

UTAH STATE BAR VISION

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UTAH STATE BAR MISSION

Lawyers serving the public and legal profession with excellence, civility, and integrity.

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Utah State Bar Commission
Friday, June 13, 2025
Utah State Bar – Law & Justice Center
Salt Lake City, Utah

AGENDA

1. 9:30 a.m. President's Welcome and Reports: Cara Tangaro

- | | | |
|-----------------|-----|--|
| <i>10 Mins.</i> | 1.1 | Report on Budget Meeting with Court: Cara Tangaro |
| <i>01 Mins.</i> | 1.2 | Annual Meeting and Swearing-in - June 26 th |
| <i>01 Mins.</i> | 1.3 | Save the Commission Retreat Date - August 22-23 |
| <i>05 Mins.</i> | 1.4 | Jackrabbit Bar: Katie Woods |
| <i>05 Mins.</i> | 1.5 | Judicial Council Report: Katie Woods |

2. 10:00 a.m. Action Items

- | | | | |
|-----------------|-----|---|------------------|
| <i>05 Mins.</i> | 2.1 | Approve Transferring Designated Reserves to Pay for New OPC Database: Nathan Severin | |
| <i>30 Mins.</i> | 2.2 | Approve Annual Meeting Awards | (TAB 1, Page 4) |
| <i>05 Mins.</i> | 2.3 | Appoint Ezzy Khaosanga to Fill Kim Cordova's Commission Seat | |
| <i>10 Mins.</i> | 2.4 | Extend Bar's ABA Delegate Term Limit from 4 Two-year Terms to 5 Two-year Terms | |
| <i>05 Mins.</i> | 2.5 | Appoint Erik Christiansen as a 2025-2027 Utah State Bar ABA Delegate | |
| <i>01 Mins.</i> | 2.6 | Approve 2023-2024 Executive Committee | (TAB 2, Page 28) |
| <i>01 Mins.</i> | 2.7 | Adopt a Resolution on Bank Signatures | |

3. 11:00 am Information Items

- | | | | |
|-----------------|-----|---|------------------|
| <i>30 Mins.</i> | 3.1 | Presentation of Court Strategic Plan:
Hon. Michele Christiansen Forster and Jonathan Puente | (TAB 3, Page 30) |
|-----------------|-----|---|------------------|

4. 11:30 am Commission Thanks You's and Recognition

11:45 Adjourn

Luncheon with Bar Staff

CONSENT AGENDA

(TAB 4, Page 40)

1. Approve Minutes of May 16, 2025 Commission Meeting

ATTACHMENTS

(TAB 5, Page 44)

1. April 2025 Financial Statements

2025

June 26	ANNUAL UTAH STATE BAR MEETING	5:00 p.m.	This is the Place Heritage Park
August 6 - 12	ABA Annual Meeting		Toronto, ON

Utah State Bar Commission Meeting

T A B 1

UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: June 13, 2025

RE: AWARD RECOMMENDATION – JUDGE OF THE YEAR

CRITERIA:

Awarded to a Utah Judge or Justice whose career exemplifies the highest standards of judicial conduct for integrity and independence; who is knowledgeable of the law and faithful to it; who is unswayed by partisan interests, public clamor or fear of criticism; patient, dignified and courteous to all who appear before the court; endeavors to improve the administration of justice and public understanding of, and respect for, the role of law in our society.

NOMINEES:

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Hon. Michele Christiansen Forster <i>2017 Dorothy Merrill Brothers Award</i>	Nick Stiles	Yes
Hon. Lisa A. Garner <i>No prior award.</i>	Sarah Johns	Yes
Hon. Dianna M. Gibson <i>No prior award.</i>	Brit Merrill (WLU), UMBA, Su Chon	Yes
Hon. Laura S. Scott <i>2014 Professionalism Award</i> <i>2020 James B. Lee Award</i> <i>2022 Judge of the Year</i>	Anonymous	No

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2024 Hon. Suchada Bazzelle	Hon. Marvin D. Bagley
2023 Hon. David O. Nuffer	Hon. James D. Gardner, Hon. George Harmond
2022 Hon. Laura S. Scott	Hon. Patrick W. Corum, Hon. Angela Fannesbeck, Hon. Ryan Harris, Hon. Constandinos Himonas, Hon. Noel S. Hyde, Hon. Derek Pullan
2021 Hon. Brendan P. McCullagh	Hon. David Hamilton, Hon. Dee Benson, Hon. Douglas Nielsen, Hon. James Blanche, Hon. Kate Appleby, Hon. Laura Scott, Hon. Noel Hyde, Hon. Royal Hansen, Hon. Constandinos Himonas, Hon. Thomas Kay
2020 Hon. Kate Appleby	Hon. David Hamilton, Hon. Douglas Nielsen, Hon. James Blanche, Hon. Laura Scott, Hon. Noel Hyde, Hon. Royal Hansen, Hon. Constandinos Himonas, Hon. Thomas Kay
2019 Hon. John Baxter	Hon. James Gardner, Hon. Diana Hagen Hon. Kimberly Hornak, Hon. Thomas Kay, Hon. Eric Ludlow, Hon. David Nuffer, Hon. Paul M. Warner, Hon. Brooke Wells, Hon. Jeffrey C. Wilcox
2018 Hon. Thomas Higbee	Hon. Mary Noonan, Hon. Doug Thomas
2017 Hon. Fredric Voros, Jr., Hon. Stephen Roth	Hon. Robert K. Hilder (Deceased.)
2016 Hon. C. Dane Nolan	
2015 Hon. Claudia Laycock	Hon. Brooke C. Wells, Hon. Carolyn B. McHugh, Hon. John R. Morris, Hon. Augustus Chin, Hon. Thomas L. Kay, Hon. David Nuffer, Hon. Paul M. Warner, Hon. Royal I. Hansen, Hon. Glen R. Dawson, Hon. Thomas L. Kay

RECOMMENDATION:

The Utah State Bar Awards Committee met on June 6, 2025 to review the nominations for the Judge of the Year Award. The Committee discussed the merits of each nominee and finally agreed upon recommending Judge Michele Christiansen Forster to the Bar Commission for consideration.

Christy Abad

From: info@utahbar.org
Sent: Monday, June 2, 2025 9:07 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Nick Stiles

Bar Number

16958

Email Address

Nicks@utcourts.gov

Date

06/02/2025

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Judge Michele Christiansen Forster

Award

Judge of the Year (Summer 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:

The following nomination is submitted by Nick Stiles, Utah Appellate Court Administrator, on behalf of the following: Jennifer Gadbois, Utah Court of Appeals' Clerk of Court, and all members of the Utah Court of Appeals including, Associate Presiding Judge Ryan Harris, Judge David Mortensen, Judge Greg Orme, Judge John Luthy, Judge Amy Oliver, and Judge Ryan Tenney. (Judge Christiansen Forster is not aware of this nomination.)

Judge Christiansen Forster is the Presiding Judge of the Utah Court of Appeals. She was appointed by her fellow judges as Presiding Judge on January 1st, 2021. Judge Christiansen Forster led the Court of Appeals through the challenging years of the COVID-19 pandemic while also overseeing significant administration changes including, expanding the Appellate Mediation Office (a free mediation service to litigants) to serve more litigants, and supported the creation of a Utah Appellate Pro Bono Pilot Program to provide pro bono counsel for individuals that can't afford counsel for their appeals. Judge Christiansen Forster also collaborated with administrative leadership to oversee the development and funding of a new (and free) appellate efilg service for litigants of Utah's Appellate Courts. Utah did not have an appellate efilg system previously.

Judge Christiansen Forster has not only been an advocate for expanding access to justice through work within Utah's Appellate Courts, she serves in leadership positions on numerous volunteer committees that are working to make the Judiciary more accessible. Judge Christiansen Forster has been the Chair of the Bar's Pro Bono Commission for nearly a decade, she also serves as the Co-Chair of the Judiciary's Strategic Plan Drafting Committee, a time-intensive committee that recently approved Utah Judiciary Strategic Plan. (Here is the link to the detailed plan: <https://www.utcourts.gov/content/dam/about/admin/USC-Strategic-Plan.pdf>) This plan provides metrics and goals on how to ensure the Judiciary remains open, fair, and efficient for all Utahns regardless of income, race, gender, etc. Judge Christiansen Forster also serves as Co-Chair of the Board of Appellate Court Judges, and as a judge representative on the Supreme Court's Rules of Appellate Procedure Advisory Committee.

Judge Christiansen Forster is not only engaged in Utah, she also recently served as Co-Chair of the Annual Conference Planning Committee for the Council of Chief Judges of the State Courts of Appeal.

Judge Christiansen Forster is one of Utah's finest judges, both in her adjudicative work for the Utah Court of Appeals, but also in her endless volunteer work for the broader 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.

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: June 13, 2025

RE: AWARD RECOMMENDATION – LAWYER OF THE YEAR

CRITERIA:

Awarded to a Utah State Bar member who, over a long and distinguished legal career, has by their ethical and personal conduct, commitment and activities, exemplified for their fellow attorneys the epitome of professionalism; who has also rendered extraordinary contributions to the programs and activities of the Utah State Bar in the prior year.

NOMINEES:

<u>NOMINEE</u>	<u>NOMINATOR</u>	<u>PUBLIC?</u>
Christopher Cockayne <i>No prior award.</i>	Nancy Earlewine - Behunin	Yes
Adam Crayk <i>No prior award.</i>	Sarah Johns	Yes
Jonathan Hafen <i>2016 Charlotte Miller Award</i>	Joseph Covey, Derek Miller, Lawyer Group at Parr Brown, Jenifer Tomchak, Patricia Jones	Yes

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2024 Margaret D. Plane	Evan Strassberg, Brent Huff
2023 Darcy M. Goddard	Colin King, Cassie Medura, William P. Morrison, Jonathan Winn
2022 Laura Milliken Gray	Robert S. Clark, Kevin Daniels, Kristen Fadel, Debra Nelson, Noella Sudbury
2021 Joni J. Jones	Wally Bugden, Richard Burbidge, Abby Dizon-Maughan, Rick Haderlie, George Hofmann, Andrew Morse, V. Lowry Snow, Ann Marie Taliaferro, Christopher Von Maack
2020 James W. McConkie II	Doug Farr, Elizabeth (Terry) Dunning, Brad Parker, Jonathan Peck, Lauren Scholnick, Margaret Plane, Michael Liechty, Richard Mauro
2019 Paul C. Burke	Ross C. Anderson, Peter W. Billings, Patricia Christensen, Susan Griffith, John Huber, Gary Johnson, Anthony Plachy
2018 Karra Porter	Peter Billings, Gary Johnson, Rick Nydegger, Pamela Vickery
2017 Paul M. Simmons	Mark Moffat and Annie Taliaferro, Jeff Hunt
2016 Annette Jarvis Bruce Maak	Laura Dupaix, Kent Scott, Joan Watt, Fran Wikstrom
2015 Ron Yengich	Steven D. Peterson

RECOMMENDATION:

The Utah State Bar Awards Committee met on June 6, 2025 to review the nominations for the Lawyer of the Year Award. The Committee discussed the merits of each nominee and finally agreed upon recommending **Jonathan Hafen** to the Bar Commission for consideration.

Christy Abad

From: info@utahbar.org
Sent: Monday, June 2, 2025 11:55 AM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Joseph Covey

Bar Number

7492

Email Address

jcovey@parrbrown.com

Date

06/02/2025

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Jonathan Hafen

Award

Lawyer of the Year Award (Summer 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:

We write to nominate Jonathan Hafen for the Utah State Bar Lawyer of the Year. Jon embodies the qualities recognized by this award. Throughout his notable career, Jon has dedicated himself to serving his community, profession, and clients with the utmost integrity and civility.

Jon is committed to the State Bar. He chairs its CLE Advisory Committee and is an Executive Committee Member of the Litigation Section, which he formerly chaired. He is a Board Member of its Leadership Academy and a member of its Securities and Labor and Employment Sections. He has organized, moderated, presented, and been a panel member of dozens of CLEs, including Bar Conventions and Sections. Additionally, Jon is a mentor through the New Lawyer Training Program.

Jon also serves his broader legal and other communities. Jon was the FBA National President. He chaired the Utah Supreme Court Advisory Committee for the URCP for eight years. Early in 2025, he co-founded Utah Lawyers for Good Policy, a non-partisan group of over 150 lawyers that meet with elected officials to discuss issues of importance to Utah and its legal community. He started and continues to present the Southern Utah Federal Law Symposium. Jon is a mentor through the FBA, BYU, and BYU Law programs. He is a Co-Chair of the Women's Leadership Institute, Board Member of UCLI, Board Member for the Salt Lake Chamber of Commerce, Chair of the Tuacahn Center for the Arts, Board Member of the Utah Tennis Association, and Past President of the BYU Alumni Association.

Through all his service, Jon is the epitome of professionalism. As is apparent, Jon is extraordinarily hard-working, cares about his community, and gives his time freely. He is also unfailingly collegial toward everyone he encounters, including opposing counsel.

Jon has had a distinguished career, from a clerkship for Judge Monroe McKay to practicing at Sidley & Austin and for decades at Parr Brown. He is a skilled and effective trial attorney, court-appointed receiver, mediator, and arbitrator. As a well-respected and highly valued colleague who has encouraged and supported many of us in our professional endeavors, Jon is a leader and has served as Parr Brown's President.

More than anything, Jon inspires us to be good people and lawyers. He loves being a lawyer and is dedicated to and takes seriously his commitment to the legal profession. We are fortunate to call him our friend and colleague and enthusiastically nominate him for this prestigious 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.



May 31, 2025

To Whom It May Concern:

Jonathan Hafen is an exceptional leader whose legal expertise, ethical example and community-driven service have made a profound and far-reaching impact on Utah's legal system, economic vitality and civic life. For these — and many other — reasons, we proudly support Jonathan's nomination as the 2025 Utah State Bar Lawyer of the Year.

I have known and worked closely with Jonathan for the past decade and have seen firsthand the positive impact he has had across our state. His conduct consistently reflects the highest ideals of the legal profession, and we are fortunate he calls Utah home.

For more than three decades, Jonathan has consistently demonstrated extraordinary legal skill and unwavering integrity as a shareholder at Parr Brown Gee & Loveless. He has successfully tried numerous high-stakes cases, including achieving some of Utah's largest plaintiff awards in tortious interference, breach of contract and eminent domain matters. As leader of Parr Brown's Receivership Group, he has helped recover over \$1 billion for victims of major Ponzi schemes. He currently serves as court-appointed receiver in the Rust Rare Coin case, having already recovered over \$50 million for its victims.

Equally impressive is Jonathan's recent and ongoing contribution to the Utah State Bar. Over the past year, he has chaired the Continuing Legal Education Advisory Committee, mentored emerging attorneys through formal Bar programs and delivered multiple impactful CLE presentations — including his March 2025 address on professionalism and his leadership training at the Utah State Bar Leadership Academy. His work has directly advanced the skills, ethics and growth of hundreds of attorneys across the state.

Jonathan's influence extends well beyond the courtroom. As a member of the Salt Lake Chamber Board of Directors and previous Public Policy Committee Co-Chair, he champions initiatives that strengthen Utah's business climate and economic vitality. He co-founded Utah Lawyers for Good Policy and serves on the boards of the Women's Leadership Institute and the Utah Center for Legal Inclusion — advancing equity, mentorship and civic engagement at every level.

Repeatedly recognized among the Mountain States' top attorneys, Jonathan's accolades — including the Utah State Bar's Charlotte L. Miller Mentorship Award and multiple honors from the Federal Bar Association — reflect what we at the Chamber know to be true: Jonathan Hafen is a principled leader, a devoted mentor and a force for good.

Sincerely,

Derek Miller
President & CEO
Salt Lake Chamber

PARR BROWN GEE & LOVELESS

ATTORNEYS AT LAW

June 2, 2025

Utah State Bar Commission
Awards Committee
c/o Christy Abad
Christy.abad@utahbar.org

Via Electronic Transmission

**Re: Utah State Bar Lawyer of the Year Award
Nomination of Jonathan O. Hafen**

Dear Commissioners and Nominating Committee Members,

We write to nominate Jonathan Hafen for the Utah State Bar Lawyer of the Year. Jon embodies the qualities recognized by this award. Throughout his notable career, Jon has dedicated himself to serving his community, profession, and clients with the utmost integrity and civility.

Jon is committed to the State Bar. He chairs its CLE Advisory Committee and is an Executive Committee Member of the Litigation Section, which he formerly chaired. He is a Board Member of its Leadership Academy and a member of its Securities and Labor and Employment Sections. He has organized, moderated, presented, and been a panel member of dozens of CLEs, including Bar Conventions and Sections. Additionally, Jon is a mentor through the New Lawyer Training Program.

Jon also serves his broader legal and other communities. Jon was the FBA National President. He chaired the Utah Supreme Court Advisory Committee for the URCP for eight years. Early in 2025, he co-founded Utah Lawyers for Good Policy, a non-partisan group of over 150 lawyers that meet with elected officials to discuss issues of importance to Utah and its legal community. He started and continues to present the Southern Utah Federal Law Symposium. Jon is a mentor through the FBA, BYU, and BYU Law programs. He is a Co-Chair of the Women's Leadership Institute, Board Member of UCLI, Board Member for the Salt Lake Chamber of Commerce, Chair of the Tuacahn Center for the Arts, Board Member of the Utah Tennis Association, and Past President of the BYU Alumni Association.

Through all his service, Jon is the epitome of professionalism. As is apparent, Jon is extraordinarily hard-working, cares about his community, and gives his time freely. He is also unfailingly collegial toward everyone he encounters, including opposing counsel.

Jon has had a distinguished career, from a clerkship for Judge Monroe McKay to practicing at Sidley & Austin and for decades at Parr Brown. He is a skilled and effective trial attorney, court-appointed receiver, mediator, and arbitrator. As a well-respected and highly valued colleague who



has encouraged and supported many of us in our professional endeavors, Jon is a leader and has served as Parr Brown's President.

More than anything, Jon inspires us to be good people and lawyers. He loves being a lawyer and is dedicated to and takes seriously his commitment to the legal profession. We are fortunate to call him our friend and colleague and enthusiastically nominate him for this prestigious award.

Sincerely,

PARR BROWN GEE & LOVELESS, P.C.

/s/ Joseph M.R. Covey
Joseph M. R. Covey, President

/s/ Jonathan R. Schofield
Jonathan R. Schofield

/s/ Robert S. Clark
Robert S. Clark

/s/ Justin P. Matkin
Justin P. Matkin

/s/ Stephen E.W. Hale
Stephen E. W. Hale

/s/ Michael T. Hoppe
Michael T. Hoppe

/s/ Daniel E. Jenesn
Daniel E. Jensen

/s/ Kara M. Houck
Kara M. Houck

/s/ Jeffrey J. Hunt
Jeffrey J. Hunt

/s/ Cheylynn Hayman
Cheylynn Hayman

/s/ D. Craig Parry
D. Craig Parry

/s/ Sara M. Nielson
Sara M. Nielson

/s/ Laura G. Kennedy
Laura G. Kennedy

/s/ Dick J. Baldwin
Dick J. Baldwin

/s/ James L. Ahlstrom
James L. Ahlstrom

/s/ Steven R. Glauser
Steven R. Glauser

Jenifer L. Tomchak

jen.tomchak@tomchaklaw.com

(801) 831-4820

10 West 100 South, Suite 700

Salt Lake City, UT 84101

tomchakskolout.com

June 1, 2025

SENT VIA EMAIL

VIA ELECTRONIC TRANSMISSION

Utah State Bar Commission
c/o Christy Abad
Christy.abad@utahbar.org

Dear Commissioners and Members of the Nominating Committee:

It is my honor to join in the nomination of Jonathan ("Jon") Hafen for the Utah State Bar 2025 Lawyer of the Year. It would be impossible to write in a short letter all of the reasons Jon deserves to be recognized as the 2025 Lawyer of the Year. Jon is a well-respected and renowned trial attorney, who has been practicing since 1991. Jon is a master of his trade. In an age where trials and trial experience is hard to come by, Jon has been recognized as one of the top 100 trial lawyers in the Mountain West and one of the Top 10 Lawyers in Utah. He is regularly sought out for his trial skills and impressive trial record. But Jon's skills extend far beyond trial. He works hard from the outset of any case to earn the trust and respect of his clients, the judge, and opposing counsel. He has often been able to settle cases that others thought were unseizable because of the rapport he develops with opposing counsel and the diplomatic way he handles himself in all of his interactions.

Jon is not just an amazing lawyer, he is the best human being I know. I do not say this lightly. I have spent the entirety of my career looking up to Jon. The trait I admire most about Jon is his unwavering commitment to improving the lives of everyone around him. While many lawyers have a complicated relationship with this profession and often focus on its negatives, Jon has always seen the good in this career and feels strongly that anyone can excel in it if given the right support. He has aimed to provide that support or to improve systems that provide that support through his work on committees, sections, and divisions of the Utah State Bar and of the Federal Bar Association. I have had the pleasure and opportunity to observe him in many of these roles. He is a true leader, inspiring hundreds of lawyers on a regular basis to improve the practice of law.

At an institutional level, he plays an active role in planning and presenting continuing legal education courses that are directed at the development of skills for new attorneys. He also regularly presents to new attorneys, encouraging them to participate on various boards and committees. During these presentations, he emphasizes the important role these organizations

play in developing the attorneys' skills and practice and, moreover, the personal satisfaction one gains from contributing to the community.

He just finished his term as the President of the National Federal Bar Association, the second largest legal organization in the country with chapters in nearly every state. One of his primary goals in that role was to provide support to law students by offering them great programming aimed at improving their transition from law school to practicing lawyers. Two of his children, inspired by Jon's love of the law, had gone to law school and recently made that transition. He knew from observing the difficulties they had faced that there was a way to ease that transition and was committed to doing just that for law students across the country. With his guidance and assistance, the number of student chapters across the nation increased from 18 to 50! Thousands of law students' lives are better and their transition to practice easier because of Jon.

Jon also continues to serve as a member and is a Past President of the Utah Chapter of the Federal Bar Association and the Utah State Bar Litigation Section. In those roles and in his role as the Chair of the Utah State Bar CLE Advisory Committee, he has planned and continues to plan educational and fun CLEs on timely topics. He organizes, every year for fifteen or more years, a Federal Law Symposium in St. George. He does this nearly single-handedly. This conference involves most of the federal judges in Utah and provides really informative CLE classes to attorneys in a location that does not get the same access to programming as attorneys in Salt Lake. He also plans the Utah Trial Academy every year either in a standalone conference or as part of the Utah State Bar Fall Forum. These are among the most helpful CLEs any young (or seasoned) litigator can attend.

I have the pleasure of being on the Utah State Bar Leadership Academy Board with Jon. This organization focuses on mentoring young attorneys to become leaders in the Bar. Each year he presents on the Seven Skills of Highly Effective Leaders, and each year, he inspires a new class of future Bar leaders. I have never left that presentation with a dry eye. Every year he impresses upon our participants the importance of leading, not just for the sake of leading, but to make a real and lasting difference in the world around you. It invigorates and inspires me. I can see that same effect on the participants in the Academy. Nearly all of the major sections or divisions of the Utah State Bar are now headed by a former Leadership Academy participant who was inspired by Jon's presentation. And his mentorship does not stop there. He continues to mentor our participants both during and outside of the program, helping many of them find legal jobs or positions on Boards that they love.

Although there are many other positions Jon has filled that are also deserving of mention, I want to highlight his recent formation of the Utah Lawyers for Good Policy. Like so many of the projects Jon has worked on, he saw a need in the Utah legal community. Instead of hoping someone else would take care of the problem—as so many lawyers do—Jon sought out a way to actively fix it. He, with other likeminded lawyers, created this non-partisan, non-profit organization intended to foster fun and informative interaction with Utah's national and local elected officials. The ultimate goal is to build a rapport between our representatives and lawyers so that together we can build a better future for all of Utah.

On a more personal note, despite Jon's incredibly busy schedule and numerous commitments, Jon goes out of his way to foster the growth of the attorneys he works with, both at Parr Brown Gee & Loveless and the boards and committees he serves on. Jon has contributed significantly to my growth as an attorney, both professionally and personally. Jon has taught me how to make my career as an attorney more rewarding by setting an example of service to the community and urging me to follow that example. I know that the profound impact Jon has had on my personal and professional development is not isolated. I deeply admire Jon and the commitment he has shown to the legal community and am so grateful for the role he has played in my life.

Thank you for your consideration of Mr. Hafen for this well-deserved honor. It is my fervent hope that the foregoing shows that Jon has, over a long and distinguished legal career, exemplified for his fellow attorneys the epitome of professionalism and rendered extraordinary contributions to the programs and activities of the Utah State Bar (this year and every year).

Sincerely,

Jenifer L. Tomchak

It is with great pleasure that I support the nomination of Jonathan Hafen for Utah State Bar Lawyer of the Year.

I first met Jon as a fellow member of the Salt Lake Chamber Board of Governors. He approached me about the mission of the Women's Leadership Institute and soon offered his incredible skills to forward our mission. When a slot on the WLI board opened up, Jon was the first person that came to mind to fill it, as the engagement, advocacy and allyship of men is critical to the success of WLI. Despite his insane professional schedule, Jon has been an absolutely stellar board member, regularly attending board meetings, offering his wealth of knowledge on systems and legal matters, and advancing his heartfelt beliefs about the value that women add to leadership.

Jon relates well with others, no matter their station. He is curious about things and people. He has a broad spectrum of interests and is involved in them. It's not happenstance that Jon seems to show up everywhere at events that are meaningful to our state and to our communities. Jon has a genuine interest in the backgrounds of people and in improving the quality of life for all of us. He leads by example.

Jon possesses natural leadership qualities and regularly offers them to others. Whether in the courtroom, boardroom or living room, Jon is unique in that he is humble, generous, wicked smart and fights for justice. He steps up. He finds ways to be additive. He is a participant, not simply a spectator. His career journey shows that he always rises to the top.

Importantly, Jon's demeanor is one of kindness, reason, listening, advocacy and love. His obvious adoration of his family, notably the respect for women in his personal life, demonstrates a life well lived.

It is inadequate to say that I just applaud this nomination. It is a well-deserved honor for a man that exemplifies some of the finest qualities that many humans can only hope for.

Sincerely,

Patricia Jones
CEO, Women's Leadership Institute

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: **Utah State Bar Commission**

DATE: **June 13, 2025**

RE: **AWARD RECOMMENDATION – SECTION OF THE YEAR**

CRITERIA:

Awarded to a Section of the Utah State Bar that has made outstanding contributions of time and talents to Bar activities as well as provided outstanding services, programs and/or activities for Bar members and the public at large during the past year. The Section serves the Utah State Bar mission of being a united, inclusive organization - serving the legal profession and the public.

NOMINEES:

NOMINEE

NOMINATOR

PUBLIC?

Elder Law Section

Estate Planning Section

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2024 Young Lawyers Division	CyberLaw Section, Paralegal Division
2023 Business Law Section	
2022 Business Law Section	Appellate Practice Section
2021 Intellectual Property Section	
2020 Indian Law Section	Litigation Section
2019 Litigation Section	
2018 Cyberlaw Section	IP Section
2017 Limited Scope Section	LGBT & Allied Lawyers, IP Section, Family Law Section
2016 Bankruptcy Section	Estate Planning Section
2015 Young Lawyers Division	
2014 Intellectual Property Section	Young Lawyers' Division
2013 Solo, Small Firm, and Rural Practice Section	Appellate Practice Section, Juvenile Law Section, Young Lawyers' Division
2012 Estate Planning Section	Elder Law Section, Young Lawyers Division
2011 Elder Law Section, Young Lawyers Division	
2010 Military Law Section	
2009 Appellate Practice	Constitutional Law Section, Solo, Small Firm and Rural Practice Section
2008 Young Lawyers Division	Young Lawyers Division, Estate Planning Section, IP Section
2007 Paralegal Division	Banking and Finance Section
2006 Litigation Section	Banking & Finance Section, Paralegal Division
2005 ADR Section	

RECOMMENDATION:

The Utah State Bar Awards Committee met on June 6, 2025 to review the nominations for the Section of Year Award. The Committee discussed the merits of each nominee and finally agreed upon recommending that both the **Elder Law Section** and the **Estate Law Section** receive the award based on the work they do together.

Christy Abad

From: Michelle Oldroyd
Sent: Wednesday, June 4, 2025 11:20 AM
To: Mary Turville; Lydia Kane; Christy Abad
Subject: RE: Section of the Year

Christy, the idea that these two are collaborating across disciplines and finding how their work and the camaraderie of their practitioners benefits all of us, is great and worthy to celebrate with the award.

Thanks!



Michelle M. Oldroyd

Community Outreach & External Relations Director
Director of Professional Education
Pronouns she/her

Utah Law & Justice Center
645 South 200 East, Salt Lake City, UT 84111
Ofc. 801-297-7033
Cell 801-557-7124
michelle.oldroyd@utahbar.org
utahbar.org/cle/

An email from Michelle M. Oldroyd, Esq.

This email does not constitute legal advice for anyone receiving it; instead, the contents are legal information only.

Please pardon misspellings. Please notify sender if this message is received in error & delete all messages and attachments if received in error.

Thank you.

From: Mary Turville <MTurville@utahbar.org>
Sent: Wednesday, June 4, 2025 11:18 AM
To: Lydia Kane <LKane@utahbar.org>; Michelle Oldroyd <michelle.oldroyd@utahbar.org>; Christy Abad <christy.abad@utahbar.org>
Subject: RE: Section of the Year

Agreed!

Sincerely,

Mary Turville

CLE Administrator
CLE Department
Utah State Bar
645 South 200 East
Salt Lake City, UT 84111

From: Lydia Kane <LKane@utahbar.org>

Sent: Wednesday, June 4, 2025 11:11 AM

To: Michelle Oldroyd <michelle.oldroyd@utahbar.org>; Christy Abad <christy.abad@utahbar.org>; Mary Turville <MTurville@utahbar.org>

Subject: RE: Section of the Year

They are both great! Very active and they take great care with their programs.

Sincerely,



Lydia Kane

Assistant CLE Director

She/Her/Hers

Utah Law & Justice Center
645 South 200 East, Salt Lake City, UT 84111
801-297-7036
lydia.kane@utahbar.org
utahbar.org

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From: Michelle Oldroyd <michelle.oldroyd@utahbar.org>

Sent: Wednesday, June 4, 2025 11:05 AM

To: Christy Abad <christy.abad@utahbar.org>; Lydia Kane <LKane@utahbar.org>; Mary Turville <MTurville@utahbar.org>

Subject: RE: Section of the Year

I think that the Elder Law and the Estate Planning Sections have been remarkable for the growth in their CLEs and community building. They are hosting in three ways, with each other, every other month – on Zoom, at our building, and in a “watch party” in St. George. It is helping so many people reach their events and content. I would celebrate their collaborations and their innovation to add a “watch party” to their CLE events.

Thoughts?



Michelle M. Oldroyd

*Community Outreach & External Relations Director
Director of Professional Education
Pronouns she/her*

Utah Law & Justice Center
645 South 200 East, Salt Lake City, UT 84111
Ofc. 801-297-7033
Cell 801-557-7124
michelle.oldroyd@utahbar.org
utahbar.org/cle/

An email from Michelle M. Oldroyd, Esq.

This email does not constitute legal advice for anyone receiving it; instead, the contents are legal information only.

Please pardon misspellings. Please notify sender if this message is received in error & delete all messages and attachments if received in error.

Thank you.

From: Christy Abad <christy.abad@utahbar.org>

Sent: Wednesday, June 4, 2025 11:02 AM

To: Michelle Oldroyd <michelle.oldroyd@utahbar.org>; Lydia Kane <LKane@utahbar.org>; Mary Turville <MTurville@utahbar.org>

Subject: Section of the Year

Hello, Michelle, Mary, and Lydia! 😊

We have not received any nominations for the 2025 Section of the Year. I am reaching out to you to see if you would recommend a Section. Is there a Section who has accomplished something outstanding this year? Made a contribution to the community? Etc., etc. . . .

Please let me know your thoughts.

Thanks!!



Christy J. Abad

Executive Assistant

Utah Law & Justice Center
645 South 200 East, Salt Lake City, UT 84111
Desk 801-297-7031
utahbar.org

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: **Utah State Bar Commission**

DATE: **June 13, 2025**

RE: **AWARD RECOMMENDATION – COMMITTEE OF THE YEAR**

CRITERIA:

Awarded to a Committee of the Utah State Bar that has made outstanding contributions of time and talents to Bar activities as well as provided outstanding services, programs and/or activities for Bar members. The Committee serves the Utah State Bar mission of being a united, inclusive organization - serving the legal profession and the public.

NOMINEES:

NOMINEE

Fund for Client Protection
1999 Committee of the Year

NOMINATOR

Christine Critchley

PUBLIC?

PAST RECIPIENTS AND NOMINEES:

Past Recipients	Other Nominations That Year
2024 Character & Fitness Committee	Innovation in Law Practice Committee, Unauthorized Practice of Law Committee
2023 Ethics & Discipline Committee of the Utah Supreme Court	
2022 Licensed Paralegal Practitioner Committee	
2021 Governmental Relations Committee	
2020 CLE Advisory Committee	
2019 Bar Journal Committee	
2018 Innovation in Law Practice Committee	
2017 Governmental Relations Committee	
2016 Utah State Bar Leadership Academy	
2015 Disaster Legal Response Committee	
2014 Civics Education Committee	Disaster Legal Response Committee
2013 Budget and Finance Committee	
2012 Pro Bono Commission	
2011 Unauthorized Practice of Law	
2010 Bar Examiner Committee	
2009 New Lawyer Training Program	
2008 Admissions Committee	
2007 Bar Journal Committee	Unauthorized Practice of Law Committee, New Lawyer CLE Committee
2006 Ethics Advisory Opinion Committee	New Lawyer CLE Committee, Governmental Relations Committee, UPL Committee
2005 Governmental Relations Committee	

RECOMMENDATION:

The Utah State Bar Awards Committee met on June 6, 2025 to review the nominations for the Committee of the Year Award. The Committee discussed the merits of the Committee's nomination and finally agreed upon recommending The Fund for Client Protection Committee to the Bar Commission for consideration.

The Utah Supreme Court established the Fund for Client Protection on April 9, 1977. The purpose of the Fund for Client Protection is to promote public confidence in the administration of justice and the integrity of the legal profession by reimbursing losses caused by the dishonest conduct of lawyers and LPPs admitted and licensed to practice law in this state.

The Fund for Client Protection Committee reviews claims to the Fund for Client Protection to make sure they are valid and meet the eligibility criteria stated in the rules of the program. When several valid cases are available, hearings are scheduled to determine the amount of award, if any, that will be granted to any claimant.

To receive a recovery from the Fund, an eligible claim must be submitted to the committee within one year after “the date of the final order or discipline,” “the lawyer’s death,” or “the date of the order of disability.” The claim form asks the client to outline the nature of the claim and provide documentary information needed by the committee to evaluate the claim. Once the committee receives the claim and the underlying evidence, it conducts a hearing, upon appropriate notice to both the claimant and the subject attorney. The committee usually schedules several claims for consideration on the same day. Hearings are conducted both in-person and virtually, with very relaxed rules of evidence. At the conclusion of each hearing, the committee deliberates, makes written findings, and sends a recommendation to the Board of the Utah State Bar about the claim.

The number of claims filed with the Fund for Client Protection Committee is ever-increasing and the time spent by our volunteer committee members has increased correspondingly.

Year	Number of Claims Filed	Total Amount of Claims Filed	Number of Claims Awarded	Total Amount Awarded
2013–14	19	\$126,141.47	14	\$92,891.47
2014–15	13	\$55,115.00	10	\$40,270.13
2015–16	10	\$47,725.50	9	\$31,140.00
2016–17	10	\$92,025.00	9	\$26,026.00
2017–18	15	\$91,320.50	11	\$43,315.50
2018–19	15	\$108,965.00	13	\$51,965.00
2019–20	17	\$54,840.00	15	\$30,705.00
2020–21	8	\$40,601.22	6	\$18,107.22
2021–22	15	\$131,232.00	13	\$85,650.00
2022–23	30	\$108,139.00	29	\$91,450.00
TOTALS	152	\$855,704.69	129	\$511,520.32

Further, the Fund for Client Protection Committee is tasked with reviewing claims that are varied and often, quite sad. Here are some examples:

Client hires an attorney to perform legal services. In a series of payments, the client remits over \$15,000 to the attorney to pay for these expected services. For unexplained reasons the attorney does not perform any of the services and stops communicating with the client. The OPC prosecutes the attorney for various ethical violations and obtains an order of disbarment. Meanwhile, the client is forced to retain another attorney at additional expense. Fund for Client Protection (FCP) recommends an award of \$15,000 to the client for the amount the client paid to the first attorney and for which the client did not receive any meaningful services.

Client hires an attorney to defend the client in a DUI criminal case and pays the attorney a fixed fee of \$2,100 for the defense. After performing some services related to the defense, the attorney, who was a solo practitioner, unexpectedly dies. The OPC takes control of the attorney's files and trust accounts. The client is required to hire another attorney to finish the criminal defense. After evaluating the nature and amount of service provided by the deceased attorney, the FCP recommends an award of \$1,500 to the client. c. Client hires an attorney to negotiate and settle a debt collection action where the client is liable to the creditor on a \$66,000 default judgment. The client pays the attorney over \$21,000 for these services, but there is no evidence that the attorney ever conducted any meaningful services or negotiations on the client's behalf. The attorney also refuses to refund any of the retainer payments to the client. After an Order of Delicensure is entered against the attorney, the attorney resigns from the Bar. The client then retains another attorney, at additional expense, to defend the collection action. The FCP recommends the maximum award of \$20,000 to the client.

Practicing law is a privilege, not a right. As with all privileges, it comes with benefits and burdens. Licensed attorneys not only must comply with the Rules of Professional Conduct and the Standards of Professionalism and Civility in their relationships with clients and with each other, but they also must self-regulate the conduct of their fellow members. This is a shared duty. When, on occasion, the 1% among us stumble, and clients are hurt, the Fund for Client Protection steps in to help put some of the pieces back together and restore confidence in our profession.

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: June 13, 2025

RE: AWARD RECOMMENDATION – Special / Distinguished Service

CRITERIA:

The Special Service Award has no specific criteria. The Award is given by the Utah State Bar Board of Bar Commissioners to recognize distinguished service to Utah State Bar or the Utah legal community and is presented to individuals who have notable Bar activity and significant professional accomplishments, including private interests, family interests, acts of heroism, charitable acts, or social accomplishments. Past recipients have given long and/or useful service to the Utah State Bar, either paid or as a volunteer.

NOMINEES:

1. Kate Conyers
2. Stanford Brandon Owen

PAST RECIPIENTS:

2001	WAINE C. RICHES
2002	KENT B. SCOTT
2002	REP. AFTON B. BRADSHAWP
2002	REP. A. LAMONT TYLER
2003	HON. LEONARD H. RUSSON
2003	DEAN W. SHEFFIELD
2003	ELAINA MARAGAKIS
2003	GARY G. SACKETT
2005	UTAH MINORITY BAR ASSOCIATION
2006	S. J. QUINNEY COLLEGE OF LAW
2007	G. STEVEN SULLIVAN
2008	DAVID R. HALL
2012	HON. DAVID R. HAMILTON
	HON. DAVID O. NUFFER
	SAMUEL ALBA
	STEVEN T. WATERMAN
2014	YOUNG LAWYERS DIVISION
2017	HON. CHRISTINE M. DURHAM
2019	ROBERT W. ADLER
	STEVEN G. JOHNSON
2020	RICHARD MAURO & SALT LAKE LEGAL DEFENDER ASSOC.
2022	NOELLA SUDBURY
	DEBRA M. NELSON
2023	NATHANIEL J. SANDERS
	HEATHER J. TANANA

RECOMMENDATION:

The Utah State Bar Awards Committee met on June 6, 2025 to review the nominations for a Special/Distinguished Service Award. The Committee discussed the merits of each nominee and finally agreed upon recommending that **Kate Conyers** should be considered by the Bar Commission for a Special/Distinguished Service Award based on her significant accomplishments and acts of service to the profession and the community over a period of many years.

Christy Abad

From: info@utahbar.org
Sent: Friday, January 31, 2025 2:21 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Women Lawyers of Utah (WLU)

Email Address

womenlawyersofutah@gmail.com

Date

01/31/2025

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Kate Conyers

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:

Please see the attached letter. I submitted this earlier, but could not tell if it went through. So, sorry if you get it twice!

File

- [Conyers-DMB-Nomination1.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

January 31, 2025

2024-2025 Board

Holly Nelson
President

Anne Freeland
President Elect

Brit Merrill
Past President

Taylor Webb
Treasurer

Jen Tomchak
Secretary

Lena Daggs
Membership & Publicity
Committee Chair

Melissa Reynolds
Larissa Lee
Career Advancement
Committee Chairs

Melinda Bowen
CLE Committee Chair

Grace Pusavat
Community Outreach
Committee Chair

Ellie Rudolf
Shelby Jaye Hughes
Retreat Committee Chairs

Ashley Gregson
Judicial Mentoring Chair

Anaya Gayle
Wellness Committee Chair

Allison Parks
Government Liaison

Naziel Scott
In-House Liaison

Sarah Hafen
Pathway to Partnership

Scarlet Smith
Historian Committee Chair

Su Chon
Professional Opportunities
Chair

Dear Utah State Bar:

We are writing to support the nomination of Kate Conyers for the Dorothy Merrill Brothers Award. Kate began volunteering with Women Lawyers of Utah in law school then went on to serve on WLU's board for several years and ultimately as WLU's President. Both within and outside of WLU, Kate has devoted countless hours to the advancement of women in the legal profession. During (and following) her tenure at WLU, Kate provided one-on-one mentoring to numerous attorneys and lead multiple initiatives aimed at supporting and furthering women in the legal field. It is hard to find someone in this legal community who does not know Kate. That is because she makes a genuine effort to connect with people and provides assistance whenever she can.

Kate's service to the legal profession is not just limited to women, she dedicates a significant amount of her time and energy to non-profits and causes benefiting the legal profession and low-income individuals in Utah and globally. Below are just a few of the many examples of Kate's public service and non-profit work:

- Various pro bono work, including spearheading the Veterans Administration Legal Clinic at the VA Hospital on the U campus.
- Kayak Court and other outreach legal clinics, including providing legal services to people experiencing homelessness and other low-income individuals with Salt Lake City Justice Court and Third District Court.
- VOA Homeless Youth Resource Center, including volunteering with legal clinic and making meals and hosting annual prom and fundraisers.
- International Legal Foundation, International Fellow/Expert
 - Trained public defenders and legal aid lawyers in Tbilisi and Kutaisi, Georgia in 2023
 - Trained public defenders in Yangon and Mandalay, Myanmar in 2018 and 2019
- Clean Slate Utah, Board Member
- Salt Lake County Bar Association, Board Member
- Utah State Bar New Lawyer Training Program, Mentor (Criminal Law)
- Rocky Mountain Innocence Center, Past President
- Utah Center for Legal Inclusion, Former Board Member
- Utah Minority Bar Association, Former Board Member

As demonstrated by her dedication and service, Kate is the epitome of what this award stands for. Thank you for considering our nomination.

Sincerely,

/s/ Anne Freeland
On behalf of WLU

Utah State Bar Commission Meeting

T A B 2

2025-2026 Executive Committee

Kim Cordova

Cara Tangaro

Tyler Young

Esabelle Khaosanga

Utah State Bar Commission Meeting

T A B 3



Utah Judiciary Strategic Plan



2026-2029



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Chief Justice Matthew B. Durrant

Message from the Chief

Utah is nationally renowned for its legal system. But to continue our reputation for excellence, we must commit to doing more and constantly improve the system we have. When people come within the walls of a courthouse, they are entitled to an environment that is professional, respectful, and impartial. They will find court staff who are knowledgeable, helpful, and committed to assisting with the judicial process in an efficient and culturally competent manner. They will also find judges who listen carefully and respectfully, treating every individual with dignity. Our judges take an oath to decide cases based on the facts presented, reasoned argument, and established law—without regard to personal characteristics such as socioeconomic status, political beliefs, or identity. Every person can expect to be heard and to receive a fair and impartial decision, free from bias or external influence. These values are at the heart of how we serve the public each day—and they also form the foundation of our future direction.

It is my great privilege to introduce the Utah Judiciary's Three-Year Strategic Plan, a comprehensive vision that will guide our courts in ensuring justice for all Utahns and build upon the excellence we have already achieved. The Judiciary plays a critical role in upholding the rule of law, safeguarding constitutional rights, and fostering public trust. Our strategic priorities reflect our commitment to being an open, fair, inclusive, and efficient Judiciary that serves all individuals with integrity and excellence.

An Open Judiciary

Transparency and accessibility are essential to public trust. The Utah Judiciary is committed to ensuring that court procedures, decisions, and operations are open and understandable to all. Through increased access to information, expanded digital resources, and community engagement, we will continue to operate responsibly and ensure that every Utahn has meaningful access to the courts.

A Fair Judiciary

Impartiality is at the heart of justice. Our Judiciary must remain free of bias in its actions, procedures, and decisions. Building on the foundation of past efforts, including the 1996 Utah Task Force on Racial and Ethnic Fairness and the establishment of the Office of Fairness and Accountability in 2021, we reaffirm our dedication to eliminating bias, enhancing procedural fairness, and fostering trust in the legal system for all Utahns.

An Inclusive Judiciary

Justice must be welcoming and accessible to all individuals, regardless of background, language, ability, or identity. Our strategic plan prioritizes inclusivity by expanding culturally responsive programs, improving language access, and ensuring that all court users feel respected and accommodated. We are dedicated to fostering a Judiciary that serves the diverse needs of Utah's communities.

An Efficient Judiciary

Timely and fair resolution of legal matters is fundamental to justice. We are committed to adopting best practices, leveraging technology, and implementing evidence-based methodologies to enhance efficiency while maintaining the highest standards of judicial integrity. Virtual hearings, electronic filing, and modernized case management systems are just a few of the initiatives aimed at ensuring a responsive and effective judicial system.

The Utah Judiciary is steadfast in its mission to administer justice fairly and efficiently. This strategic plan reflects our dedication to continuous improvement, innovation, and service to the people of Utah. I look forward to working alongside our judicial colleagues, legal partners, and the community to bring this vision to life.



MISSION

To provide an open, fair, efficient, and independent system for the advancement of justice under the law.

JUDICIARY VALUES

Uphold the Rule of Law

The Judiciary applies the law equally to institutions, entities, and individuals.

Independent

The Judiciary is an independent, self-governing branch of government, which acts in accordance with the law at every level to make impartial decisions that are free from improper influence or pressure.

Open

The Judiciary operates transparently and responsibly and is accessible to all.

Fair

The Judiciary is impartial and free of bias in its actions, procedures, and decisions.

Inclusive

The Judiciary provides a respectful, welcoming, and accommodating environment for all.

Efficient

The Judiciary ensures the fair and timely resolution of all matters by adopting and utilizing best practices, technology, and evidence-based methodology to serve all court uses.

Overview

Beginning in 1996, the Judicial Council's Utah Task Force on Racial and Ethnic Fairness in the Legal System conducted a comprehensive review of the Utah criminal justice system to examine issues of racial and ethnic fairness. The Task Force published a final report that included suggestions to address equity issues found within the judicial branch. A quarter-century later, the Judiciary is reflecting on the progress made since those efforts and looking toward the future.

In 2021, the Judicial Council established the Office of Fairness and Accountability, charging it — through the Committee on Fairness and Accountability — with developing a strategic plan to address bias and inequity in the judicial system. Under the applicable Rules of Judicial Administration, this strategic plan must include "the Judiciary's goals and policy directives for meeting the court's mission for the open, fair, and efficient administration of justice under the law while also being responsive to the state's cultural, ethnic, socioeconomic, linguistic, physical, gender, and age diversities. Branch efforts in this regard will strive to eliminate bias and the appearance of bias, meet the needs of increasing numbers of self-represented litigants, remain receptive to the needs of all branch constituents, ensure that court procedures are fair and understandable, and provide culturally responsive programs and services."

To develop this plan, the Committee on Fairness and Accountability convened a Strategic Plan Drafting Committee composed of employees and judges from every court level and district around the State. This committee has created the goals, strategies, and action items necessary to help the Judiciary meet its mission. By formalizing a strategic plan, the Judiciary can assess areas for improvement, set clear objectives, and advance its mission while upholding our commitment to excellence.

COMMITMENT ONE

Promoting Public Trust and Confidence

The Utah Judiciary is dedicated to upholding its constitutional duty to provide open courts that resolve disputes, interpret and apply the law, and safeguard the constitutional rights of all Utahns. The effectiveness of this role relies on maintaining public trust and confidence, as well as fostering strong relationships with the other branches of government. To uphold that trust, the Judiciary is committed to transparent communication, active community engagement, and exemplary service to the people of Utah.



GOAL 1

Discern public opinion regarding the Judiciary and its processes and implement changes where necessary

Strategy 1: Gather and assess current public opinion
Strategy 2: Create opportunities for ongoing feedback

GOAL 2

Communicate more effectively with the public and increase public outreach and education

Strategy 1: Increase utility of the public website
Strategy 2: Increase opportunities for public outreach by courts in each district
Strategy 3: Increase engagement with schools
Strategy 4: Increase engagement with the media

GOAL 3

Improve and expand training for all court staff and judicial officers to enhance consistency and efficiency throughout the State to improve service to the public

Strategy 1: Enhance and expand current training and practices to ensure exemplary service

GOAL 4

Increase opportunities for strategic engagement with other branches of government

Strategy 1: Continue engagement and identify new ways to engage with other branches of government
Strategy 2: Increase opportunities for engagement with Tribal Nations

COMMITMENT TWO

Increasing Access to Justice

Many obstacles hinder the promise of equal justice under the law. These challenges include the complexity of legal and judicial systems, difficulties faced by self-represented litigants, language barriers, and perceptions of bias and unfairness in governmental institutions. The Utah Judiciary is committed to reviewing and improving court processes and rules to expand access to justice. By actively seeking and addressing feedback from court patrons and community members, the Judiciary will hold itself accountable for removing barriers and ensuring equal access to justice for all.



GOAL 1

Address immediate barriers to accessing the judicial system

Strategy 1: Employ strategies to increase the understanding of court rules and procedures by non-law trained individuals

Strategy 2: Enhance our service culture

GOAL 2

Create accountability mechanisms for expanding court access and increase our capacity to improve while balancing sustainability of operations

Strategy 1: Invite community members to provide input to help us find ways to increase access to justice and continually solicit feedback from community members about court processes and their impact on the community and access to justice



COMMITMENT THREE

Ensuring Constitutional Openness

Utah's judicial system is designed to be fair and accessible to everyone. Utah's Constitutional Declaration of Rights declares that courts shall be open and that every person shall have remedy under the law without denial or delay. To uphold this principle, the Judiciary must identify and systematically eliminate practices that result in disparate treatment. These practices may exist in various areas including courthouse facilities, juror selection, access to legal resources, hiring procedures, and employee retention strategies. By gathering data in these areas, the Judiciary remains responsive to Utah's evolving community needs and ensures equal treatment for all who interact with the judicial system.



GOAL 1

Advance a fair and inclusive judiciary

Strategy 1: Identify practices and conditions that may create or contribute to disparate treatment and outcomes

Strategy 2: Identify existing data on demographics and create processes to enhance collection of demographic data

Strategy 3: Eliminate practices that create or contribute to disparate outcomes and implement practices that are just and equitable for all

GOAL 2

Provide equal opportunities for all employees

Strategy 1: Promote fair hiring practices in recruitment efforts

Strategy 2: Expand employee retention efforts

Strategy 3: Support efforts to increase and broaden the applicant pool for judicial positions

GOAL 3

Provide resources to understand and mitigate bias

Strategy 1: Expand training and educational opportunities in areas that contribute to fair treatment and outcomes



Special Thanks

Judicial Council Members

Chief Justice Matthew B. Durrant
Chair, Utah Supreme Court

Judge David N. Mortensen
Vice Chair, Utah Court of Appeals

Judge Suchada Bazzelle
Fourth District Juvenile Court

Judge Brian Brower
Clearfield, Sunset, and Morgan County Justice Courts

Judge Jon Carpenter
Carbon County, Wellington City, and East Carbon Justice Courts

Judge Samuel Chiara
Eighth District Court

Judge Rita Cornish
Business and Chancery Court

Judge Michael DiReda
Second District Court

Judge Susan Eisenman
Third District Juvenile Court

Judge Angela Fomesbeck
First District Court

Judge James Gardner
Third District Court

Judge Michael Leavitt
Fifth District Juvenile Court

Judge Thomas Low
Fourth District Court

Judge Brendan McCullagh
West Valley City Justice Court

Judge Amber Mettler
Third District Court

Justice Paige Petersen
Utah Supreme Court

Katie Woods
Utah State Bar

Ron Gordon
Staff, State Court Administrator, Administrative Office of the Courts

Strategic Plan Drafting Committee

Judge Michele Christiansen Forster
Chair, Court of Appeals

Judge Monica Diaz
Chair, Third District Juvenile Court

Neira Siaperas
Chair, Deputy State Court Administrator

Holly Albrecht
Facilities Coordinator

Lauren Andersen
Director of Utah Judicial Institute

Shane Behr
District Court Administrator

Tricia Bradshaw
Clerk of Court

Sherrone Braegger
Probation Officer

Miranda Buchanan
Probation Supervisor

Spencer Cottle
Chief Probation Officer

Judge Dianna Gibson
Third District Court

Alicia Espinoza
Language Access Program Coordinator

Marketa Heslop
Judicial Case Manager

Judge Eric Jewell
Payson, Santaquin, Genola, and Goshen Justice Courts

Bryson King
Associate General Counsel

Janine Liebert
Director of Self-Help Center & Law Library

Kristy Martinez
Clerk of Court

Tania Mashburn
Director of Communications

Brielle McCourt
Judicial Assistant

Judge Richard Mrazik
Third District Court

Zerina Ocanovic
Juvenile Court Management Analyst

Bart Olsen
Director of Human Resources

Jim Peters
Justice Court Administrator

Nathanael Player
Former Self-Help Center & Law Library Director

Tiffany Power
Trial Court Executive

Jonathan Puente
Director of Office of Fairness and Accountability

Kepiolani Smith
Judicial Team Manager

Nick Stiles
Appellate Court Administrator

Cade Stubbs
Trial Court Executive

Karl Sweeney
Director of Finance

Sonia Sweeney
Juvenile Court Administrator

Erin York
Judicial Team Manager

Office of Fairness and Accountability

Jonathan Puente
Director of Office of Fairness and Accountability

Jessica Leavitt
Language Access Program Manager

Abram Sherrod
Public Outreach and Education Coordinator

Abby Padovich
Language Access Program Coordinator

Alicia Espinoza Rodriguez
Language Access Program Coordinator

Committee on Fairness and Accountability

Justice Jill Pohlman
Chair, Utah Supreme Court

Judge Monica Diaz
Third District Juvenile Court

Lauren Andersen
Director of Utah Judicial Institute

Judge Renee Jimenez
Senior Judge

Bryson King
Associate General Counsel

Tania Mashburn
Director of Communication

Shawn Newell
Public Member

Jonathan Puente
Director of Office of Fairness and Accountability

Judge Steven Roth
Retired Judge

Tucker Samuelsen
Director of Data and Research

Judge Todd Shaughnessy
Third District Court

Abram Sherrod
Public Outreach and Education Coordinator

Judge Bill Thorne
Retired Judge

Judge Denalee Welch-O'Donnell
Mojave Justice Court

Justice Michael Zimmerman
Retired





Administrative Office of the Courts
Scott M. Matheson Courthouse
450 South State Street
Salt Lake City, Utah 84111
801-578-3800 | www.utcourts.gov

Utah State Bar Commission Meeting

T A B 4

UTAH STATE BAR COMMISSION MEETING

MINUTES

Friday, May 16, 2025

In Attendance: President Cara Tangaro, Kim Cordova, Miriam Alred, Tom Bayles (remote), Brett Chambers, Matt Hansen, Rick Hoffman, Chrystal Mancuso-Smith, Shawn Newell, Olivia Shaughnessy, Jess Couse, and Tyler Young.

Ex-Officio Members: Nate Alder, Jennifer Carver, Erik Christiansen, Tiffany Shimada, Ezzy Khaosanga, Nick Stiles, Jennifer Carver.

Not in Attendance: Mark Morris and Christian Clinger. Ex-Officio members Andy Gonzalez, Dean Kronk Warner, Eili McCann, Brit Merrill, Dean More, Katie Woods.

Also in Attendance: Executive Director Elizabeth A. Wright, Assistant Executive Director Aubrey Schade, General Counsel Maribeth LeHoux, Finance Director Nathan Severin, Communications Director Jennifer Weaver, and IT Director Spencer Twede.

1. President's Welcome and Reports

1.1 Election Results

Ms. Tangaro announced the results of the Commission Elections, with Tyler Young being elected as president elect. In the Third Division, Jess Couser was elected for a full term on the Commission. Mr. Bayles won his election for the Fifth Division. Ms. Tangaro congratulated Matt Hansen on his judicial nomination, which will open another spot on the Commission for the Second Division, as he was also re-elected.

1.2 Spring Convention Reports

Ms. Tangaro reported that the Spring Convention was a successful event and had great attendance.

1.3 Report on fee meeting with the Court

Ms. Tangaro, Ms. Wright, and Mr. Severin met with the Court for approval of the licensing fee for 2025-2026. They told the Court that eventually we will have to raise rates, probably in 2 years. The current fee has been \$425 since 2009. Overall, costs have gone up on everything and fees have not correspondingly increased. The Court is going to review various programs the Bar has been charged with executing in evaluating costs.

1.4 Admissions Ceremony

The next admissions ceremony is May 20th at the Capitol at noon. All Commissioners are encouraged to attend.

1.5 Annual Meeting

The Annual Meeting will be June 26th at 5pm at This is the Place. AG Derek Brown will give the keynote address.

2. Information and Discussion Items

2.1 2025 Legislative Session Recap

Ron Gordon and Michael Drechsel from the Administrative Office of the Court presented along with Jacey Skinner, Frank Pignanelli and Steve Styler, our government affairs teams. They reported that the Governmental Relations Committee reviewed over 200 bills during the 2025 legislative session. Many members of the bar reached out to their representatives, particularly about HB 512 which would have allowed the legislature to provide a recommendation to the public on whether a judge should be retained during a retention election. The recommendation would have appeared next to the judge's name on the ballot. The focus of the team was making sure that the citizens have access to the courts, and the protection of the process. During the interim, they are going to work to help explain the importance of system and that it's not about individual judges and individual decisions. The involvement of individual bar members led to members of the public being informed and getting involved. The group discussed potential challenges that may arise next year, and the importance of involving regional bar and bar affinity groups.

During the Interim Session, there is an item on bar licensure. Additionally, earlier discussions about court productivity will be revisited. There is also discussion of creating a new law school at UVU.

3. Reports

3.1 Western States Bar Conference

Mr. Young reported on the Western States Bar Conference, which was held in Arizona. He attended with Elizabeth, Aubrey and Olivia. Topics included access to justice, including such programs as the Sandbox, as well as the use of technology, including AI, to expand access to justice.

3.2 ABA Day in Washington DC

Mr. Christiansen reported on ABA Day in DC, which occurred in early April. Working with Frank Pignanelli, Mr. Christiansen was able to meet with members of the Utah delegation to discuss funding for the Legal Services Corporation which funds free legal services providers in all states including Utah. Mr. Christiansen reported that Utah's delegation indicated there would be no Legal Services funding in the proposed 2026 budget.

3.3 Report on Supreme Court Ad Hoc Committee on Regulatory Reform

Mr. Stiles reported on the Committee and working groups, which will be working from now until August, 2026. The Court has asked the working groups to study different regulatory reforms and to provide reports and recommendations based on info and data from the Sandbox and propose rule changes to the Court.

3.4 Bar 95th Anniversary

Ms. Weaver, Bar Communications Director, presented plans for the Bar's 95th anniversary in 2026. So far, a committee has been formed. The short-term goal is to increase public awareness and engagement leading up to the event.

4. Action Items

4.1 Approve 2025-2026 Budget for Submission to Court

Mr. Hoffman presented the proposed budget, which had been previously provided to the Commissioners for their review. We are budgeting to lose money; the controlled loss is timed with an increase to licensing fees in two years. The Commission discussed, and thanked Mr. Severin for this excellent work.

Ms. Tangaro made a motion to approve the budget. Mr. Young seconded, and the motion was unanimously approved.

4.2 Appoint 2026 Summer Convention Co-Chairs

Ms. Cordova discussed appointing chairs for the 2026 Summer Convention in Sun Valley. She recommended Cecilia Romero and Christina Jepson. She is continuing to look for a third person and welcomes recommendations of the Commission.

Ms. Tangaro made a motion to approve the Convention Co-Chairs. Mr. Young seconded, and the motion was unanimously approved.

4.3 Approve Creation of AI and the Law Committee

Mr. Borden presented (remotely) about creating and chairing an AI committee. The committee would have three main functions:

1. Educating members of the bar;
2. Allowing the Bar to be a stakeholder in the development of AI in the law policy; and
3. Providing legal scholarship, including setting up clinic at BYU

Mr. Borden offered to chair the newly formed committee. The Commission discussed how a new AI Committee would interact with the existing Innovation and the Law Committee.

Ms. Tangaro made a motion to approve the creation of the AI and the Law Committee. Mr. Newell seconded, and the motion was unanimously approved.

Adjournment.

The Commission adjourned at 10:52 am.

Consent Agenda.

The Commission approved by consent the following items:

- Minutes of the March 13, 2025 Commission Meeting

Utah State Bar Commission Meeting

T A B 5

**UTAH STATE BAR
Budget and Finance Committee
Financial Results as of April 30, 2025
and for the ten months then ended**

FINANCIAL STATEMENT HIGHLIGHTS

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

	Actual	Budget	Fav (unfav) \$ Variance	Fav (unfav) % Variance
YTD Revenue	7,488,160	7,435,143	53,017	1%
YTD Expenses	6,767,839	6,644,053	(123,786)	-2%
YTD Net Profit/(Loss)	720,321	791,990	(70,770)	-9%

YTD net profit is \$720,321 and is \$(70,770) less than budgeted.

YTD Net Profit –Cash Basis: Adding back year-to-date depreciation expense of \$145,007 and deducting capital expenditures of \$117,902 the cash basis year-to-date net profit is \$27,095 higher.

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

Admissions: Admissions revenue for attorney exam fees and laptop fees has fallen short of budgeted amounts through March by (\$36,686). Laptop fees were budgeted to be increased this fiscal year; however, this adjustment did not happen, leading to a 28% budget-to-actual for that revenue category. This is being monitored, but the expectation is that this trend will continue through the end of the fiscal year. Expenses are right on track to hit the budget.

NLTP: The NLTP fees are (\$6,836) unfavorable YTD. Lower enrollment in the program than budgeted is what accounts for the shortfall. Combined with a (\$4,850) unfavorability among expenses, the total net loss YTD is (\$41).

LPP: The LPP Licensing Revenue was budgeted for 2024-25 with Licensing since that is where it had historically been coded; however, it is being separated out this year and therefore shows a favorable variance of \$23,699 YTD.

CLE: In-Person CLE Registrations are trending more popular than video library sales, which has been a trend since the end of COVID. Total budgeted revenue YTD has picked up and is 12% higher than budgeted. Program services expense is 32% higher than the budgeted number YTD, netting a (\$30,442) unfavorability YTD.

Summer Convention: The Summer Convention's revenue is (\$8,837) less than budgeted attributable to registration fees, while expenses are essentially flat at \$2,961 more than budgeted, netting a profit of \$12,227 YTD.

Fall Forum: The Fall Forum was a two-day event and thus incurred more costs than the prior fiscal year. The Fall Forum is not expected to close with a net loss, currently at a \$12,189 profit.

**UTAH STATE BAR
Budget and Finance Committee
Financial Results as of April 30, 2025
and for the ten months then ended**

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	\$2,545,647
Capital Replacement Reserve – Equipment	200,000
Capital Replacement Reserve – Building	600,000
Technology/Contracts Reserve - Database & Tava Contracts	<u>154,375</u>
Total	\$3,500,022

Estimated current cash reserve as of April 30, 2025	<u>\$4,245,225</u>
Sufficient/ (Deficient) Cash Reserve	<u>\$ 745,203</u>

**Utah State Bar
Income Statement
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
Admissions	600,550	620,345	647,996	(27,651)	96%	704,655	88%
NLTP	72,363	67,200	74,036	(6,836)	91%	81,531	82%
LPP	2,408	9,028	1,545	7,482	584%	1,728	523%
OPC	30,415	65,049	36,856	28,193	176%	37,160	175%
CLE	514,094	501,429	449,301	52,128	112%	653,768	77%
Summer Convention	56,087	52,240	61,077	(8,837)	86%	61,077	86%
Fall Forum	93,925	132,070	213,925	(81,855)	62%	213,925	62%
Spring Convention	127,735	166,048	203,085	(37,037)	82%	203,085	82%
Member Services	299,273	318,546	308,021	10,525	103%	323,751	98%
Public Services	38,339	77,580	10,718	66,862	724%	65,164	119%
Bar Operations	5,238,306	5,297,451	5,256,709	40,743	101%	5,354,656	99%
Facilities	128,350	144,924	167,971	(23,048)	86%	207,086	70%
Innovation in Law	115,233	36,250	3,903	32,347	929%	5,500	659%
Total Revenue	7,317,078	7,488,160	7,435,143	53,017	101%	7,913,085	95%
Expenses							
Admissions	522,631	555,361	552,679	(2,682)	100%	635,844	87%
NLTP	58,679	67,241	62,391	(4,850)	108%	74,101	91%
LPP	57,289	55,162	71,379	16,217	77%	81,491	68%
OPC	1,356,701	1,412,833	1,431,955	19,122	99%	1,716,979	82%
CLE	477,222	545,515	462,945	(82,570)	118%	699,838	78%
Summer Convention	23,749	40,013	37,052	(2,961)	108%	37,052	108%
Fall Forum	75,711	119,881	78,512	(41,369)	153%	78,512	153%
Spring Convention	113,157	123,322	113,832	(9,490)	108%	113,832	108%
Member Services	825,594	838,135	810,269	(27,866)	103%	987,659	85%
Public Services	596,659	512,775	475,452	(37,323)	108%	550,182	93%
Bar Operations	1,871,522	1,923,567	1,962,893	39,326	98%	2,402,613	80%
Facilities	368,075	388,734	393,970	5,236	99%	480,568	81%
Innovation in Law	136,492	185,068	190,724	5,656	97%	227,821	81%
Total Expenses	6,483,482	6,767,608	6,644,053	(123,555)	102%	8,086,493	84%
Other							
Gain (Loss) - Disposal Of Assets	-	(231)	-	-	-	-	-
Net Profit (Loss)	\$ 833,596	\$ 720,321	\$ 791,090	\$ (70,770)	91%	\$ (173,408)	-415%
Depreciation	126,992	145,007	130,118	(14,889)	111%	156,142	
Cash increase (decrease) from operations	960,589	862,787	862,787			(17,266)	
Changes in operating assets/liabilities	(4,393,132)	(4,026,119)	(4,026,119)			20,000	
Capital expenditures	(190,604)	(117,912)	(52,000)	(65,912)	227%	(52,000)	
Net change in cash	\$ (3,623,147)	\$ (3,281,244)	\$ (3,215,332)	\$ (65,912)	102%	\$ (49,266)	

Utah State Bar
Income Statement - Consolidated By Account
April 30, 2025

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	194,725	194,125	208,214	(14,089)	93%	207,627	93%
4002 · Admissions - Attorney Exam Fees	64,375	45,475	69,463	(23,988)	65%	70,380	65%
4003 · Admissions - Retake Fees	18,475	37,200	13,828	23,372	269%	18,169	205%
4004 · Admissions - Laptop Fees	93,258	95,603	131,745	(36,142)	73%	136,265	70%
4005 · Admissions - Application Forms	12,075	42,250	10,610	31,640	398%	12,207	346%
4006 · Transfer App Fees	73,500	78,550	65,597	12,953	120%	80,414	98%
4008 · Attorney - Motion	102,875	129,200	109,872	19,328	118%	137,107	94%
4009 · House Counsel	17,850	12,750	16,321	(3,571)	78%	20,208	63%
4010 · Section/Local Bar Support fees	107,281	82,423	110,077	(27,654)	75%	110,077	75%
4011 · Admissions LPP	2,000	1,700	1,217	483	140%	1,400	121%
4020 · NLTP Fees	72,600	67,200	74,036	(6,836)	91%	81,531	82%
4021 · Lic Fees > 3 Years	3,929,255	3,994,190	4,014,904	(20,714)	99%	4,015,774	99%
4022 · Lic Fees < 3 Years	230,235	257,610	226,113	31,497	114%	226,299	114%
4023 · Lic Fees - House Counsel	62,310	64,565	63,411	1,154	102%	63,411	102%
4024 · Lic Fees LPP	6,160	6,675	5,894	781	113%	5,894	113%
4025 · Pro Hac Vice Fees	195,775	176,375	212,492	(36,117)	83%	250,781	70%
4026 · Lic Fees - Inactive/FS	120,210	120,910	121,660	(750)	99%	121,543	99%
4027 · Lic Fees - Inactive/NS	220,185	219,345	224,885	(5,540)	98%	226,494	97%
4030 · Certs of Good Standing	17,220	17,480	17,451	29	100%	21,423	82%
4039 · Room Rental-All parties	41,776	48,950	51,364	(2,414)	95%	61,598	79%
4042 · Food & Beverage Rev-All Parties	64,413	59,859	79,307	(19,447)	75%	101,187	59%
4051 · Meeting - Registration	196,362	246,618	396,662	(150,045)	62%	396,662	62%
4052 · Meeting - Sponsor Revenue	88,000	116,050	82,060	33,990	141%	87,398	133%
4053 · Meeting - Vendor Revenue	24,525	37,460	24,525	12,935	153%	24,525	153%
4061 · Advertising Revenue	198,721	234,713	208,186	26,527	113%	221,566	106%
4063 · Modest Means revenue	7,125	8,400	4,083	4,317	206%	5,000	168%
4071 · Mem Benefits - Lexis	632	316	639	(323)	50%	957	33%
4072 · Royalty Inc - Bar J, MBNA, LM,M	11,965	7,003	9,131	(2,128)	77%	11,163	63%
4081 · CLE - Registrations	388,715	473,291	328,845	144,446	144%	475,000	100%
4082 · CLE - Video Library Sales	34,556	28,594	13,749	14,845	208%	36,436	78%
4090 · Tenant Rent	21,000	35,000	35,000	-	100%	42,000	83%
4095 · Miscellaneous Income	30,534	47,369	31,930	15,439	148%	33,904	140%
4096 · Late Fees	88,900	76,850	87,575	(10,725)	88%	88,905	86%
4104 · In Kind Rev-Facilities & Other	-	1,100	-	1,100		-	0%
4200 · Seminar Profit/Loss	69,671	6,052	101,221	(95,169)	6%	129,429	5%
Investment income	350,714	334,358	258,333	76,024	129%	310,000	108%
Total Revenue	7,177,845	7,420,020	7,435,143	(15,123)	100%	7,859,944	94%
Program Service Expenses							
5001 · Meeting Facility-external only	73,288	166,189	72,464	(93,725)	229%	76,929	216%
5002 · Meeting facility-internal only	22,006	24,373	24,410	36	100%	28,658	85%
5013 · ExamSoft	29,929	21,858	29,929	8,071	73%	29,929	73%
5014 · Questions	65,836	75,254	68,146	(7,108)	110%	68,147	110%
5015 · Investigations	750	420	749	329	56%	900	47%
5016 · Credit Checks	2,522	2,582	2,222	(360)	116%	3,237	80%
5017 · Medical Exam	160	1,379	46	(1,333)	2998%	320	431%
5025 · Temp Labor/Proctors	8,002	5,446	7,856	2,410	69%	7,856	69%
5030 · Speaker Fees & Expenses	12,713	19,500	5,820	(13,680)	335%	12,250	159%
5031 · Speaker Reimb. - Receipt Req'd	19,005	19,757	14,045	(5,712)	141%	15,345	129%
5035 · Awards	5,324	18,458	3,574	(14,884)	516%	5,511	335%
5037 · Grants/ contributions - general	37,800	10,138	39,747	29,608	26%	41,550	24%
5040 · Witness & Hearing Expense	266	747	885	138	84%	1,620	46%
5041 · Process Serving	894	526	1,049	523	50%	1,049	50%
5046 · Court Reporting	2,243	3,314	1,625	(1,689)	204%	2,603	127%
5047 · Casemaker	44,673	43,715	45,147	1,431	97%	54,291	81%
5055 · Legislative Expense	53,708	74,750	53,708	(21,042)	139%	63,708	117%
5060 · Program Special Activities	(5,193)	43,767	-	(43,767)		-	0%
5061 · LRE - Bar Support	60,000	70,000	70,000	-	100%	70,000	100%

Utah State Bar
Income Statement - Consolidated By Account
April 30, 2025

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5062 · Law Day	420	-	10,991	10,991	0%	13,652	0%
5063 · Special Event Expense	21,690	7,361	13,348	5,987	55%	13,500	55%
5064 · MCLE Fees Paid	41,819	41,602	31,120	(10,482)	134%	47,959	87%
5070 · Equipment Rental	33,111	69,497	27,756	(41,741)	250%	37,128	187%
5075 · Food & Bev-external costs only	303,049	307,268	292,163	(15,105)	105%	423,048	73%
5076 · Food & beverage - internal only	42,033	43,409	41,970	(1,439)	103%	51,556	84%
5079 · Soft Drinks	7,195	4,803	6,448	1,645	74%	7,216	67%
5084 · In Kind Exp-Facilities & other	-	2	-	(2)			
5085 · Misc. Program Expense	4,402	7	125	118	6%	125	6%
5090 · Commission Expense	43,106	43,401	37,271	(6,130)	116%	44,725	97%
5099 · Blomquist Hale	306,530	-	-	-		-	0%
5100 · Wellness Benefits	-	259,139	271,300	12,161	96%	325,560	80%
5702 · Travel - Lodging	33,802	20,380	44,173	23,793	46%	47,272	43%
5703 · Travel - Transportation/Parking	12,416	9,776	22,463	12,687	44%	26,600	37%
5704 · Travel - Mileage Reimbursement	5,031	5,204	6,205	1,002	84%	6,559	79%
5705 · Travel - Per Diems	3,189	3,308	3,242	(66)	102%	4,032	82%
5706 · Travel - Meals	-	1	750	750	0%	900	0%
5707 · Travel - Commission Mtgs	29,256	35,085	22,083	(13,001)	159%	26,500	132%
5805 · ABA Annual Meeting	4,309	13,227	8,261	(4,966)	160%	9,145	145%
5810 · ABA Mid Year Meeting	5,877	10,501	7,500	(3,001)	140%	7,500	140%
5815 · Commission/Education	425	6,375	17,083	10,708	37%	20,500	31%
5820 · ABA Annual Delegate	-	4,859	2,500	(2,359)	194%	2,500	194%
5840 · President's Expense	15,000	15,000	15,000	-	100%	18,000	83%
5850 · Leadership Academy	7,160	11,752	16,000	4,248	73%	16,000	73%
5865 · Retreat	41,519	25,754	43,100	17,346	60%	45,300	57%
5866 · Wellbeing Committee	100,269	51,000	30,323	(20,677)	168%	30,323	168%
5960 · Overhead Allocation - Seminars	-	-	(733)	(733)	0%	0	0%
5970 · Event Revenue Sharing - 3rd Pty	47,593	29,106	45,525	16,419	64%	93,066	31%
Total Program Service Expenses	1,564,586	1,636,519	1,469,305	(167,214)	111%	1,820,237	90%
Salaries & Benefit Expenses							
5510 · Salaries/Wages	2,923,266	3,069,450	3,098,650	29,200	99%	3,696,984	83%
5605 · Payroll Taxes	235,535	241,734	247,939	6,206	97%	295,759	82%
5610 · Health Insurance	256,590	264,700	292,783	28,083	90%	354,690	75%
5620 · Health Ins/Medical Reimb	10,105	14,456	10,977	(3,479)	132%	13,156	110%
5630 · Dental Insurance	14,423	14,644	14,064	(580)	104%	16,791	87%
5640 · Life & LTD Insurance	17,746	18,143	17,861	(282)	102%	21,369	85%
5645 · Workman's Comp Insurance	2,806	2,838	2,100	(737)	135%	2,520	113%
5650 · Retirement Plan Contributions	215,944	231,652	264,690	33,038	88%	318,597	73%
5655 · Retirement Plan Fees & Costs	4,500	11,959	11,050	(909)	108%	14,733	81%
5660 · Training/Development	6,354	6,520	10,164	3,645	64%	10,511	62%
Total Salaries & Benefit Expenses	3,687,290	3,876,095	3,970,297	94,202	98%	4,745,131	82%
General & Administrative Expenses							
6680 · Commercial Credit Card Rebate	(3,094)	(3,337)	(1,477)	1,860	-226%	(2,071)	161%
7025 · Office Supplies	16,393	13,676	14,318	642	96%	18,184	75%
7033 · Operating Meeting Supplies	4,423	3,786	4,172	386	91%	5,035	75%
7035 · Postage/Mailing, net	41,756	52,964	51,412	(1,552)	103%	63,828	83%
7040 · Copy/Printing Expense	111,849	115,195	111,688	(3,508)	103%	140,602	82%
7041 · Copy/Print revenue	(14,853)	(5,598)	(14,386)	(8,787)	39%	(17,228)	32%
7045 · Internet Service	19,009	1,853	19,689	17,836	9%	21,562	9%
7050 · Computer Maintenance	186,372	185,119	207,095	21,976	89%	247,042	75%
7055 · Computer Supplies & Small Equip	10,684	12,637	9,480	(3,157)	133%	10,359	122%
7089 · Membership Database Fees	125,466	120,166	123,967	3,801	97%	148,374	81%
7100 · Telephone	40,876	28,183	28,355	173	99%	33,917	83%
7105 · Advertising	9,497	619	13,873	13,254	4%	16,581	4%
7110 · Publications/Subscriptions	10,876	8,209	9,753	1,543	84%	11,580	71%
7115 · Public Relations	-	-	-	-		-	0%
7120 · Membership/Dues	14,171	12,472	13,486	1,015	92%	13,556	92%

Utah State Bar
Income Statement - Consolidated By Account
April 30, 2025

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
7135 · Bank Service Charges	432	2,268	1,250	(1,018)	181%	1,500	151%
7136 · ILM Service Charges	17,254	16,738	17,399	661	96%	20,251	83%
7140 · Credit Card Merchant Fees	93,471	101,789	82,816	(18,973)	123%	184,297	55%
7141 · Credit Card surcharge	(3,477)	(3,398)	(2,705)	693	126%	(3,069)	111%
7150 · E&O/Off & Dir Insurance	62,220	61,375	62,069	694	99%	74,487	82%
7160 · Audit Expense	42,586	43,291	43,438	147	100%	43,438	100%
7175 · O/S Consultants	80,056	80,038	24,118	(55,919)	332%	26,804	299%
7176 · Bar Litigation	7,319	9,900	11,959	2,060	83%	14,265	69%
7179 · Payroll Adm Fees	8,138	7,843	6,520	(1,323)	120%	7,824	100%
7180 · Administrative Fee Expense	1,329	1,116	1,416	300	79%	1,699	66%
7190 · Lease Interest Expense	2,224	1,769	1,769	-	100%	2,864	62%
7195 · Other Gen & Adm Expense	10,568	14,712	10,769	(3,942)	137%	12,963	113%
Total General & Administrative Expenses	895,643	888,995	855,347	(33,648)	104%	1,103,818	81%
In Kind Expenses							
7103 · InKind Contrib-UDR & all other	12,764	22,893	12,913	(9,980)	177%	15,754	145%
Total In Kind Expenses	12,764	22,893	12,913	(9,980)	177%	15,754	145%
Building Overhead Expenses							
6015 · Janitorial Expense	25,580	27,715	26,204	(1,512)	106%	31,445	88%
6020 · Heat	27,983	18,152	28,396	10,244	64%	33,355	54%
6025 · Electricity	40,297	47,408	40,899	(6,510)	116%	49,641	96%
6030 · Water/Sewer	10,113	12,711	9,213	(3,498)	138%	11,599	110%
6035 · Outside Maintenance	18,822	10,744	24,264	13,520	44%	29,117	37%
6040 · Building Repairs	12,148	8,594	11,760	3,166	73%	14,112	61%
6045 · Bldg Mtnce Contracts	19,924	32,969	23,995	(8,974)	137%	28,793	115%
6055 · Real Property Taxes	20,820	19,750	20,132	382	98%	24,000	82%
6060 · Personal Property Taxes	1,425	1,739	1,276	(463)	136%	1,500	116%
6065 · Bldg Insurance/Fees	19,096	18,316	19,934	1,618	92%	23,921	77%
6070 · Building & Improvements Depre	78,397	91,126	83,659	(7,467)	109%	100,391	91%
6075 · Furniture & Fixtures Depre	16,182	18,006	17,223	(783)	105%	20,668	87%
7065 · Computers, Equip & Sftwre Depr	32,412	35,875	29,236	(6,639)	123%	35,083	102%
Total Building Overhead Expenses	323,199	343,106	336,191	(6,915)	102%	403,625	85%
Total Expenses	6,483,482	6,767,608	6,644,053	(123,555)	102%	8,086,493	84%
Other							
4300 · Gain (Loss) - Disposal Of Assets	-	(231)	-	(231)		-	0%
4120 · Grant Income	139,233	68,140	-	68,140		53,141	128%
	139,233	67,909	-	67,909	0%	53,141	128%
Net Profit (Loss)	\$ 833,596	720,321	\$ 791,090	\$ (70,770)	91%	\$ (173,408)	-415%

**Utah State Bar
Admissions
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	194,725	194,125	208,214	(14,089)	93%	207,627	93%
4002 · Admissions - Attorney Exam Fees	64,375	45,475	69,463	(23,988)	65%	70,380	65%
4003 · Admissions - Retake Fees	18,475	37,200	13,828	23,372	269%	18,169	205%
4004 · Admissions - Laptop Fees	93,200	95,000	131,686	(36,686)	72%	136,207	70%
4005 · Admissions - Application Forms	6,575	6,000	6,707	(707)	89%	6,707	89%
4006 · Transfer App Fees	73,500	78,550	65,597	12,953	120%	80,414	98%
4008 · Attorney - Motion	102,875	129,200	109,872	19,328	118%	137,107	94%
4009 · House Counsel	17,850	12,750	16,321	(3,571)	78%	20,208	63%
4095 · Miscellaneous Income	4,575	3,945	4,608	(663)	86%	6,136	64%
4096 · Late Fees	24,400	18,100	21,700	(3,600)	83%	21,700	83%
4200 · Seminar Profit/Loss	-	-	-	-	-	-	-
Total Revenue	600,550	620,345	647,996	(27,651)	96%	704,655	85%
Expenses							
Program Services	153,841	169,171	159,010	(10,161)	106%	165,520	102%
Salaries & Benefits	271,149	292,051	291,786	(265)	100%	349,499	84%
General & Administrative	79,195	75,422	83,563	8,141	90%	98,819	76%
Building Overhead	18,446	18,718	18,320	(398)	102%	22,006	85%
Total Expenses	522,631	555,361	552,679	(2,682)	100%	635,844	87%
Net Profit (Loss)	\$ 77,919	\$ 64,984	\$ 95,317	\$ (30,333)	68%	\$ 68,811	94%

**Utah State Bar
NLTP
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4020 · NLTP Fees	72,600	67,200	74,036	(6,836)	91%	81,531	82%
4081 · CLE - Registrations	-	-	-	-	-	-	-
4096 · Late Fees	-	-	-	-	-	-	-
4200 · Seminar Profit/Loss	(237)	-	-	-	-	-	-
Total Revenue	72,363	67,200	74,036	(6,836)	91%	81,531	82%
Expenses							
Program Services	1,607	793	2,015	1,222	39%	2,015	39%
Salaries & Benefits	38,081	49,638	42,028	(7,610)	118%	50,344	99%
General & Administrative	15,058	15,491.19	17,057	1,566	91%	20,192	77%
Building Overhead	3,932	1,319	1,291	(28)	102%	1,550	85%
Total Expenses	58,679	67,241	62,391	(4,850)	108%	74,101	91%
Net Profit (Loss)	\$ 13,684	(41)	\$ 11,645	\$ (11,686)	0%	\$ 7,430	-1%

**Utah State Bar
LPP
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4004 · Admissions - Laptop Fees	58	603	59	544	1027%	59	1027%
4011 · Admissions LPP	2,000	1,700	1,217	483	140%	1,400	121%
4024 · Lic Fees LPP	200	6,675	269	6,406	2481%	269	2481%
4096 · Late Fees	150	50	-	50		-	
Total Revenue	2,408	9,028	1,545	7,482		1,728	523%
Expenses							
Program Services	20,217	16,550	20,219	3,669	82%	20,219	82%
Salaries & Benefits	28,680	31,659	41,905	10,246	76%	50,191	63%
General & Administrative	5,247	5,634	7,964	2,330	71%	9,531	59%
Building Overhead	3,146	1,319	1,291	(28)	102%	1,550	85%
Total Expenses	57,289	55,162	71,379	16,217	77%	81,491	68%
Net Profit (Loss)	\$ (54,882)	(46,135)	\$ (69,834)	\$ 23,699	66%	\$ (79,764)	58%

**Utah State Bar
OPC
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4095 · Miscellaneous Income	3,069	2,650	4,664	(2,014)	57%	4,969	53%
4200 · Seminar Profit/Loss	27,346	62,399	32,192	30,207	194%	32,192	194%
Total Revenue	30,415	65,049	36,856	28,193	176%	37,160	175%
Expenses							
Program Services	7,518	13,229	11,704	(1,525)	113%	15,420	86%
Salaries & Benefits	1,158,810	1,224,661	1,242,535	17,875	99%	1,489,075	82%
General & Administrative	121,997	112,244	116,350	4,107	96%	138,767	81%
Building Overhead	68,376	62,700	61,365	(1,335)	102%	73,716	85%
Total Expenses	1,356,701	1,412,833	1,431,955	19,122	99%	1,716,979	82%
Net Profit (Loss)	\$ (1,326,286)	\$ (1,347,784)	\$ (1,395,098)	\$ 47,315	97%	\$ (1,679,818)	80%

**Utah State Bar
CLE
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4052 · Meeting - Sponsor Revenue	52,800	54,200	46,860	7,340	116%	52,198	104%
4081 · CLE - Registrations	388,400	473,291	328,845	144,446	144%	475,000	100%
4082 · CLE - Video Library Sales	34,556	28,594	13,749	14,845	208%	36,436	78%
4095 · Miscellaneous Income	20	-	-	-	-	-	-
4104 · In Kind Rev-Facilities & Other	-	1,100	-	1,100	-	-	-
4200 · Seminar Profit/Loss	38,317	(55,756)	59,846	(115,602)	-93%	87,666	-64%
Total Revenue	514,094	501,429	449,301	52,128	112%	599,102	84%
Expenses							
Program Services	279,570	346,784	261,737	(85,047)	132%	456,399	76%
Salaries & Benefits	130,981	145,373	142,845	(2,528)	102%	171,160	85%
General & Administrative	55,235	42,544	47,666	5,122	89%	59,494	72%
Building Overhead	11,436	10,814	10,697	(117)	101%	12,785	85%
Total Expenses	477,222	545,515	462,945	(82,570)	118%	699,838	78%
Net Profit (Loss)	\$ 36,871	\$ (44,086)	\$ (13,644)	\$ (30,442)	323%	\$ (100,736)	44%

**Utah State Bar
Summer Convention
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	50,077	39,990	50,077	(10,087)	80%	50,077	80%
4052 · Meeting - Sponsor Revenue	1,000	2,250	1,000	1,250	225%	1,000	225%
4053 · Meeting - Vendor Revenue	-	-	-	-		-	
4054 · Meeting - Material Sales	-	-	-	-		-	
4055 · Meeting - Sp Ev Registration	-	-	-	-		-	
4095 · Miscellaneous Income	5,010	10,000	10,000	-	100%	10,000	100%
Total Revenue	56,087	52,240	61,077	(8,837)	86%	61,077	86%
Expenses							
Program Services	21,353	36,345	33,281	(3,064)	109%	33,281	109%
Salaries & Benefits	736	406	755	349	54%	755	54%
General & Administrative	1,661	2,262	3,016	754	75%	3,016	75%
In Kind	-	1,000	-	(1,000)		-	
Building Overhead	-	-	-	-		-	
Total Expenses	23,749	40,013	37,052	(2,961)	108%	37,052	108%
Net Profit (Loss)	\$ 32,338	\$ 12,227	\$ 24,025	\$ (11,798)	51%	\$ 24,025	51%

**Utah State Bar
Fall Forum
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 - Meeting - Registration	56,150	80,590	176,150	(95,560)	46%	176,150	46%
4052 - Meeting - Sponsor Revenue	23,900	21,600	23,900	(2,300)	90%	23,900	-
4053 - Meeting - Vendor Revenue	8,875	14,880	8,875	6,005	168%	8,875	168%
4055 - Meeting - Sp Ev Registration	-	-	-	-	-	-	-
4095 - Miscellaneous Income	5,000	15,000	5,000	10,000	300%	5,000	-
Total Revenue	93,925	132,070	213,925	(81,855)	62%	213,925	62%
Expenses							
Program Services	70,542	111,445	73,215	(38,231)	152%	73,215	152%
Salaries & Benefits	1,879	2,399	1,941	(458)	124%	1,941	124%
General & Administrative	3,291	3,037	3,356	319	90%	3,356	90%
In Kind	-	3,000	-	(3,000)	-	-	-
Building Overhead	-	-	-	-	-	-	-
Total Expenses	75,711	119,881	78,512	(41,369)	153%	78,512	153%
Net Profit (Loss)	\$ 18,214	\$ 12,189	\$ 135,413	\$ (123,224)	9%	\$ 135,413	9%

**Utah State Bar
Spring Convention
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	90,135	107,660	170,435	(62,775)	63%	170,435	63%
4052 · Meeting - Sponsor Revenue	10,300	16,400	10,300	6,100	159%	10,300	159%
4053 · Meeting - Vendor Revenue	15,650	22,080	15,650	6,430	141%	15,650	141%
4054 · Meeting - Material Sales	-	-	-	-		-	0%
4055 · Meeting - Sp Ev Registration	1,650	4,908	1,700	3,208	289%	1,700	289%
4095 · Miscellaneous Income	10,000	15,000	5,000	10,000	300%	5,000	300%
Total Revenue	127,735	166,048	203,085	(37,037)	82%	203,085	82%
Expenses							
Program Services	101,688	112,655	99,938	(12,717)	113%	99,938	113%
Salaries & Benefits	6,864	3,630	9,197	5,567	39%	9,197	39%
General & Administrative	4,605	4,036	4,697	660	86%	4,697	86%
In Kind	-	3,000	-	(3,000)		-	0%
Building Overhead	-	-	-	-		-	0%
Total Expenses	113,157	123,322	113,832	(9,490)	108%	113,832	108%
Net Profit (Loss)	\$ 14,578	\$ 42,726	\$ 89,253	\$ (46,527)	48%	\$ 89,253	48%

**Utah State Bar
Member Services
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	87,661	66,535	90,065	(23,530)	74%	90,065	74%
4061 · Advertising Revenue	198,721	234,713	208,186	26,527	113%	221,566	106%
4071 · Mem Benefits - Lexis	632	316	639	(323)	50%	957	33%
4072 · Royalty Inc - Bar J, MBNA, LM,M	11,965	7,003	9,131	(2,128)	77%	11,163	63%
4095 · Miscellaneous Income	-	-	-	-		-	
4120 · Grant Income	-	10,000	-	10,000		-	
4200 · Seminar Profit/Loss	(21)	(21)	-	(21)		-	
Total Revenue	298,958	318,546	308,021	10,525	103%	323,751	98%
Expenses							
Program Services	488,003	470,087	453,056	(17,031)	104%	553,297	85%
Salaries & Benefits	154,575	187,903	173,469	(14,434)	108%	207,265	91%
General & Administrative	169,589	166,659	171,260	4,602	97%	212,165	79%
In Kind	-	847	-	(847)		-	
Building Overhead	13,427	12,640	12,484	(156)	101%	14,931	85%
Total Expenses	825,594	838,135.31	810,269	(27,866)	103%	987,659	85%
Net Profit (Loss)	\$ (526,636)	\$ (519,589)	\$ (502,248)	\$ (17,341)	103%	\$ (663,908)	78%

**Utah State Bar
Public Services
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4052 · Meeting - Sponsor Revenue	-	10,500	-	10,500		-	
4053 · Meeting - Vendor Revenue	-	500	-	500		-	
4063 · Modest Means revenue	7,125	8,400	4,083	4,317	206%	5,000	168%
4095 · Miscellaneous Income	20	40	23	17	174%	23	174%
4120 · Grant Income	29,500	58,140	-	58,140		53,141	109%
4200 · Seminar Profit/Loss	1,694	-	6,612	(6,612)	0%	7,000	0%
Total Revenue	38,339	77,580	10,718	66,862	724%	65,164	119%
Expenses							
Program Services	181,695	139,395	120,870	(18,525)	115%	126,819	110%
Salaries & Benefits	330,166	322,099	285,708	(36,390)	113%	341,506	94%
General & Administrative	72,275	41,504	59,304	17,801	70%	70,362	59%
Building Overhead	12,523	9,778	9,570	(208)	102%	11,496	85%
Total Expenses	596,659	512,775	475,452	(37,323)	108%	550,182	93%
Net Profit (Loss)	\$ (558,320)	\$ (435,195)	\$ (464,734)	\$ 29,539	94%	\$ (485,018)	90%

**Utah State Bar
Bar Operations
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	19,620	15,888	20,012	(4,124)	79%	20,012	79%
4021 · Lic Fees > 3 Years	3,929,255	3,994,190	4,014,904	(20,714)	99%	4,015,774	99%
4022 · Lic Fees < 3 Years	230,235	257,610	226,113	31,497	114%	226,299	114%
4023 · Lic Fees - House Counsel	62,310	64,565	63,411	1,154	102%	63,411	102%
4024 · Lic Fees LPP	5,960	-	5,625	(5,625)	0%	5,625	0%
4025 · Pro Hac Vice Fees	195,775	176,375	212,492	(36,117)	83%	250,781	70%
4026 · Lic Fees - Inactive/FS	120,210	120,910	121,660	(750)	99%	121,543	99%
4027 · Lic Fees - Inactive/NS	220,185	219,345	224,885	(5,540)	98%	226,494	97%
4029 · Prior Year Lic Fees	-	-	-	-	-	-	-
4030 · Certs of Good Standing	17,220	17,480	17,451	29	100%	21,423	82%
4051 · Meeting - Registration	-	18,378	-	18,378	-	-	-
4052 · Meeting - Sponsor Revenue	-	11,100	-	11,100	-	-	-
4060 · E-Filing Revenue	17,061	8,432	20,741	(12,309)	41%	20,741	41%
4061 · Advertising Revenue	-	-	-	-	-	-	-
4095 · Miscellaneous Income	2,840	692	2,635	(1,943)	26%	2,776	25%
4096 · Late Fees	64,350	58,700	65,875	(7,175)	89%	67,205	87%
4200 · Seminar Profit/Loss	2,571	(571)	2,571	(3,141)	-22%	2,571	-22%
Investment Income	350,714	334,358	258,333	76,024	129%	310,000	108%
Total Revenue	5,238,306	5,297,451	5,256,709	40,743	101%	382,552	1369%
Expenses							
Program Services	167,240	162,308	165,602	3,294	98%	187,257	87%
Salaries & Benefits	1,306,664	1,315,580	1,429,915	114,335	92%	1,703,711	77%
General & Administrative	334,897	385,470	308,918	(76,552)	125%	441,564	87%
In Kind	1,264	1,885	1,371	(514)	137%	1,509	125%
Building Overhead	61,458	58,324	57,086	(1,238)	102%	68,572	85%
Total Expenses	1,871,522	1,923,567	1,962,893	39,326	98%	2,402,613	80%
Other Income/Expense							
4300 · Gain (Loss) - Disposal Of Assets	-	(231)	-	-	-	-	n/a
Net Profit (Loss)	\$ 3,366,784	\$ 3,373,653	\$ 3,293,816	\$ 79,837	102%	\$ (2,020,061)	-167%

**Utah State Bar
Facilities
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4039 · Room Rental-All parties	41,776	48,950	51,364	(2,414)	95%	61,598	79%
4042 · Food & Beverage Rev-All Parties	64,413	59,859	79,307	(19,447)	75%	101,187	59%
4043 · Setup & A/V charges-All parties	1,161	1,072	2,301	(1,229)	47%	2,301	47%
4090 · Tenant Rent	21,000	35,000	35,000	-	100%	42,000	83%
4095 · Miscellaneous Income	-	42	-	42		-	
4103 · In - Kind Revenue - UDR	-	-	-	-		-	
Total Revenue	128,350	144,924	167,971	(23,048)	86%	207,086	70%
Expenses							
Program Services	70,850	57,432	67,741	10,309	85%	85,756	67%
Salaries & Benefits	142,483	134,669	144,132	9,463	93%	173,704	78%
General & Administrative	12,786	22,692	13,046	(9,646)	174%	17,741	128%
In Kind	11,500	13,161	11,542	(1,619)	114%	14,245	92%
Building Overhead	130,455	160,780	157,508	(3,271)	102%	189,123	85%
Total Expenses	368,075	388,734	393,970	5,236	99%	480,568	81%
Net Profit (Loss)	\$ (239,724)	(243,810)	\$ (225,998)	\$ (17,812)	108%	\$ (273,483)	89%

**Utah State Bar
Innovation in Law
April 30, 2025**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4005 · Admissions - Application Forms	-	36,250	3,903	32,347	929%	5,500	659%
4095 · Miscellaneous Income	-	-	-	-	-	-	-
Total Revenue	-	36,250	3,903	32,347	929%	5,500	659%
Expenses							
Program Services	462	324	917	593	35%	1,100	29%
Salaries & Benefits	116,222	166,027	164,079	(1,948)	101%	196,783	84%
General & Administrative	19,807	12,001	19,148	7,148	63%	22,043	54%
In Kind	-	-	-	-	-	-	-
Building Overhead	-	6,716	6,580	(136)	102%	7,895	85%
Total Expenses	136,492	185,068	190,724	5,656	97%	227,821	81%
Net Profit (Loss)	\$ (136,492)	\$ (148,818)	\$ (186,821)	\$ 38,003	80%	\$ (222,321)	67%

Utah State Bar Balance Sheet

	<u>4/30/2025</u>
ASSETS	
Current Assets	
Cash in Bank	256,631
Invested Funds	5,543,147
Total Cash/Investments	<u>5,799,778</u>
Accounts Receivable	92,050
Prepaid Expenses	256,546
A/R - Sections	187,309
Total Other Current Assets	<u>535,905</u>
Total Current Assets	<u>6,335,683</u>
Fixed Assets	
Property & Equipment	5,304,069
Accumulated Depreciation	(4,419,431)
Land	633,142
Total Fixed Assets	<u>1,517,780</u>
TOTAL ASSETS	<u>7,853,463</u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
AP Trade	94,538
Other Accounts Payable	4,952
Accrued Payables	491,601
Cap Lease Oblig - ST	2,691
A/P - Sections	2,475
Deferred Revenue	81,268
Total Current Liabilities	<u>677,525</u>
Long Term Liabilities	
Capital Lease Oblig	4,580
Total Long Term Liabilities	<u>4,580</u>
Total Liabilities	<u>682,105</u>
Equity	
Unrestricted Net Assets (R/E)	6,451,038
Fund Balance - Current Year	720,321
Total Equity	<u>7,171,359</u>
TOTAL LIABILITIES & EQUITY	<u>\$ 7,853,463</u>

INSTITUTIONAL LIQUIDITY
MANAGEMENT

Balance Sheet Classification

ILM-UT ST BAR (3176)

Base Currency: USD As of 04/30/2025

Dated: 05/05/2025

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	829,806.73	AAA	4.240	04/30/2025	4.240	4.240	829,806.73	0.00	1.0000	0.00	829,806.73
CCYUSD	Payable	-253,262.19	AAA	0.000	04/30/2025	0.000	0.000	-253,262.19	0.00	1.0000	0.00	-253,262.19
CCYUSD	Receivable	4,739.39	AAA	0.000	04/30/2025	0.000	0.000	4,739.39	0.00	1.0000	0.00	4,739.39
82620KAE3	SIEMENS FINANCIERINGSMAATSCHAPPIJ NV	250,000.00	AA-	3.250	05/27/2025	4.375	4.787	249,786.50	-86.00	99.8802	3,475.69	253,176.19
912797PZ4	UNITED STATES TREASURY	500,000.00	A-1+	0.000	07/08/2025	4.327	4.220	496,008.78	34.00	99.2086	0.00	496,042.78
---	---	1,331,283.93	AA+	---	05/31/2025	5.090	5.129	1,327,079.21	-52.00	---	3,475.69	1,330,502.90

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
025816CY3	AMERICAN EXPRESS CO	350,000.00	A	3.950	08/01/2025	4.574	4.532	349,457.26	-5.36	99.8434	3,456.25	352,908.15
949764HB3	Wells Fargo Bank, National Association	250,000.00	AA+	5.400	10/31/2025	5.453	5.450	249,937.41	0.00	99.9750	36.99	249,974.40
254676BR9	Discover Bank	100,000.00	A	5.400	11/07/2025	5.453	5.445	99,973.97	0.00	99.9740	2,574.25	102,548.22
85324TT22	Standard Chartered Bank	350,000.00	A-1+	0.000	06/02/2025	4.629	4.401	348,593.78	0.00	99.5982	0.00	348,593.78
912797OK6	UNITED STATES TREASURY	1,875,000.00	A-1+	0.000	08/19/2025	4.322	4.270	1,850,908.65	57.28	98.7182	0.00	1,850,966.14
---	---	2,925,000.00	AA+	---	08/17/2025	4.527	4.460	2,888,871.27	51.93	---	6,087.48	2,904,990.88

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	0.000	9,384.345	0.00	135.00	0.0450	0.00	135.00
57629TBS5	MASSMUTUAL GLOBAL FUNDING II	250,000.00	AA+	5.078	04/09/2027	4.865	5.104	251,116.98	-1,126.73	99.9961	775.86	250,766.11
3133ERQW4	FEDERAL FARM CREDIT BANKS FUNDING CORP	800,000.00	AAA	4.500	08/26/2026	4.500	4.460	800,000.00	399.20	100.0499	6,365.78	806,764.98
61690U8F0	MORGAN STANLEY BANK NA	250,000.00	AA-	5.017	10/15/2027	4.897	5.145	250,548.84	-1,119.09	99.7719	557.48	249,987.23
---	---	1,600,000.00	AA+	---	12/28/2026	4.646	5.682	1,301,665.82	-1,711.82	---	7,698.13	1,307,653.33

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
---	---	5,856,283.93	AA+	---	11/23/2025	4.690	4.909	5,527,816.30	-1,711.69	---	17,242.30	5,543,146.91

* 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: Lol.

UTAH STATE BAR
Membership Statistics
April 30, 2025

<u>STATUS</u>	<u>04/30/24</u>	<u>04/30/25</u>	<u>Change</u>	
Active	9,230	9,406	176	
Active under 3 years	927	1,113	186	
Active Emeritus	341	372	31	
In House Counsel	139	153	14	
Foreign Legal Counsel	4	3	(1)	
LPP	28	35	7	
Military Spouse	-	-	-	
 Subtotal - Active	 10,669	 11,082	 413	 3.9%
Inactive - Full Service	840	831	(9)	
Inactive - No Service	2,057	2,040	(17)	
Inactive Emeritus	528	549	21	
Inactive House Counsel	14	17	3	
Inactive LPP	3	3	-	
 Subtotal - Inactive	 3,442	 3,440	 (2)	 -0.1%
 Total Active and Inactive	 14,111	 14,522	 411	 2.9%
 <u>Supplemental Information</u>				
Paralegals	166	180	14	
 <u>Active Attorneys by Region</u>				
1st Division (Logan - Brigham)	220	224	4	
2nd Division (Davis - Weber)	1,020	1,071	51	
3rd Division (Salt Lake)	5,692	5,788	96	
4th Division (Utah)	1,502	1,538	36	
5th Division (Southern Utah)	594	623	29	
Out of State	1,641	1,838	197	
 Total Active Attorneys	 10,669	 11,082	 413	