - Vendor Revenue	14,800	15,000	28,821	(13,821)	52%	39,950	38%
4054 · Meeting - Material Sales	-	-	-	-	#DIV/0!	-	-
4055 · Meeting - Sp Ev Registration	13,235	1,200	1,800	(600)	67%	3,707	32%
4060 · E-Filing Revenue	-	-	-	-	#DIV/0!	16,741	0%
4061 · Advertising Revenue	92,087	99,802	90,966	8,836	110%	212,038	47%
4062 · Subscriptions	30	30	15	15	200%	30	100%
4063 · Modest Means revenue	4,900	4,625	4,288	337	108%	10,000	46%
4071 · Mem Benefits - Lexis	656	728	643	85	113%	1,279	-
4072 · Royalty Inc - Bar J, MBNA, LM,M	5,200	5,067	5,264	(197)	96%	11,438	44%
4081 · CLE - Registrations	97,546	133,993	112,139	21,854	119%	315,000	43%
4082 · CLE - Video Library Sales	45,680	53,708	32,586	21,122	165%	146,835	37%
4090 · Tenant Rent	8,930	9,516	9,319	197	102%	19,252	49%
4093 · Law Day Revenue	-	-	-	-	#DIV/0!	2,500	0%
4095 · Miscellaneous Income	17,474	5,255	3,633	1,622	145%	10,211	51%
4096 · Late Fees	81,550	73,100	82,632	(9,532)	88%	102,450	71%
4103 · In - Kind Revenue - UDR	-	-	-	-	#DIV/0!	-	#DIV/0!
4200 · Seminar Profit/Loss	30,306	10,261	17,493	(7,232)	59%	65,371	16%
Investment income	3,679	88,916	1,034	87,882	8599%	10,301	863%
Total Revenue	5,470,804	5,577,309	5,665,509	(88,200)	98%	6,996,114	80%
Program Service Expenses							
5001 · Meeting Facility-external only	29,371	98,902	18,941	(79,961)	522%	45,840	216%
5002 · Meeting facility-internal only	7,853	12,583	10,872	(1,712)	116%	26,020	48%
5013 · ExamSoft	27,297	17,623	27,770	10,147	63%	33,764	52%
5014 · Questions	36,486	49,463	48,600	(864)	102%	73,183	68%
5015 · Investigations	770	479	743	264	65%	1,600	30%
5016 · Credit Checks	929	748	847	99	88%	2,364	32%
5017 · Medical Exam	-	-	-	-	#DIV/0!	800	-
5020 · Exam Scoring	-	-	-	-	#DIV/0!	-	-
5025 · Temp Labor/Proctors	-	3,522	-	(3,522)	#DIV/0!	90	3913%
5030 · Speaker Fees & Expenses	12,209	23,256	5,831	(17,425)	399%	12,887	180%
5031 · Speaker Reimb. - Receipt Req'd	-	-	6,307	6,307	0%	13,170	0%
5035 · Awards	6,523	10,027	1,744	(8,283)	575%	3,770	266%
5037 · Grants/ contributions - general	-	22,500	2,000	(20,500)	1125%	18,500	122%
5040 · Witness & Hearing Expense	124	7	103	96	7%	389	2%
5041 · Process Serving	348	73	299	226	24%	607	12%
5046 · Court Reporting	-	30	-	(30)	#DIV/0!	15	200%
5047 · Casemaker	27,170	25,438	24,390	(1,048)	104%	49,999	51%
5055 · Legislative Expense	30,000	32,134	30,000	(2,134)	107%	60,000	54%
5060 · Program Special Activities	4,581	-	-	-	#DIV/0!	-	-
5061 · LRE - Bar Support	64,182	60,000	64,182	4,182	93%	64,182	93%
5062 · Law Day	-	-	-	-	#DIV/0!	9,400	0%
5063 · Special Event Expense	26,230	29,797	12,352	(17,446)	241%	21,223	140%
5064 · MCLE Fees Paid	16,896	18,430	17,477	(953)	105%	52,681	35%
5070 · Equipment Rental	7,258	7,670	36,095	28,425	21%	40,119	19%
5075 · Food & Bev-external costs only	141,265	261,191	177,980	(83,212)	147%	307,857	85%
5076 · Food & beverage - internal only	10,052	18,990	14,499	(4,491)	131%	32,964	58%
5079 · Soft Drinks	2,269	3,136	3,108	(28)	101%	5,680	55%
5085 · Misc. Program Expense	401	2,946	2,288	(658)	129%	2,890	102%
5090 · Commission Expense	18,304	20,913	19,018	(1,895)	110%	37,456	56%
5095 · Wills for Heroes	279	917	625	(292)	147%	1,250	73%
5096 · UDR Support	-	-	-	-	#DIV/0!	-	-
5099 · Blomquist Hale	44,824	44,869	45,000	131	100%	90,000	50%
5702 · Travel - Lodging	28,465	34,034	32,222	(1,812)	106%	51,020	67%
5703 · Travel - Transportation/Parking	6,099	15,740	6,321	(9,419)	249%	14,162	111%
5704 · Travel - Mileage Reimbursement	4,802	4,458	2,770	(1,689)	161%	8,886	50%
5705 · Travel - Per Diems	3,190	3,349	1,568	(1,781)	214%	4,327	77%
5706 · Travel - Meals	-	-	625	625	0%	1,250	0%
5707 · Travel - Commission Mtgs	37,847	46,987	26,250	(20,737)	179%	52,500	89%
5805 · ABA Annual Meeting	300	2,085	2,087	2	100%	4,173	50%
5810 · ABA Mid Year Meeting	375	1,322	4,003	2,680	33%	8,005	17%
5815 · Commission/Education	11,000	1,400	9,750	8,350	14%	19,500	7%
5820 · ABA Annual Delegate	1,234	5,245	3,300	(1,945)	159%	6,600	79%
5830 · Western States Bar Conference	-	-	4,480	4,480	0%	8,959	0%
5840 · President's Expense	9,000	9,000	10,002	1,002	90%	20,000	45%
5841 · President's Reimbursement	-	-	-	-	#DIV/0!	-	#DIV/0!
5845 · Reg Reform Task Force	-	-	-	-	#DIV/0!	-	-
5850 · Leadership Academy	2,325	-	5,102	5,102	0%	10,200	0%
5855 · Bar Review	964	53	-	(53)	#DIV/0!	-	#DIV/0!
5865 · Retreat	21,944	26,554	16,650	(9,904)	159%	33,300	80%
5866 · Wellbeing Committee	32,650	40,588	39,363	(1,225)	103%	76,311	53%
5867 · Bar Membership Survey	-	-	-	-	#DIV/0!	-	#DIV/0!
5868 · UCLI Support	-	1,000	-	(1,000)	#DIV/0!	-	#DIV/0!



Utah State Bar  
Income Statement - Consolidated By Account  
December 31, 2022

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5960 · Overhead Allocation - Seminars	-	-	22,199	22,199	0%	17,115	0%
5970 · Event Revenue Sharing - 3rd Pty	24,551	27,279	19,695	(7,584)	139%	62,273	44%
Total Program Service Expenses	700,368	1,010,890	807,453	(203,437)	125%	1,437,281	70%
Salaries & Benefit Expenses							
5510 · Salaries/Wages	1,478,871	1,563,368	1,674,392	111,024	93%	3,326,637	47%
5605 · Payroll Taxes	112,010	115,874	129,221	13,347	90%	272,485	43%
5610 · Health Insurance	137,751	131,204	152,810	21,606	86%	305,955	43%
5620 · Health Ins/Medical Reimb	3,350	1,476	3,875	2,398	38%	6,728	22%
5630 · Dental Insurance	7,549	7,897	8,551	654	92%	18,527	43%
5640 · Life & LTD Insurance	9,243	9,664	11,567	1,903	84%	23,819	41%
5645 · Workman's Comp Insurance	1,796	1,522	2,530	1,008	60%	2,961	51%
5650 · Retirement Plan Contributions	127,752	132,922	153,624	20,701	87%	311,428	43%
5655 · Retirement Plan Fees & Costs	4,730	4,348	7,089	2,741	61%	14,000	31%
5660 · Training/Development	3,474	1,790	3,066	1,276	58%	7,004	26%
Total Salaries & Benefit Expenses	1,886,525	1,970,064	2,146,722	176,658	92%	4,289,544	44%
General & Administrative Expenses							
7025 · Office Supplies	9,650	7,579	7,971	392	95%	18,127	42%
7015 · Office Equip Repairs	-	-	-	-	#DIV/0!	-	#DIV/0!
7033 · Operating Meeting Supplies	1,711	782	6,458	5,676	12%	8,700	9%
7035 · Postage/Mailing, net	22,124	23,099	31,137	8,037	74%	49,646	47%
7040 · Copy/Printing Expense	57,902	63,985	67,111	3,126	95%	152,187	42%
7041 · Copy/Print revenue	(8,137)	(7,504)	(9,603)	(2,099)	78%	(18,595)	40%
7045 · Internet Service	10,784	12,521	10,560	(1,961)	119%	17,961	70%
7050 · Computer Maintenance	28,602	98,832	37,337	(61,495)	265%	143,658	69%
7055 · Computer Supplies & Small Equip	16,549	13,580	13,857	277	98%	20,989	65%
7089 · Membership Database Fees	25,087	27,009	35,196	8,187	77%	84,285	32%
7095 · Fax Equip & Supplies	(70)	-	(70)	(70)	0%	(140)	-
7100 · Telephone	28,578	30,547	32,437	1,889	94%	63,519	48%
7105 · Advertising	2,901	10,392	3,666	(6,726)	283%	45,444	23%
7106 · Public Notification	-	-	-	-	#DIV/0!	-	#DIV/0!
7107 · Production Costs	2,500	4,607	5,324	717	87%	7,500	61%
7110 · Publications/Subscriptions	15,131	12,558	14,828	2,270	85%	26,874	47%
7115 · Public Relations	-	-	-	-	#DIV/0!	-	#DIV/0!
7120 · Membership/Dues	10,150	19,135	9,942	(9,193)	192%	17,117	112%
7135 · Bank Service Charges	418	468	503	35	93%	800	58%
7136 · ILM Service Charges	11,002	10,463	10,790	327	97%	20,541	51%
7138 · Bad debt expense	-	-	-	-	#DIV/0!	-	-
7140 · Credit Card Merchant Fees	44,078	44,121	42,538	(1,583)	104%	122,848	36%
7141 · Credit Card surcharge	(21,763)	(19,385)	(23,386)	(4,001)	83%	(66,551)	29%
7145 · Commission Election Expense	-	-	-	-	#DIV/0!	3,013	0%
7150 · E&O/Off & Dir Insurance	29,565	35,194	28,446	(6,748)	124%	56,894	62%
7160 · Audit Expense	38,143	41,031	38,143	(2,888)	108%	38,143	108%
7170 · Lobbying Rebates	7	-	107	107	0%	214	0%
7175 · O/S Consultants	50,957	2,612.50	5,757	3,145	45%	9,461	28%
7176 · Bar Litigation	15,890	10,593	7,032	(3,561)	151%	10,000	106%
7177 · UPL	-	4,363	-	(4,363)	#DIV/0!	20,000	22%
7178 · Offsite Storage/Backup	-	-	-	-	#DIV/0!	-	#DIV/0!
7179 · Payroll Adm Fees	1,476	2,099	1,485	(614)	141%	2,973	71%
7180 · Administrative Fee Expense	846	754	763	9	99%	1,580	48%
7190 · Lease Interest Expense	-	1,646	182	(1,464)	904%	364	452%
7191 · Lease Sales Tax Expense	-	-	-	-	#DIV/0!	-	#DIV/0!
7195 · Other Gen & Adm Expense	13,552	5,142	11,318	6,176	45%	16,019	32%
Total General & Administrative Expenses	407,635	456,223	389,828	(66,395)	117%	873,571	47%
In Kind Expenses							
7103 · InKind Contrib-UDR & all other	7,075	8,466	5,811	(2,655)	146%	14,763	57%
Total In Kind Expenses	7,075	8,466	5,811	(2,655)	146%	14,763	48%
Building Overhead Expenses							
6015 · Janitorial Expense	13,644	17,303	12,906	(4,397)	134%	26,681	65%
6020 · Heat	8,163	10,487	8,213	(2,274)	128%	22,269	47%
6025 · Electricity	24,398	25,187	25,032	(155)	101%	43,987	57%
6030 · Water/Sewer	3,728	4,943	3,981	(962)	124%	6,142	80%
6035 · Outside Maintenance	8,508	8,884	7,166	(1,718)	124%	17,290	51%
6040 · Building Repairs	14,738	5,212	20,482	15,270	25%	25,872	20%
6045 · Bldg Mtnce Contracts	12,886	10,879	13,359	2,480	81%	28,065	39%
6050 · Bldg Mtnce Supplies	-	-	-	-	#DIV/0!	-	#DIV/0!
6055 · Real Property Taxes	17,026	15,459	18,240	2,781	85%	35,074	44%
6060 · Personal Property Taxes	186	219	186	(33)	118%	387	56%
6065 · Bldg Insurance/Fees	10,500	11,541	10,677	(864)	108%	21,355	54%
6070 · Building & Improvements Depre	41,557	42,593	40,019	(2,574)	106%	80,543	53%
6075 · Furniture & Fixtures Depre	1,330	3,431	1,839	(1,592)	187%	4,198	82%
7065 · Computers, Equip & Sftwre Depr	26,115	31,728	27,706	(4,022)	115%	60,781	52%
Total Building Overhead Expenses	182,781	187,866	189,805	1,938	99%	372,644	49%
Total Expenses	3,184,383	3,633,509	3,539,618	(93,891)	103%	6,987,803	46%
Other							
4300 · Gain (Loss) - Disposal Of Assets	-	-	-	-	#DIV/0!	-	#DIV/0!
4120 · Grant Income	27,178	7,500	-	(7,500)	#DIV/0!	-	#DIV/0!
	27,178	7,500	-	(7,500)	#DIV/0!	-	
Net Profit (Loss)	\$ 2,313,599	\$ 1,951,300.16	\$ 2,125,891	\$ (174,591)	92%	\$ 8,311	23478%

## Utah State Bar Balance Sheets

	<u>12/31/2022</u>	<u>6/30/2022</u>
<b>ASSETS</b>		
Current Assets		
Petty Cash	\$ 625	\$ 625
Cash in Bank	146,268	1,278,654
Invested Funds	7,188,138	7,371,903
Total Cash/Investments	<u>7,335,031</u>	<u>8,651,182</u>
Accounts Receivable	75,441	97,588
Prepaid Expenses	248,677	241,574
A/R - Sections	59,299	48,211
Total Other Current Assets	<u>383,417</u>	<u>387,373</u>
Total Current Assets	<u>7,718,448</u>	<u>9,038,555</u>
Fixed Assets		
Property & Equipment	5,094,027	5,073,034
Accumulated Depreciation	(4,336,715)	(4,328,468)
Land	633,142	633,142
Total Fixed Assets	<u>1,390,453</u>	<u>1,377,707</u>
<b>TOTAL ASSETS</b>	<u><u>\$ 9,108,901</u></u>	<u><u>\$ 10,416,263</u></u>
<b>LIABILITIES &amp; EQUITY</b>		
Liabilities		
Current Liabilities		
AP Trade	\$ 15,367	\$ 203,619
Other Accounts Payable	39,168	141,552
Accrued Payables	489,898	454,417
Cap Lease Oblig - ST	1,271	4,112
A/P - Sections	-	210,495
Deferred Revenue	300	2,684,077
Total Current Liabilities	<u>546,003</u>	<u>3,698,272</u>
Long Term Liabilities		
Capital Lease Oblig	9,936	(4,255)
Total Long Term Liabilities	<u>9,936</u>	<u>(4,255)</u>
Total Liabilities	<u>555,939</u>	<u>3,694,016</u>
Equity		
Unrestricted Net Assets (R/E)	6,601,662	6,528,232
Fund Balance - Current Year	1,951,300	194,014
Total Equity	<u>8,552,962</u>	<u>6,722,247</u>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>\$ 9,108,901</u></u>	<u><u>\$ 10,416,263</u></u>

# Balance Sheet Classification

ILM-UT ST BAR (3176)

Base Currency: USD As of 12/31/2022

Dated: 01/20/2023

## CE

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
38141W273	GOLDMAN:FS GOVT INST	395,821.17	AAA	4.140	12/31/2022	4.140	4.140	395,821.17	0.00	1.0000	0.00	395,821.17
CCYUSD	Cash	1,824.62	AAA	0.000	12/31/2022	0.000	0.000	1,824.62	0.00	1.0000	0.00	1,824.62
CCYUSD	Receivable	400,250.00	AAA	0.000	12/31/2022	0.000	0.000	400,250.00	0.00	1.0000	0.00	400,250.00
---	---	<b>797,895.79</b>	<b>AAA</b>	---	<b>12/31/2022</b>	<b>2.054</b>	<b>2.054</b>	<b>797,895.79</b>	<b>0.00</b>	<b>1.0000</b>	<b>0.00</b>	<b>797,895.79</b>

## ST

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
19416QEA4	COLGATE-PALMOLIVE CO	300,000.00	AA-	1.950	02/01/2023	4.014	4.503	299,483.33	-128.33	99.7850	2,437.50	301,792.50
59217GAX7	METROPOLITAN LIFE GLOBAL FUNDING I	200,000.00	AA-	3.000	01/10/2023	3.246	7.363	199,987.59	-210.59	99.8885	2,850.00	202,627.00
06051GEU9	BANK OF AMERICA CORP	200,000.00	A	3.300	01/11/2023	0.321	4.286	200,161.64	-220.04	99.9708	3,116.67	203,058.27
9128284A5	UNITED STATES TREASURY	400,000.00	AAA	2.625	02/28/2023	3.065	4.517	399,722.29	-972.29	99.6875	3,567.68	402,317.68
912828ZD5	UNITED STATES TREASURY	400,000.00	AAA	0.500	03/15/2023	3.061	4.349	397,965.71	-1,090.71	99.2188	596.69	397,471.69
064159VK9	BANK OF NOVA SCOTIA	164,000.00	A	1.625	05/01/2023	0.356	5.468	164,688.60	-2,759.92	98.7370	444.17	162,372.85
064159VK9	BANK OF NOVA SCOTIA	75,000.00	A	1.625	05/01/2023	0.351	5.468	75,316.28	-1,263.53	98.7370	203.13	74,255.88
64952WDP5	NEW YORK LIFE GLOBAL FUNDING	300,000.00	AAA	1.100	05/05/2023	3.248	4.929	297,827.49	-1,726.59	98.7003	513.33	296,614.23
74368CBB9	PROTECTIVE LIFE GLOBAL FUNDING	167,000.00	AA-	0.502	04/12/2023	0.451	5.268	167,023.77	-2,227.00	98.6807	183.97	164,980.74
795451AU7	Sallie Mae Bank	250,000.00	BBB+	0.350	09/22/2023	0.400	0.400	249,909.59	0.00	99.9638	242.12	250,151.71
87165EUF2	Synchrony Bank	250,000.00	BBB	0.400	09/18/2023	0.450	0.449	249,910.71	0.00	99.9643	294.44	250,205.16
90348JT34	UBS Bank USA	250,000.00	A+	0.350	09/22/2023	0.400	0.400	249,909.59	0.00	99.9638	23.97	249,933.56
38149MZX4	Goldman Sachs Bank USA	250,000.00	A+	0.350	09/22/2023	0.400	0.400	249,909.59	0.00	99.9638	242.12	250,151.71
05580AD92	BMW Bank of North America	250,000.00	AA-	0.350	09/25/2023	0.400	0.400	249,908.31	0.00	99.9633	237.33	250,145.64
538036SD7	Live Oak Banking Company	250,000.00	NA	0.250	10/02/2023	0.300	0.300	249,905.91	0.00	99.9624	53.08	249,958.99
48133DE71	JPMORGAN CHASE FINANCIAL COMPANY LLC	200,000.00	A+	2.500	05/01/2023	2.500	6.364	200,000.00	-2,540.40	98.7298	861.11	198,320.71
38150AMC6	GOLDMAN SACHS GROUP INC	250,000.00	A	3.000	06/13/2023	3.049	6.962	249,949.11	-4,267.36	98.2727	1,000.00	246,681.75
3130ASR6	FEDERAL HOME LOAN BANKS	1,000,000.00	AAA	2.600	07/14/2023	4.168	4.984	993,242.40	-4,268.40	98.8974	1,227.78	990,201.78
69448XNA6	Pacific Life Short Term Funding LLC	250,000.00	A-1+	0.000	01/10/2023	3.146	2.790	249,806.25	0.00	99.9225	0.00	249,806.25
78014RGL8	ROYAL BANK OF CANADA	250,000.00	A+	4.000	11/30/2023	4.004	5.074	250,000.00	-2,324.75	99.0701	861.11	248,536.36
3133ENY87	FEDERAL FARM CREDIT BANKS FUNDING CORP	500,000.00	AAA	5.050	11/09/2023	5.050	5.112	500,000.00	-289.00	99.9422	3,647.22	503,358.22
---	---	<b>6,156,000.00</b>	<b>AA</b>	---	<b>06/20/2023</b>	<b>2.571</b>	<b>3.895</b>	<b>6,144,628.16</b>	<b>-24,288.91</b>	---	<b>22,603.42</b>	<b>6,142,942.67</b>

## LT

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
525ESC1Y5	LEHMAN ESCROW	300,000.00	NA	0.000	01/01/2049	---	1,094.938	0.00	1,050.00	0.3500	0.00	1,050.00
89114X2E2	TORONTO-DOMINION BANK	250,000.00	A+	3.300	05/24/2024	4.230	5.984	251,288.26	-5,886.48	98.1607	847.92	246,249.70
---	---	<b>550,000.00</b>	<b>A+</b>	---	<b>07/01/2024</b>	<b>4.230</b>	<b>10.607</b>	<b>251,288.26</b>	<b>-4,836.48</b>	---	<b>847.92</b>	<b>247,299.70</b>

## Summary

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
---	---	<b>7,503,895.79</b>	<b>AA</b>	---	<b>06/14/2023</b>	<b>2.572</b>	<b>3.921</b>	<b>7,193,812.21</b>	<b>-29,125.39</b>	---	<b>23,451.34</b>	<b>7,188,138.16</b>

\* Grouped by: BS Class 2. \* Groups Sorted by: BS Class 2. \* Weighted by: Base Market Value + Accrued, except Book Yield by Base Book Value + Accrued. \* Holdings Displayed by: Lot.

**UTAH STATE BAR**  
**Membership Statistics**  
**December 31, 2022**

<b><u>STATUS</u></b>	<b><u>12/31/21</u></b>	<b><u>12/31/22</u></b>	<b><u>Change</u></b>
Active	8,941	8,931	(10)
Active under 3 years	814	849	35
Active Emeritus	283	325	42
In House Counsel	113	125	12
Foreign Legal Counsel	4	4	-
LPP	18	25	7
Military Spouse	-	-	-
<b>Subtotal - Active</b>	<b>10,173</b>	<b>10,259</b>	<b>86</b>
Inactive - Full Service	808	837	29
Inactive - No Service	2,068	2,084	16
Inactive Emeritus	412	458	46
Inactive House Counsel	10	12	2
Inactive LPP	-	-	-
<b>Subtotal - Inactive</b>	<b>3,298</b>	<b>3,391</b>	<b>93</b>
<b>Total Active and Inactive</b>	<b>13,471</b>	<b>13,650</b>	<b>179</b>
<b><u>Supplemental Information</u></b>			
Paralegals	151	139	(12)
<b><u>Active Attorneys by Region</u></b>			
1st Division (Logan - Brigham)	202	213	11
2nd Division (Davis - Weber)	1,002	1,003	1
3rd Division (Salt Lake)	5,580	5,574	(6)
4th Division (Utah)	1,374	1,393	19
5th Division (Southern Utah)	558	577	19
Out of State	1,457	1,499	42
<b>Total Active Attorneys</b>	<b>10,173</b>	<b>10,259</b>	<b>86</b>