

Utah State Bar Commission

Friday, February 9, 2024
Utah Law & Justice Center

AGENDA

1. **9:00 a.m. President's Welcome and Reports: Erik Christiansen**
 - 05 Mins. 1.1 ABA Mid-Year Meeting and NCBP Meeting Report
 - 02 Mins. 1.2 Billy Walker Retirement and Replacement
Search Status: **Elizabeth Wright**
 - 05 Mins. 1.3 Legislative Update
 - 05 Mins. 1.4 Spring Convention Report: **Cara Tangaro**
 - 01 Mins. 1.5 St. George Room Reservations (TAB 1, Page 3)
 - 05 Mins. 1.6 State Audit Update: **Elizabeth Wright**
 - 05 Mins. 1.7 Two-day Fall Forum on November 14 -15?: **Michelle Oldroyd**
2. **9:30 a.m. Action Items**
 - 20 Mins. 2.1 Approve recommendation for 2024-2025 License Fees: (TAB 2, Page 5)
Rick Hoffman and Nathan Severin
 - 10 Mins. 2.2 Select Dorathy Merrill Brothers Award Recipient (TAB 3, Page 7)
 - 10 Mins. 2.3 Select Raymond Uno Award Recipient (TAB 4, Page 15)
 - 10 Mins. 2.4 Well-Being Impact Award (TAB 5, Page 20)
3. **10:30 a.m. Information Items**
 - 20 Mins. 3.1 Leadership Academy Report: **Jen Tomchak**
 - 20 Mins. 3.2 Well-being Service Provider Updates: **Martha Knudson**
 - 20 Mins. 3.3 Access to Justice Director Introduction and Report: **Megan Connelly**
- 11:45 a.m. Adjourn**

CONSENT AGENDA

(TAB 6, Page 26)

(Approved by policy if no objections are raised)

1. Minutes of January 12, 2024 Commission Meeting

ATTACHMENTS

(TAB 7, Page 30)

1. December 2023 Financial Statements

2024 CALENDAR

February 13	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
February 16	IP Summit	All Day	S.J. Quinney College of Law
February 20	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
February 27	Conference Call re: GRC Vote Review	4:00 p.m.	Telephone/Video Conference
February 27-28	Utah State Bar Examination		Law & Justice Center
March 8	Executive Committee Meeting	Noon	Telephone/Video Conference
March 14	Commission Meeting	1:00 p.m.	Dixie Center, St. George, Utah
March 14	Opening Reception	4:00 p.m.	Dixie Center, St. George, Utah
March 14	Commission/Judges Dinner	6:30 p.m.	BCC, St. George, Utah
March 14-16	Utah State Bar Spring Convention		Dixie Center, St. George, Utah
April 1	Bar Election - Balloting Begins		
April 3 - 6	Western States Bar Conference		Lihue, Hawaii
April 9 - 11	ABA Day in Washington DC		Washington DC
April 11	Bar Sections Leadership Meeting		Law & Justice Center
April 12	Executive Committee Meeting	Noon	Telephone/Video Conference
April 15	Bar Election - Balloting Ends		
April 19	Commission Meeting	9:00 a.m.	Law & Justice Center
May TBD	Admission Ceremony	Noon	TBD
May 3	Law Day Luncheon	Noon	Grand America
June TBD	Jackrabbit Bar		TBD
June 14	Executive Committee Meeting	Noon	Telephone/Video Conference
June 21	Commission Meeting	9:00 a.m.	Law & Justice Center
July 10	Executive Committee Meeting	Noon	Telephone/Video Conference
July 17	Commission Meeting	9:00 a.m.	TBD
August 1 - 6	ABA Annual Meeting		Chicago, Illinois

TAB 1

Utah State Bar.

Spring Convention in St. George



March 14-16

Dixie Center at St. George

1835 Convention Center Drive | St. George, Utah

Make your plans
to attend today!

2024 "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	Nightly Rate (Does NOT include tax)	Block Size	Release Date	Miles from Dixie Center to Hotel
Clarion Suites St. George 1239 S. Main St., St. George (435) 673-7000, request "Utah State Bar"	\$129	10-King 10-2 Queen	2/14/24	1
Comfort Inn & Suites 138 E. Riverside Dr., St. George (435) 628-8544, request "Utah State Bar" or ask for Yolanda	\$200	10-King 10-2 Queen	2/14/24	0.5
Courtyard St. George 185 S. 1470 E., St. George (435) 986-0555	\$269	10-King 10-2 Queen	1/29/24	4
Fairfield Inn 1660 S. Convention Center Dr., St. George (435) 673-6066	\$185 \$199	10-King 10-2 Queen	2/14/24	0.3
Hilton Garden Inn 1731 S. Convention Center Dr., St. George (435) 634-4100	\$185 \$199	10-King 10-2 Queen	2/14/24	0.1
Holiday Inn 1808 S. Crosby Way, St. George (435) 628-8007	\$185 \$205	10-King 10-2 Queen	2/14/24	0.5
Holiday Inn Express & Suites, St. George North 2450 N. Town Center Dr., Washington (435) 986-1313 x10	\$139	10-King 10-2 Queen	1/14/24	11.5
Hyatt Place 1819 S. 120 E., St. George (435) 656-8686	\$199 \$209	10-King 10-2 Queen	2/14/24	0.5
My Place Hotel, St. George 1644 S. 270 E., St. George (435) 674-4997	25% off daily rate	22 rooms (any available)	no closing date	6
Red Lion Hotel 850 S. Bluff St., St. George (435) 628-4235	\$129	10-King 10-2 Queen	2/01/24	2
Tru by Hilton 1251 S. Sunland Dr., St. George (435) 634-7768	\$189	10-King 5-2 Queen	2/14/24	1

Visit utahbar.org/springconvention
to book your reservation today!

TAB 2

Utah Courts
UCJA Rule 14-207 (Code of Judicial Administration)

Rule 14-207. Finances.

Rule printed on January 29, 2024 at 12:25 pm. Go to <https://www.utcourts.gov/rules> for current rules.

Effective:
11/1/2023

(a) **Budget.** The Board must prepare an annual budget that is published for comment before final adoption. The Board must adopt the budget at its first regular meeting following the reorganization meeting. No obligations may be incurred unless within the limits of the budget and within the scope of the authorized objectives of the Board. The Bar's annual budget must include a budget for the OPC, including the salaries of OPC counsel and staff, expenses, and administrative costs. The Board must ratify the budget for the OPC approved by the Oversight Committee unless the Board petitions the Supreme Court for modifications, in which case the budget approved by the Supreme Court is final.

(b) **Annual Licensing Fees.** The Board must annually submit to the Supreme Court recommendations on increasing, decreasing, or maintaining the annual licensing fees for attorneys, Licensed Paralegal Practitioners, and entities regulated by the Utah State Bar. The submission must include a basis for the recommendation.

(c) **Section dues.**

(1) Bar sections may, with Board approval, charge an annual membership fee to obtain the commitment of members to section activities and to provide revenue to carry out the section's purposes. The amount of such membership fees will be fixed by the section subject to the approval of the Board.

(2) The Bar must hold any funds raised by sections from membership fees as separately identifiable funds of the sections, and disburse to the sections as needed, to carry out the functions of the sections. Such funds may not revert to the general Bar fund at the end of the budget year, but will continue to be held as a separately identifiable fund.

(d) **Disbursements.**

(1) Bar funds are disbursed only in accordance with the provisions of law and by these Bylaws, and at the direction of the Board.

(2) Checking accounts must be maintained with banks to be designated by the Board in such amounts as the Board will determine.

(3) No check may be drawn on Bar funds except as the Board authorizes.

(4) Checks under \$1,000 may be signed by an Executive Committee member or by the executive director. Checks over \$1,000 must bear the signatures of any two Executive Committee members or any one Executive Committee member and the executive director, unless the funds come from the revolving-fund account for day-to-day operating needs, in which case a check of any amount may be signed by an Executive Committee member or by the executive director. The Board designates the size of the revolving-fund account annually and may revise this at any time.

(e) **Investing funds.** The Board must direct any investment of Bar funds.

TAB 3

UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: February 9, 2024

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

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Adrienne Bell	<i>No prior Bar awards.</i>	Anaya Gayle
Kendra Brown	<i>No prior Bar awards.</i>	Private
Monica Call	<i>No prior Bar awards.</i>	Private
Jill Coil	<i>No prior Bar awards.</i>	Ricky Shelton
Hon. Diana Hagen	<i>No prior Bar awards.</i>	Gabrelle Jones
Melissa Holyoak	<i>No prior Bar awards.</i>	Jenifer Tomchak, Women Lawyers of Utah
Annette Jan	<i>No prior Bar awards.</i>	Sean Reyes
Hon. Linda Jones	<i>No prior Bar awards.</i>	Private
Kara North	<i>2017 Professionalism Award</i>	Emily Adams
Emily Paulos	<i>No prior Bar awards.</i>	Alyssa Wood
Hon. David Sam	<i>No prior Bar awards.</i>	St. Benjamin Bartholomew
Scarlet Smith	<i>1999 Judge of the Year</i>	Private
Gretta Spendlove	<i>No prior Bar awards.</i>	Miriam Allred
Juliette White	<i>No prior Bar awards.</i>	Ashley Gregson
	<i>2021 Professionalism Award</i>	Dana Robinson

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2024 to review the nominations for the Dorathy Merrill Brothers Award. The Committee discussed the merits of each nominee and finally agreed upon recommending Judge Diana Hagen to the Bar Commission for consideration.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2023	Ashley Peck	Jill Coil, Mary Deiss Brown, Hon. Michele Christiansen-Forster, Heidi Goebel, Hon. Ann Marie McIlff Allen, Rachel Ortiz, Michelle Quist
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	

Christy Abad

From: info@utahbar.org <webhost@utahbar.org>
Sent: Thursday, February 1, 2024 10:09 AM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Jenifer Tomchak

Bar Number

10127

Email address

jen.tomchak@tomchaklaw.com

Date

02/01/2024

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Diana Hagen

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:

On behalf of the Women Lawyers of Utah, it is my honor to nominate Diana Hagen as the Dorothy Merrill Brothers Award recipient for 2024. Diana is the embodiment of all of the qualities recognized by this award. Her professionalism, public service, and public dedication have significantly contributed to the advancement of women in the legal profession. We have outlined her vast accomplishments in the attached letter.

File

- [WLU_Diana-Hagen-Nomination_DM-Brothers-2024.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

February 1, 2024

2023-2024 Board

Brit Merrill
President

Lauren Shurman
Past President

Holly Nelson
President Elect

Taylor Webb
Treasurer

Jen Tomchak
Secretary

Larissa Lee
Melissa Reynolds
Career Advancement
Committee Chairs

Melinda Bowen
CLE Committee Chair

Sarah Hafen
Path to Partnership Chair

Ashley Gregson
Judicial Mentoring Chair

Anaya Gayle
Attorney Wellness Chair

Anne Freeland
Lena Daggs
Membership & Publicity
Committee Chairs

Ellie Rudolf
Shelby Jaye Hughes
Retreat Committee Chairs

Naz Scott
In-House Attorney Liaison

Rachel Terry
Government Attorney
Liaison

Grace Pusavat
Community Outreach Chair

Scarlet Smith
Historian

Patricia Christensen
WLU Advisor

VIA ELECTRONIC TRANSMISSION

Utah State Bar Awards Committee
c/o Christy Abad

**Re: Justice Diana Hagen Nomination for Dorothy Merrill
Brothers Award 2024**

Dear Awards Committee:

On behalf of the Women Lawyers of Utah, it is my honor to nominate Diana Hagen as the Dorothy Merrill Brothers Award recipient for 2024. Diana is the embodiment of all of the qualities recognized by this award. Her professionalism, public service, and public dedication have significantly contributed to the advancement of women in the legal profession.

I first met Diana when she was the incoming president of the Utah Chapter of the Federal Bar Association ("FBA"). Diana felt strongly that the FBA should have a pro bono committee and host at least one event annually that focuses on increasing access to justice. She knew that the two of us shared a common passion for increasing awareness about domestic violence and approached me to chair the newly-formed pro bono committee. It was my first active involvement in any Bar activity. Together we created a statewide program to train shelter workers how to prepare and submit self-petitions for legal status under the Violence Against Women Act for non-residents who had been victims of domestic violence. The project was an overwhelming success. The Pro Bono Committee, Diana's legacy project for the FBA, is now in its fifteenth year, hosting annual projects targeted at increasing access to justice.

Since my first interaction with Diana, my admiration for her has only grown. Diana is an amazing woman, who has taken great measures to put her family first, while still managing to have an extremely successful career and to volunteer for a number of causes that are important to her. Her exemplary career has served as an inspiring example to countless women in the legal profession. In addition, to being an inspiration, Diana has actively and persistently encouraged women to get involved in the Bar and

community, to apply for positions in the judiciary, and to otherwise extend themselves in a way that enriches their lives and helps them achieve their professional goals. She does not stop there, either. She serves as a cheerleader for these women, writing letters in support and giving glowing referrals.

Professional Achievements

Diana's legal prowess is well known throughout Utah and Tenth Circuit. She is a polished and bright oral advocate and accomplished legal writer, who has spent most of her career representing the United States in its most high profile cases in Utah. The S.J. Quinney College of Law, University of Utah, where she taught appellate advocacy, described her career as follows:

[Ms. Hagen] received her law degree Order of the Coif from the University of Utah College of Law (1998), where she received 1st Place, Best Brief, and Best Oral Advocate in the Traynor Moot Court Competition, competed as a member of the National Moot Court Team, and served as a Note and Comment Editor of the Utah Law Review. Following law school, she served as a law clerk for federal District Court Judge Tena Campbell. After her clerkship, she joined the litigation section of the Salt Lake City law firm of Parr Waddoups Brown Gee & Loveless, where she focused on media and First Amendment law. Diana joined the Appellate Section of the United States Attorney's Office in January 2001. Since that time, she has briefed well over 200 appeals and has presented more than 60 appellate arguments before the Tenth Circuit Court of Appeals in Denver, Colorado. As Appellate Chief, Diana is responsible for supervising all federal criminal appeals from the District of Utah as well as assisting with civil appeals. In addition to her appellate work, Diana periodically works on novel or challenging matters at the trial court level. Most notably, Diana was on the trial team that successfully prosecuted Brian David Mitchell and Wanda Barzee for the kidnapping of Elizabeth Smart.

Available at https://faculty.utah.edu/u0071160-DIANA_HAGEN/biography/index.html. After many years as the Appellate Chief, Diana was promoted yet again to serve as First Assistant to the U.S. Attorney of the United States Attorney's Office for the District of Utah. Then in 2018, Diana fulfilled her lifelong dream of becoming a judge. She was first appointed to the Utah Court of Appeals and shortly thereafter (in 2022) to the Utah Supreme Court, where she is recognized as a dedicated and thoughtful member of the judiciary.

From the bench, her questions demonstrate that she has always prepared thoroughly and identified the crucial dispositive issues. Her knowledge of the law and appellate procedure is clear at every oral argument. She maintains a calm and respectful judicial temperament, even in situations that would likely anger other judges. Her knowledge and demeanor invite—rather than command—respect. Perhaps even more important, however, is the commitment that she demonstrates to Utah law in her written opinions. Her opinions are exceptionally clear and concise. She is careful. She faithfully adheres to the appellate rules even when it may be tempting to reach issues that were waived or inadequately briefed. She strengthens Utah law. And her demeanor comes through in her written work—her words are courteous and respectful even in explaining why a party has lost on appeal.

Public Service and Dedication

Diana also has a strong commitment to her community. She has served on a number of boards, where she set herself apart as a strong leader who gets results. Diana is a Past-President of the Salt Lake County Bar Association, the Utah Chapter of the Federal Bar Association, and the Women Lawyers of Utah. Diana has also been a member of the U.S. District Court Attorney Discipline Committee and the Utah board of the Tenth Circuit Historical Society. She served as a community member to the Utah Dating Violence Taskforce from 2005 to 2010, and actively participates in programs to increase awareness about domestic and dating violence.

Diana has a special passion for breaking down barriers for females, in the legal community and generally. As such, she has served as a mentor for Women Lawyers of Utah (“WLU”) since 2008 (in addition to the informal mentoring she provides to promising female attorneys). She served on WLU’s Work/Life Balance Committee, a role for which she is eminently qualified. Early in her career, when Diana was a mother of two young children, she was forced to make difficult decisions early in her career to ensure that she was able to be an active participant in her children’s lives. As a result of her decisions, she has had a more fulfilling career and serves as an example to many female attorneys who are trying to find the elusive work/life balance.

Admirably, when Diana’s young daughter expressed an interest in joining the Girl Scouts of America and Diana learned that there were no troops in her area, Diana formed a troop. She volunteered as the troop leader from 2011 until her daughter graduated and now serves on the Girl Scouts Board of Directors. Diana spent countless hours planning detailed lessons for her troop that focus on empowering these young girls and helping them develop into future leaders. Diana is a strong role model to her daughter, teaching her (and the other girls in her troop) that they can be anything they desire.

Since taking the bench, Justice Hagen continues to be actively involved in WLU's programming. In particular, she has been a tremendous asset to WLU's judicial mentoring committee. She has volunteered many hours toward meeting with aspiring judicial candidates, mentoring them on the judicial selection process and participating in mock interviews. She gladly shares the insights she gained through her own experiences in applying for judicial positions with other WLU members. Justice Hagen is also a frequent speaker at WLU events and CLE programs, such as Banter with the Bench. She recently participated in a panel discussion, attended by over 200 WLU members, celebrating the first female majority on the Utah Supreme Court.

Conclusion

Thank you for your consideration of Ms. Hagen. I am confident that she will make a valuable addition to the impressive group of women on whom the Utah State Bar has bestowed this award.

Sincerely,

Jenifer L. Tomchak

TAB 4

UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: February 9, 2024

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

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Kim Cordova	<i>No prior Bar awards.</i>	<i>Private</i>
Abby Dizon-Maughan	<i>2021 Young Lawyer of the Year</i>	<i>Private</i>
		Dana Robinson
Hon. Shauna Graves-Robertson	<i>No prior Bar awards.</i>	Hon. Laura Scott
Gabriela Mena	<i>No prior Bar awards.</i>	Kaytlin Beckett
		Greg Skordas
Hon. Christina Ortega	<i>No prior Bar awards.</i>	Tony Graf, Utah Minority Bar, Tara Isaacson, Camille Neider
		<i>Private</i>
Eduardo Reyes Chavez	<i>No prior Bar awards.</i>	<i>Private</i>
Hon. Andrew Valdez	<i>2005 Judge of the Year</i>	Cary Jones
		Mark Morris

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2024 to consider the nominations for the 2024 Raymond S. Uno Award. The committee agreed upon recommending Judge Shauna Graves-Robertson for the award.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2023	Sade Turner	Heidi Chamorro, Gabriela Mena, James Sorenson
2022	Ross I. Romero	Abby Dizon-Maughan, Prof. Erika George, Cheryl Mori
2021	Engels Tejada	<i>No other nominees.</i>
2020	Melinda Bowen	Hon. Lynn W. Davis, James A. Sorenson, Engels Tejada
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.	

Christy Abad

From: info@utahbar.org <webhost@utahbar.org>
Sent: Friday, February 2, 2024 3:11 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Women Lawyers of Utah Laura Scott

Bar Number

6649

Email address

lsscott@utcourts.gov

Date

02/02/2024

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Shauna Graves-Robertson

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:

As the only African American female judge ever appointed or elected to serve the State of Utah, Judge Shauna Graves-Robertson has dedicated her life to enhancing the administration of justice and has tirelessly served our community as a respected jurist, trusted colleague, patient mentor, and gracious role model. Recognizing that being the "first" and the "only" can be often isolating and lonely, she is the first to welcome, engage, encourage, and support others who are navigating the often-difficult path of the legal profession, especially minorities and women.

Judge Graves-Robertson's commitment to advancing and supporting minorities is evidenced by her devotion of endless hours supporting efforts to diversify the legal community and better serve communities of color. She has served on numerous committees and boards, including the Utah Task Force on Racial and Ethnic Fairness in the Legal Profession, the Utah Supreme Court Rules of Criminal Procedure Committee, and the Committee on Judicial Outreach. She is also a dedicated member of the Alpha Kappa Alpha sorority, the National Association of Women Judges, Women Lawyers of Utah (WLU), and the Utah Minority Bar Association. And through her service on the Board of Directors of the Alberta Henry Education Foundation and Youth and Families with Promise, Judge Graves-Robertson has worked hard to advance access to education for Utah's economically disadvantaged students.

Her contributions have been recognized with the Racial Justice Award from the YWCA (2007), the Martin Luther King Jr. Drum Major Award (2008), the Social Justice/Civil Rights award (2013), the Meritorious Service Award from the Ogden branch of the NAACP (2014), and an honorary doctorate of Humane Letters from Salt Lake Community College (2017).

For over thirty years, Judge Graves-Robertson has been quietly but persistently pressing issues of racial and ethnic and gender fairness in our community. WLU is nominating Judge Graves-Robertson because of her steadfast commitment to justice, professionalism, and activities to advance minorities and women in the legal professional. For example, Judge Graves-Robertson actively participates in WLU's annual "Banter With the Bench," which provides an opportunity for attendees to engage in small group discussions with Utah's female judges. Judge Graves-Robertson is also actively engaged with UMBA and regularly attends and otherwise supports their events.

In short, Judge Graves-Robertson is a lawyer of great character, integrity, and personal strength who treats everyone with dignity, respect, and kindness. WLU can think of no one more deserving of this award.

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.

TAB 5

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: February 9, 2024

RE: AWARD RECOMMENDATION – Utah Legal Well-being Impact Award

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Anita Dickinson	<i>No prior Bar awards.</i>	Jennifer Mitchell
Danielle Hawkes	<i>No prior Bar awards.</i>	<i>Private</i>
		Martha Knudson

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2024 to consider the nominations for the 2024 Utah Legal Well-being Impact Award. The committee agreed upon recommending Danielle Hawkes for the award.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2023	Martha Knudson	

Christy Abad

From: info@utahbar.org <webhost@utahbar.org>
Sent: Friday, February 2, 2024 4:51 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Women Lawyers of Utah (WLU)

Bar Number

[REDACTED]

Email address

[REDACTED]

Date

02/02/2024

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Danielle Hawkes

Award

THE UTAH LEGAL WELL-BEING IMPACT 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:

Danielle Hawkes has been a long-time champion of attorney well-being, even before the concept was on the radar as something to pay attention to. Dani's steadfast efforts over many years have improved the lives of Utah attorneys and lifted the level of service we are able to provide clients and community members in the justice system. Dani has contributed significantly to the state bar and the resources it offers to attorneys in our state.*

*See attached letter for complete nomination

File

- [WLU-Nomination_Dani-Hawkes-2024.pdf](#)

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.



WOMEN LAWYERS of UTAH

February 2, 2024

VIA ELECTRONIC SUBMISSION

2023-2024 Board

Brit Merrill
President

Lauren Shurman
Past President

Holly Nelson
President Elect

Taylor Webb
Treasurer

Jen Tomchak
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Melissa Reynolds
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Path to Partnership Chair

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Scarlet Smith
Historian

Patricia Christensen
WLU Advisor

Utah State Bar Awards Committee
c/o Christy Abad

Re: Danielle Hawkes Nomination for The Utah Legal Well-Being Impact Award 2024

Dear Awards Committee:

Danielle Hawkes has been a long-time champion of attorney well-being, even before the concept was on the radar as something to pay attention to. Dani's steadfast efforts over many years have improved the lives of Utah attorneys and lifted the level of service we are able to provide clients and community members in the justice system. Dani has contributed significantly to the state bar and the resources it offers to attorneys in our state.

Dani was instrumental in establishing the "Lawyers Helping Lawyers" program and has dedicated untold hours to its success. A survivor of alcohol and drug use disorder, Dani has been open about her experiences through that and into a place where she is now thriving and has a successful law firm and practice. Her vulnerability in sharing her story over many years has been extraordinary and stood in absolute defiance of the stigma attached to these very serious health challenges – especially in the legal community (in which these and similar illnesses run rampant, but are rarely acknowledged with kindness and grace). Her efforts have touched lives individually and the practice of law in Utah generally.

Not only does Dani openly share her experiences, she has been dedicated to advocacy for folks with these and similar challenges. Her efforts have saved careers and have literally saved lives. Her work over many years has been exemplary and undaunted. She has worked quietly, but determinedly, in this space with no expectation or desire for recognition. Her work has simply been to help others come through deep darkness back into light.

WLU is nominating Dani now because her focus on attorney well-being, in part, prompted WLU to create its own attorney wellness chair position on our board. Dani inspired WLU to further amplify the message that mental,

physical, and emotion health and well-being are critical to our success and livelihood. Dani's actions have created a ripple effect in WLU and throughout the bar.

Dani's remarkable service deserves recognition.

We strongly recommend that the Utah State Bar Commission recognize Dani's difficult and tireless efforts to raise visibility of well-being in the legal profession. Without reservation, WLU nominates Dani Hawkes for the 2024 Utah Legal Well-Being Impact Award.

Sincerely,



Feb. 3, 2024

Dear Members of the Award Committee,

I am writing to enthusiastically nominate Danielle Hawkes for the Utah State Bar Well Being Impact Award. Through her work on both the Well-Being Committee and Lawyers Helping Lawyers, Dani has demonstrated an unwavering commitment to the well-being of Utah's legal profession, making her an ideal candidate for this award.

Here are some key reasons why Dani deserves to be recognized:

1. **Revitalization of Lawyers Helping Lawyers:** Dani took on the challenge of revitalizing the Lawyers Helping Lawyers program in Utah when it was in dire need of rejuvenation. Her vision, dedication, and hard work breathed new life into this vital resource for attorneys struggling with mental health, addiction, and stress-related issues.
2. **Innovative Approaches:** Under Dani's leadership, the program has embraced innovative approaches to well-being, including organizing wellness workshops, providing access to mental health resources, and fostering a supportive community for lawyers to connect and seek help when needed.
3. **Positive Impact:** The impact of Dani's efforts has been tangible and far-reaching. She has helped countless legal professionals in Utah find support, guidance, and resources to navigate the challenges they face in their demanding careers.
4. **Advocacy and Awareness:** Dani's advocacy work has also contributed to raising awareness about the importance of well-being in the legal profession. She has been a vocal advocate for reducing stigma associated with substance use disorders and other mental health issues and encouraging open conversations about these topics within the legal community.

I wholeheartedly endorse Danielle Hawkes as a deserving candidate for the Utah State Bar Well Being Impact Award. Her contributions reflect the values and mission of this award, and her work has made a significant difference in the lives of her colleagues.

Please feel free to contact me if you require any additional information or references regarding Danielle Hawkes' qualifications for this award.

Sincerely,



Martha Knudson
Director, Utah State Bar Well-Being Committee
Martha.knudson@utahbar.org | 801-573-5101

TAB
6

UTAH STATE BAR COMMISSION MEETING

MINUTES

Friday, January 12, 2024

In Attendance: President Erik Christiansen, President-elect Cara Tangaro, and Commissioners Tom Bayles, Kim Cordova, Matt Hansen, Mark Morris, Chrystal Mancuso-Smith, Traci Gunderson, Tyler Young, and John Rees.

Ex-Officio Members: Nate Alder, Katie Lawyer, Kristin Woods, Lauren Shurman, Ezzy Khaosanga, Ashley Biehl, Tony Graf, Dean Elizabeth Kronk Warner, and Dean David Moore.

Not in Attendance: Commissioners J. Brett Chambers, Rick Hoffman, Greg Hoole and Shawn Newell. Ex-Officio members Anaya Gayle and Margaret Plane.

Also in Attendance: Executive Director Elizabeth A. Wright, General Counsel Maribeth LeHoux, Emily Lee, Director of Admissions, Utah Court Representative Nick Stiles, Hon. Augustus Chin, Mary-Margaret Pingree, Michael Barnhill.

1. President's Welcome and Reports

1.1 Review Legislative Phone Conference Calendar

Mr. Christiansen talked about the upcoming Legislative Session, and the Commission meetings that occur on Tuesdays after the Government Relations Committee meets.

1.2 Spring Convention Report

Ms. Tangaro provided an update. She informed the Commission that many judges will be attending, including all women from the Utah Supreme Court. Ms. Tangaro discussed main speakers and various CLEs as well as events planned at the Convention.

1.3 St. George Room Reservation Reminds

Mr. Christiansen noted that the Hilton has already filled up, and reminded Commissioner to book their accommodations soon. There will be a Commission dinner on March 14.

1.4 Third and Fourth Division Bar Elections Reminder

Mr. Christiansen discussed open seats and deadlines, with commissioner petitions due February 1, 2024.

1.5 Governor Cox Presentation at the Bar

Ms. Wright gave a summary of Governor Cox's CLE at the Bar, which was very well attended, both in person and online. The Governor spoke about his Disagree Better campaign.

1.6 2024 Annual Meeting

Mr. Christensen discussed the 2024 Annual Meeting, which will be held July 12 at the Utah Law & Justice Center. Ms. Woods suggested moving the July 17th Commission meeting to that date.

2. Action Items

2.1 Nominate Kim Cordova to Run for President-Elect

Ms. Cordova spoke about the role of the Bar and the Commission and why she was interested in being president.

Motion: Mr. Young moved to approve Ms. Cordova's nomination as president-elect. Mr. Morris seconded the motion. The Commission unanimously approved the motion.

2.2 Introduction of Ezzy Khaosanga, New YLD ABA Delegate

Mr. Christiansen introduced Ezzy Khaosanga to the Commission. She is the new YLD ABA Delegate.

2.3 Approve Asking the Court to Adopt the NextGen Bar Examination

Ms. Emily Lee, Director of Admissions, with Michael Barnhill from the Admissions Committee, presented on the NextGen Bar Examination. The Commission discussed the previously provided memo, as well as the role of the Commission regarding the Bar exam. Beginning July 2026, the current version of the Bar exam is being phased out. By 2028, the NextGen Bar will be the only version of the Bar provided by the NCBE. Ms. Lee recommended adopting the NextGen exam beginning in July 2027, so that the fall class of 2024 will know right from the beginning that they'll be tested on the new exam. Ms. Lee also discussed the alternative route to licensure that is being discussed, but clarified the new Bar exam will not be impacted by the alternate path discussions. If the NextGen exam is not adopted, we would have to develop our own exam. Ms. Lee noted that while we would be able to develop our own questions, the results would not be portable. Ms. Warner supported the recommendation of waiting till 2027 so that Utah was not an early adopter as the kinks get worked out. Mr. Moore asked if 2027 was too early and we should do 2028, since that's when Family Law will be added to the exam. Discussion ensued, with Commissioner's asking questions to the law school Dean's as to what the effects would be of the new bar exam. "Interviewing and Counseling" will be a subject on the new exam, and the Dean's noted that not everyone takes that course. Ms. Lee said we could always change our recommendation if before then we get information out of early adopting states that there are issues. Modified recommendation is to start July 2028.

Motion: Mr. Young made a motion for adopting the Next Gen Bar for July 2028. Ms. Tangaro seconded, and the Commission unanimously approved.

2.4 Approve Updates to Bar's Policies and Procedures

Ms. LeHoux discussed the changes to the Bar's policies and procedures, which were included in the meeting materials. This included changes to the Bar's social media policy, as well as other updates to reflect changes (e.g., payment methods, the dissolution of the Tuesday Night Bar).

Ms. Tangaro made a motion to approve the changes, which Mr. Hansen seconded. The

Commission approved unanimously.

3. Information Items

3.1 Law Related Education: Judge Augustus Chin

Judge Chin presented on Law Related Education, noting this was the 50th year of the program. Director Kathy Dryer is retiring after 30 years. Judge Chin discussed the role of civil education and what the law related education does, including Mock Trial, We the People (increase involvement in civil engagement). Princess Gutierrez is the new executive director. Judge Chin also discussed Peer Court, an alternative to the juvenile court process, which the group manages. The program is seeking additional funding of \$10,000 for the next fiscal year.

Ms. Gunderson made a motion to add and additional \$10,000 in the budget for Law Related Education if there are sufficient funds in the budget. Ms. Mancuso-Smith seconded, and the motion was unanimously approved.

3.2 JPEC Updates: Mary-Margaret Pingree

Ms. Pingree presented about JPEC. She discussed how important it is for judges to get feedback. She reported that Judges tell her the surveys are the only way they can get feedback and that they read all the comments.

Ms. Pingree walked through her presentation, which discussed the information the surveys provide to voters, and how they create public accountability to judiciary. She stated that evaluations sent to third parties to review to help maintain anonymity. Scores are posted on the website if judges decide to run for retention election. Often, judges retire rather than face retention if they got low scores.

3.3 Update on Legislative Audit

Ms. Wright gave an update on the legislative audit. She reported to the Commission that the Bar had separated functions into self-sustaining and non-self-sustaining. She stated that the Bar will use the information from the audit when we have to present on fees to the Court.

3.4 Other Items

The Commission noted that Mr. Christiansen has been selected to go on the Board of Governors of the ABA.

Adjournment.

The Commission adjourned at 11:05 am.

Consent Agenda.

The Commission approved by consent the following items:

- Minutes of the November 10, 2023 Commission Meeting.

TAB
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UTAH STATE BAR
Budget and Finance Committee
Financial Results as of December 31, 2023
and for the six months then ended

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FINANCIAL STATEMENT HIGHLIGHTS

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

	Actual	Budget	Fav (unfav) \$ Variance	Fav (unfav) % Variance
YTD Revenue	5,924,797	5,999,547	(74,750)	-1%
YTD Expenses	3,893,690	3,816,435	(77,256)	-2%
YTD Net Profit/(Loss)	2,031,107	2,183,113	(152,005)	-7%

YTD net profit is \$2,031,107 and is \$(152,005) less than budgeted. \$109,539 of this relates to grant revenue budgeted in FY 2024 that had to be recognized in FY 2023 as noted in prior months, which means that overall combined other revenues are favorable \$31,789.

YTD Net Profit –Cash Basis: Adding back year-to-date depreciation expense of \$76,576 and deducting capital expenditures of \$120,465, the cash basis year-to-date net profit is approximately \$(43,889) lower.

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

Admissions: Admissions is currently reporting a \$(70,419) unfavorable variance compared to the budget. Expenses are 20%, or \$56,213 over budget, mainly attributable to Program Services and Salaries.

NLTP: NLTP revenues are at 131% of the budget, and expenses are favorable at 77% of budget among all three functional expenses categories, creating a \$19,778 favorable variance YTD.

CLE: CLE is reporting a \$(7,604) loss YTD. Revenues and expenses are at 92% and 79%, respectively. In-person CLE registrations are \$47,739 favorable, while video library sales are unfavorable \$(63,598). This YTD trend proves that in-person CLE continues to gain momentum.

Summer Convention: The Summer Convention performed \$(12,877) lower than expected YTD, although a profit of \$51,102 has been booked. A \$29,000 shortfall of sponsor revenue compared to budget, resulting from the online format change, and allocated expenses YTD coming in favorably at 47% to offset net to the unfavorability.

Fall Forum: This Year's Fall Forum was a success and looks to have netted a \$23,129 profit against a budget of \$23,129. Attendance was outstanding, and all expenses were within \$2,000 of their allotment.

Member Services: Total YTD Revenue is flat at \$1,857 favorable. Program services and salaries are currently over-budget, which nets to a \$(68,171) unfavorability.

UTAH STATE BAR
Budget and Finance Committee
Financial Results as of December 31, 2023
and for the six months then ended

32

Public Services: Fiscal year 2024 budgeted grant revenue of \$109,539 in July 2023, which required recognition in fiscal year 2023. This was recognized as required, and thus contributes to the understatement of revenues of only 32% of budget YTD. Total expenses are currently over budget by \$13,269, or 3%.

Bar Operations: Bar Operations has seen just a 1% overspend among budgeted expenses. Netted against a favorable investment income, there is currently \$143,254 favorability YTD compared to budget.

Facilities: With a combination of rental revenues being at 77%, or \$(21,845) less than budgeted, and a current overspend for Program Services and G&A, an unfavorable variance of \$(32,229) is being recognized YTD.

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 - 4 Months' Operations	\$2,699,823
Capital Replacement Reserve – Equipment	200,000
Capital Replacement Reserve – Building	600,000
Technology/Contracts Reserve - Database & Tava Contracts	<u>378,000</u>
Total	\$3,877,823
Estimated cash reserve as of December 31, 2023	<u>\$4,021,294</u>
Excess of current cash reserve exceeding board-designated reserve	<u>\$ 143,471</u>

**Utah State Bar
Income Statement
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
Licensing	18,875	21,000	19,928	1,072	105%	4,588,938	4,665,152	4,737,868	(72,716)	98%	4,968,948	94%
Admissions	27,910	14,600	29,344	(14,744)	50%	208,910	229,125	243,331	(14,206)	94%	641,787	36%
NLTP	2,100	8,250	2,542	5,708	325%	27,300	42,900	32,807	10,093	131%	61,899	69%
OPC	-	8,120	-	8,120	-	13,146	9,420	16,523	(7,103)	57%	38,800	24%
CLE	64,710	38,095	67,478	(29,383)	56%	217,845	233,207	254,558	(21,351)	92%	818,011	29%
Summer Convention	-	-	-	-	-	128,325	51,102	85,000	(33,898)	60%	85,000	60%
Fall Forum	225	-	354	(354)	0%	47,275	88,925	72,792	16,133	122%	72,792	122%
Spring Convention	-	-	-	-	-	1,300	2,390	1,177	1,213	203%	119,200	2%
Member Services	1,493	27,152	1,739	25,413	1561%	190,803	217,044	215,187	1,857	101%	344,881	63%
Public Services	(5,326)	2,057	(7,907)	9,964	-26%	6,134	34,397	106,005	(71,608)	32%	113,303	30%
Bar Operations	27,569	43,743	15,909	27,834	275%	90,736	227,009	75,462	151,547	301%	194,716	117%
Facilities	13,773	12,548	19,009	(6,461)	66%	65,019	72,493	94,338	(21,845)	77%	210,806	34%
Innovation in Law	-	14,053	10,750	3,303	131%	-	51,634	64,500	(12,866)	80%	129,000	40%
Total Revenue	151,329	189,618	159,145	30,472	119%	5,585,732	5,924,797	5,999,547	(74,750)	99%	7,799,143	76%
Expenses												
Licensing	12,071	12,642	11,899	(743)	100%	101,980	126,223	108,791	(17,433)	116%	277,027	46%
Admissions	28,363	45,301	29,500	(15,801)	154%	270,111	338,998	282,786	(56,213)	120%	522,602	65%
NLTP	5,056	6,331	7,310	979	87%	30,660	32,914	42,600	9,685	77%	85,054	39%
OPC	148,217	147,526	156,927	9,401	94%	780,959	839,380	848,592	9,312	99%	1,693,689	50%
CLE	48,324	47,612	45,894	(1,718)	104%	282,844	240,811	304,486	63,675	79%	781,283	31%
Summer Convention	-	-	292	292	0%	237,329	18,524	39,545	21,021	47%	42,623	43%
Fall Forum	7	49,505	12	(49,493)	412540%	72,089	65,796	63,839	(1,957)	103%	72,793	90%
Spring Convention	72	-	-	-	-	118	(9,857)	-	9,857	-	119,199	-8%
Member Services	47,061	70,184	59,120	(11,064)	119%	319,821	470,736	400,708	(70,028)	117%	1,051,348	45%
Public Services	50,689	59,447	62,828	3,381	95%	341,113	421,517	408,248	(13,269)	103%	809,793	52%
Bar Operations	169,058	176,917	185,588	8,671	95%	1,017,172	1,071,331	1,063,038	(8,293)	101%	2,113,518	51%
Facilities	33,310	38,946	31,100	(7,846)	125%	180,266	219,514	187,286	(32,229)	117%	397,705	55%
Innovation in Law	-	16,631	11,070	(5,561)	150%	-	57,803	66,418	8,615	87%	132,835	44%
Total Expenses	542,229	671,041	601,539	(69,502)	112%	3,634,462	3,893,690	3,816,435	(77,256)	102%	8,099,469	48%
Other												
Net Profit (Loss)	\$ (390,900)	(481,423)	\$ (442,393)	\$ (39,030)	109%	\$ 1,951,270	2,031,107	\$ 2,183,113	\$ (152,005)	93%	\$ (300,326)	-676%
Depreciation	13,571	12,610	12,990	380	97%	77,752	76,576	77,947	1,370	98%	158,246	
Cash increase (decrease) from operations	(377,329)	(468,813)	(429,403)	(39,410)	88%	2,029,022	2,107,683	2,261,059	(153,376)	93%	(142,080)	
Changes in operating assets/liabilities	(142,965)	26,539	26,539	-	-539%	(3,042,682)	(4,423,774)	(4,423,774)	-	100%	20,000	
Capital expenditures	(143,788)	(1,200)	(8,333)	7,134	1725%	(58,589)	(120,465)	(50,000)	(70,465)	241%	(157,000)	
Net change in cash	\$ (664,083)	\$ (443,474)	\$ (411,198)	\$ (32,276)	108%	\$ (1,072,249)	\$ (2,436,556)	\$ (2,212,715)	\$ (223,841)	110%	\$ (279,080)	873%

**Utah State Bar
Licensing
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4010 · Section/Local Bar Support fees	-	-	-	-	-	17,048	19,152	17,506	1,646	109%	17,662	108%
4004 · Admissions - Laptop Fees	-	-	-	-	-	230	-	235	(235)	0%	235	0%
4006 · Transfer App Fees	-	-	-	-	-	-	-	-	-	-	-	0%
4011 · Admissions LPP	-	-	-	-	-	1,200	1,100	1,364	(264)	81%	2,500	44%
4021 · Lic Fees > 3 Years	3,400	5,950	3,484	2,466	171%	3,814,880	3,868,635	3,909,270	(40,635)	99%	3,967,112	98%
4020 · NLTP Fees	-	-	-	-	-	2,400	-	-	-	-	-	0%
4022 · Lic Fees < 3 Years	-	250	-	250	-	190,430	206,020	217,723	(11,703)	95%	235,702	87%
4023 · Lic Fees - House Counsel	-	-	-	-	-	52,480	57,895	58,316	(421)	99%	62,149	93%
4025 · Pro Hac Vice Fees	12,750	11,900	13,304	(1,404)	89%	85,900	91,375	89,631	1,744	102%	222,539	41%
4024 · Lic Fees LPP	-	-	21	(21)	0%	3,850	5,275	4,610	666	114%	5,202	101%
4026 · Lic Fees - Inactive/FS	(150)	(750)	(154)	(596)	487%	121,085	120,595	124,311	(3,716)	97%	123,058	98%
4027 · Lic Fees - Inactive/NS	315	945	322	623	293%	223,020	222,180	228,314	(6,134)	97%	229,337	97%
4029 · Prior Year Lic Fees	-	-	-	-	-	-	-	-	-	-	-	0%
4030 · Certs of Good Standing	1,460	1,400	1,711	(311)	82%	10,080	9,800	11,811	(2,011)	83%	23,338	42%
4061 · Advertising Revenue	-	-	-	-	-	140	-	143	(143)	0%	143	0%
4081 · CLE - Registrations	-	-	-	-	-	-	-	-	-	-	204	0%
4095 · Miscellaneous Income	-	5	-	5	-	15	225	6	219	3750%	67	336%
4096 · Late Fees	1,100	1,300	1,240	60	105%	66,200	62,900	74,628	(11,728)	84%	79,700	79%
Total Revenue	18,875	21,000	19,928	1,072	105%	4,588,938	4,665,152	4,737,868	(72,716)	98%	4,968,948	94%
Expenses												
Program Services	-	-	-	-	-	14,843	11,650	14,854	3,204	78%	29,405	-
Salaries & Benefits	9,646	9,337	9,668	331	97%	62,555	59,666	63,409	3,743	94%	118,727	50%
General & Administrative	1,428	2,263	1,264	(999)	179%	18,619	48,494	24,632	(23,862)	197%	116,365	42%
Building Overhead	997	1,042	967	(75)	108%	5,964	6,413	5,896	(517)	109%	12,530	51%
Total Expenses	12,071	12,642	11,899	(743)	106%	101,980	126,223	108,791	(17,433)	116%	277,027	46%
Net Profit (Loss)	\$ 6,804	\$ 8,358	\$ 8,029	\$ 329	104%	\$ 4,486,958	\$ 4,538,929	\$ 4,629,077	\$ (90,148)	98%	\$ 4,691,921	97%

Note: Includes LPP staff time and exam expense

**Utah State Bar
Admissions
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4001 · Admissions - Student Exam Fees	-	550	-	550		17,050	22,275	17,538	4,737	127%	146,472	15%
4002 · Admissions - Attorney Exam Fees	(850)	850	(1,025)	1,875	-83%	28,900	33,575	34,857	(1,282)	96%	71,069	47%
4003 · Admissions - Retake Fees	-	-	-	-		19,600	15,050	28,654	(13,604)	53%	39,729	38%
4004 · Admissions - Laptop Fees	600	400	927	(527)	43%	9,100	21,600	14,060	7,540	154%	100,894	21%
4005 · Admissions - Application Forms	-	-	-	-		5,000	5,000	6,333	(1,333)	79%	7,599	66%
4006 · Transfer App Fees	5,050	2,200	6,763	(4,563)	33%	28,800	41,000	38,569	2,431	106%	69,972	59%
4008 · Attorney - Motion	20,400	9,350	19,762	(10,412)	47%	75,650	66,300	73,285	(6,985)	90%	141,219	47%
4009 · House Counsel	2,550	850	2,745	(1,895)	31%	15,300	11,050	16,471	(5,421)	67%	32,028	35%
4011 · Admissions LPP	-	-	9	(9)	0%	-	-	51	(51)	0%	102	0%
4095 · Miscellaneous Income	160	400	163	237	245%	2,610	3,375	2,659	716	127%	5,947	57%
4096 · Late Fees	-	-	-	-		6,900	9,900	10,854	(954)	91%	26,900	37%
4200 · Seminar Profit/Loss	-	-	-	-		-	-	-	-		(144)	0%
Total Revenue	27,910	14,600	29,344	(14,744)	50%	208,910	229,125	243,331	(14,206)	94%	641,787	33%
Expenses												
Program Services	416	4,979	535	(4,444)	931%	97,942	122,327	103,178	(19,149)	119%	143,133	85%
Salaries & Benefits	19,604	28,936	20,983	(7,953)	138%	124,254	159,929	133,467	(26,462)	120%	275,322	58%
General & Administrative	6,574	9,538	6,270	(3,268)	152%	37,340	45,371	35,697	(9,674)	127%	81,930	55%
Building Overhead	1,768	1,847	1,712	(135)	108%	10,575	11,371	10,444	(928)	109%	22,217	51%
Total Expenses	28,363	45,301	29,500	(15,801)	154%	270,111	338,998	282,786	(56,213)	120%	522,602	65%
Net Profit (Loss)	\$ (453)	\$ (30,701)	\$ (156)	\$ (30,544)	19628%	\$ (61,201)	\$ (109,873)	\$ (39,455)	\$ (70,419)	278%	\$ 119,185	-92%

**Utah State Bar
NLTP
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4020 · NLTP Fees	2,100	8,250	2,508	5,742	329%	27,300	42,900	32,605	10,295	132%	62,883	68%
4081 · CLE - Registrations	-	-	-	-		-	-	-	-		-	
4095 · Miscellaneous Income	-	-	34	(34)	0%	-	-	202	(202)	0%	404	0%
4096 · Late Fees	-	-	-	-		-	-	-	-		-	
4200 · Seminar Profit/Loss	-	-	-	-		-	-	-	-		(1,388)	0%
Total Revenue	2,100	8,250	2,542	5,708	325%	27,300	42,900	32,807	10,093	131%	61,899	69%
Expenses												
Program Services	-	-	475	475	0%	-	950	2,850	1,900	33%	5,700	17%
Salaries & Benefits	3,191	4,387	4,024	(363)	109%	18,965	20,346	23,706	3,360	86%	49,636	41%
General & Administrative	1,489	1,550	2,446	896	63%	9,441	9,195	13,820	4,625	67%	24,982	37%
Building Overhead	377	394	365	(29)	108%	2,254	2,424	2,224	(200)	109%	4,736	51%
Total Expenses	5,056	6,331	7,310	979	87%	30,660	32,914	42,600	9,685	77%	85,054	39%
Net Profit (Loss)	\$ (2,956)	\$ 1,919	\$ (4,768)	\$ 6,688	-40%	\$ (3,360)	\$ 9,986	\$ (9,793)	\$ 19,778	-102%	\$ (23,155)	-43%

**Utah State Bar
OPC
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4095 - Miscellaneous Income	-	50	-	50		700	1,350	2,500	(1,150)	54%	5,000	27%
4200 - Seminar Profit/Loss	-	8,070	-	8,070		12,446	8,070	14,023	(5,953)	58%	33,800	24%
Total Revenue	-	8,120	-	8,120		13,146	9,420	16,523	(7,103)	57%	38,800	24%
Expenses												
Program Services	1,450	248	1,513	1,266	16%	4,651	6,333	5,074	(1,259)	125%	13,235	48%
Salaries & Benefits	125,815	129,149	132,346	3,197	98%	664,939	715,149	700,893	(14,256)	102%	1,418,860	50%
General & Administrative	14,397	11,282	16,718	5,436	67%	72,171	75,748	104,003	28,255	73%	179,240	42%
Building Overhead	6,554	6,847	6,350	(498)	108%	39,198	42,150	38,722	(3,428)	109%	82,354	51%
Total Expenses	148,217	147,526	156,927	9,401	94%	780,959	839,380	848,692	9,312	99%	1,693,689	50%
Net Profit (Loss)	\$ (148,217)	\$ (139,406)	\$ (156,927)	\$ 17,521	89%	\$ (767,813)	\$ (829,959)	\$ (832,169)	\$ 2,210	100%	\$ (1,654,889)	50%

**Utah State Bar
CLE
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4051 · Meeting - Registration	-	-	-	-		-	-	-	-		-	
4052 · Meeting - Sponsor Revenue	24,700	10,000	30,235	(20,235)	33%	26,200	34,000	32,071	1,929	106%	43,700	78%
4053 · Meeting - Vendor Revenue	-	-	125	(125)	0%	-	-	750	(750)	0%	1,500	0%
4054 · Meeting - Material Sales	-	-	-	-		-	-	-	-		-	
4055 · Meeting - Sp Ev Registration	-	-	-	-		-	-	-	-		-	
4081 · CLE - Registrations	19,846	31,852	19,599	12,253	163%	133,993	180,063	132,324	47,739	136%	448,577	40%
4082 · CLE - Video Library Sales	3,902	731	6,295	(5,564)	12%	53,708	23,063	86,660	(63,598)	27%	233,106	10%
4083 · CLE - Material Sales	-	-	-	-		-	-	-	-		-	
4084 · Business Law Book Sales	-	-	-	-		-	-	-	-		-	
4093 · Law Day Revenue	-	-	-	-		-	-	-	-		2,952	0%
4095 · Miscellaneous Income	-	-	-	-		100	(25)	100	(125)	-25%	100	-25%
4200 · Seminar Profit/Loss	16,262	(4,489)	11,224	(15,713)	-40%	3,845	(3,893)	2,653	(6,546)	-147%	88,076	-4%
Total Revenue	64,710	38,095	67,478	(29,383)	56%	217,845	233,207	254,558	(21,351)	92%	818,011	29%
Expenses												
Program Services	30,999	27,858	27,215	(643)	102%	168,490	126,797	179,057	52,259	71%	528,380	24%
Salaries & Benefits	13,230	13,943	14,545	602	96%	77,257	78,299	87,715	9,417	89%	171,075	46%
General & Administrative	2,966	4,701	2,991	(1,710)	157%	29,663	28,738	30,114	1,376	95%	66,911	43%
Building Overhead	1,129	1,109	1,142	33	97%	7,434	6,977	7,601	624	92%	14,917	47%
Total Expenses	48,324	47,612	45,894	(1,718)	104%	282,844	240,811	304,486	63,675	79%	781,283	31%
Net Profit (Loss)	\$ 16,385	\$ (9,517)	\$ 21,584	\$ (31,101)	-44%	\$ (64,999)	\$ (7,604)	\$ (49,928)	\$ 42,324	15%	\$ 36,728	-21%

**Utah State Bar
Summer Convention
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4051 · Meeting - Registration	-	-	-	-		82,125	50,102	55,000	(4,898)	91%	55,000	91%
4052 · Meeting - Sponsor Revenue	-	-	-	-		33,700	1,000	15,000	(14,000)	7%	15,000	7%
4053 · Meeting - Vendor Revenue	-	-	-	-		11,300	-	15,000	(15,000)	0%	15,000	0%
4054 · Meeting - Material Sales	-	-	-	-		-	-	-	-		-	
4055 · Meeting - Sp Ev Registration	-	-	-	-		1,200	-	-	-		-	
4095 · Miscellaneous Income	-	-	-	-		-	-	-	-		-	
Total Revenue	-	-	-	-		128,325	51,102	85,000	(33,898)	60%	85,000	60%
Expenses												
Program Services	-	-	-	-		228,042	16,353	27,107	10,754	60%	27,107	60%
Salaries & Benefits	-	-	-	-		2,022	736	3,996	3,260	18%	3,996	18%
General & Administrative	-	-	292	292	0%	7,265	1,436	8,442	7,006	17%	11,520	12%
Building Overhead	-	-	-	-		-	-	-	-		-	
Total Expenses	-	-	292	292	0%	237,329	18,524	39,545	21,021	47%	42,623	43%
Net Profit (Loss)	\$ -	\$ -	\$ (292)	\$ 292	0%	\$ (109,004)	\$ 32,578	\$ 45,455	\$ (12,877)	72%	\$ 42,377	77%

**Utah State Bar
Fall Forum
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4051 · Meeting - Registration	225	-	354	(354)	0%	42,875	56,150	67,492	(11,342)	83%	67,492	83%
4052 · Meeting - Sponsor Revenue	-	-	-	-		1,000	23,900	1,900	22,000	1258%	1,900	-
4053 · Meeting - Vendor Revenue	-	-	-	-		3,400	8,875	3,400	5,475	261%	3,400	261%
4054 · Meeting - Material Sales	-	-	-	-		-	-	-	-		-	-
4055 · Meeting - Sp Ev Registration	-	-	-	-		-	-	-	-		-	-
4095 · Miscellaneous Income	-	-	-	-		-	-	-	-	0%	-	-
Total Revenue	225	-	354	(354)	0%	47,275	88,925	72,792	16,133	122%	72,792	122%
Expenses												
Program Services	-	49,505	-	(49,505)		67,960	60,626	58,701	(1,925)	103%	63,201	96%
Salaries & Benefits	-	-	-	-		2,060	1,879	2,162	283	87%	2,162	87%
General & Administrative	7	-	12	12	0%	2,069	3,291	2,976	(315)	111%	7,430	44%
Building Overhead	-	-	-	-		-	-	-	-		-	-
Total Expenses	7	49,505	12	(49,493)	-	72,089	65,796	63,839	(1,957)	103%	72,793	90%
Net Profit (Loss)	\$ 218	\$ (49,505)	\$ 342	\$ (49,847)	-	\$ (24,814)	\$ 23,129	\$ 8,953	\$ 14,176	258%	\$ (1)	-2312944%

**Utah State Bar
Spring Convention
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget		Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue													
4051 · Meeting - Registration	-	-	-	-	-		-	640	-	640		94,250	1%
4052 · Meeting - Sponsor Revenue	-	-	-	-	-		1,000	1,000	877	123	114%	16,000	6%
4053 · Meeting - Vendor Revenue	-	-	-	-	-		300	750	300	450	250%	7,550	10%
4054 · Meeting - Material Sales	-	-	-	-	-		-	-	-	-		-	0%
4055 · Meeting - Sp Ev Registration	-	-	-	-	-		-	-	-	-		1,400	0%
4095 · Miscellaneous Income	-	-	-	-	-		-	-	-	-		-	0%
Total Revenue	-	-	-	-	-		1,300	2,390	1,177	1,213	203%	119,200	2%
Expenses													
Program Services	-	-	-	-	-		-	(10,000)	-	10,000		103,810	-10%
Salaries & Benefits	72	-	-	-	-		103	65	-	(65)		6,201	1%
General & Administrative	-	-	-	-	-		15	78	-	(78)		9,188	1%
Building Overhead	-	-	-	-	-		-	-	-	-		-	0%
Total Expenses	72	-	-	-	-		118	(9,857)	-	9,857		119,199	-8%
Net Profit (Loss)	\$ (72)	\$ -	\$ -	\$ -	-		\$ 1,182	\$ 12,247	\$ 1,177	\$ 11,070	1040%	\$ 1	1224655%

**Utah State Bar
Member Services
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4010 · Section/Local Bar Support fees	238	-	241	(241)	0%	85,344	86,310	86,413	(103)	100%	87,051	99%
4051 · Meeting - Registration	-	-	-	-		-	-	-	-		-	
4052 · Meeting - Sponsor Revenue	-	-	-	-		-	-	-	-		-	
4061 · Advertising Revenue	1,255	27,152	1,488	25,664	1825%	99,662	124,215	118,168	6,047	105%	241,817	51%
4062 · Subscriptions	-	-	-	-		30	-	60	(60)	0%	60	0%
4071 · Mem Benefits - Lexis	-	-	-	-		728	305	728	(423)	42%	1,379	22%
4072 · Royalty Inc - Bar J, MBNA, LM,M	-	-	-	-		5,067	6,214	9,786	(3,572)	63%	14,033	44%
4081 · CLE - Registrations	-	-	-	-		-	-	-	-		450	0%
4093 · Law Day Revenue	-	-	-	-		-	-	-	-		-	
4095 · Miscellaneous Income	-	-	10	(10)	0%	-	-	60	(60)	0%	119	0%
4200 · Seminar Profit/Loss	-	-	-	-		(29)	-	(28)	28	0%	(28)	0%
Total Revenue	1,493	27,152	1,739	25,413	1561%	190,803	217,044	215,187	1,857	101%	344,881	63%
Expenses												
Program Services	22,765	45,054	33,498	(11,557)	134%	135,233	269,781	197,873	(71,908)	136%	611,630	44%
Salaries & Benefits	17,706	18,062	18,586	524	97%	84,405	94,826	88,894	(5,932)	107%	199,069	48%
General & Administrative	5,270	5,759	5,710	(49)	101%	91,608	97,925	105,204	7,278	93%	223,307	44%
Building Overhead	1,320	1,309	1,326	18	99%	8,575	8,204	8,738	533	94%	17,342	47%
Total Expenses	47,061	70,184	59,120	(11,064)	119%	319,821	470,736	400,708	(70,028)	117%	1,051,348	45%
Net Profit (Loss)	\$ (45,568)	\$ (43,032)	\$ (57,381)	\$ 14,349	75%	\$ (129,018)	(253,692)	\$ (185,522)	\$ (68,171)	137%	\$ (706,467)	36%

**Utah State Bar
Public Services
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4010 · Section/Local Bar Support fees	-	-	-	-		-	-	-	-		-	
4051 · Meeting - Registration	-	-	-	-		-	(1,694)	-	(1,694)		-	
4063 · Modest Means revenue	675	625	746	(121)	84%	4,625	3,750	5,112	(1,362)	73%	10,000	38%
4093 · Law Day Revenue	-	-	-	-		-	-	-	-		-	
4095 · Miscellaneous Income	-	-	-	-		10	-	7	(7)	0%	20	0%
4120 · Grant Income	-	-	-	-		7,500	29,500	109,539	(80,039)	27%	109,539	27%
4200 · Seminar Profit/Loss	(6,001)	1,432	(8,653)	10,085	-17%	(6,001)	2,841	(8,653)	11,494	-33%	(6,256)	-45%
Total Revenue	(5,326)	2,057	(7,907)	9,964	-26%	6,134	34,397	106,005	(71,608)	32%	113,303	30%
Expenses												
Program Services	10,581	11,651	10,683	(968)	109%	109,132	138,072	110,796	(27,276)	125%	181,785	76%
Salaries & Benefits	33,758	38,260	44,308	6,049	86%	188,610	224,358	244,966	20,608	92%	508,601	44%
General & Administrative	5,149	8,282	6,675	(1,607)	124%	36,192	51,367	45,401	(5,966)	113%	104,324	49%
Building Overhead	1,200	1,254	1,161	(93)	108%	7,179	7,720	7,085	(635)	109%	15,083	51%
Total Expenses	50,689	59,447	62,828	3,381	95%	341,113	421,517	408,248	(13,269)	103%	809,793	52%
Net Profit (Loss)	\$ (56,014)	\$ (57,390)	\$ (70,735)	\$ 13,344	81%	\$ (334,978)	\$ (387,120)	\$ (302,243)	\$ (84,877)	128%	\$ (696,490)	56%

**Utah State Bar
Bar Operations
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4031 · Enhanced Web Revenue	-	-	-	-		-	-	-	-		-	
4051 · Meeting - Registration	-	-	-	-		-	-	-	-		-	
4052 · Meeting - Sponsor Revenue	-	-	-	-		-	-	-	-		-	
4053 · Meeting - Vendor Revenue	-	-	-	-		-	-	-	-		-	
4060 · E-Filing Revenue	-	-	-	-		-	-	-	-		6,483	0%
4103 · In - Kind Revenue - UDR	-	-	-	-		-	-	-	-		-	
4095 · Miscellaneous Income	70	70	69	1	101%	1,820	1,305	1,797	(492)	73%	2,745	48%
4200 · Seminar Profit/Loss	-	-	-	-		-	-	-	-		-	
Investment Income	27,499	43,673	15,840	27,833	276%	88,916	225,704	73,665	152,039	306%	185,488	122%
Total Revenue	27,569	43,743	15,909	27,834	275%	90,736	227,009	75,462	151,547	301%	194,716	47%
Expenses												
Program Services	19,783	6,025	18,627	12,602	32%	159,326	69,393	96,824	27,431	72%	196,661	35%
Salaries & Benefits	120,590	123,281	134,767	11,486	91%	667,903	780,377	743,517	(36,861)	105%	1,489,029	52%
General & Administrative	23,420	42,116	27,262	(14,853)	154%	158,451	187,163	192,646	5,483	97%	361,449	52%
In Kind	127	126	126	(0)	100%	761	758	756	(2)	100%	1,496	51%
Building Overhead	5,139	5,368	4,805	(563)	112%	30,731	33,640	29,296	(4,344)	115%	64,883	52%
Total Expenses	169,058	176,917	185,588	8,671	95%	1,017,172	1,071,331	1,063,038	(8,293)	101%	2,113,518	51%
Net Profit (Loss)	\$ (141,489)	\$ (133,174)	\$ (169,679)	\$ 36,505	78%	\$ (926,436)	(844,322)	\$ (987,576)	\$ 143,254	85%	\$ (1,918,802)	44%

**Utah State Bar
Facilities
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4039 · Room Rental-All parties	4,765	2,900	7,855	(4,955)	37%	26,826	23,925	44,221	(20,296)	54%	92,443	26%
4042 · Food & Beverage Rev-All Parties	6,298	6,487	9,196	(2,709)	71%	27,553	34,406	40,229	(5,823)	86%	97,929	35%
4043 · Setup & A/V charges-All parties	1,124	1,161	372	789	312%	1,124	1,161	372	789	312%	1,402	83%
4090 · Tenant Rent	1,586	2,000	1,586	414	126%	9,516	13,000	9,516	3,484	137%	19,032	68%
4095 · Miscellaneous Income	-	-	-	-	-	-	-	-	-	-	-	-
4103 · In - Kind Revenue - UDR	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue	13,773	12,548	19,009	(6,461)	66%	65,019	72,493	94,338	(21,845)	77%	210,806	34%
Expenses												
Program Services	4,522	8,467	3,598	(4,869)	235%	26,194	40,186	21,166	(19,020)	190%	54,166	74%
Salaries & Benefits	15,572	16,307	14,065	(2,242)	116%	76,991	86,132	84,390	(1,742)	102%	168,779	51%
General & Administrative	(618)	195	(163)	(358)	-120%	(6,581)	5,436	(1,913)	(7,349)	-284%	(3,350)	-162%
In Kind	1,285	960	1,297	337	74%	7,705	7,439	7,779	340	96%	18,502	40%
Building Overhead	12,549	13,017	12,303	(714)	106%	75,956	80,321	75,864	(4,457)	106%	159,608	50%
Total Expenses	33,310	38,946	31,100	(7,846)	125%	180,266	219,514	187,286	(32,229)	117%	397,705	55%
Net Profit (Loss)	\$ (19,536)	\$ (26,398)	\$ (12,091)	\$ (14,307)	218%	\$ (115,247)	\$ (147,022)	\$ (92,948)	\$ (54,074)	158%	\$ (186,899)	79%

**Utah State Bar
Innovation in Law
December 31, 2023**

	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4005 · Admissions - Application Forms	-	-	1,041.67	(1,041.67)	0%	-	-	6,250	(6,250)	0%	12,500	0%
4022 · Lic Fees < 3 Years	-	-	250.00	(250.00)	0%	-	-	1,500	(1,500)	0%	3,000	0%
4095 · Miscellaneous Income	-	-	791.67	(791.67)	0%	-	-	4,750	(4,750)	0%	9,500	0%
4120 · Grant Income	-	14,053.01	8,666.67	5,386.34	162%	-	51,634	52,000	(366)	99%	104,000	50%
4103 · In - Kind Revenue - UDR	-	-	-	-	-	-	-	-	-	-	-	-
Total Revenue	-	14,053.01	10,750.00	3,303.01	131%	-	51,634	64,500	(12,866)	80%	129,000	40%
Expenses												
Program Services	-	84.29	504.17	419.88	17%	-	407	3,025	2,618	13%	6,050	7%
Salaries & Benefits	-	15,654.22	7,373.33	(8,280.89)	212%	-	53,235	44,240	(8,995)	120%	88,480	60%
General & Administrative	-	892.52	2,989.50	2,096.98	30%	-	4,161	17,937	13,776	23%	35,874	12%
In Kind	-	-	-	-	-	-	-	-	-	-	-	-
Building Overhead	-	-	202.58	202.58	0%	-	-	1,216	1,216	0%	2,431	0%
Total Expenses	-	16,631.03	11,069.58	(5,561.45)	150%	-	57,803	66,418	8,615	87%	132,835	44%
Net Profit (Loss)	\$ -	\$ (2,578)	\$ (320)	\$ (2,258)	807%	\$ -	\$ (6,169)	\$ (1,918)	\$ (4,252)	322%	\$ (3,835)	161%

Utah State Bar
Income Statement - Consolidated By Account
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	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue												
4001 Admissions - Student Exam Fees	-	550	-	550		17,050	22,275	17,538	4,737	127%	146,472	15%
4002 Admissions - Attorney Exam Fees	(850)	850	(1,025)	1,875	-63%	28,900	33,575	34,857	(1,282)	96%	171,069	47%
4003 Admissions - Relate Fees	-	-	-	-		19,600	15,050	28,654	(13,604)	53%	39,729	38%
4004 Admissions - Laptop Fees	1,500	400	927	(527)	43%	9,330	21,600	14,295	7,305	151%	101,129	21%
4005 Admissions - Application Forms	-	-	1,042	(1,042)	0%	5,000	5,000	12,583	(7,583)	40%	20,099	25%
4006 Transfer App Fees	5,050	2,200	6,763	(4,563)	33%	28,800	41,000	38,569	2,431	108%	69,972	59%
4008 Attorney - Motion	20,400	9,350	19,762	(10,412)	47%	75,500	66,300	73,285	(6,985)	90%	141,219	47%
4009 House Counsel	2,550	850	2,745	(1,895)	31%	15,300	11,050	16,471	(5,421)	67%	32,028	35%
4010 Section/Local Bar Support fees	238	-	241	(241)	0%	102,392	105,462	103,919	1,543	101%	104,713	101%
4011 Admissions LPP	-	-	9	(9)	0%	1,200	1,100	1,415	(315)	76%	2,602	42%
4012 Admissions Military Spouse	-	-	-	-		-	-	-	-		-	0%
4020 NLTP Fees	2,100	8,250	2,508	5,742	329%	29,700	42,900	32,605	10,295	132%	62,883	58%
4021 Lic Fees > 3 Years	3,400	5,950	3,484	2,466	171%	3,814,880	3,888,635	3,909,270	(40,635)	98%	3,967,112	98%
4022 Lic Fees < 3 Years	-	250	250	-	100%	190,430	206,020	219,223	(13,203)	94%	238,702	86%
4023 Lic Fees - House Counsel	-	-	-	-		52,480	57,895	58,316	(421)	99%	62,149	93%
4024 Lic Fees LPP	-	-	21	(21)	0%	3,850	5,275	4,610	666	114%	5,202	101%
4025 Pro Hac Vice Fees	12,750	11,900	13,304	(1,404)	86%	85,900	91,375	89,631	1,744	102%	222,539	41%
4026 Lic Fees - Inactive/FE	(150)	(750)	(154)	(596)	487%	121,065	120,595	124,311	(3,716)	97%	123,058	98%
4027 Lic Fees - Inactive/NE	315	945	322	623	293%	223,020	222,180	228,314	(6,134)	97%	229,337	97%
4029 Prior Year Lic Fees	-	-	-	-		-	-	-	-		-	0%
4030 Certs of Good Standing	1,460	1,400	1,711	(311)	82%	10,080	9,800	11,811	(2,011)	83%	23,338	42%
4039 Room Rental-All parties	4,765	2,900	7,855	(4,955)	37%	26,826	23,925	44,221	(20,296)	54%	92,443	26%
4042 Food & Beverage Rev-All Parties	6,298	6,487	9,196	(2,709)	71%	27,553	34,406	40,229	(5,823)	89%	97,929	35%
4043 Solup & AV charges-All parties	1,124	1,161	372	789	312%	1,124	1,161	372	789	312%	1,402	83%
4051 Meeting - Registration	225	-	354	(354)	0%	125,000	105,198	122,492	(17,294)	86%	216,742	49%
4052 Meeting - Sponsor Revenue	24,700	10,000	30,235	(20,235)	33%	61,900	59,900	49,848	10,052	120%	76,600	78%
4053 Meeting - Vendor Revenue	-	-	125	(125)	0%	15,000	9,625	19,450	(9,825)	49%	27,450	35%
4054 Meeting - Material Sales	-	-	-	-		-	-	-	-		-	0%
4055 Meeting - Sp Ev Registration	-	-	-	-		1,200	-	-	-		1,400	0%
4060 E-Filing Revenue	-	-	-	-		-	-	-	-		6,483	0%
4061 Advertising Revenue	1,255	27,152	1,488	25,897	1825%	99,802	124,215	118,311	5,904	105%	241,960	51%
4062 Subscriptions	-	-	-	-		30	-	60	(60)	0%	60	0%
4063 Modest Means revenue	675	625	746	(121)	84%	4,625	3,750	5,112	(1,362)	73%	10,000	36%
4071 Mem Benefits - Lexis	-	-	-	-		728	305	728	(423)	43%	1,379	22%
4072 Royalty Inc - Bar J, MBNA, LLM	-	-	-	-		5,064	6,214	9,786	(3,572)	63%	14,033	44%
4081 CLE - Registrations	19,846	31,852	19,599	12,253	163%	133,993	180,063	132,324	47,739	123%	449,231	40%
4082 CLE - Video Library Sales	3,902	731	8,295	(5,564)	12%	53,708	23,063	86,660	(63,597)	27%	233,106	10%
4090 Tenant Rent	1,586	2,000	1,586	414	126%	9,516	13,000	9,516	3,484	137%	19,032	68%
4093 Law Day Revenue	-	-	-	-		-	-	-	-		2,952	0%
4095 Miscellaneous Income	230	525	1,087	(562)	48%	5,255	6,230	12,081	(5,850)	52%	23,902	26%
4096 Late Fees	1,100	1,300	1,240	60	105%	73,100	72,800	85,482	(12,682)	89%	106,600	68%
4200 Seminar Profit/Loss	10,261	5,014	2,571	2,443	195%	10,261	7,018	7,995	(977)	88%	114,060	5%
Investment income	27,499	43,673	15,840	27,833	278%	88,916	225,704	73,685	152,019	308%	185,468	122%
Total Revenue	151,329	175,565	150,479	25,086	117%	5,576,232	5,843,654	5,938,008	(94,354)	100%	7,585,604	77%
Program Service Expenses												
5001 Meeting Facility-external only	750	16,340	918	(15,590)	1700%	98,902	60,312	65,488	5,176	82%	104,128	58%
5002 Meeting facility-internal only	2,840	1,365	2,952	1,587	46%	12,583	12,446	13,727	1,281	91%	26,456	47%
5013 ExamSoft	-	-	-	-		17,623	23,706	17,623	(6,083)	138%	17,623	135%
5014 Questions	-	-	-	-		49,463	45,763	49,463	3,700	93%	73,982	62%
5015 Investigations	75	75	133	58	56%	479	300	829	(529)	38%	1,629	18%
5016 Credit Checks	120	277	105	(172)	264%	748	1,243	658	(585)	189%	2,169	57%
5017 Medical Exam	-	160	-	(160)	0%	-	160	-	(160)	0%	320	50%
5020 Exam Scoring	-	-	21	21	0%	3,522	6,670	3,647	(3,023)	183%	3,772	177%
5025 Temp Labor/Proctors	-	2,000	-	(2,000)	0%	23,256	1,590	15,225	13,635	10%	54,400	3%
5030 Speaker Fees & Expenses	-	1,075	679	(396)	158%	-	2,889	5,074	2,185	57%	9,148	32%
5031 Speaker Reimb. - Receipt Req'd	-	-	148	148	0%	10,027	2,898	7,312	4,414	40%	11,492	25%
5035 Awards	160	-	2,125	(2,125)	0%	22,500	4,000	12,750	8,750	31%	35,500	11%
5037 Grants/ contributions - general	10,000	-	366	366	0%	-	311	712	(401)	27%	2,569	11%
5040 Witness & Hearing Expense	-	-	120	120	0%	73	1,949	750	(1,199)	260%	1,470	133%
5041 Process Serving	-	-	(357)	(357)	100%	30	26,576	25,002	(1,574)	106%	50,000	53%
5045 Court Reporting	-	4,240	5,207	207	96%	32,134	33,708	32,134	(1,574)	105%	62,134	54%
5047 Casemaker	-	-	-	-		-	(25,000)	-	25,000	0%	-	0%
5055 Legislative Expense	-	-	-	-		60,000	60,000	60,000	-	100%	60,000	100%
5060 Program Special Activities	-	-	152	152	0%	-	-	913	(913)	0%	13,159	0%
5061 LRE - Bar Support	-	-	-	-		-	-	-	-		49,947	74%
5062 Law Day	-	-	1,467	(1,467)	0%	29,797	36,910	20,928	(15,982)	283%	58,017	38%
5063 Special Event Expense	1,271	7,570	2,758	(3,406)	222%	18,432	21,821	21,821	-	100%	15,217	104%
5064 MCLE Fees Paid	3,141	6,164	1,124	2,000	78%	8,593	15,792	13,457	(2,335)	117%	360,097	42%
5070 Equipment Rental	1,124	(876)	21,491	(33,688)	257%	261,191	151,244	107,930	(43,314)	140%	41,948	52%
5075 Food & Beverage-external costs only	26,697	55,179	5,168	821	84%	18,990	21,874	22,754	(880)	96%	5,649	80%
5076 Food & Beverage - internal only	5,225	4,347	92	(563)	710%	3,136	4,527	2,932	(1,595)	154%	9,853	90%
5079 Soft Drinks	95	319	443	124	72%	2,946	895	5,419	4,523	17%	40,067	57%
5085 Misc. Program Expense	4,588	5,802	4,648	(1,154)	125%	20,913	22,886	20,932	(1,954)	109%	1,315	45%
5090 Commission Expense	-	592	5	(587)	1083%	917	592	959	367	62%	-	0%
5095 Wills for Heroes	-	-	-	-		-	-	-	-		391,000	27%
5096 UDR Support	-	-	16,465	(16,465)	0%	44,869	106,598	98,737	(7,861)	108%	58,184	45%
5099 Blomquist Hale	7,482	18,496	1,332	1,219	9%	34,034	26,328	26,335	7	100%	40,125	20%
5702 Travel - Lodging	439	1,981	1,625	(356)	122%	15,740	8,113	12,314	4,200	86%	10,112	19%
5703 Travel - Transportation/Parking	460	309	89	(220)	340%	4,458	1,947	2,892	944	67%	6,250	30%
5704 Travel - Mileage Reimbursement	-	194	174	(20)	112%	3,349	1,884	2,592	709	73%	900	21%
5705 Travel - Per Diem	-	-	75	75	0%	-	190	450	260	42%	27,000	43%
5706 Travel - Meals	-	-	2,250	2,250	0%	46,987	11,603	13,500	1,897	86%	4,554	25%
5707 Travel - Commission Mgt	388	-	152	152	0%	2,085	1,130	1,085	75	60%	4,378	30%
5805 ABA Annual Meeting	-	835	73	(762)	1141%	1,302	1,330	439	(891)	363%	10,200	0%
5810 ABA Mid Year Meeting	1,322	-	850	850	0%	-	-	5,100	5,100	0%	7,241	0%
5815 Commission/Education	2,199	-	292	292	0%	5,245	-	3,717	3,717	0%	26,459	0%
5820 ABA Annual Delegation	-	-	2,205	2,205	0%	9,000	9,000	13,230	(4,230)	100%	18,000	50%
5830 Western States Bar Conference	1,500	1,500	1,500	-	100%	-	-	-	-		-	0%
5840 President's Expense	-	-	-	-		-	-	-	-		-	0%
5841 President's Reimbursement	-	-	-	-		-	-	-	-		-	0%
5845 Reg Reform Task Force	-	-	-	-		-	-	-	-		-	0%
5850 Leadership Academy	-	-	833	833	0%	53	283	5,000	4,717	6%	10,000	3%
5855 Bar Review	-	-	3,775	3,775	0%	26,554	8,035	22,650	14,615	35%	45,300	18%
5856 Retiree	-	-	10,079	(9,531)	189%	40,588	117,662	40,617	(77,045)	290%	101,100	116%
5868 Wellbeing Committee	10,025	19,610	-	-		-	-	-	-		-	0%
5867 Bar Membership Survey	-	-	250	250	0%	1,000	-	1,500	1,500	0%	3,000	0%
5868 UCL Support	-	-	(872)	(872)	0%	-	-	3,843	3,843	0%	704	0%
5960 Overhead Allocation - Seminars	-	-	1,212	946	22%	27,279	21,999	28,311	6,312	78%	86,939	25%
5970 Event Revenue Sharing - 3rd Pty	1,168	266	-	-		-	-	-	-		1,964,263	43%
Total Program Service Expenses	90,185	153,871	96,649	(57,222)	129%	1,011,813	852,875	820,505	(32,370)	104%	1,964,263	43%
Salaries & Benefit Expenses												
5510 Salaries/Wages	284,968	317,016	318,847	1,831	99%	1,563,368	1,818,852	1,764,795	(54,057)	103%	3,543,762	

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	Actual Dec-22	Actual Dec-23	Budget Dec-23	Fav (Unfav) variance	% of Budget	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
7095 Fax Equip & Supplies	-	-	-	-	-	-	-	-	-	-	63,334	0%
7100 Telephone	4,657	5,781	4,711	(1,069)	123%	30,547	28,847	30,775	1,928	94%	47,414	46%
7105 Advertising	-	49	-	(49)	-	10,392	5,542	21,707	16,165	28%	-	12%
7106 Public Notification	-	-	-	-	-	-	-	-	-	-	-	0%
7107 Production Costs	-	1,750	667	(1,063)	263%	4,607	1,750	9,990	8,240	18%	15,106	12%
7110 Publications/Subscriptions	351	230	711	481	32%	12,558	8,143	15,386	7,243	53%	30,241	27%
7115 Public Relations	-	-	-	-	-	-	-	-	-	-	-	0%
7120 Membership/Dues	463	1,942	117	(1,825)	1661%	11,637	12,622	12,191	(431)	104%	16,188	78%
7135 Bank Service Charges	34	-	49	49	0%	468	(80)	671	751	-12%	790	-10%
7136 ILM Service Charges	1,841	1,740	1,663	123	93%	10,463	10,650	10,592	(58)	101%	20,239	53%
7138 Bad debt expense	-	-	-	-	-	-	-	-	-	-	-	0%
7140 Credit Card Merchant Fees	2,397	3,796	1,543	(2,253)	246%	44,121	62,436	38,256	(24,180)	163%	148,940	42%
7141 Credit Card surcharge	(85)	(238)	(21)	217	1133%	(19,385)	(1,632)	(4,827)	(3,195)	24%	(4,988)	33%
7145 Commission Election Expense	-	-	254	254	0%	-	-	1,525	1,525	0%	3,050	0%
7150 E&O/Off & Dir Insurance	5,866	6,222	5,675	(547)	110%	35,194	37,332	34,050	(3,282)	110%	68,103	55%
7160 Audit Expense	-	-	-	-	-	41,031	42,586	42,031	(555)	101%	42,031	101%
7170 Lobbying Rebates	-	-	-	-	-	-	-	-	-	-	336	0%
7175 O/S Consultants	924	2,147	1,052	(1,085)	202%	2,613	19,840	32,665	12,825	61%	64,778	31%
7176 Bar Litigation	7,104	-	7,376	7,376	0%	10,593	5,741	9,930	4,189	58%	29,213	20%
7177 UPL	180	-	274	274	0%	4,363	-	6,634	6,634	0%	15,867	0%
7178 Offsite Storage/Backup	-	-	-	-	-	-	-	-	-	-	-	0%
7179 Payroll Adm Fees	253	753	252	(501)	299%	2,099	4,508	2,091	(2,417)	218%	3,603	125%
7180 Administrative Fee Expense	125	125	116	(7)	106%	754	798	711	(87)	112%	1,666	48%
7190 Lease Interest Expense	-	-	12	12	0%	1,646	1,535	1,323	(212)	118%	2,581	59%
7191 Lease Sales Tax Expense	-	-	-	-	-	-	-	-	-	-	-	0%
7195 Other Gen & Adm Expense	78	1,851	684	(1,167)	271%	5,142	8,535	8,054	(481)	108%	17,273	49%
Total General & Administrative Expenses	60,083	86,578	72,467	(14,111)	119%	456,253	556,402	578,958	20,555	96%	1,219,170	46%
In Kind Expenses												
7103 InKind Contrib-UDR & all other	1,412	1,096	1,423	337	78%	8,466	8,197	8,535	338	96%	19,998	41%
Total In Kind Expenses	1,412	1,096	1,423	337	78%	8,466	8,197	8,535	338	96%	19,998	41%
Building Overhead Expenses												
6015 Janitorial Expense	2,904	3,518	3,025	(494)	118%	17,303	16,781	18,033	1,252	93%	32,407	52%
6020 Heat	3,567	4,164	3,332	(832)	128%	10,487	12,561	9,845	(2,716)	128%	28,356	44%
6025 Electricity	2,755	3,302	2,793	(509)	118%	25,187	27,416	25,454	(1,952)	108%	45,489	60%
6030 Water/Sewer	393	546	370	(175)	147%	4,943	7,865	4,641	(3,244)	170%	7,550	104%
6035 Outside Maintenance	441	441	425	(16)	104%	8,884	9,980	8,351	(1,630)	120%	29,801	33%
6040 Building Repairs	89	1,583	78	(1,505)	2938%	5,212	8,866	4,260	(4,606)	208%	12,146	73%
6045 Bldg Mncse Contracts	3,148	2,066	3,056	1,050	66%	10,879	14,226	10,606	(3,621)	134%	28,089	51%
6050 Bldg Mncse Supplies	-	-	-	-	-	-	-	-	-	-	-	0%
6055 Real Property Taxes	2,205	2,000	2,317	317	86%	15,459	12,820	16,252	3,432	79%	30,156	43%
6060 Personal Property Taxes	36	108	14	(94)	774%	219	650	84	(566)	774%	444	146%
6065 Bldg Insurance/Fees	1,924	1,910	1,934	24	99%	11,541	11,457	11,603	145	99%	23,417	49%
6070 Building & Improvements Depr	7,099	7,840	7,025	(815)	112%	42,593	47,038	42,151	(4,887)	112%	86,658	54%
6075 Furniture & Fixtures Depr	1,293	1,706	541	(1,165)	318%	3,431	9,973	3,244	(6,729)	307%	6,487	154%
7055 Computers, Equip & Software Depr	5,179	3,064	5,425	2,381	59%	31,728	19,565	32,552	12,987	60%	65,101	30%
Total Building Overhead Expenses	31,933	32,188	30,534	(1,854)	106%	187,856	199,220	187,084	(12,136)	106%	396,101	50%
Total Expenses	642,229	671,041	601,539	(69,502)	112%	3,634,462	3,891,690	3,816,435	(77,256)	102%	8,099,469	48%
Other												
4300 Gain (Loss) - Disposal Of Asset	-	-	-	-	-	7,500	81,134	161,539	80,405	50%	213,539	38%
4120 Grant Income	-	14,053	8,667	8,667	162%	7,500	81,134	161,539	80,405	50%	213,539	38%
Net Profit (Loss)	\$ (390,900)	\$ (481,423)	\$ (442,393)	\$ (39,030)	109%	\$ 1,951,270	\$ 2,031,107	\$ 2,183,113	\$ (152,005)	93%	\$ (300,326)	-67%

Utah State Bar Balance Sheet

	12/31/2023	6/30/2023
ASSETS		
Current Assets		
Petty Cash	-	492
Cash in Bank	242,011	1,615,702
Invested Funds	6,784,203	7,846,747
Total Cash/Investments	7,026,214	9,462,941
Accounts Receivable	88,722	87,469
Prepaid Expenses	312,099	301,765
A/R - Sections	106,493	80,113
Total Other Current Assets	507,314	469,347
Total Current Assets	7,533,528	9,932,288
Fixed Assets		
Property & Equipment	5,223,538	5,107,752
Accumulated Depreciation	(4,301,234)	(4,229,508)
Land	633,142	633,142
Total Fixed Assets	1,555,445	1,511,385
TOTAL ASSETS	\$ 9,088,973	\$ 11,443,673
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
AP Trade	77,253	324,674
Other Accounts Payable	6,410	215,334
Accrued Payables	503,658	521,733
Cap Lease Oblig - ST	1,913	1,669
A/P - Sections	2,365	306,425
Deferred Revenue	10,767	3,617,316
Total Current Liabilities	602,366	4,987,151
Long Term Liabilities		
Capital Lease Oblig	7,837	8,859
Total Long Term Liabilities	7,837	8,859
Total Liabilities	610,203	4,996,010
Equity		
Unrestricted Net Assets (R/E)	6,447,663	6,601,662
Fund Balance - Current Year	2,031,107	(153,998)
Total Equity	8,478,771	6,447,663
TOTAL LIABILITIES & EQUITY	\$ 9,088,973	\$ 11,443,673

Balance Sheet Classification

ILM-UT ST BAR (3176)

Base Currency: USD As of 12/31/2023

Dated: 01/02/2024

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	748,512.13	AAA	5.250	12/31/2023	5.250	5.250	748,512.13	0.00	1.0000	0.00	748,512.13
CCYUSD	Receivable	3,651.95	AAA	0.000	12/31/2023	0.000	0.000	3,651.95	0.00	1.0000	0.00	3,651.95
---	---	752,164.08	AAA	---	12/31/2023	5.225	5.225	752,164.08	0.00	1.0000	0.00	752,164.08

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
74368CBA1	PROTECTIVE LIFE GLOBAL FUNDING	350,000.00	AA-	0.473	01/12/2024	5.998	6.690	349,438.56	-224.31	99.7755	777.17	349,991.42
3130AM5J7	FEDERAL HOME LOAN BANKS	500,000.00	AAA	0.375	04/29/2024	5.500	5.227	491,891.42	155.08	98.4093	322.92	492,369.42
3130APDV4	FEDERAL HOME LOAN BANKS	500,000.00	AAA	0.650	10/07/2024	5.414	4.973	482,419.45	1,398.05	96.7635	758.33	484,575.83
3130AQUU5	FEDERAL HOME LOAN BANKS	500,000.00	AAA	1.610	09/04/2024	5.415	5.075	487,616.66	925.34	97.7084	2,616.25	491,158.25
89114X2E2	TORONTO-DOMINION BANK	250,000.00	A+	5.150	05/24/2024	4.229	6.168	250,897.75	-1,908.75	99.5956	1,323.26	250,312.26
3130AUEK6	FEDERAL HOME LOAN BANKS	400,000.00	AAA	5.000	12/27/2024	5.550	5.267	397,917.77	1,057.43	99.7438	222.22	399,197.42
3130AUV35	FEDERAL HOME LOAN BANKS	500,000.00	AAA	5.165	03/08/2024	5.531	5.451	499,670.44	52.56	99.9446	10,114.79	509,837.79
3130AQW90	FEDERAL HOME LOAN BANKS	500,000.00	AAA	2.500	02/23/2024	5.368	5.330	497,910.57	-50.57	99.5720	4,444.44	502,304.44
3135GAJP7	FEDERAL NATIONAL MORTGAGE ASSOCIATION	1,000,000.00	AAA	5.500	07/24/2024	5.500	5.291	1,000,000.00	58.00	100.0058	23,986.11	1,024,044.11
3133EPTK1	FEDERAL FARM CREDIT BANKS FUNDING CORP	500,000.00	AAA	5.500	11/21/2024	5.508	5.577	500,000.00	-362.50	99.9275	3,055.56	502,693.06
---	---	5,000,000.00	AAA	---	07/05/2024	5.449	5.421	4,957,762.63	1,100.32	---	47,621.05	5,006,484.00

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	---	2,852.509	0.00	420.00	0.1400	0.00	420.00
637639AB1	NATIONAL SECURITIES CLEARING CORP	350,000.00	AAA	1.500	04/23/2025	5.630	4.855	332,024.76	3,162.19	95.7677	991.67	336,178.62
74256LET2	PRINCIPAL LIFE GLOBAL FUNDING II	350,000.00	A+	1.375	01/10/2025	5.921	5.371	334,411.02	1,744.73	96.0445	2,285.94	338,441.69
949764HB3	Wells Fargo Bank, National Association	250,000.00	AA+	5.400	10/31/2025	5.453	5.453	249,771.20	0.00	99.9085	36.99	249,808.19
254676BR9	Discover Bank	100,000.00	A	5.400	11/07/2025	5.453	5.445	99,907.40	0.00	99.9074	798.90	100,706.30
---	---	1,350,000.00	AA	---	05/29/2025	5.665	6.395	1,016,114.38	5,326.92	---	4,113.49	1,025,554.80

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
---	---	7,102,164.08	AA+	---	08/03/2024	5.457	5.547	6,726,041.08	6,427.25	---	51,734.55	6,784,202.88

* 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, 2023

<u>STATUS</u>	<u>12/31/22</u>	<u>12/31/23</u>	<u>Change</u>
Active	8,931	9,129	198
Active under 3 years	849	896	47
Active Emeritus	325	346	21
In House Counsel	125	135	10
Foreign Legal Counsel	4	4	-
LPP	25	26	1
Military Spouse	-	-	-
Subtotal - Active	10,259	10,536	277
Inactive - Full Service	837	827	(10)
Inactive - No Service	2,084	2,085	1
Inactive Emeritus	458	533	75
Inactive House Counsel	12	13	1
Inactive LPP	-	3	3
Subtotal - Inactive	3,391	3,461	70
Total Active and Inactive	13,650	13,997	347
<u>Supplemental Information</u>			
Paralegals	139	158	19
<u>Active Attorneys by Region</u>			
1st Division (Logan - Brigham)	213	222	9
2nd Division (Davis - Weber)	1,003	1,011	8
3rd Division (Salt Lake)	5,574	5,671	97
4th Division (Utah)	1,393	1,485	92
5th Division (Southern Utah)	577	583	6
Out of State	1,499	1,564	65
Total Active Attorneys	10,259	10,536	277