

## UTAH STATE BAR VISION

A just legal system that is understood, valued, and accessible to all.

## UTAH STATE BAR MISSION

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

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**Utah State Bar Commission Meeting**  
**Friday, October 17, 2025**  
**Utah State Bar – Law & Justice Center**  
**Salt Lake City, Utah**

**AGENDA**

- 1. 9:30 a.m. President's Welcome and Reports: Kim Cordova**
  - 01 Mins. 1.1 Welcome Yvette Donosso
  - 01 Mins. 1.2 Welcome Nicole Johnston, new YLD ABA Delegate
  - 01 Mins. 1.3 JPEC Surveys Mailed October 20<sup>th</sup> (TAB 1, Page 4)
  - 01 Mins. 1.4 Reminder: Breakfast with Lawyer Legislators  
**November 19th @ 7:30 am - State Capitol Board Room**
  - 01 Mins. 1.5 Reminder: Fall Forum November 13-14 @ Little America Hotel  
*Thursday, November 13<sup>th</sup> - 11:30am - 4:00pm*  
*Friday, November 14<sup>th</sup> - 8:30am - 4:30pm*
  - 01 Mins. 1.6 Event Invitations: (TAB 2, Page 6)
    - a. Reception with ABA President Michelle Behnke  
November 12: **Erik Christiansen**
    - b. UMBA Award Dinner – November 17
    - c. Legal Aid Fundraiser
  - 01 Mins. 1.7 Update on Commission Speaks Event: **Tyler Young**
  - 01 Mins. 1.8 Women Lawyers Mentoring Award
  - 01 Mins. 1.9 Utah State Bar Elections Reminder:
    - President-elect written notice due January 2<sup>nd</sup>
    - Commission Election Petitions due February 2<sup>nd</sup>  
1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> Divisions
- 2. 9:45 a.m. Reports**
  - 05 Mins. 2.1 Judicial Council Report: **Katie Woods**
  - 05 Mins. 2.2 Legislative Audit Meeting and S.B. 1003: **Elizabeth Wright** (TAB 3, Page 10)
- 3. 10:00 a.m. Action Items**
  - 02 Mins. 3.1 Purchase table for UMBA Banquet (TAB 4, Page 15)
  - 15 Mins. 3.2 Approve Financial Audit: **Rick Hoffman** and **Nathan Severin** (TAB 5, Page 18)
  - 10 Mins. 3.3 Approve Changes to TAVA Contract (Handout)
  - 10 Mins. 3.4 Approve Hiring Intrepid Communications (TAB 6, Page 40)  
on an as Needed Basis
  - 10 Mins. 3.5 Select Fall Forum Award Winners: **Adam Bondy** (TAB 7, Page 42)
    - Lee, Miller, Moxley Mentoring Awards
    - Community Member Award
    - Professionalism Award
    - Additional Consideration: Special Service Award

**10:45 a.m. Executive Session**

**11:00 a.m. Adjourn**

**ATTACHMENTS**

**(TAB 8, Page 74)**

1. August 2025 Financial Statements

**CONSENT AGENDA**

**(TAB 9, Page 97 )**

(Approved without discussion by policy, if no objection is raised.)

1. Approve Minutes of August 22, 2025 Commission Meeting.
2. Approve Amendments to the Appellate Section Bylaws.
3. Approve Fund for Client Protection Payments.

**CALENDAR**

|                       |                             |           |                             |
|-----------------------|-----------------------------|-----------|-----------------------------|
| <b>November 12</b>    | Executive Committee Meeting | Noon      | Video Conference            |
| <b>November 12</b>    | Michelle Behnke Reception   | 5:00 p.m. | Parsons Behle               |
| <b>November 13-14</b> | Fall Forum                  |           | Little America Hotel        |
| <b>November 19</b>    | Lawyer Legislator Breakfast | 7:30 a.m. | Utah State Capitol Building |
| <b>November 21</b>    | Bar Commission Meeting      | 9:00 a.m. | Law & Justice Center        |

**2026**

|                     |                                       |           |                      |
|---------------------|---------------------------------------|-----------|----------------------|
| <b>January 22</b>   | Executive Committee Meeting           | Noon      | Video Conference     |
| <b>January 30</b>   | Bar Commission Meeting                | 9:00 a.m. | Law & Justice Center |
| <b>February 2</b>   | Bar Commission Election Petitions Due |           |                      |
| <b>February 3-9</b> | ABA Midyear Meeting                   |           | San Antonio, Texas   |

Utah State Bar Commission Meeting

**T A B 1**



# JPEC

UTAH JUDICIAL PERFORMANCE  
EVALUATION COMMISSION

5

**Check your Inbox:  
Judicial Evaluations  
October 20th**

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& Civility CLE  
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Utah State Bar Commission Meeting

**T A B 2**

Your presence is requested  
at a reception in honor of

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MICHELLE A. BEHNKE

American Bar Association President 2025-2026

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Wednesday, November 12 from 5:00 in the evening.

Parsons Behle & Latimer - Side Bar Reception Area - 15th Floor  
201 S. Main Street, Salt Lake City, Utah

RSVP to Christy - [cabad@utahbar.org](mailto:cabad@utahbar.org)

With Appreciation to Our Sponsors:

Parsons Behle & Latimer  
Utah State Bar

Women Lawyers of Utah  
Utah Minority Bar Association  
Utah Chapter of the American Bar Foundation



# UTAH MINORITY BAR ASSOCIATION

PROMOTING DIVERSITY IN THE LAW

September 24, 2025

Dear Friends and Supporters:

On behalf of the Utah Minority Bar Association (UMBA), it is with great pleasure that we invite you to attend our annual Scholarship and Awards Banquet. This year, UMBA is honored to announce **Sadé A. Turner** as our keynote speaker and recipient of the UMBA Distinguished Lawyer of the Year Award. Awards will also be given to attorneys, firms, and community members for their demonstrated commitment to diversity and inclusion in the State of Utah.

We are pleased to announce that this year's Banquet will be held on **Monday, November 17, 2025 at 5:30 p.m.** The cocktail hour will begin at 5:30 p.m. and our dinner program will commence at 6:30 p.m. The event will be held in-person at the **Little America Hotel** located at 500 South Main Street in downtown Salt Lake City.

From its inception, UMBA has been committed to promoting diversity within the legal profession. To this end, UMBA has worked to support students as they navigate law school and prepare to enter the workforce. We seek to mentor law students, expand their professional networks, and provide professional, academic, and financial support. At last year's Banquet, UMBA also awarded more than \$60,000 in scholarships to law students who demonstrated strong academic success and service to addressing issues impacting minority communities. This would not have been possible without generous donations from our local firms and businesses, and individuals like you.

We hope you will consider supporting this year's scholarship recipients. To donate to our scholarship fund and purchase tickets for the Banquet, please visit <http://www.utahminoritybar.org/2025banquet>, or mail your payment by check to the **Utah State Bar, Attn: Utah Minority Bar Association, 645 S 200 E, Salt Lake City, UT 84111**. A sponsorship form is enclosed for those wishing to pay by mail. Please submit payment for sponsorships and donations no later than **November 7, 2025**. Please contact me at [utahminoritybar@gmail.com](mailto:utahminoritybar@gmail.com) with any questions you may have.

We thank you for your ongoing support and hope to see you at the Scholarship and Awards Banquet!

Aline Longstaff  
2025-2026 President  
Utah Minority Bar Association

# current

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Utah State Bar Commission Meeting

**T A B 3**

Enrolled Copy

S.B. 1003

**Judiciary Amendments**  
2025 FIRST SPECIAL SESSION  
STATE OF UTAH  
**Chief Sponsor: Brady Brammer**  
House Sponsor: Casey Snider

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**LONG TITLE****General Description:**

This bill modifies provisions relating to the Utah Supreme Court.

**Highlighted Provisions:**

This bill:

- modifies provisions governing the membership and internal management of the Utah Supreme Court;
- provides that the governor shall appoint a chief justice of the Utah Supreme Court (chief justice) when a vacancy in the office occurs;
- requires that a governor's selection for chief justice is subject to the advice and consent of the Senate;
- modifies the term of office for chief justice;
- modifies provisions related to an interim chief justice and appointment procedures; and
- makes technical and conforming changes.

**Money Appropriated in this Bill:**

None

**Other Special Clauses:**

This bill provides a special effective date.

This bill provides revisor instructions.

**Utah Code Sections Affected:**

AMENDS:

**78A-3-101**, as last amended by Laws of Utah 2022, Chapter 276

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*Be it enacted by the Legislature of the state of Utah:*

Section 1. Section **78A-3-101** is amended to read:

**78A-3-101 . Number of justices -- Terms -- Chief justice and associate chief justice -- Selection and functions.**

(1) The Supreme Court consists of five justices.

(2)(a) A justice of the Supreme Court ~~[shall be]~~ is appointed initially to serve until the first general election held more than three years after the effective date of the appointment.

(b) After the first term of appointment under Subsection (2)(a), the term of office of a justice of the Supreme Court is 10 years and commences on the first Monday in January following the date of election.

~~[(c) A justice whose term expires may serve upon request of the Judicial Council until a successor is appointed and qualified.]~~

~~(3)(a) The justices of the Supreme Court shall elect a chief justice from among the members of the court by a majority vote of all justices.]~~

~~[(b) The term of the office of chief justice is four years.]~~

~~[(c) The chief justice may serve successive terms.]~~

[(d)] (a) Upon any vacancy in the office of chief justice, including expiration of a term of the office of chief justice, or upon a chief justice's death, removal, or resignation, the governor shall appoint a chief justice from among the members of the Supreme Court, with the advice and consent of the Senate.

(b) Except as provided in Subsection (3)(c), the term of the office of chief justice is eight years.

(c)(i) For a chief justice whose term of office began on April 1, 2024, the term of the office of the chief justice is four years.

(ii) The term of the office of chief justice expires on April 1, 2028, for any chief justice who is elected to serve by the justices of the Supreme Court before the effective date of this bill.

(d) On and after the effective date of this bill, a member of the Supreme Court may not serve as chief justice for more than one term.

(e) The chief justice may resign from the office of chief justice without resigning from the Supreme Court.

~~[(e)] (f) The chief justice may be removed from the office of chief justice by a majority vote of all justices of the Supreme Court.~~

~~[(f)] (g) The chief justice shall receive the sum of \$2,000 per annum as additional compensation for the period served as chief justice.~~

- (4)(a) ~~[If the justices are unable to elect a chief justice]~~ If a chief justice has not been appointed by the governor and confirmed by the Senate within 30 days of a vacancy in that office, the associate chief justice shall act as interim chief justice until a chief justice is ~~[elected]~~ appointed and confirmed under this section.
- (b) If the associate chief justice is unable or unwilling to act as interim chief justice as described in Subsection (4)(a), the most senior justice shall act as interim chief justice until a chief justice is ~~[elected]~~ appointed and confirmed under this section.
- (5) In addition to the chief justice's duties as a member of the Supreme Court, the chief justice has duties as provided by law.
- (6)(a) There is created the office of associate chief justice.
- (b) The associate chief justice is elected by a majority vote of the members of the Supreme Court.
- ~~[(b)]~~ (c) The term of office of the associate chief justice is two years.
- ~~[(c)]~~ ~~The associate chief justice shall be:~~
- ~~[(i)]~~ ~~elected by a majority vote of the members of the Supreme Court; and]~~
- ~~[(ii)]~~ ~~allocated duties as the chief justice determines.]~~
- ~~[(d)]~~ ~~If the chief justice is absent or otherwise unable to serve, the associate chief justice shall serve as chief justice.]~~
- ~~[(e)]~~ (d) The chief justice may:
- (i) determine the allocated duties of the associate chief justice; and
- (ii) delegate responsibilities to the associate chief justice as consistent with law.
- (e) If the chief justice is absent or otherwise unable to serve, the associate chief justice shall perform the duties of the office of the chief justice until the chief justice is no longer absent or unable to serve.
- (f) The associate chief justice shall receive the sum of \$1,000 per annum for the period served as associate chief justice.

## Section 2. **Effective Date.**

This bill takes effect:

- (1) except as provided in Subsection (2), December 6, 2025; or
- (2) if approved by two-thirds of all members elected to each house:
  - (a) upon approval by the governor;
  - (b) without the governor's signature, the day following the constitutional time limit of Utah Constitution, Article VII, Section 8; or
  - (c) in the case of a veto, the date of veto override.

96           Section 3. **Revisor instructions.**

97           The Legislature intends that the Office of Legislative Research and General Counsel, in  
98           preparing the Utah Code database for publication, replace the phrase "the effective date of this  
99           bill" with the actual effective date of the bill.

Utah State Bar Commission Meeting

**T A B 4**



# UTAH MINORITY BAR ASSOCIATION

PROMOTING DIVERSITY IN THE LAW

## 2025 UMBA SCHOLARSHIP AND AWARDS BANQUET SPONSORSHIP FORM

Please fill out this form completely and email it back to: [utahminoritybar@gmail.com](mailto:utahminoritybar@gmail.com). Checks should be payable to "Utah Minority Bar Association" and mailed to:

Utah State Bar  
Attn: Utah Minority Bar Association  
645 S 200 E, Salt Lake City, UT 84111

**PLEASE SEND NOTICE AND PAYMENT BY OR BEFORE NOVEMBER 7, 2025**

|  | <b>Platinum Sponsor<br/>\$5,500+</b> | <b>Gold Sponsor<br/>\$3,500+</b> | <b>Silver Sponsor<br/>\$2,500+</b> | <b>Bronze Sponsor<br/>\$1,500+</b> |
|-----------------------------------------------------------------------------------|--------------------------------------|----------------------------------|------------------------------------|------------------------------------|
| <b>Contribution to Student Scholarships</b>                                       | ✓                                    | ✓                                | ✓                                  | ✓                                  |
| <b>Reserved Table for 8 Attendees</b>                                             | ✓                                    | ✓                                | ✓                                  | ✓                                  |
| <b>Logo Placement Included in Event Signage</b>                                   | ✓                                    | ✓                                | ✓                                  | ✓                                  |
| <b>Logo Placement in Event Program</b>                                            | ✓                                    | ✓                                | ✓                                  |                                    |
| <b>Logo Placement on UMBA Website</b>                                             | ✓                                    | ✓                                | ✓                                  |                                    |
| <b>Special Recognition from Podium During Banquet</b>                             | ✓                                    | ✓                                |                                    |                                    |
| <b>Ad Space in Banquet Program</b>                                                | ✓                                    |                                  |                                    |                                    |
| <b>Premium Banquet Table</b>                                                      | ✓                                    |                                  |                                    |                                    |
| <b>Scholarship Awarded in Organization's Name<sup>1</sup></b>                     | ✓                                    |                                  |                                    |                                    |

<sup>1</sup> UMBA awards several scholarships of varying values. Firms purchasing a Platinum Sponsorship will be assigned a scholarship on a first come first serve basis in order of highest to lowest value.



# UTAH MINORITY BAR ASSOCIATION

PROMOTING DIVERSITY IN THE LAW

Platinum Sponsor (\$5,500+)  
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 Additional Table(s) for 8 (\$1,000)

Individual Tickets (\$150)  
 Government/Nonprofit Attorneys (\$100)  
 Past President's Scholarship  
 Designation (insert amount): \$\_\_\_\_  
 Scholarship/Individual Donation  
 (insert amount): \$\_\_\_\_

**Total payment:** \$\_\_\_\_\_

I have paid online at <http://www.utahminoritybar.org/2025banquet>

I have enclosed a check made payable to UTAH MINORITY BAR ASSOCIATION

Card Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_ Security Code: \_\_\_\_\_

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Table Name: \_\_\_\_\_

Address: \_\_\_\_\_

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Utah State Bar Commission Meeting

**T A B 5**

Right Answers, Right Here.



# TANNER

Accountants & Advisors

## UTAH STATE BAR

Financial Statements and Supplemental Schedules  
As of and for the Year Ended June 30, 2025 (with Summarized Financial Information  
as of and for the Year Ended June 30, 2024)

Together with Independent Auditors' Report



# TANNER

## Independent Auditors' Report

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### To the Board of Commissioners of the Utah State Bar

#### Opinion

We have audited the accompanying financial statements of Utah State Bar (a nonprofit organization) (the Bar), which comprise the statement of financial position as of June 30, 2025, the related statements of activities and cash flows for the year then ended, and the related notes to financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Utah State Bar as of June 30, 2025, and the changes in its net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

#### Basis for Opinion

We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the *Auditors' Responsibilities for the Audit of the Financial Statements* section of our report. We are required to be independent of Utah State Bar and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

#### Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Bar's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

#### Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Bar's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Bar's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

#### **Report on Summarized Comparative Information**

We have previously audited the Utah State Bar's 2024 financial statements and we expressed an unmodified opinion on those financial statements in our report dated October 16, 2024. In our opinion, the summarized comparative information presented herein as of June 30, 2024 and for the year then ended is consistent, in all material respects, with the audited financial statements from which it was derived.

#### **Report on Supplemental Schedules**

Our audit was conducted for the purpose of forming an opinion on the financial statements as a whole. The supplemental schedules of continuing legal education and conferences revenues and expenses, member services revenues and expenses, public services revenues and expenses, bar sections revenues and expenses, mandatory continuing education advisory board, and facilities revenues and expenses are presented for the purpose of additional analysis and are not a required part of the financial statements. These schedules are the responsibility of the Bar's management and are derived from and relate directly to the underlying accounting and other records used to prepare the financial statements. Such schedules have been subjected to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such schedules directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, in accordance with auditing standards generally accepted in the United States of America. In our opinion, such schedules are fairly stated in all material respects in relation to the financial statements as a whole.

*Tanner LLC*

October 9, 2025

36 S. State St., Suite 600, Salt Lake City, UT 84111-1400

## Statements of Financial Position

As of June 30, 2025 (with Summarized Financial Information as of June 30, 2024)

|                                                          | Bar<br>Operations | Bar Sections | Fund for<br>Client<br>Protection | Mandatory<br>Continuing Legal<br>Education Fund | Total<br>2025 | Total<br>2024 |
|----------------------------------------------------------|-------------------|--------------|----------------------------------|-------------------------------------------------|---------------|---------------|
| <b>Assets</b>                                            |                   |              |                                  |                                                 |               |               |
| Current assets:                                          |                   |              |                                  |                                                 |               |               |
| Cash and cash equivalents                                | \$ 4,888,573      | \$ 179,352   | \$ 103,711                       | \$ 401,339                                      | \$ 5,572,975  | \$ 8,534,726  |
| Investments, at fair value                               | 4,275,332         | 1,151,965    | 114,856                          | 462,628                                         | 6,004,781     | 2,921,002     |
| Receivables                                              | 91,629            | 49,430       | -                                | -                                               | 141,059       | 120,631       |
| Prepaid expenses                                         | 254,481           | -            | -                                | -                                               | 254,481       | 296,716       |
| Total current assets                                     | 9,510,015         | 1,380,747    | 218,567                          | 863,967                                         | 11,973,296    | 11,873,075    |
| Property and equipment, net                              | 1,518,614         | -            | -                                | 4,246                                           | 1,522,860     | 1,553,326     |
| Total assets                                             | \$ 11,028,629     | \$ 1,380,747 | \$ 218,567                       | \$ 868,213                                      | \$ 13,496,156 | \$ 13,426,401 |
| <b>Liabilities and Net Assets</b>                        |                   |              |                                  |                                                 |               |               |
| Current liabilities:                                     |                   |              |                                  |                                                 |               |               |
| Accounts payable and accrued liabilities                 | \$ 1,028,026      | \$ 18,195    | \$ 7,069                         | \$ 4,212                                        | \$ 1,057,502  | \$ 875,304    |
| Deferred revenue                                         | 4,069,394         | -            | -                                | -                                               | 4,069,394     | 3,888,392     |
| Interfund payable (advance)                              | (231,699)         | 198,566      | -                                | 33,133                                          | -             | -             |
| Total current liabilities                                | 4,865,721         | 216,761      | 7,069                            | 37,345                                          | 5,126,896     | 4,763,696     |
| Commitments and contingencies                            |                   |              |                                  |                                                 |               |               |
| Net assets:                                              |                   |              |                                  |                                                 |               |               |
| Net assets without donor restrictions - undesignated     | 2,647,241         | -            | -                                | -                                               | 2,647,241     | 2,859,407     |
| Net assets without donor restrictions - board designated | 3,450,022         | 1,163,986    | 211,498                          | 830,868                                         | 5,656,374     | 5,711,689     |
| Total net assets without donor restrictions              | 6,097,263         | 1,163,986    | 211,498                          | 830,868                                         | 8,303,615     | 8,571,096     |
| Net assets with donor restrictions                       | 65,645            | -            | -                                | -                                               | 65,645        | 91,609        |
| Total net assets                                         | 6,162,908         | 1,163,986    | 211,498                          | 830,868                                         | 8,369,260     | 8,662,705     |
| Total liabilities and net assets                         | \$ 11,028,629     | \$ 1,380,747 | \$ 218,567                       | \$ 868,213                                      | \$ 13,496,156 | \$ 13,426,401 |

See accompanying notes to financial statements.

## Statements of Activities

For the Year Ended June 30, 2025 (with Summarized Financial Information for the Year Ended June 30, 2024)

|                                                          | Bar<br>Operations | Bar<br>Sections | Fund for<br>Client<br>Protection | Mandatory<br>Continuing Legal<br>Education Fund | In-Kind &<br>Interfund | Total<br>2025 | Total<br>2024 |
|----------------------------------------------------------|-------------------|-----------------|----------------------------------|-------------------------------------------------|------------------------|---------------|---------------|
| <b>Changes in net assets without donor restrictions:</b> |                   |                 |                                  |                                                 |                        |               |               |
| Revenues:                                                |                   |                 |                                  |                                                 |                        |               |               |
| Licensing                                                | \$ 4,972,239      | \$ -            | \$ -                             | \$ -                                            | \$ -                   | \$ 4,972,239  | \$ 4,908,345  |
| Admissions                                               | 599,001           | -               | -                                | -                                               | -                      | 599,001       | 594,787       |
| New lawyer training program                              | 77,207            | -               | -                                | -                                               | -                      | 77,207        | 80,866        |
| Office of Professional Conduct                           | 65,149            | -               | -                                | -                                               | -                      | 65,149        | 30,615        |
| Continuing legal education and conferences               | 1,172,513         | -               | -                                | -                                               | -                      | 1,172,513     | 1,045,310     |
| Member services                                          | 355,472           | -               | -                                | -                                               | (66,535)               | 288,937       | 253,634       |
| Public services                                          | 18,465            | -               | -                                | -                                               | -                      | 18,465        | 11,059        |
| Bar sections                                             | -                 | 426,309         | -                                | -                                               | -                      | 426,309       | 509,067       |
| Fund for client protection                               | -                 | -               | 5,456                            | -                                               | -                      | 5,456         | 85,127        |
| Mandatory Continuing Legal Education Fund                | -                 | -               | -                                | 638,904                                         | (71,583)               | 567,321       | 537,053       |
| Bar Operations                                           | 29,330            | -               | -                                | -                                               | -                      | 29,330        | 2,571         |
| Legal Service Innovation                                 | 20,250            | -               | -                                | -                                               | -                      | 20,250        | 7,750         |
| Facilities                                               | 176,857           | -               | -                                | -                                               | (144,633)              | 32,224        | 25,079        |
| Net investment income                                    | 386,567           | -               | 12,952                           | 35,582                                          | -                      | 435,101       | 457,225       |
| Grant revenue                                            | 2,495             | -               | -                                | -                                               | -                      | 2,495         | -             |
| Total revenues                                           | 7,875,545         | 426,309         | 18,408                           | 674,486                                         | (282,751)              | 8,711,997     | 8,548,488     |
| Net assets released from restrictions                    | 91,609            | -               | -                                | -                                               | -                      | 91,609        | 233,776       |
| Total revenues and reclassifications                     | \$ 7,967,154      | \$ 426,309      | \$ 18,408                        | \$ 674,486                                      | \$ (282,751)           | \$ 8,803,606  | \$ 8,782,264  |

See accompanying notes to financial statements.

**Statements of Activities – Continued***For the Year Ended June 30, 2025 (with Summarized Financial Information for the Year Ended June 30, 2024)*

|                                                                       | Bar<br>Operations | Bar<br>Sections | Fund for<br>Client<br>Protection | Mandatory<br>Continuing Legal<br>Education Fund | In-Kind &<br>Interfund | Total<br>2025 | Total<br>2024 |
|-----------------------------------------------------------------------|-------------------|-----------------|----------------------------------|-------------------------------------------------|------------------------|---------------|---------------|
| <b>Changes in net assets without donor restrictions (continued) :</b> |                   |                 |                                  |                                                 |                        |               |               |
| Expenses:                                                             |                   |                 |                                  |                                                 |                        |               |               |
| Licensing                                                             | \$ 321,644        | \$ -            | \$ -                             | \$ -                                            | \$ (500)               | \$ 321,144    | \$ 317,550    |
| Admissions                                                            | 627,585           | -               | -                                | -                                               | (16,659)               | 610,926       | 540,829       |
| New lawyer training program                                           | 79,110            | -               | -                                | -                                               | (524)                  | 78,586        | 77,522        |
| Office of Professional Conduct                                        | 1,709,379         | -               | -                                | -                                               | (424)                  | 1,708,955     | 1,613,863     |
| Continuing legal education and conferences                            | 1,112,993         | -               | -                                | -                                               | (90,455)               | 1,022,538     | 853,340       |
| Member services                                                       | 995,325           | -               | -                                | -                                               | (5,637)                | 989,688       | 974,515       |
| Public services                                                       | 597,624           | -               | -                                | -                                               | (8,559)                | 589,065       | 678,220       |
| Bar sections                                                          | -                 | 379,477         | -                                | -                                               | (99,272)               | 280,205       | 347,282       |
| Fund for client protection                                            | -                 | -               | 108,617                          | -                                               | -                      | 108,617       | 95,259        |
| Mandatory Continuing Legal Education Fund                             | -                 | -               | -                                | 636,424                                         | (24,625)               | 611,799       | 557,796       |
| Bar operations                                                        | 2,088,460         | -               | -                                | -                                               | (16,234)               | 2,072,226     | 2,019,539     |
| Legal Services Innovation                                             | 221,314           | -               | -                                | -                                               | (396)                  | 220,918       | 170,102       |
| Facilities                                                            | 475,886           | -               | -                                | -                                               | (19,466)               | 456,420       | 443,563       |
| Total expenses                                                        | 8,229,320         | 379,477         | 108,617                          | 636,424                                         | (282,751)              | 9,071,087     | 8,689,380     |
| Increase (decrease) in net assets without donor restrictions          | (262,166)         | 46,832          | (90,209)                         | 38,062                                          | -                      | (267,481)     | 92,884        |
| <b>Change in net assets with donor restrictions:</b>                  |                   |                 |                                  |                                                 |                        |               |               |
| Grant revenue                                                         | 65,645            | -               | -                                | -                                               | -                      | 65,645        | 257,173       |
| Net assets released from restrictions                                 | (91,609)          | -               | -                                | -                                               | -                      | (91,609)      | (233,776)     |
| Increase in net assets with donor restrictions                        | (25,964)          | -               | -                                | -                                               | -                      | (25,964)      | 23,397        |
| Increase (decrease) in net assets                                     | (288,130)         | 46,832          | (90,209)                         | 38,062                                          | -                      | (293,445)     | 116,281       |
| <b>Net assets:</b>                                                    |                   |                 |                                  |                                                 |                        |               |               |
| Beginning of the year                                                 | 6,451,038         | 1,117,154       | 301,707                          | 792,806                                         | -                      | 8,662,705     | 8,546,424     |
| End of the year                                                       | \$ 6,162,908      | \$ 1,163,986    | \$ 211,498                       | \$ 830,868                                      | \$ -                   | \$ 8,369,260  | \$ 8,662,705  |

See accompanying notes to financial statements.

## Statements of Cash Flows

For the Year Ended June 30, 2025 (with Summarized Financial Information for the Year Ended June 30, 2024)

|                                                                                                                            | Bar<br>Operations | Bar<br>Sections | Fund for<br>Client<br>Protection | Mandatory<br>Continuing Legal<br>Education Fund | Total<br>2025 | Total<br>2024 |
|----------------------------------------------------------------------------------------------------------------------------|-------------------|-----------------|----------------------------------|-------------------------------------------------|---------------|---------------|
| <b>Cash flows from operating activities:</b>                                                                               |                   |                 |                                  |                                                 |               |               |
| Change in net assets                                                                                                       | \$ (288,130)      | \$ 46,832       | \$ (90,209)                      | \$ 38,062                                       | \$ (293,445)  | \$ 116,281    |
| Adjustments to reconcile change in net assets to net cash and cash equivalents provided by (used in) operating activities: |                   |                 |                                  |                                                 |               |               |
| Depreciation and amortization                                                                                              | 175,363           | -               | -                                | 4,570                                           | 179,933       | 163,727       |
| Net unrealized gain on investments                                                                                         | (98,850)          | (15,124)        | (448)                            | (3,623)                                         | (118,045)     | (115,532)     |
| Loss on disposal of assets                                                                                                 | 3,226             | -               | -                                | -                                               | 3,226         | 403           |
| Changes in assets and liabilities:                                                                                         |                   |                 |                                  |                                                 |               |               |
| Receivables                                                                                                                | 28,962            | (49,430)        | -                                | 40                                              | (20,428)      | (39,321)      |
| Prepaid expenses                                                                                                           | 42,235            | -               | -                                | -                                               | 42,235        | 5,019         |
| Accounts payable and accrued liabilities                                                                                   | 167,530           | 9,911           | 6,613                            | 338                                             | 184,392       | (198,528)     |
| Deferred revenue                                                                                                           | 181,002           | -               | -                                | -                                               | 181,002       | (72,894)      |
| Interfund advance                                                                                                          | (70,244)          | 61,002          | -                                | 9,242                                           | -             | -             |
| Net cash and cash equivalents provided by (used in) operating activities                                                   | 141,094           | 53,191          | (84,044)                         | 48,629                                          | 158,870       | (140,845)     |
| <b>Cash flows from investing activities:</b>                                                                               |                   |                 |                                  |                                                 |               |               |
| Purchases of property and equipment                                                                                        | (151,557)         | -               | -                                | (1,137)                                         | (152,694)     | (190,606)     |
| Purchases of investments                                                                                                   | (15,487,468)      | (1,985,556)     | (164,151)                        | (378,665)                                       | (18,015,840)  | (6,658,425)   |
| Proceeds from sale of investments and reinvested income                                                                    | 13,740,039        | 1,150,000       | 110,000                          | 50,067                                          | 15,050,106    | 9,280,000     |
| Net cash and cash equivalents provided by (used in) investing activities                                                   | (1,898,986)       | (835,556)       | (54,151)                         | (329,735)                                       | (3,118,428)   | 2,430,969     |
| <b>Cash flows from financing activities:</b>                                                                               |                   |                 |                                  |                                                 |               |               |
| Payments on finance lease obligation                                                                                       | (2,193)           | -               | -                                | -                                               | (2,193)       | (1,669)       |
| Net increase (decrease) in cash and cash equivalents                                                                       | (1,760,085)       | (782,365)       | (138,195)                        | (281,106)                                       | (2,961,751)   | 2,288,455     |
| Cash and cash equivalents as of beginning of the year                                                                      | 6,648,658         | 961,717         | 241,906                          | 682,445                                         | 8,534,726     | 6,246,271     |
| Cash and cash equivalents as of end of the year                                                                            | \$ 4,888,573      | \$ 179,352      | \$ 103,711                       | \$ 401,339                                      | \$ 5,572,975  | \$ 8,534,726  |
| <b>Supplemental disclosure of cash flow information:</b>                                                                   |                   |                 |                                  |                                                 |               |               |
| Cash paid for interest                                                                                                     | \$ 2,283          | \$ -            | \$ -                             | \$ -                                            | \$ 2,283      | \$ 2,806      |

See accompanying notes to financial statements.

## Notes to Financial Statements

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### 1. Description of Organization and Summary of Significant Accounting Policies

#### **Description of Organization**

The Utah State Bar (the Bar or the Organization) is an organization created by statute in 1931 under the laws of the state of Utah. The Bar's purpose was amended and clarified by the Utah State Constitution and by court order on June 30, 1981, and the Bar was incorporated as a 501(c)(6) organization on June 24, 1991. All attorneys licensed under the laws of the state of Utah, which approximate 14,500 are considered licensees of the Bar.

#### **Basis of Presentation and Fund Accounting**

The assets, liabilities and net assets of the Bar have been prepared in accordance with accounting principles generally accepted in the United States of America (US GAAP), which require the Bar to report information regarding its financial position and activities according to the following net asset classifications, as applicable:

**Net assets without donor restrictions:** Net assets that are not subject to donor-imposed restrictions and may be expended for any purpose in performing the primary objectives of the Bar. These net assets may be used at the discretion of the Bar's management and Board of Directors.

**Net assets with donor restrictions:** Net assets subject to restrictions imposed by donors and grantors. Some donor restrictions are temporary in nature; those restrictions will be met by actions of the Bar or by the passage of time. Other donor restrictions are perpetual in nature, where the donor stipulates the funds be maintained in perpetuity.

Net assets without donor restrictions are presented as designated or undesignated. The undesignated fund is used for the general operations of the Bar. The designated funds are used for activities of the various Bar sections, the Fund for Client Protection, and the Mandatory Continuing Legal Education Fund (MCLE Fund), including overhead charges to defray the costs of administering those funds.

The financial statements include prior-year summarized comparative information in total but not by net asset class. Such information does not include sufficient detail to constitute a presentation in accordance with US GAAP. Accordingly, such information should be read in conjunction with the Bar's financial statements as of and for the year ended June 30, 2024, from which the summarized information was derived.

#### **Concentrations of Risk**

The Bar maintains its cash and cash equivalents in bank deposit accounts which, at times, exceed federally insured limits. As of June 30, 2025 and 2024, the Organization had cash and cash equivalents balances in excess of federally insured limits. To date, the Organization has not experienced a loss or lack of access to its invested cash; however, no assurance can be provided that access to the Organization's invested cash and cash equivalents will not be impacted by adverse conditions in financial markets.

#### **Use of Estimates in Preparing Financial Statements**

The preparation of financial statements in accordance with US GAAP requires management to make estimates and assumptions that affect the reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

#### **Cash Equivalents**

The Bar considers all highly liquid investments purchased with original maturities to the Bar of three months or less to be cash equivalents. As of June 30, 2025, these cash equivalents consisted of money market mutual funds totaling \$4,548,071.

#### **Investments**

Investments consist primarily of corporate bonds. Investments are reported at their fair values in the statement of financial position. Realized and unrealized gains or losses are reflected currently in the statements of activities.

### **Property and Equipment**

Property and equipment are stated at cost less accumulated depreciation and amortization. Depreciation and amortization are calculated using the straight-line method over the estimated economic useful lives of the assets or over the related lease terms (if shorter), as follows:

|                                                  |             |
|--------------------------------------------------|-------------|
| Building                                         | 25 years    |
| Building improvements                            | 10-25 years |
| Computers and computer software                  | 3-5 years   |
| Office furniture, equipment and leased equipment | 3-7 years   |

Expenditures for routine maintenance and repairs are charged to operating expenses as incurred. Major renewals and betterments are capitalized and depreciated over their estimated useful lives. Upon retirement or other disposition of property and equipment, the cost and accumulated depreciation and amortization are removed from the accounts and any gain or loss is recorded as income or expense in the statements of activities.

### **Revenue Recognition and Deferred Revenue**

The Bar recognizes revenue from licensing, admissions, continuing legal education, services and programs, conventions, bar examinations, room rental and catering and other services when the Organization has (1) identified the customer contract, (2) identified the performance obligation in the contract, (3) determined the transaction price, (4) allocated the entire transaction price to the single performance obligation, and (5) recognized revenue when the performance obligation has been satisfied. Licensing fees are assessed in June for the following fiscal year. All fees collected prior to the current fiscal year-end are recorded as deferred revenue. Deferred revenue is recognized as income in the year in which it is earned (i.e., benefits provided to licensees).

### **Grant Revenue**

Grants received are recorded as with or without donor restrictions, depending on the existence and/or nature of any donor restrictions. Revenue from grants with a measurable performance or other barrier, and a right of return, are not recognized until the conditions on which they depend have been substantially met.

If a donor restriction expires in the same reporting period in which the grant revenue was initially recognized that revenue is reported as an increase in net assets without donor restriction. All other donor-restricted revenue is reported as an increase in net assets with donor restrictions. When a restriction expires (that is, when a stipulated time restriction ends or purpose restriction is accomplished), net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the statements of activities as net assets released from restrictions.

### **Income Taxes**

On June 24, 1991, the Bar was incorporated as a 501(c)(6) organization and has received a determination letter from the Internal Revenue Service exempting the Bar from federal income taxes. Management believes that the Bar is designed and operated in compliance with the applicable requirements of the Internal Revenue Code and, accordingly, no provision for federal and state income taxes has been provided for in the accompanying statements of activities.

The Bar is subject to income tax at current corporate rates on net income from unrelated business activities. Income taxes on unrelated business activities have not been significant. The Bar paid no income taxes during the year ended June 30, 2025.

A liability for uncertain tax positions is recognized in the financial statements when it is more likely than not the position will not be sustained upon examination by the tax authorities. As of June 30, 2025, the Bar had no uncertain tax positions that qualified for either recognition or disclosure in the financial statements. The Bar is subject to routine audits by tax jurisdictions; however, there are no audits for any tax periods in progress.

### **Subsequent Events**

Management has evaluated events occurring subsequent to June 30, 2025 through October 9, 2025, which is the date the financial statements were available.

### Reclassifications

Certain amounts in the 2024 financial statements have been reclassified to conform with the current year presentation.

## 2. Liquidity and Availability

Financial assets available for general expenditure, that is, without donor or other restrictions limiting their use, within one year of the date of the statement of financial position, comprise the following as of June 30:

|                                                                                | 2025         | 2024         |
|--------------------------------------------------------------------------------|--------------|--------------|
| Cash and cash equivalents                                                      | \$ 5,572,975 | \$ 8,534,726 |
| Investments                                                                    | 6,004,781    | 2,921,002    |
| Receivables                                                                    | 141,059      | 120,631      |
|                                                                                | 11,718,815   | \$11,576,359 |
| Less amounts not available to be used within one year or otherwise restricted: |              |              |
| Board designated funds                                                         | (5,656,374)  | (5,711,689)  |
|                                                                                | \$ 6,062,441 | \$ 5,864,670 |

The Bar regularly monitors liquidity required to meet its operating needs and other contractual commitments using budgets and cash flow projections, while also striving to maximize the investment of its available funds. The Bar's excess cash is invested in a portfolio of corporate bonds. Additionally, the Bar's governing board has designated a portion of its unrestricted resources for contingencies, which is identified as board-designated in the table above (Note 7).

## 3. Investments and Net Investment Income

Investments consisted of the following as of June 30, 2025:

|                          | Amortized Cost | Cumulative Net<br>Unrealized Gains (Losses) | Fair Value   |
|--------------------------|----------------|---------------------------------------------|--------------|
| US Government securities | \$ 1,928,733   | \$ (293)                                    | \$ 1,928,440 |
| Corporate bonds          | 1,472,461      | 15,933                                      | 1,488,394    |
| Federal agency bonds     | 1,550,000      | 9,488                                       | 1,559,488    |
| Certificate of deposits  | 749,869        | 4,032                                       | 753,901      |
| Commercial paper         | 274,513        | 45                                          | 274,558      |
|                          | \$ 5,975,576   | \$ 29,205                                   | \$ 6,004,781 |

Investment income for the year ended June 30, 2025, consisted of the following:

|                                    | Undesignated | Designated | Total      |
|------------------------------------|--------------|------------|------------|
| Net investment income and interest | \$ 387,454   | 48,720     | \$ 436,174 |
| Net unrealized gain (loss)         | (911)        | (162)      | (1,073)    |
|                                    | \$ 386,543   | 48,558     | \$ 435,101 |

Investments consisted of the following as of June 30, 2024:

|                         | Amortized Cost | Cumulative Net<br>Unrealized Gains | Fair Value   |
|-------------------------|----------------|------------------------------------|--------------|
| Certificate of deposits | \$ 2,831,797   | \$ 12,218                          | \$ 2,844,015 |
| Corporate bonds         | 88,804         | 400                                | 89,204       |
|                         | \$ 2,908,383   | \$ 12,619                          | \$ 2,921,002 |

Investment income for the year ended June 30, 2024, consisted of the following:

|                                    | Undesignated | Designated | Total      |
|------------------------------------|--------------|------------|------------|
| Net investment income and interest | \$ 398,473   | 45,865     | \$ 444,338 |
| Net unrealized gain                | 11,057       | 1,830      | 12,887     |
|                                    | \$ 409,530   | 47,695     | \$ 457,225 |

#### 4. Fair Value Measurements

The Bar's financial instruments consist of investments as of June 30, 2025 and 2024. Management believes that the recorded value of each financial instrument approximates its fair value.

Fair value is defined as the price that would be received to sell an asset or paid to transfer a liability in an orderly transaction between market participants at the measurement date. To increase the comparability of fair value measures, the following hierarchy prioritizes the inputs to valuation methodologies used to measure fair value:

*Level 1* Valuations based on quoted prices for identical assets or liabilities in active markets.

*Level 2* Valuations based on observable inputs other than quoted prices included in Level 1, such as quoted prices for similar assets or liabilities in active markets, quoted prices for identical or similar assets and liabilities in markets that are not active, or other inputs that are observable or can be corroborated by observable market data.

*Level 3* Valuations based on unobservable inputs reflecting the Bar's own assumptions, applied consistently with reasonably available assumptions made by other market participants. These valuations require significant judgment.

The following tables present the assets carried at fair value as of June 30, 2025 and 2024 in the accompanying consolidated balance sheets by fair value hierarchy level, as described above.

| Description              | June 30, 2025 |              |         |              |
|--------------------------|---------------|--------------|---------|--------------|
|                          | Level 1       | Level 2      | Level 3 | Total        |
| US Government securities | \$ -          | \$ 1,928,440 | \$ -    | \$ 1,928,440 |
| Corporate bonds          | 1,488,394     | -            | -       | 1,488,394    |
| Federal agency bonds     | -             | 1,559,488    | -       | 1,559,488    |
| Certificates of deposits | -             | 753,901      | -       | 753,901      |
| Commercial Paper         | -             | 274,558      | -       | 274,558      |
| Total                    | \$ 1,488,394  | \$ 4,516,387 | \$ -    | \$ 6,004,781 |

| Description              | June 30, 2024 |              |         |              |
|--------------------------|---------------|--------------|---------|--------------|
|                          | Level 1       | Level 2      | Level 3 | Total        |
| Certificates of deposits | \$ -          | \$ 2,831,799 | \$ -    | \$ 2,831,799 |
| Corporate bonds          | 89,203        | -            | -       | 89,203       |
| Total                    | \$ 89,203     | \$ 2,831,799 | \$ -    | \$ 2,921,002 |

## 5. Property and Equipment

Property and equipment consisted of the following as of June 30:

|                                                  | 2025         | 2024         |
|--------------------------------------------------|--------------|--------------|
| Building and building improvements               | \$ 3,653,155 | \$ 3,571,798 |
| Computers and computer software                  | 840,617      | 865,049      |
| Office furniture, equipment and leased equipment | 842,553      | 802,065      |
| Land                                             | 633,142      | 633,142      |
|                                                  | 5,969,467    | 5,872,054    |
| Less accumulated depreciation and amortization   | (4,446,607)  | (4,318,728)  |
|                                                  | \$ 1,522,860 | \$ 1,553,326 |

Depreciation and amortization expense for property and equipment totaled \$179,933 and \$163,727 for the years ended June 30, 2025 and 2024, respectively.

## 6. Employee Benefit Plans

The Bar sponsors a defined contribution 401(k) plan (the Plan). Upon hiring, employees who have attained the age of 21 or older may elect to contribute a portion of their compensation, subject to Internal Revenue Code limitations, to the Plan. Following employees' one year anniversary, the Bar contributes to the Plan an amount equal to 10% of their compensation. Contributions to the Plan were \$326,192 and \$304,716 for the years ended June 30, 2025 and 2024, respectively.

The Bar sponsors a Section 125 cafeteria plan. All contributions to this plan are made by the participants.

## 7. Board Designated Net Assets Without Donor Restrictions

Board designated net assets without donor restrictions consist of the Bar operation's reserves for potential future liabilities and assets designated for Bar sections, Fund for Client Protection, and the mandatory continuing legal education fund. Board designated net assets without donor restrictions consisted of the following as of June 30:

|                                           | 2025         | 2024         |
|-------------------------------------------|--------------|--------------|
| Bar operations reserves :                 |              |              |
| Four-month operating expense reserve      | \$ 2,545,647 | \$ 2,545,647 |
| Capital replacement reserve – building    | 600,000      | 600,000      |
| Capital replacement reserve – equipment   | 200,000      | 200,000      |
| New OPC Database                          | -            | 50,000       |
| Wellbeing Program                         | 104,375      | 104,375      |
| Total Bar operations reserves             | 3,450,022    | 3,500,022    |
| Bar sections                              | 1,163,986    | 1,117,154    |
| Fund for client protection                | 211,498      | 301,707      |
| Mandatory continuing legal education fund | 830,868      | 792,806      |
|                                           | \$ 5,656,374 | \$ 5,711,689 |

## 8. Fund for Client Protection

On October 30, 1983, the Bar received approval from the Utah Supreme Court to assess lawyers and Licensed Paralegal Practitioners (LPPs) to maintain the Fund at sufficient levels to pay eligible claims. The Bar is required to maintain a Fund balance of at least \$200,000. Before annual licensing begins, the Bar calculates how much each lawyer and LPP must pay to maintain the Fund balance. After the Supreme Court approves the assessment amount, the Bar adds the assessment amount to the annual licensing renewal form so lawyers can pay the amount during the renewal process. The assessment averages \$5 to \$7 but has been as high as \$20 depending on claims made to the Fund. There were no fees collected for the year ended June 30, 2025. A fee of \$7 was collected from licensee attorneys for the year ended June 30, 2024.

Cases must be reviewed and approved by the Fund Committee of the Bar and also by the Board of Commissioners of the Bar before they are considered to be claims payable by the Fund. The Fund Committee routinely reviews open matters. In the Fund Committee's opinion, these open matters will not have a material adverse effect on the financial position, results of activities, or liquidity of the Bar.

## 9. Expenses By Nature and Function

The accompanying financial statements include certain expenses that are attributable to both program and supporting functions of the Bar. These expenses include salaries and wages, employee benefits, and supplies and other office expenses, which are allocated based on head count; and depreciation, utilities, and maintenance, which are allocated based on estimated square footage.

Expenses by natural classification for the year ended June 30, 2025 are as follows:

|                            | Program Services |                 |                 |              |                |            |            | Support Services |                          | Total        |
|----------------------------|------------------|-----------------|-----------------|--------------|----------------|------------|------------|------------------|--------------------------|--------------|
|                            | Regulatory       | Member Services | Public Services | Education    | Building Usage | MCLE       | CSF        | Sections         | General & Administrative |              |
| Program                    | \$ 124,617       | \$ 631,694      | \$ 141,567      | \$ 758,220   | \$ 71,522      | \$ -       | \$ 107,755 | \$ 280,205       | \$ 196,328               | \$ 2,311,908 |
| Salaries and benefits      | 2,235,289        | 159,682         | 385,919         | 182,324      | 161,994        | 513,094    | -          | -                | 1,442,782                | 5,081,084    |
| General and administrative | 459,952          | 193,895         | 49,688          | 68,961       | 26,388         | 22,184     | 862        | -                | 372,472                  | 1,194,402    |
| Overhead and depreciation  | 120,671          | 4,417           | 11,891          | 13,033       | 196,516        | 76,521     | -          | -                | 60,644                   | 483,693      |
|                            | \$ 2,940,529     | \$ 989,688      | \$ 589,065      | \$ 1,022,538 | \$ 456,420     | \$ 611,799 | \$ 108,617 | \$ 280,205       | \$ 2,072,226             | \$ 9,071,087 |

Expenses by natural classification for the year ended June 30, 2024 were as follows:

|                            | Program Services |                 |                 |            |                |            |           | Support Services |                          | Total        |
|----------------------------|------------------|-----------------|-----------------|------------|----------------|------------|-----------|------------------|--------------------------|--------------|
|                            | Regulatory       | Member Services | Public Services | Education  | Building Usage | MCLE       | CSF       | Sections         | General & Administrative |              |
| Program                    | \$ 109,319       | \$ 626,292      | \$ 200,858      | \$ 588,844 | \$ 88,933      | \$ -       | \$ 93,925 | \$ 347,282       | \$ 166,719               | \$ 2,222,172 |
| Salaries and benefits      | 1,878,766        | 145,042         | 377,858         | 171,067    | 175,634        | 455,038    | -         | -                | 1,614,159                | 4,817,564    |
| General and administrative | 435,254          | 198,232         | 83,853          | 79,528     | 16,477         | 26,174     | 1,334     | -                | 341,172                  | 1,182,024    |
| Overhead and depreciation  | 126,425          | 4,949           | 15,651          | 13,901     | 162,519        | 76,584     | -         | -                | 67,591                   | 467,620      |
|                            | \$ 2,549,764     | \$ 974,515      | \$ 678,220      | \$ 853,340 | \$ 443,563     | \$ 557,796 | \$ 95,259 | \$ 347,282       | \$ 2,189,641             | \$ 8,689,380 |

#### 10. Contingencies

The Bar may, from time to time, be subject to legal proceedings arising in the normal course of business. Management does not believe the outcome of any matters currently pending will have a material impact on the financial position, results of activities, or liquidity of the Bar.

#### 11. Related Parties

The primary purpose of the Bar is to perform services on behalf of its licensees, which may result in related-party transactions arising through its regular activities.

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## SUPPLEMENTAL SCHEDULES

## ***Schedule of Continuing Legal Education and Conferences***

### ***Revenues and Expenses***

*For the Year Ended June 30, 2025*

|                                     | <b>Summer<br/>Convention</b> | <b>Fall<br/>Forum</b> | <b>Spring<br/>Convention</b> | <b>CLE<br/>Events</b> | <b>Total</b> |
|-------------------------------------|------------------------------|-----------------------|------------------------------|-----------------------|--------------|
| Revenues                            | \$ 52,240                    | \$ 132,070            | \$ 166,048                   | \$ 822,155            | \$ 1,172,513 |
| Expenses:                           |                              |                       |                              |                       |              |
| Program                             | 36,345                       | 111,445               | 112,655                      | 581,229               | 841,674      |
| Salaries and benefits               | 406                          | 2,399                 | 3,630                        | 175,889               | 182,324      |
| General and administrative          | 2,262                        | 3,037                 | 4,036                        | 72,659                | 81,994       |
| In-Kind                             | 1,000                        | 3,000                 | 3,000                        | -                     | 7,000        |
| Interfund facilities                | -                            | -                     | -                            | (30,237)              | (30,237)     |
| MCLE fees                           | (2,369)                      | (2,438)               | (3,056)                      | (52,354)              | (60,217)     |
| Total expenses                      | 37,644                       | 117,443               | 120,265                      | 747,186               | 1,022,538    |
| Excess of revenues<br>over expenses | \$ 14,596                    | \$ 14,627             | \$ 45,783                    | \$ 74,969             | \$ 149,975   |

## ***Schedule of Member Services***

### ***Revenues and Expenses***

*For the Year Ended June 30, 2025*

|                                         | <b>Bar<br/>Journal</b> | <b>Member<br/>Services</b> | <b>Legislative</b> | <b>Public<br/>Education</b> | <b>Young Lawyers<br/>Division</b> | <b>Total</b> |
|-----------------------------------------|------------------------|----------------------------|--------------------|-----------------------------|-----------------------------------|--------------|
| Revenues                                | \$ 262,332             | \$ 17,563                  | \$ -               | \$ 3,000                    | \$ 6,042                          | \$ 288,937   |
| Expenses:                               |                        |                            |                    |                             |                                   |              |
| Program                                 | 53,409                 | 423,798                    | 97,000             | 2,455                       | 59,822                            | 636,484      |
| Salaries and benefits                   | 48,414                 | -                          | 6,776              | 104,492                     | -                                 | 159,682      |
| General and administrative              | 165,422                | -                          | 69                 | 22,439                      | 10,382                            | 198,312      |
| In-Kind                                 | 847                    | -                          | -                  | -                           | -                                 | 847          |
| Interfund facilities                    | (5,241)                | -                          | -                  | (375)                       | -                                 | (5,616)      |
| MCLE fees                               | -                      | -                          | -                  | -                           | (21)                              | (21)         |
| Total expenses                          | 262,851                | 423,798                    | 103,845            | 129,011                     | 70,183                            | 989,688      |
| Deficiency of revenues<br>over expenses | \$ (519)               | \$ (406,235)               | \$ (103,845)       | \$ (126,011)                | \$ (64,141)                       | \$ (700,751) |

## Schedule of Public Services

### Revenues and Expenses

For the Year Ended June 30, 2025

|                                      | Committees   | Consumer Assistance | Access to Justice | Total        |
|--------------------------------------|--------------|---------------------|-------------------|--------------|
| Revenues                             | \$ 40        | \$ -                | \$ 76,565         | \$ 76,605    |
| Expenses:                            |              |                     |                   |              |
| Salaries and benefits                | 134,184      | -                   | 15,942            | 150,126      |
| Program                              | 41,403       | 67,508              | 277,008           | 385,919      |
| General and administrative           | 5,080        | 11,500              | 44,999            | 61,579       |
| Interfund facilities                 | (7,677)      | -                   | (882)             | (8,559)      |
| Total expenses                       | 172,990      | 79,008              | 337,067           | 589,065      |
| Deficiency of revenues over expenses | \$ (172,950) | \$ (79,008)         | \$ (260,502)      | \$ (512,460) |

## Schedule of Bar Sections

### Revenues and Expenses

For the Year Ended June 30, 2025

|                                  | Balance<br>June 30,<br>2024 | Revenues   | Expenses   | Balance<br>June 30,<br>2025 | Net<br>Increase<br>(Decrease) |
|----------------------------------|-----------------------------|------------|------------|-----------------------------|-------------------------------|
| Bar Section Funds:               |                             |            |            |                             |                               |
| Antitrust/Unfair Competition     | \$ 9,589                    | \$ 625     | \$ 2,182   | \$ 8,032                    | \$ (1,557)                    |
| Appellate Practice               | 53,718                      | 10,073     | 18,748     | 45,043                      | (8,675)                       |
| Banking and Finance              | 19,015                      | 6,946      | 3,647      | 22,314                      | 3,299                         |
| Bankruptcy                       | 22,315                      | 7,110      | 6,401      | 23,024                      | 709                           |
| Business Law                     | 58,781                      | 20,160     | 10,045     | 68,896                      | 10,115                        |
| Collection Law                   | 38,321                      | 1,140      | 266        | 39,195                      | 874                           |
| Constitutional Law               | 13,309                      | 2,470      | 672        | 15,107                      | 1,798                         |
| Construction Law                 | 9,991                       | 1,882      | 692        | 11,181                      | 1,190                         |
| Corporate Counsel                | 21,491                      | 1,485      | 1,084      | 21,892                      | 401                           |
| Criminal Law                     | 60,968                      | 6,460      | 2,295      | 65,133                      | 4,165                         |
| Cyber Law                        | 18,877                      | 24,381     | 12,160     | 31,098                      | 12,221                        |
| Community Association Law        | 8,371                       | 7,950      | 2,317      | 14,004                      | 5,633                         |
| Cannabis Law                     | 6,091                       | 7,247      | 3,674      | 9,664                       | 3,573                         |
| Dispute Resolution               | 31,227                      | 8,228      | 1,036      | 38,419                      | 7,192                         |
| Education Law                    | 11,799                      | 6,763      | 2,152      | 16,410                      | 4,611                         |
| Elder Law                        | 25,042                      | 5,263      | 2,661      | 27,644                      | 2,602                         |
| Environmental Law                | 10,836                      | 1,360      | 800        | 11,396                      | 560                           |
| Entertainment Law                | 4,912                       | 9,825      | 5,487      | 9,250                       | 4,338                         |
| Family Law                       | 93,994                      | 45,597     | 46,538     | 93,053                      | (941)                         |
| Franchise Law                    | 8,426                       | 1,695      | 912        | 9,209                       | 783                           |
| Government/Administrative Law    | 43,081                      | 8,025      | 10,002     | 41,104                      | (1,977)                       |
| Health Law                       | 26,946                      | 3,400      | 14,377     | 15,969                      | (10,977)                      |
| Intellectual Property            | 122,382                     | 1,925      | 1,816      | 122,491                     | 109                           |
| International Law                | 12,586                      | 41,253     | 17,231     | 36,608                      | 24,022                        |
| Indian Law                       | 10,311                      | 2,090      | 928        | 11,473                      | 1,162                         |
| Juvenile Law                     | 9,891                       | 2,660      | 5,314      | 7,237                       | (2,654)                       |
| Labor and Employment Law         | 38,586                      | 10,680     | 37,876     | 11,390                      | (27,196)                      |
| Legal Entrepreneurs              | 8,005                       | 7,902      | 1,810      | 14,097                      | 6,092                         |
| Limited Scope                    | 3,079                       | 200        | 70         | 3,209                       | 130                           |
| Litigation                       | 94,698                      | 57,757     | 43,716     | 108,739                     | 14,041                        |
| Military Law                     | 5,026                       | 720        | 252        | 5,494                       | 468                           |
| Non-profit/Charitable Law        | 15,088                      | 2,000      | 560        | 16,528                      | 1,440                         |
| Probate/Estate Planning          | 78,541                      | 22,573     | 12,631     | 88,483                      | 9,942                         |
| Real Property                    | 15,241                      | 32,535     | 17,888     | 29,888                      | 14,647                        |
| Securities                       | 34,603                      | 9,550      | 45,572     | (1,419)                     | (36,022)                      |
| Senior Lawyers                   | 2,596                       | 520        | 182        | 2,934                       | 338                           |
| Solo, Small Firm, Rural Practice | 29,794                      | 3,500      | 2,003      | 31,291                      | 1,497                         |
| Tax                              | 13,350                      | 18,860     | 23,421     | 8,789                       | (4,561)                       |
| Total Bar Section Funds          | 1,090,877                   | 402,810    | 359,418    | 1,134,269                   | 43,392                        |
| Paralegal Division               | 26,277                      | 23,499     | 20,059     | 29,717                      | 3,440                         |
|                                  | \$ 1,117,154                | \$ 426,309 | \$ 379,477 | \$ 1,163,986                | \$ 46,832                     |

***Schedule of Mandatory******Continuing Education Advisory Board****For the Year Ended June 30, 2025*

## Revenues:

|                                                          |            |
|----------------------------------------------------------|------------|
| Compliance fees from attorneys                           | \$ 280,350 |
| Continuing Legal Education<br>(provider attendance fees) | 358,554    |
| Investment income                                        | 35,582     |
| MCLE Revenue                                             | 674,486    |
| Interfund revenue                                        | (71,583)   |
| Total revenues                                           | 602,903    |

## Expenses:

|                                       |            |
|---------------------------------------|------------|
| Salaries, payroll taxes, and benefits | 513,094    |
| Office overhead                       | 101,146    |
| Travel                                | 19,297     |
| Board meetings                        | 2,887      |
| MCLE Expenses                         | 636,424    |
| Interfund facilities                  | (24,625)   |
| Total expenses                        | 611,799    |
| Deficiency of revenues over expenses  | \$ (8,896) |

***Schedule of Facilities******Revenues and Expenses****For the Year Ended June 30, 2025*

|                                       |              |
|---------------------------------------|--------------|
| Revenues:                             |              |
| Outside parties                       | \$ 32,224    |
| In-kind and interfund revenues:       |              |
| Interdepartmental charges             | 79,107       |
| Sections                              | 21,435       |
| Utah Bar Foundation and other in-kind | 19,466       |
| MCLE                                  | 24,625       |
| Total in-kind and interfund revenues  | 144,633      |
| Total revenues                        | 176,857      |
| Expenses:                             |              |
| Building overhead                     | 196,516      |
| Food, beverage and AV costs           | 71,522       |
| Salaries and benefits                 | 161,994      |
| General and administrative            | 26,388       |
|                                       | 456,420      |
| In-kind expenses                      | 19,466       |
| Total expenses                        | 475,886      |
| Deficiency of revenues over expenses  | \$ (299,029) |

Utah State Bar Commission Meeting

**T A B 6**



## Statement of Work No. 2

This Statement of Work (SOW) is entered into by and between The Intrepid Group, Inc. ("Intrepid") and Utah State Bar ("Client") pursuant to the Work Agreement dated September 9, 2025

### Overview

This Statement of Work includes the following scope of services:

Provide on-call strategic communications counsel and services during the legislative session and on other priority issues. This may include:

- Draft and edit press materials, including press releases, talking points, fact sheets, and op-eds.
- Develop and implement media strategy to support the Bar's priorities.
- Organize and execute press conferences and media availabilities.
- Pitch stories to media and manage follow-up with journalists.
- Provide general communications support and guidance.

### Total Budget

Billed hourly @ Chris Thomas \$250; Staff \$175

### Payment Terms

- Up to 20% of the total fee may be satisfied through in-kind value provided by the Utah State Bar.
- "In-kind value" is defined as credits or benefits associated with Bar activities, including but not limited to: conference registration fees, exhibit/booth space, sponsorships, advertising, or other promotional opportunities mutually agreed upon by both parties.
- The remaining balance (minimum 80% of the total fee) will be invoiced and paid in cash according to terms of Work Agreement.

### Authorization

This Statement of Work is incorporated by reference as Addendum No. 2 to the Work Agreement previously executed by both parties. By signing below, Client affirms they are authorized to enter into this SOW and agrees to the terms set forth herein.

### Client Approval

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Utah State Bar Commission Meeting

**T A B 7**

## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

**TO:** Utah State Bar Commission

**DATE:** October 17, 2025

**RE:** AWARD RECOMMENDATION – James Lee, Charlotte Miller, Paul Moxley Mentoring Awards.

**CRITERIA:**

*Awarded to three individual attorneys who have demonstrated exceptional commitment to the mentorship of Utah lawyers, generally. These individuals have guided lawyers throughout their professional training in a continuing, multifaceted partnership sustained by mutual respect and concern. These mentors make a broad impact on mentorship by facilitating communities or building infrastructure. They have provided intellectual leadership, created a supportive environment, have acted as advocates, and promoted diversity and inclusiveness.*

**NOMINEES:**

| Nominee                                  | Previous Award?                        | Nominator                        |
|------------------------------------------|----------------------------------------|----------------------------------|
| Thomas R. Barton                         | No                                     | Dana Robinson                    |
| Wendy Brown                              | No                                     | Debra Nelson,<br>Benjamin Miller |
| James R. Kruse                           | No                                     | Tally Van Ry                     |
| Cheryl Mori                              | 2009 Uno Award<br>2018 James Lee Award | Jenifer Tomchak                  |
| F. Joseph Paldino<br>(Not a Utah lawyer) | No                                     |                                  |
| Chantelle Petersen                       | No                                     | Anne Freeland                    |

**RECOMMENDATION:**

The Utah State Bar Awards Committee met on October 10, 2025 to review and discuss the nominations and voted to recommend awards to the following:

Wendy M. Brown  
F. Joseph Paldino  
Thomas R. Barton

**PREVIOUS RECIPIENTS:**

**LEE AWARD:**

2016 Rodney G. Snow  
2017 Joseph O. Walkowski  
2018 Cheryl M. Mori  
2019 Walter A. Romney, Jr.  
2020 Hon. Laura Scott  
2021 Edwin S. Wall  
2022 Hon. Su J. Chon  
2023 Hon. Augustus G. Chin  
2024 J. Michael Bailey

**MILLER AWARD:**

2016 Jonathan O. Hafen  
2017 Patricia W. Christensen  
2018 William F. Atkin  
2019 Kathleen McConkie  
2020 Nicholas Mills  
2021 Ann Marie Taliaferro  
2022 Phillip S. Ferguson  
2023 Rebecca A. Ryon  
2024 Patricia W. Christensen

**MOXLEY AWARD**

2016 K. Dawn Atkin  
2017 Troy L. Booher  
2018 Shawn McGarry  
2019 Susan Peterson  
2020 Bruce Dibb  
2021 Kent B. Scott  
2022 Jennifer S. Huntsman  
2023 Phillip W. Lear  
2024 Adrienne Bell

## Christy Abad

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**From:** info@utahbar.org  
**Sent:** Tuesday, September 23, 2025 11:44 AM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Debra Nelson

**Bar Number**

9176

**Email Address**

[debranelson@utah.gov](mailto:debranelson@utah.gov)

**Date**

09/24/2025

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

Utah State Bar Member

**Nominee's Name**

Wendy Brown

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**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:**

It is with great admiration and respect that I nominate Wendy Brown, Criminal Appeals Section Head, at the Indigent Appellate Defense Division, for the distinguished honor of the Mentoring Award. Throughout her legal career, Wendy has exemplified the highest standards of mentorship, consistently investing their time, expertise, and heart into guiding the next generation of legal professionals.

What sets Wendy apart is not only her deep knowledge of the law but her unwavering commitment to developing others. Over the years, she has mentored countless young attorneys, interns, and law students, offering more than just legal advice—she has provided a model of integrity, resilience, and professionalism. Her mentorship has been a transformative force, shaping careers and building confidence in those fortunate enough to learn from her.

Whether through formal mentorship programs, one-on-one guidance, or informal conversations, Wendy brings patience, insight, and encouragement to every interaction. She is known for creating a safe space where questions are welcomed, mistakes are learning opportunities, and success is celebrated. Many of her mentees have gone on to achieve great professional milestones, often citing Wendy as a key influence in their journey.

Wendy embodies what it means to be a mentor: someone who lifts others up, opens doors, and never stops believing in the potential of those around them. Her impact is lasting, her guidance invaluable, and her dedication truly exceptional.

For these reasons and many more, I wholeheartedly nominate Wendy for this award. Her contributions to the legal profession—and to the people within it—are worthy of this esteemed recognition.

**Please select one:**

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

**Christy Abad**

---

**From:** info@utahbar.org  
**Sent:** Tuesday, September 23, 2025 10:57 AM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Benjamin Miller

**Bar Number**

17720

**Email Address**[benmiller@utah.gov](mailto:benmiller@utah.gov)**Date**

09/23/2025

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

Utah State Bar Member

**Nominee's Name**

Wendy Brown

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**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:**

Wendy Brown is a truly remarkable attorney. She is the section head of the Utah Indigent Appellate Defense Division's criminal appeals section. She somehow maintains her own caseload, that is considerably higher than recommended standards, while still epitomizing what being a mentor means to the three full-time attorneys in her section and all of our law clerks. She oversees all their work and provides the perfect level of guidance and teaching while ensuring each attorney never feels like they are being dictated to. She seamlessly integrates law clerks into our office's work each semester and has helped each one meaningfully contribute to our office and also learn and grown on their own terms. I am continuously impressed and inspired by Wendy's efforts to make sure that the attorneys she mentors are all on a continued path of their own to becoming effective and zealous defense attorneys.

**Please select one:**

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

**Christy Abad**

---

**From:** info@utahbar.org  
**Sent:** Monday, September 29, 2025 2:19 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

**Bar Number**

**Email Address**

**Date**

09/29/2025

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

Utah State Bar Member

**Nominee's Name**

F. Joseph Paldino

**Award**

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**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:**

Working alongside Joseph Paldino in our Salt Lake City office, I have seen the difference that true mentorship makes in a lawyer's career. Joe exemplifies what this award represents—he models professionalism and respect for others, and he teaches by example that integrity should guide every decision in the practice of law.

I have seen firsthand the impact of Joe's mentorship while assisting him in managing the Salt Lake City office and supporting a team of 15 attorneys. He generously makes time to answer questions, discuss challenges and share his perspective. Equally important, he builds our confidence and reminds us that practicing law is not just about technical skill but about who we serve and who we become in the process.

Joe's mentorship extends well beyond my experience. He has guided paralegals, interns and associates who have gone on to become Partners and senior leaders. Former intern and now Partner Rita Kim shared, "I am incredibly grateful for Joe, who saw something in me before I fully saw it myself. His guidance, patience and belief gave me the confidence to grow and pursue opportunities I once thought were out of reach."

Jenn Hood, now Senior Manager of Global Mobility & Immigration at AESC US, described his mentorship as a turning point: "Joe reminded me of who I was and why I fell in love with immigration law. His mentorship extended beyond technical growth—he encouraged me to find my voice, publish, speak and engage with the broader legal community."

Joe also created formal programs to expand mentorship opportunities. He launched a week-long immigration law academy at BYU's J. Reuben Clark Law School, built a credit-bearing internship at St. John's University School of Law and teaches as an adjunct professor at the University of Utah College of Law. Each initiative gives students hands-on experience while underscoring courtesy and professionalism as central to client service.

Beyond the firm and classroom, Joe invests in the community. He organized and funded a visit for Latinx high school students in Utah to explore careers in law, an experience their advisor described as "life-changing."

Joe's legacy as a mentor is measured not only in the careers he has helped shape but in the values he instills. He leads with respect, encourages adaptability and ensures future lawyers understand the responsibility of serving clients with integrity. For these reasons, I proudly nominate him for this award.

**Please select one:**

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

## Christy Abad

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**From:** info@utahbar.org  
**Sent:** Friday, September 26, 2025 2:06 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

### Nominator Name

Dana Robinson

### Bar Number

n/a

### Email Address

[drobinson@parsonsbehle.com](mailto:drobinson@parsonsbehle.com)

### Date

09/26/2025

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

Utah State Bar Member

### Nominee's Name

Thomas R. Barton

### Award

James B. Lee, Charlotte L. Miller, Paul T. Moley Mentoring Awards (Fall Forum)

**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:**

Parsons Behle & Latimer (Parsons) is honored to nominate Thomas R. Barton for the James B. Lee Mentor Award. For decades, Tom has embodied mentorship, guiding attorneys across the Utah legal community with honesty and care.

Tom views mentorship as a partnership built on listening and trust. He learns a mentee's background, aspirations and challenges, tailoring his guidance to their needs. His goal is to help lawyers become successful, ethical professionals at Parsons or wherever their careers take them.

"Tom actively advocates for my professional growth," says Parsons' associate Rebecca Jensen. "He highlights my contributions in front of other attorneys, encourages colleagues to entrust me with new and challenging assignments, and communicates his confidence in me to clients and firm leadership. He takes deliberate steps to ensure I am given opportunities to develop and succeed."

Emphasizing ethics as the foundation of a career, Tom urges mentees to consider the Rules of Professional Conduct as tools to practice with integrity, civility and confidence.

One of Tom's mentees Alex Leeman shareholder and general counsel at Parsons describes Tom's influence: "Tom is one of the attorneys I credit with teaching me to practice law. He was one of my first mentors, and he remains an example and unofficial mentor to me 15 years later. Tom is an outstanding mentor because he's a fantastic attorney but also practices law the right way. He zealously represents his clients' interests, while maintaining civility and respect towards his opponents. He is the kind of attorney I would trust with my own case, and exactly the person we want mentoring the next generation of Utah lawyers."

Tom's mentorship blends practical guidance with emotional support. He reassures young lawyers under the pressures of early practice and integrates mentees into the community by taking them to CLEs, making introductions, creating opportunities and building confidence. He advocates for mentees within the firm, ensuring they receive challenging work that stretches their skills.

"Tom has imparted invaluable professional knowledge," says Parsons' associate Whitney McKiddy. "He advised me to remain true to myself, even in tense situations with opposing counsel. He encouraged me to be kind and courteous, demonstrating that courtesy is not a weakness but a necessary skill in this profession. He has supported me in the firm and made me a part of the legal community. He has advocated to get me great work. Tom takes mentoring very seriously."

**File**

- [Barton-James-B.-Lee-Mentoring-Award-DR9.25.25.docx](#)

**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: October 17, 2025

RE: AWARD RECOMMENDATION – Community Member Award

CRITERIA:

*Awarded to a non-lawyer member of the community who demonstrates outstanding service toward the creation of a better public understanding of the legal profession and the administration of justice, the judiciary or the legislative process.*

### NOMINEES:

| Nominee              | Previous Award? | Nominator                    |
|----------------------|-----------------|------------------------------|
| Mallorie Mecham      | No              |                              |
| Brandon Owen         | No              | Laurie Lambert, <i>et al</i> |
| Chelsey Phelps, AFCC | No              |                              |

### RECOMMENDATION:

The Utah State Bar Awards Committee met on October 10, 2025 to review and discuss the nominations and voted to recommend the following:

Chelsey Phelps and the Association of Family and Conciliation Courts, Utah Chapter

### PREVIOUS RECIPIENTS:

|      |                        |      |                   |
|------|------------------------|------|-------------------|
| 1986 | BONNIE MILLER          | 2009 | KAREN HALE        |
| 1987 | BRYON HARWARD          | 2010 | LINDA SAPPINGTON  |
| 1988 | STANFORD P. DARGER     | 2011 | ROBERT MYRICK     |
| 1989 | ROBERT L. STAYNER      | 2012 | MARY KAY GRIFFIN  |
| 1990 | KSL                    | 2013 | ROBERT AUSTIN     |
| 1991 | NORMA W. MATHESON      | 2014 | STEVEN R. BURT    |
| 1992 | STANLEY B. BONHAM      | 2015 | ANNE BURKHOLDER   |
| 1993 | LYLE K. CAMPBELL       | 2016 | JO LYNN SPRUANCE  |
| 1994 | RAY O. WESTERGARD      | 2017 | MARIANNA DI PAOLO |
| 1996 | SHERIANNE S. COTTERELL | 2018 | KAI WILSON        |
| 1997 | MARGARET R. BIRD       | 2019 | DET. GREG SMITH   |
| 1998 | JOHN FLOREZ            | 2021 | BERTIE KEE LOPEZ  |
| 1999 | RAY O. WESTERGARD      | 2022 | SHAWN NEWELL      |
| 2000 | JENNIFER YIM           | 2023 | KAITLYN PIEPER    |
| 2001 | JO BRANDT              | 2024 | KIM RUSSO         |
| 2002 | SYLVIA BENNION         |      |                   |
| 2003 | FRASER NELSON          |      |                   |
| 2004 | PEGGI LOWDEN           |      |                   |
| 2005 | REV. FRANCE A. DAVIS   |      |                   |
| 2006 | DONNA K.W. JOHNSON     |      |                   |
| 2007 | DANIEL J. BECKER       |      |                   |
| 2008 | CARMA J. HARPER        |      |                   |

Nominee: **Chelsey Phelps**, LMFT; Current role: Secretary, AFCC Utah Chapter

Chelsey has served the Utah legal community with exceptional dedication in her role as Secretary of the AFCC Utah Chapter. Her leadership has expanded the bridge between family law professionals and the mental health community. The result is a better-informed public, more effective courts, and improved outcomes for families navigating high conflict matters.

Chelsey has advanced public understanding of the legal profession and justice system by:

1. Education that reaches both the bar and the public. Chelsey designs and teaches continuing legal education programs that translate complex psychological concepts into practical tools for lawyers, judges, and mediators. Topics include child development in high conflict cases, reunification frameworks, and trauma-informed practices. These programs equip legal professionals to explain processes and options to clients in clearer, calmer language.
2. Leadership that scales impact. As Secretary, Chelsey modernized event planning, communications, and volunteer coordination for AFCC Utah. Her efforts increased attendance, broadened interdisciplinary participation, and ensured consistent delivery of high quality programming that members can bring back to their clients and communities.
3. Conference planning with real results. Chelsey has been instrumental in organizing AFCC Utah conferences that bring attorneys, judicial officers, guardians ad litem, and therapists into the same room. These gatherings have improved shared vocabulary and reduced misunderstandings that often slow cases and frustrate families.
4. Service that centers families. Chelsey volunteers significant time to mentorship and resource sharing. She connects attorneys with mental health professionals for case consultations and helps therapists understand the court's expectations. This collaboration improves the public's experience of the legal system and increases confidence in court-ordered processes.

#### Impact highlights

- Multiple CLE presentations and panels addressing parenting plans, child resistance or refusal, and mediation skills.
- Documented improvements in attendee feedback on clarity, usefulness, and immediate application to client communication and case strategy.

- Driven strong interdisciplinary attendance at AFCC Utah programs, which improves the consistency of advice families receive.

Chelsey's work makes the legal system more understandable and humane for families. She models professionalism, humility, and collaboration. Her steady leadership within AFCC Utah has multiplied the Chapter's ability to educate the public through better trained lawyers and more aligned professional partners.

### Nominee: **Association of Family and Conciliation Courts, Utah Chapter**

The AFCC Utah Chapter has transformed the way our state's legal community understands and serves families. The Chapter's programming helps attorneys, judges, commissioners, and mental health professionals speak the same language about child development, conflict resolution, and safe parenting arrangements. The result is a better informed public and a justice system that works more effectively for families in crisis. The Utah Chapter is the fastest growing chapter in the world and has been for 3 years running.

How AFCC Utah advances public understanding and the administration of justice

1. Education that spreads quickly and widely. Through conferences, workshops, and CLEs, AFCC Utah provides practical, research-based education to legal professionals. When lawyers and judges gain a clearer understanding of mental health issues, they can explain options to clients in plain terms and craft orders that families can follow.
2. Interdisciplinary collaboration. AFCC Utah is the hub where the bench, the bar, and mental health experts meet. This collaboration reduces confusion for families, shortens learning curves for professionals, and promotes consistent practices across courtrooms.
3. Mediation Day. For the past three years, AFCC Utah has organized Mediation Day in both Salt Lake County and Utah County. Mediation Day is designed for unrepresented parties to have the opportunity come to the courthouse, be represented by a volunteer attorney, have a volunteer mediator mediate their case, mental health professionals on hand to provide input or assistance, and paralegals to help draft documents. Several Judges and Commissioners are on hand to sign the Decrees if cases are resolved. The AFCC Chapter recruits an army of volunteers to put this on multiple times per year, and each mediation day has had between 15 and 25 cases, with most cases reaching a full resolution.

Impact highlights

- Annual and midyear conferences that attract attorneys, judges, commissioners, guardians ad litem, mediators, and therapists.
- Consistent programming on child-centered practices, trauma awareness, and effective mediation.
- Mediation Day events that demonstrate how collaborative resolution reduces court backlog, costs, and conflict for families.
- Positive public coverage that highlights real outcomes for community members seeking resolution.

AFCC Utah has made the justice system easier to navigate for families by equipping legal professionals with clear, shared frameworks and by delivering needed services through Mediation Day. The Chapter's work exemplifies service to the community and aligns directly with the award's purpose.

As discussed today, I'd like to nominate Chelsy Phelps and the AFCC Utah Chapter for the Distinguished Community Member Award.

Chelsy is a Marriage and Family Therapist who has been active both within and without the legal community. Within the legal community, she has provided training to Family Law attorneys through Utah on non-legal options for resolving high-conflict family matters through therapeutic treatments, enabling attorneys to approach family matters holistically, providing better results for children of divorce than are generally achieved through pure litigation. She also helps attorneys develop a trauma-informed approach to high conflict litigation. She, along with AFCC, hosts educational events where attorneys obtain CLEs while learning best practices in family law matters, and therapists learn about family law and their roles in high-conflict family legal matters.

I personally learned much from Chelsey at an AFCC-sponsored CLE event. I was also referred to Chelsy as a resource when taking the Guardian Ad Litem training. These experiences and my discussions with senior family law attorneys made clear to me that Chelsy has been a long standing resource in the community, promoting and educating on holistic conflict resolution in family matters, and that her efforts have greatly improved outcomes for children in high-conflict family law cases.

Regarding AFCC itself, I have long admired their efforts to educate attorneys, therapists, judges, and other professionals that are involved in family law matters, either directly or indirectly. Every Guardian Ad Litem in Utah, both public and private, are introduced to the resources AFCC provides to both members and non-members. I have personally benefitted from AFCC resources, even though I am not a member. Their resources have improved my practice immensely.



## UTAH STATE BAR AWARDS COMMITTEE AWARD RECOMMENDATION

TO: Utah State Bar Commission

DATE: October 17, 2025

RE: AWARD RECOMMENDATION – Professionalism Award

CRITERIA:

*Awarded to a lawyer or judge whose deportment in the practice of law represents the highest standards of fairness, integrity, and civility.*

### NOMINEES:

| <i>Nominee</i>     | <i>Previous Award?</i> | <i>Nominator</i>                                                      |
|--------------------|------------------------|-----------------------------------------------------------------------|
| Julianne P. Blanch | No                     | Dana Robinson,<br>Katherine Venti,<br>Juliette White, Bart<br>Johnsen |
| Clark Cannon       | No                     |                                                                       |

### RECOMMENDATION:

The Utah State Bar Awards Committee met on October 10, 2025 to review and discuss the nominations and voted to recommend the following:

Julianne P. Blanch

### PREVIOUS RECIPIENTS:

2004 HON. GORDON J. LOW  
 2004 RICHARD W. CAMPBELL  
 2004 STEPHEN B. NEBEKER  
 2004 M. DAYLE JEFFS  
 2004 KEN CHAMBERLAIN  
 2005 HON. RICHARD C. HOWE  
 2006 BERT L. DART, JR.  
 2007 FRANCIS J. CARNEY  
 2008 ELLEN MAYCOCK  
       DON WINDER  
 2009 CRAIG R. MARIGER  
 2010 TIMOTHY B. ANDERSON  
 2011 T. RICHARD DAVIS  
 2012 PAUL M. DURHAM

2013 WILLIAM S. BRITT  
 2014 LAURA S. SCOTT  
 2018 TARA ISAACSON  
 2016 PATRICK L. ANDERSON  
 2017 LINDA M. JONES  
 2018 TERRY L. WADE  
 2019 HON. EVELYN J. FURSE  
 2020 MARGARET D. PLANE  
 2021 JULIETTE P. WHITE  
 2022 ROBERT S. CLARK  
 2023 HON. GEORGE M. HARMOND, JR.  
 2024 HON. JEFFREY NOLAND

**Christy Abad**

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**From:** info@utahbar.org  
**Sent:** Wednesday, September 24, 2025 4:39 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Dana Robinson

**Bar Number**

n/a

**Email Address**

[drobinson@parsonsbehle.com](mailto:drobinson@parsonsbehle.com)

**Date**

09/24/2025

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

Utah State Bar Member

**Nominee's Name**

Julianne P. Blanch

**Award**

Professionalism Award (Fall Forum)

**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:**

Parsons Behle & Latimer is proud to nominate Julianne P. Blanch for the Utah State Bar Professionalism Award. Throughout her distinguished career, Juli has embodied the highest standards of fairness, integrity and civility in the practice of law. Her approach to advocacy reflects the profession's most honored traditions—truthfulness, reliability and respect for all.

Juli has long believed that civility is not only essential to the profession, but to the justice system itself. As she has said, "The legal profession is the last bastion of civility." This principle has guided her practice in dozens of trials. Whether working with clients, colleagues, judges or opposing counsel, Juli models courtesy and professionalism, even in the most high-stakes disputes.

Her commitment to fairness is evident in the way she approaches advocacy. Juli believes that taking reasonable positions—even acknowledging weaknesses in her client's case when pressed by a judge—upholds the integrity of the legal process. This candor, coupled with her ability to communicate clearly and promptly, has earned her the trust of clients, opposing counsel and the courts.

Integrity defines Juli's practice. She approaches every case with meticulous preparation, ensuring she represents her clients in an exceptional manner in every circumstance. She is known for her responsiveness—promptly addressing requests from the court or opposing counsel—and for fostering professional, respectful relationships that build mutual trust. Her interactions consistently reflect the highest level of integrity, setting a standard for those around her. This commitment to reciprocity and fairness ensures that even adversaries know they can rely on her actions to be honorable.

Juli's professional excellence has also been recognized nationally, through her leadership and appointments to organizations including the American College of Trial Lawyers and the International Society of Barristers. Parsons Behle & Latimer enthusiastically nominates Julianne P. Blanch for the Utah State Bar Professionalism Award.

**File**

- 2025-Blanch-Utah-State-Bar-Professionalism-Award-nomination-DR9.23.25\_JC\_jpb.docx

**Please select one:**

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

**Christy Abad**

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**From:** info@utahbar.org  
**Sent:** Wednesday, September 24, 2025 4:57 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Katherine Venti

**Bar Number**

9318

**Email Address**[kventi@parsonsbehle.com](mailto:kventi@parsonsbehle.com)**Date**

09/24/2025

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

Utah State Bar Member

**Nominee's Name**

Julianne P. Blanch

**Award**

Professionalism Award (Fall Forum)

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

I wish to nominate Julianne P. Blanch for the Professionalism Award.

Juli is an extremely experienced litigator who has been the lead attorney on hundreds of cases. Many of these have been contentious, involving high stakes, high emotions, and difficult opposing counsel. Juli handled all of these with the utmost professionalism – maintaining integrity and civility throughout. She has never departed from the high standards set by the Bar or this firm. In addition, she ensured that other lawyers and paralegals working on those cases upheld high standards of professionalism, integrity, and civility by setting the tone and example of an exemplary lawyer. She is most deserving of this award.

**Please select one:**

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

## Christy Abad

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**From:** info@utahbar.org  
**Sent:** Friday, September 26, 2025 2:18 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

### Nominator Name

Juliette P. White

### Bar Number

9616

### Email Address

[jwhite@parsonsbehle.com](mailto:jwhite@parsonsbehle.com)

### Date

09/26/2025

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

Utah State Bar Member

### Nominee's Name

Julianne P. Blanch

### Award

Professionalism Award (Fall Forum)

**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 consider the following a supporting statement to the full nomination submitted by Dana Robinson from Parsons Behle & Latimer for my colleague Julianne P. Blanch.  
Thank you.

"Juli is the archetype by which we should measure all recipients of this award. I have never met, worked with, or heard of a lawyer that better exemplifies the core principles of our profession, and those which this award seeks to recognize. Juli is quietly confident, unflaggingly honest and fair in all her interactions, and practices law with pragmatism and deep integrity."

- Juliette P. White, Director, Vice President & Treasurer  
Parsons Behle & Latimer

### Please select one:

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

**Christy Abad**

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**From:** info@utahbar.org  
**Sent:** Wednesday, September 24, 2025 5:01 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

**Nominator Name**

Bart J. Johnsen

**Bar Number**

7068

**Email Address**

[bjohnsen@parsonsbehle.com](mailto:bjohnsen@parsonsbehle.com)

**Date**

09/24/2025

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

Utah State Bar Member

**Nominee's Name**

Julianne P. Blanch

**Award**

Professionalism Award (Fall Forum)

**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:**

Juli embodies what it means to practice law with integrity, fairness, and grace. She leads with kindness and professionalism, always seeking to resolve matters with respect and civility. Those who work with her know her as a steady, reliable presence—someone who can be counted on to act with honesty and compassion, even in the most challenging situations. Juli's dedication to her clients, her colleagues, and the legal profession makes her a shining example of the values honored by the Utah State Bar Professionalism 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.



UTAH STATE BAR AWARDS COMMITTEE  
AWARD RECOMMENDATION

TO: Utah State Bar Commission  
 DATE: October 17, 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. Stanford Brandon Owen

RECOMMENDATION:

The Utah State Bar Awards Committee met on October 10, 2025 to review the nomination for a Special/Distinguished Service Award. The Committee discussed the merits of the nominee and agreed upon recommending that **S. Brandon Owen** should be considered by the Bar Commission for a Special/Distinguished Service Award based on his significant accomplishments and acts of service to the profession and the community over a period of many years.

PAST RECIPIENTS:

|      |                                                 |
|------|-------------------------------------------------|
| 2001 | WAINE C. RICHES                                 |
| 2002 | KENT B. SCOTT                                   |
| 2002 | REP. AFTON B. BRADSHAW                          |
| 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                               |
| 2024 | KATE CONYERS                                    |

## Christy Abad

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**From:** info@utahbar.org  
**Sent:** Wednesday, February 12, 2025 3:46 PM  
**To:** Christy Abad  
**Subject:** New submission from Nomination Bar Awards

### Nominator Name

Alissa Owen

### Bar Number

9078

### Email Address

[aowen@deseretmgt.com](mailto:aowen@deseretmgt.com)

### Date

02/12/2025

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

Utah State Bar Member

### Nominee's Name

Stanford Brandon Owen

### Award

Special Service Award (When Warranted)

**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:**

HEARTS AND HANDS AWARD: Brandon Owen combined his legal expertise with his passion for tennis (former U of U college player) and pickleball (senior pro tour player) to support underprivileged youth, particularly among the Navajo Nation. Shortly after law school, Brandon began volunteering with Tennis n Tutoring, a Judge Valdez project at Liberty Park. This initiative introduced juvenile delinquent boys at Decker Lake to tennis, offering them a positive outlet through sports and competition. Inspired by this work, Brandon started his own organization that expanded his efforts to the Navajo Nation, where he has taught tennis and pickleball to Navajo elementary school students for years. Recognizing that Navajo children often can travel hours by bus to Bluff elementary, he and his family regularly traveled to the reservation, painting tennis lines on school playgrounds and raising funds, donating rackets, snacks, and equipment. At Bluff Elementary—where 99% of students are Navajo—his efforts have given children access to a sport that promotes physical health, discipline, and broader life aspirations. The Navajo Nation faces a diabetes epidemic, as shared to him by tribal leaders, making health-focused activities critical for youth. Brandon's work provided a means for children to combat diabetes, stay active, and experience opportunities beyond their community. By participating in high school tennis programs, these students can travel with high school tennis beyond their rural surroundings, gaining exposure and inspiration for their futures. Beyond sports, Brandon has contributed to Bluff's after-school enrichment by creating a science experiment video series for Navajo youth. Many children endure long bus rides to and from school, often lacking proper food and engagement. The principal has suggested many youth only have hot meals at the school. Brandon has helped supply both, ensuring these students have constructive, stimulating activities to break up their travel time. His service extends further—he has worked with Design Build Bluff (architect. program w/ U of U), bringing his youth to help construct homes for impoverished families on the reservation. One such project in Dennehotso provided a home for a family with a physically disabled child, selected by tribal leaders, who had been living in substandard conditions, some live without running water or electricity. Brandon's dedication to serving marginalized communities through mentorship, education, and hands-on support reflects his deep commitment to making a tangible difference in the lives of others. His contributions deserve recognition for their lasting impact on Navajo youth and beyond.

Brandon's references to his service

- Tennis N Tutoring – Personal Reference Debbie Robb (Head Tennis Pro at Liberty Park when Brandon was coaching Judge Valdez project; Coach Debbie is also a member of the bar) Debbie Robb – 801-979-2747
- Laurie Lambert – Utah Tennis Association Executive Director, assisted in one of the Bluff Trips 435-655-5590
- Larue Barton – Community Leader in San Juan County who has helped on the Bluff teaching trips – 435-459-2370 (lives in Blanding and Bluff)
- Brandon is a volunteer tennis coach at Brighton High School, notwithstanding his full time private practice at RQN.

**Christy Abad**

**From:** Joseph M.R. Covey <jcovey@parrbrown.com>  
**Sent:** Friday, June 6, 2025 5:34 PM  
**To:** Alissa Owen; Christy Abad  
**Cc:** Angie@thelocalbook.com; Laurie Lambert; cookql@gmail.com; julietcook@yahoo.com  
**Subject:** RE: Award Nomination Brandon Owen - Utah State Bar | Community Service Award

 **IRONSCALES couldn't recognize this email as this is the first time you received an email from this sender jcovey@parrbrown.com**

I would welcome the opportunity to speak to Brandon's commitment to service and the refreshingly pleasant way he goes about doing it.

**Joseph M.R. Covey** | Attorney | **Parr Brown Gee & Loveless** | A Professional Corporation  
 101 South 200 East, Suite 700 | Salt Lake City, Utah 84111  
 D: 801.257.7920 | T: 801.532.7840 | F: 801.532.7750 | [jcovey@parrbrown.com](mailto:jcovey@parrbrown.com) | [www.parrbrown.com](http://www.parrbrown.com)

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**From:** Alissa Owen <alissaowenlegal@gmail.com>  
**Sent:** Friday, June 6, 2025 5:18 PM  
**To:** Christy Abad <christy.abad@utahbar.org>  
**Cc:** Angie@thelocalbook.com; Joseph M.R. Covey <jcovey@parrbrown.com>; Laurie Lambert <llambert@utahtennis.com>; cookql@gmail.com; julietcook@yahoo.com  
**Subject:** Re: Award Nomination Brandon Owen - Utah State Bar | Community Service Award

Yes, thank you, Christy.

I know those who can speak to Brandon's service to and in the community include the following:

1- **Laurie Lambert**, Executive Director of Utah Tennis (801) 655-5590. She has seen the volunteer coaching, project management for the Navajo volunteer service, and equipment donations Brandon has facilitated to the Navajo community, as well as participated with us. She is included on this email and can speak to Brandon's community service and dedication to the Navajo tennis and pickleball program we started. He has provided this service as an ongoing project over the years. Brandon painted lines on their elementary school, helped teach the youth over the years tennis and pickleball, and donated and fundraised rackets, equipment and snacks.

2- Many in the community can speak to his dedication as a volunteer assistant coach at Brighton High school, including Joe Covey at Parr Waddoups. I am including him on this email and his phone number is (801) 520-5410 and email is [jcovey@parrbrown.com](mailto:jcovey@parrbrown.com). Joe is a member of the Utah Bar and can speak to

the coaching he provides for the community of youth. I am also including Juliet and Larry Cook (an attorney) who can speak to his dedication and long commitment to volunteer coaching at Brighton High School and the service he provides to youth using his tennis talent. They have also participated in the Navajo community tennis project and volunteered their time and resources with us.

3- I also included the Neuberger family - tennis family and community tennis members who helped us with our teaching, donations and instruction to the Navajo. Angie's number is [angie@thelocalbook.com](mailto:angie@thelocalbook.com) and 435-668-2755.

**Angie, Joe and Laurie,**

Thank you in advance. This is not Brandon's idea, he has no idea I nominated him, and he doesn't need any public recognition for what he does-- that's not why he does that, but Brandon but because of Brandon's (and all of your) community service both on the Navajo Nation at Bluff elementary, fundraising for tennis rackets, donating equipment, teaching them tennis and pickleball over the years so I nominated Brandon for a Utah Bar Service award. Christy Abad is asking for any additional support for Brandon. You all deserve this award as well for all you do!

No pressure to share anything and you do not need to copy me. I am just providing some additional information about his dedication to the Navajo, tennis, tennis youth, and the community.

Thanks very much,

Alissa

(801) 244-0416

On Fri, Jun 6, 2025 at 2:18 PM Christy Abad <[christy.abad@utahbar.org](mailto:christy.abad@utahbar.org)> wrote:

Alissa,

I just want to keep you up to date on your nomination of Stanford Brandon Owen for a Special Service Award.

The Utah State Bar Awards Committee discussed your nomination at their meetings in both February and June. The Committee continues to be impressed by Mr. Owen's accomplishments and has voted to retain the nomination for another year. If you or someone else would like to provide the committee with additional information, that would be greatly appreciated.

The Utah State Bar Board of Bar Commissioners is considering reinstating the Heart and Hands award and the Awards Committee feels that Mr. Owen is an ideal candidate for that award.

Kind regards,



— Brian, Start







Blunt, Utah



Blunt, Utah







Utah State Bar Commission Meeting

**T A B 8**

**UTAH STATE BAR**  
**Budget and Finance Committee**  
**Financial Results as of August 31, 2025**  
**and for the two months then ended**

**FINANCIAL STATEMENT HIGHLIGHTS**

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

|                              | <b>Actual</b>    | <b>Budget</b>    | <b>Fav (unfav)<br/>\$ Variance</b> | <b>Fav (unfav)<br/>% Variance</b> |
|------------------------------|------------------|------------------|------------------------------------|-----------------------------------|
| YTD Revenue                  | 5,013,839        | 5,009,444        | 4,395                              | 0%                                |
| YTD Expenses                 | 1,437,669        | 1,418,686        | (18,983)                           | -1%                               |
| <b>YTD Net Profit/(Loss)</b> | <b>3,576,170</b> | <b>3,590,758</b> | <b>(14,588)</b>                    | <b>0%</b>                         |

YTD net profit is \$3,576,170 and is (\$17,588) less than budgeted.

**YTD Net Profit –Cash Basis:** Adding back year-to-date depreciation expense of \$30,297 and deducting capital expenditures of \$27,911 the cash basis year-to-date net profit is \$2,386 higher.

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

**CLE:** CLE Revenue caught up to budget amounts YTD from July, with the addition of the Litigation section sponsoring Civility Day, held at Little America. Program services expenses are unfavorable by (\$39,525), mainly due expenses related to Civility Day and other Section events not yet closed.

**Summer Convention:** The Summer Convention/Annual Meeting was held in June 2025, so all revenues and expenses associated with it were booked into the last fiscal year. This change was after the budget was already created, and therefore the numbers here only represent our July Online Series that would have normally been combined with the Summer Convention/Annual Meeting. As a result, there is a net shortfall when compared to budget of 30%, or \$(33,230)

**UTAH STATE BAR  
Budget and Finance Committee  
Financial Results as of August 31, 2025  
and for the two 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 beyond the fiscal year:

|                                              |                |
|----------------------------------------------|----------------|
| Operations Reserve - 4 Months' Operations    | \$2,767,295    |
| Capital Replacement Reserve – Equipment      | 200,000        |
| Capital Replacement Reserve – Building       | 600,000        |
| Technology/Contracts Reserve -Tava Contracts | <u>124,375</u> |
| Total                                        | \$3,691,670    |

|                                                      |                    |
|------------------------------------------------------|--------------------|
| Estimated current cash reserve as of August 31, 2025 | <u>\$3,739,089</u> |
| Sufficient/ (Deficient) Cash Reserve                 | <u>\$ 47,419</u>   |

**Utah State Bar  
Income Statement  
August 31, 2025**

|                                          | Actual<br>LYTD      | Actual<br>YTD       | Budget<br>YTD       | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|------------------------------------------|---------------------|---------------------|---------------------|-------------------------|----------------|---------------------|------------------------|
| <b>Revenue</b>                           |                     |                     |                     |                         |                |                     |                        |
| Admissions                               | 52,335              | 52,555              | 50,083              | 2,473                   | 105%           | 638,565             | 8%                     |
| NLTP                                     | 6,000               | 6,000               | 5,715               | 285                     | 105%           | 74,576              | 8%                     |
| LPP                                      | 6,255               | 8,198               | 5,851               | 2,347                   | 140%           | 8,325               | 98%                    |
| OPC                                      | 650                 | 350                 | 920                 | (570)                   | 38%            | 45,272              | 1%                     |
| CLE                                      | 95,354              | 80,238              | 81,717              | (1,479)                 | 98%            | 723,034             | 11%                    |
| Summer Convention                        | 52,040              | 17,667              | 53,085              | (35,418)                | 33%            | 53,085              | 33%                    |
| Fall Forum                               | 7,050               | 13,450              | 4,702               | 8,748                   | 286%           | 140,000             | 10%                    |
| Spring Convention                        | 2,550               | 3,200               | 2,488               | 712                     | 129%           | 167,000             | 2%                     |
| Member Services                          | 67,401              | 54,035              | 68,903              | (14,868)                | 78%            | 384,312             | 14%                    |
| Public Services                          | 6,070               | 3,410               | 6,027               | (2,617)                 | 57%            | 27,309              | 12%                    |
| Bar Operations                           | 4,623,922           | 4,751,026           | 4,707,158           | 43,867                  | 101%           | 5,443,174           | 87%                    |
| Facilities                               | 21,744              | 23,711              | 22,704              | 1,007                   | 104%           | 184,299             | 13%                    |
| Innovation in Law                        | 1,250               | -                   | 93                  | (93)                    | 0%             | 1,500               | 0%                     |
| Total Revenue                            | 4,942,621           | 5,013,839           | 5,009,444           | 4,395                   | 100%           | 7,890,449           | 64%                    |
| <b>Expenses</b>                          |                     |                     |                     |                         |                |                     |                        |
| Admissions                               | 182,226             | 111,673             | 139,231             | 27,558                  | 80%            | 551,668             | 20%                    |
| NLTP                                     | 9,125               | 12,298              | 11,961              | (338)                   | 103%           | 71,640              | 17%                    |
| LPP                                      | 10,714              | 17,656              | 19,299              | 1,643                   | 91%            | 75,385              | 23%                    |
| OPC                                      | 299,654             | 312,466             | 304,198             | (8,268)                 | 103%           | 1,818,899           | 17%                    |
| CLE                                      | 66,531              | 91,072              | 47,998              | (43,074)                | 190%           | 644,152             | 14%                    |
| Summer Convention                        | 39,709              | 3,331               | 5,519               | 2,188                   | 60%            | 5,519               | 60%                    |
| Fall Forum                               | 225                 | 192                 | 561                 | 369                     | 34%            | 124,918             | 0%                     |
| Spring Convention                        | -                   | 70                  | -                   | (70)                    | -              | 126,870             | 0%                     |
| Member Services                          | 156,999             | 149,726             | 161,855             | 12,129                  | 93%            | 1,021,118           | 15%                    |
| Public Services                          | 160,539             | 159,261             | 159,520             | 260                     | 100%           | 596,423             | 27%                    |
| Bar Operations                           | 442,308             | 466,225             | 454,321             | (11,903)                | 103%           | 2,446,937           | 19%                    |
| Facilities                               | 72,930              | 75,921              | 78,339              | 2,418                   | 97%            | 503,097             | 15%                    |
| Innovation in Law                        | 34,575              | 37,777              | 35,883              | (1,893)                 | 105%           | 221,998             | 17%                    |
| Total Expenses                           | 1,475,534           | 1,437,669           | 1,418,686           | (18,983)                | 101%           | 8,208,624           | 18%                    |
| <b>Other</b>                             |                     |                     |                     |                         |                |                     |                        |
| Gain (Loss) - Disposal Of Assets         | -                   | -                   | -                   | -                       | -              | -                   | -                      |
| <b>Net Profit (Loss)</b>                 | <b>\$ 3,467,087</b> | <b>\$ 3,576,170</b> | <b>\$ 3,590,758</b> | <b>\$ (14,588)</b>      | <b>100%</b>    | <b>\$ (318,175)</b> | <b>-1124%</b>          |
| Depreciation                             | 28,502              | 30,297              | 29,236              | (1,062)                 | 104%           | 179,859             |                        |
| Cash increase (decrease) from operations | 3,495,589           | 3,606,468           | 3,606,468           | -                       | -              | (138,315)           |                        |
| Changes in operating assets/liabilities  | (354,344)           | (3,803,554)         | (3,803,554)         | -                       | -              | (94,200)            |                        |
| Capital expenditures                     | (54,079)            | (27,911)            | (15,700)            | (12,211)                | 178%           |                     |                        |
| <b>Net change in cash</b>                | <b>\$ 3,087,165</b> | <b>\$ (224,997)</b> | <b>\$ (212,786)</b> | <b>\$ (12,211)</b>      | <b>106%</b>    | <b>\$ (232,515)</b> |                        |

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**August 31, 2025**

|                                        | Actual<br>LYTD   | Actual<br>YTD    | Budget<br>YTD    | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|----------------------------------------|------------------|------------------|------------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                         |                  |                  |                  |                         |                |                  |                        |
| 4001 · Admissions - Student Exam Fees  | 1,375            | 2,200            | 1,415            | 785                     | 155%           | 197,793          | 1%                     |
| 4002 · Admissions - Attorney Exam Fees | 1,275            | 1,700            | 1,396            | 304                     | 122%           | 48,393           | 4%                     |
| 4003 · Admissions - Retake Fees        | 550              | 850              | 445              | 405                     | 191%           | 30,066           | 3%                     |
| 4004 · Admissions - Laptop Fees        | 1,630            | 1,773            | 1,579            | 193                     | 112%           | 92,144           | 2%                     |
| 4005 · Admissions - Application Forms  | 6,250            | -                | 2,446            | (2,446)                 | 0%             | 7,620            | 0%                     |
| 4006 · Transfer App Fees               | 10,500           | 17,000           | 10,328           | 6,672                   | 165%           | 92,905           | 18%                    |
| 4008 · Attorney - Motion               | 27,200           | 24,650           | 26,723           | (2,073)                 | 92%            | 148,647          | 17%                    |
| 4009 · House Counsel                   | 4,250            | 3,400            | 5,202            | (1,802)                 | 65%            | 17,688           | 19%                    |
| 4010 · Section/Local Bar Support fees  | -                | -                | -                | -                       | -              | 129,790          | 0%                     |
| 4011 · Admissions LPP                  | 200              | -                | 145              | (145)                   | 0%             | 1,448            | 0%                     |
| 4012 · Admissions Military Spouse      | -                | -                | -                | -                       | -              | -                | 0%                     |
| 4020 · NLTP Fees                       | 6,000            | 6,000            | 5,715            | 285                     | 105%           | 74,576           | 8%                     |
| 4021 · Lic Fees > 3 Years              | 3,889,450        | 3,978,850        | 3,977,674        | 1,176                   | 100%           | 4,085,659        | 97%                    |
| 4022 · Lic Fees < 3 Years              | 174,850          | 215,750          | 177,007          | 38,743                  | 122%           | 260,788          | 83%                    |
| 4023 · Lic Fees - House Counsel        | 60,860           | 59,470           | 63,354           | (3,884)                 | 94%            | 67,211           | 88%                    |
| 4024 · Lic Fees LPP                    | 5,825            | 8,025            | 5,476            | 2,549                   | 147%           | 6,275            | 128%                   |
| 4025 · Pro Hac Vice Fees               | 49,100           | 44,725           | 51,208           | (6,483)                 | 87%            | 224,829          | 20%                    |
| 4026 · Lic Fees - Inactive/FS          | 119,550          | 121,350          | 122,139          | (789)                   | 99%            | 123,528          | 98%                    |
| 4027 · Lic Fees - Inactive/NS          | 216,195          | 221,445          | 221,170          | 275                     | 100%           | 225,574          | 98%                    |
| 4029 · Prior Year Lic Fees             | -                | -                | -                | -                       | -              | -                | 0%                     |
| 4030 · Certs of Good Standing          | 3,220            | 3,440            | 3,290            | 150                     | 105%           | 22,379           | 15%                    |
| 4031 · Enhanced Web Revenue            | -                | -                | -                | -                       | -              | -                | 0%                     |
| 4039 · Room Rental-All parties         | 7,125            | 7,400            | 7,080            | 320                     | 105%           | 58,650           | 13%                    |
| 4042 · Food & Beverage Rev-All Parties | 9,619            | 9,311            | 10,624           | (1,313)                 | 88%            | 82,523           | 11%                    |
| 4043 · Setup & A/V charges-All parties | -                | -                | -                | -                       | -              | 1,126            | 0%                     |
| 4051 · Meeting - Registration          | 39,790           | -                | 40,790           | (40,790)                | 0%             | 255,790          | 0%                     |
| 4052 · Meeting - Sponsor Revenue       | 14,150           | 18,750           | 11,121           | 7,629                   | 169%           | 92,614           | 20%                    |
| 4053 · Meeting - Vendor Revenue        | 1,700            | 13,650           | 1,452            | 12,198                  | 940%           | 40,000           | 34%                    |
| 4055 · Meeting - Sp Ev Registration    | -                | -                | -                | -                       | -              | 4,000            | 0%                     |
| 4060 · E-Filing Revenue                | -                | -                | -                | -                       | -              | 8,000            | 0%                     |
| 4061 · Advertising Revenue             | 67,085           | 51,259           | 68,903           | (17,644)                | 74%            | 262,950          | 19%                    |
| 4062 · Subscriptions                   | -                | -                | -                | -                       | -              | -                | -                      |
| 4063 · Modest Means revenue            | 2,050            | (100)            | 1,904            | (2,004)                 | -5%            | 8,754            | -1%                    |
| 4071 · Mem Benefits - Lexis            | 316              | 309              | -                | 309                     | -              | -                | 0%                     |
| 4072 · Royalty Inc - Bar J, MBNA, LM,M | -                | 1,218            | -                | 1,218                   | -              | 7,778            | 16%                    |
| 4081 · CLE - Registrations             | 85,079           | 76,311           | 76,998           | (687)                   | 99%            | 618,305          | 12%                    |
| 4082 · CLE - Video Library Sales       | 10,275           | 10,594           | 4,719            | 5,875                   | 225%           | 45,000           | 24%                    |
| 4090 · Tenant Rent                     | 5,000            | 7,000            | 5,000            | 2,000                   | 140%           | 42,000           | 17%                    |
| 4095 · Miscellaneous Income            | 12,030           | 1,515            | 12,186           | (10,671)                | 12%            | 39,843           | 4%                     |
| 4096 · Late Fees                       | 33,500           | 28,700           | 32,608           | (3,908)                 | 88%            | 58,500           | 49%                    |
| 4103 · In - Kind Revenue - UDR         | -                | -                | -                | -                       | -              | -                | 0%                     |
| 4104 · In Kind Rev-Facilities & Other  | -                | -                | 1,015            | (1,015)                 | 0%             | 47,303           | 0%                     |
| 4200 · Seminar Profit/Loss             | -                | -                | -                | -                       | -              | 350,000          | 22%                    |
| Investment income                      | 76,622           | 77,296           | 58,333           | 18,962                  | 133%           | -                | -                      |
| <b>Total Revenue</b>                   | <b>4,942,621</b> | <b>5,013,839</b> | <b>5,009,444</b> | <b>4,395</b>            | <b>100%</b>    | <b>7,880,449</b> | <b>64%</b>             |
| <b>Program Service Expenses</b>        |                  |                  |                  |                         |                |                  |                        |
| 5001 · Meeting Facility-external only  | 18,539           | 34,811           | 13,570           | (21,241)                | 257%           | 101,957          | 34%                    |
| 5002 · Meeting facility-internal only  | 5,050            | 5,750            | 5,296            | (454)                   | 109%           | 28,990           | 20%                    |
| 5013 · ExamSoft                        | -                | -                | -                | -                       | -              | 22,295           | 0%                     |
| 5014 · Questions                       | 52,996           | 9,200            | 55,231           | 46,031                  | 17%            | 78,215           | 12%                    |
| 5015 · Investigations                  | 75               | 306              | 141              | (166)                   | 218%           | 900              | 34%                    |
| 5016 · Credit Checks                   | 449              | 376              | 437              | 62                      | 86%            | 4,254            | 9%                     |
| 5017 · Medical Exam                    | -                | 160              | -                | (160)                   | -              | 1,260            | 13%                    |
| 5025 · Temp Labor/Proctors             | 200              | 7,850            | 200              | (7,650)                 | 3919%          | 5,446            | 144%                   |
| 5030 · Speaker Fees & Expenses         | 1,500            | -                | 1,000            | 1,000                   | 0%             | 20,976           | 0%                     |
| 5031 · Speaker Reimb. - Receipt Req'd  | 981              | -                | 870              | 870                     | 0%             | 20,370           | 0%                     |
| 5035 · Awards                          | 427              | -                | 109              | 109                     | 0%             | 24,426           | 0%                     |
| 5037 · Grants/ contributions - general | 1,500            | 1,750            | 1,843            | 93                      | 95%            | 15,300           | 11%                    |
| 5040 · Witness & Hearing Expense       | 258              | -                | 625              | 625                     | 0%             | 1,129            | 0%                     |
| 5041 · Process Serving                 | 209              | 85               | 124              | 39                      | 68%            | 463              | 18%                    |
| 5045 · Bar Anniversary                 | -                | -                | -                | -                       | -              | 10,000           | 0%                     |
| 5046 · Court Reporting                 | 313              | 30               | 216              | 186                     | 14%            | 4,370            | 1%                     |
| 5047 · Casemaker                       | 9,049            | -                | -                | -                       | -              | -                | 0%                     |

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**August 31, 2025**

|                                              | Actual<br>LYTD | Actual<br>YTD  | Budget<br>YTD  | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|----------------------------------------------|----------------|----------------|----------------|-------------------------|----------------|------------------|------------------------|
| 5048 · Licensee Case Research Tools          | -              | 8,667          | 8,862          | 195                     | 98%            | 53,170           | 16%                    |
| 5055 · Legislative Expense                   | 10,000         | 20,000         | 20,000         | -                       | 100%           | 120,000          | 17%                    |
| 5060 · Program Special Activities            | 17,723         | 500            | -              | (500)                   |                | 226              | 221%                   |
| 5061 · LRE - Bar Support                     | 70,000         | 70,000         | 70,000         | -                       | 100%           | 70,000           | 100%                   |
| 5062 · Law Day                               | -              | -              | -              | -                       |                | 1,000            | 0%                     |
| 5063 · Special Event Expense                 | 180            | -              | -              | -                       |                | 5,654            | 0%                     |
| 5064 · MCLE Fees Paid                        | 5,890          | 4,543          | 5,043          | 501                     | 90%            | 45,998           | 10%                    |
| 5070 · Equipment Rental                      | 39,435         | 7,566          | 3,355          | (4,210)                 | 225%           | 37,882           | 20%                    |
| 5075 · Food & Bev-external costs only        | 35,743         | 23,680         | 19,262         | (4,418)                 | 123%           | 433,402          | 5%                     |
| 5076 · Food & beverage - internal only       | 7,365          | 7,967          | 7,860          | (107)                   | 101%           | 54,759           | 15%                    |
| 5079 · Soft Drinks                           | 963            | 648            | 983            | 335                     | 66%            | 6,052            | 11%                    |
| 5084 · In Kind Exp-Facilities & other        | -              | -              | -              | -                       |                | -                | 0%                     |
| 5085 · Misc. Program Expense                 | -              | -              | -              | -                       |                | -                | 0%                     |
| 5090 · Commission Expense                    | 2,723          | 7,528          | 2,939          | (4,589)                 | 256%           | 51,990           | 14%                    |
| 5095 · Wills for Heroes                      | -              | -              | -              | -                       |                | -                | 0%                     |
| 5100 · Wellness Benefits                     | 57,082         | 35,214         | 41,667         | 6,453                   | 85%            | 250,000          | 14%                    |
| 5702 · Travel - Lodging                      | 2,507          | 701            | 1,497          | 796                     | 47%            | 22,130           | 3%                     |
| 5703 · Travel - Transportation/Parking       | 1,819          | 1,970          | 1,746          | (224)                   | 113%           | 10,657           | 18%                    |
| 5704 · Travel - Mileage Reimbursement        | 192            | 34             | 172            | 138                     | 20%            | 7,661            | 0%                     |
| 5705 · Travel - Per Diems                    | 675            | 259            | 628            | 369                     | 41%            | 4,253            | 6%                     |
| 5706 · Travel - Meals                        | -              | -              | -              | -                       |                | -                | 0%                     |
| 5707 · Travel - Commission Mtgs              | -              | -              | -              | -                       |                | 27,500           | 0%                     |
| 5805 · ABA Annual Meeting                    | 8,746          | 24,137         | 14,301         | (9,836)                 | 169%           | 23,882           | 101%                   |
| 5810 · ABA Mid Year Meeting                  | -              | -              | -              | -                       |                | 17,500           | 0%                     |
| 5815 · Commission/Education                  | -              | -              | -              | -                       |                | 6,375            | 0%                     |
| 5820 · ABA Annual Delegate                   | 1,607          | -              | 2,870          | 2,870                   | 0%             | 6,250            | 0%                     |
| 5830 · Western States Bar Conference         | -              | -              | -              | -                       |                | 7,575            | 0%                     |
| 5840 · President's Expense                   | 3,000          | 3,000          | 3,000          | -                       | 100%           | 18,000           | 17%                    |
| 5841 · President's Reimbursement             | -              | -              | -              | -                       |                | -                | 0%                     |
| 5845 · Reg Reform Task Force                 | -              | -              | -              | -                       |                | -                | 0%                     |
| 5850 · Leadership Academy                    | -              | 514            | -              | (514)                   |                | 16,000           | 3%                     |
| 5865 · Retreat                               | 21,552         | 9,511          | 22,052         | 12,541                  | 43%            | 26,254           | 36%                    |
| 5866 · Wellbeing Committee                   | 20,000         | 7,700          | 11,681         | 3,981                   | 66%            | 33,000           | 23%                    |
| 5960 · Overhead Allocation - Seminars        | -              | -              | -              | -                       |                | 1,345            | 0%                     |
| 5970 · Event Revenue Sharing - 3rd Pty       | 3,943          | 2,665          | 3,742          | 1,076                   | 71%            | 81,399           | 3%                     |
| <b>Total Program Service Expenses</b>        | <b>402,687</b> | <b>297,122</b> | <b>321,323</b> | <b>24,202</b>           | <b>92%</b>     | <b>1,780,264</b> | <b>17%</b>             |
| <b>Salaries &amp; Benefit Expenses</b>       |                |                |                |                         |                |                  |                        |
| 5510 · Salaries/Wages                        | 617,367        | 672,209        | 614,491        | (57,719)                | 109%           | 3,735,962        | 18%                    |
| 5605 · Payroll Taxes                         | 45,257         | 47,637         | 47,008         | (629)                   | 101%           | 285,801          | 17%                    |
| 5610 · Health Insurance                      | 49,627         | 54,167         | 52,085         | (2,082)                 | 104%           | 347,233          | 16%                    |
| 5620 · Health Ins/Medical Reimb              | 2,178          | 2,900          | 2,708          | (192)                   | 107%           | 16,264           | 18%                    |
| 5630 · Dental Insurance                      | 2,577          | 2,881          | 3,162          | 281                     | 91%            | 18,971           | 15%                    |
| 5640 · Life & LTD Insurance                  | 3,437          | 3,961          | 3,491          | (470)                   | 113%           | 21,091           | 19%                    |
| 5645 · Workman's Comp Insurance              | 568            | 569            | 565            | (4)                     | 101%           | 3,343            | 17%                    |
| 5650 · Retirement Plan Contributions         | 41,458         | 54,703         | 57,962         | 3,259                   | 94%            | 352,414          | 16%                    |
| 5655 · Retirement Plan Fees & Costs          | 3,618          | -              | 3,588          | 3,588                   | 0%             | 15,699           | 0%                     |
| 5660 · Training/Development                  | 2,888          | 3,495          | 3,787          | 292                     | 92%            | 6,660            | 52%                    |
| 66000 · Payroll Expenses                     | 0              | 0              | 1              | 1                       | 1%             | 5                | 0%                     |
| <b>Total Salaries &amp; Benefit Expenses</b> | <b>768,974</b> | <b>842,523</b> | <b>788,847</b> | <b>(53,675)</b>         | <b>107%</b>    | <b>4,803,443</b> | <b>18%</b>             |
| <b>General &amp; Administrative Expenses</b> |                |                |                |                         |                |                  |                        |
| 6680 · Commercial Credit Card Rebate         | -              | -              | -              | -                       |                | (3,372)          | 0%                     |
| 7025 · Office Supplies                       | 5,349          | 958            | 4,443          | 3,485                   | 22%            | 16,695           | 6%                     |
| 7015 · Office Equip Repairs                  | -              | -              | -              | -                       |                | -                | 0%                     |
| 7033 · Operating Meeting Supplies            | 672            | 637            | 712            | 75                      | 89%            | 4,855            | 13%                    |
| 7035 · Postage/Mailing, net                  | 12,449         | 11,084         | 12,883         | 1,799                   | 86%            | 67,356           | 16%                    |
| 7040 · Copy/Printing Expense                 | 32,391         | 25,838         | 33,848         | 8,009                   | 76%            | 142,355          | 18%                    |
| 7040 · Copy/Printing Expense - Other         | -              | -              | -              | -                       |                | -                | 0%                     |
| 7041 · Copy/Print revenue                    | (1,355)        | (1,452)        | (1,906)        | (453)                   | 76%            | (8,998)          | 16%                    |
| 4094 · Copy/Print revenue                    | -              | -              | -              | -                       |                | -                | 0%                     |
| 7045 · Internet Service                      | 323            | 159            | 336            | 177                     | 47%            | 2,392            | 7%                     |
| 7050 · Computer Maintenance                  | 37,123         | 37,891         | 39,953         | 2,062                   | 95%            | 231,566          | 16%                    |
| 7055 · Computer Supplies & Small Equip       | 2,970          | 643            | 1,661          | 1,018                   | 39%            | 8,015            | 8%                     |
| 7089 · Membership Database Fees              | 22,440         | 26,199         | 22,471         | (3,728)                 | 117%           | 138,601          | 19%                    |

**Utah State Bar**  
**Income Statement - Consolidated By Account**  
**August 31, 2025**

|                                                    | Actual<br>LYTD      | Actual<br>YTD    | Budget<br>YTD       | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|----------------------------------------------------|---------------------|------------------|---------------------|-------------------------|----------------|---------------------|------------------------|
| 7100 · Telephone                                   | 5,961               | 5,591            | 4,207               | (1,384)                 | 133%           | 28,616              | 20%                    |
| 7105 · Advertising                                 | 65                  | -                | 68                  | 68                      | 0%             | 753                 | 0%                     |
| 7110 · Publications/Subscriptions                  | 1,647               | 1,695            | 1,809               | 114                     | 94%            | 10,853              | 16%                    |
| 7115 · Public Relations                            | -                   | -                | -                   | -                       | -              | -                   | 0%                     |
| 7120 · Membership/Dues                             | 7,992               | 7,811            | 8,480               | 669                     | 92%            | 13,812              | 57%                    |
| 7135 · Bank Service Charges                        | 373                 | 384              | 379                 | (4)                     | 101%           | 2,275               | 17%                    |
| 7136 · ILM Service Charges                         | 2,709               | 3,424            | 2,707               | (717)                   | 126%           | 19,582              | 17%                    |
| 7140 · Credit Card Merchant Fees                   | 45,826              | 44,941           | 50,346              | 5,405                   | 89%            | 247,982             | 18%                    |
| 7140 · Credit Card Merchant Fees - Other           | -                   | -                | -                   | -                       | -              | -                   | 0%                     |
| 7141 · Credit Card surcharge                       | (861)               | (903)            | (790)               | 113                     | 114%           | (3,805)             | 24%                    |
| 7150 · E&O/Off & Dir Insurance                     | 12,275              | 12,093           | 12,319              | 227                     | 98%            | 73,915              | 16%                    |
| 7160 · Audit Expense                               | 32,724              | 26,950           | 34,033              | 7,083                   | 79%            | 45,022              | 60%                    |
| 7170 · Lobbying Rebates                            | -                   | -                | -                   | -                       | -              | 50                  | 0%                     |
| 7175 · O/S Consultants                             | 7,143               | 12,533           | 2,837               | (9,696)                 | 442%           | 73,935              | 17%                    |
| 7176 · Bar Litigation                              | -                   | 5,917            | -                   | (5,917)                 | -              | 12,216              | 48%                    |
| 7177 · UPL                                         | -                   | -                | -                   | -                       | -              | 5,785               | 0%                     |
| 7179 · Payroll Adm Fees                            | 1,550               | 1,584            | 2,093               | 509                     | 76%            | 12,559              | 13%                    |
| 7180 · Administrative Fee Expense                  | 201                 | 208              | 216                 | 8                       | 96%            | 1,296               | 16%                    |
| 7190 · Lease Interest Expense                      | 625                 | 471              | 437                 | (34)                    | 108%           | 1,595               | 30%                    |
| 7191 · Lease Sales Tax Expense                     | -                   | -                | -                   | -                       | -              | -                   | 0%                     |
| 7195 · Other Gen & Adm Expense                     | 2,141               | 142              | 1,856               | 1,713                   | 8%             | 16,513              | 1%                     |
| <b>Total General &amp; Administrative Expenses</b> | <b>232,735</b>      | <b>224,797</b>   | <b>235,398</b>      | <b>10,601</b>           | <b>95%</b>     | <b>1,165,793</b>    | <b>19%</b>             |
| <b>In Kind Expenses</b>                            | <b>2,300</b>        | <b>2,120</b>     | <b>1,667</b>        | <b>(453)</b>            | <b>127%</b>    | <b>24,754</b>       | <b>9%</b>              |
| 7103 · InKind Contrib-UDR & all other              | 2,300               | 2,120            | 1,667               | (453)                   | 127%           | 24,754              | 9%                     |
| <b>Total In Kind Expenses</b>                      | <b>2,300</b>        | <b>2,120</b>     | <b>1,667</b>        | <b>(453)</b>            | <b>127%</b>    | <b>24,754</b>       | <b>9%</b>              |
| <b>Building Overhead Expenses</b>                  | <b>6,010</b>        | <b>3,956</b>     | <b>6,042</b>        | <b>2,086</b>            | <b>65%</b>     | <b>35,615</b>       | <b>11%</b>             |
| 6015 · Janitorial Expense                          | 2,212               | 990              | 2,759               | 1,769                   | 36%            | 25,844              | 4%                     |
| 6020 · Heat                                        | 13,358              | 13,443           | 13,438              | (5)                     | 100%           | 58,698              | 23%                    |
| 6025 · Electricity                                 | 3,818               | 4,805            | 3,933               | (871)                   | 122%           | 15,775              | 30%                    |
| 6030 · Water/Sewer                                 | 1,550               | 1,695            | 1,854               | 159                     | 91%            | 19,105              | 9%                     |
| 6035 · Outside Maintenance                         | 505                 | 1,183            | 555                 | (627)                   | 213%           | 12,849              | 9%                     |
| 6040 · Building Repairs                            | 6,288               | 6,559            | 6,678               | 119                     | 98%            | 39,327              | 17%                    |
| 6045 · Bldg Mtnce Contracts                        | -                   | -                | -                   | -                       | -              | -                   | 0%                     |
| 6050 · Bldg Mtnce Supplies                         | 4,000               | 3,900            | 4,231               | 331                     | 92%            | 25,018              | 16%                    |
| 6055 · Real Property Taxes                         | 250                 | 350              | 241                 | (109)                   | 145%           | 2,014               | 17%                    |
| 6060 · Personal Property Taxes                     | 2,344               | 3,931            | 2,484               | (1,447)                 | 158%           | 23,638              | 17%                    |
| 6065 · Bldg Insurance/Fees                         | 17,971              | 19,240           | 18,521              | (718)                   | 104%           | 113,495             | 17%                    |
| 6070 · Building & Improvements Depr                | 3,527               | 3,654            | 3,698               | 44                      | 99%            | 22,655              | 16%                    |
| 6075 · Furniture & Fixtures Depr                   | 7,003               | 7,403            | 7,016               | (388)                   | 106%           | 43,710              | 17%                    |
| 7065 · Computers, Equip & Sftwre Depr              | -                   | -                | -                   | -                       | -              | -                   | 16%                    |
| <b>Total Building Overhead Expenses</b>            | <b>68,837</b>       | <b>71,108</b>    | <b>71,450</b>       | <b>343</b>              | <b>100%</b>    | <b>437,742</b>      | <b>16%</b>             |
| <b>Total Expenses</b>                              | <b>1,475,534</b>    | <b>1,437,669</b> | <b>1,418,686</b>    | <b>(18,983)</b>         | <b>101%</b>    | <b>8,208,624</b>    | <b>18%</b>             |
| <b>Other</b>                                       | <b>(231)</b>        | <b>-</b>         | <b>-</b>            | <b>-</b>                | <b>-</b>       | <b>-</b>            | <b>0%</b>              |
| 4300 · Gain (Loss) - Disposal Of Assets            | -                   | -                | -                   | -                       | -              | 10,000              | 0%                     |
| 4120 · Grant Income                                | (231)               | -                | -                   | -                       | 0%             | 10,000              | 0%                     |
| <b>Net Profit (Loss)</b>                           | <b>\$ 3,466,856</b> | <b>3,576,170</b> | <b>\$ 3,590,758</b> | <b>\$ (14,588)</b>      | <b>100%</b>    | <b>\$ (318,175)</b> | <b>-1124%</b>          |

**Utah State Bar  
Admissions  
August 31, 2025**

|                                        | Actual<br>LYTD      | Actual<br>YTD      | Budget<br>YTD      | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|----------------------------------------|---------------------|--------------------|--------------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                         |                     |                    |                    |                         |                |                  |                        |
| 4001 · Admissions - Student Exam Fees  | 1,375               | 2,200              | 1,415              | 785                     | 155%           | 197,793          | 1%                     |
| 4002 · Admissions - Attorney Exam Fees | 1,275               | 1,700              | 1,396              | 304                     | 122%           | 48,393           | 4%                     |
| 4003 · Admissions - Retake Fees        | 550                 | 850                | 445                | 405                     | 191%           | 30,066           | 3%                     |
| 4004 · Admissions - Laptop Fees        | 1,400               | 1,600              | 1,349              | 251                     | 119%           | 91,542           | 2%                     |
| 4005 · Admissions - Application Forms  | 5,000               | -                  | 2,354              | (2,354)                 | 0%             | 6,120            | 0%                     |
| 4006 · Transfer App Fees               | 10,500              | 17,000             | 10,328             | 6,672                   | 165%           | 92,905           | 18%                    |
| 4008 · Attorney - Motion               | 27,200              | 24,650             | 26,723             | (2,073)                 | 92%            | 148,647          | 17%                    |
| 4009 · House Counsel                   | 4,250               | 3,400              | 5,202              | (1,802)                 | 65%            | 17,688           | 19%                    |
| 4095 · Miscellaneous Income            | 785                 | 1,155              | 870                | 285                     | 133%           | 5,411            | 21%                    |
| 4096 · Late Fees                       | -                   | -                  | -                  | -                       | -              | -                | -                      |
| 4200 · Seminar Profit/Loss             | -                   | -                  | -                  | -                       | -              | -                | -                      |
| Total Revenue                          | 52,335              | 52,555             | 50,083             | 2,473                   | 106%           | 638,565          | 8%                     |
| <b>Expenses</b>                        |                     |                    |                    |                         |                |                  |                        |
| Program Services                       | 103,022             | 29,111             | 71,375             | 42,264                  | 41%            | 138,290          | 21%                    |
| Salaries & Benefits                    | 61,233              | 63,992             | 48,769             | (15,223)                | 131%           | 296,568          | 22%                    |
| General & Administrative               | 14,212              | 15,035             | 15,182             | 147                     | 99%            | 92,907           | 16%                    |
| Building Overhead                      | 3,759               | 3,535              | 3,906              | 370                     | 91%            | 23,903           | 15%                    |
| Total Expenses                         | 182,226             | 111,673            | 139,231            | 27,558                  | 80%            | 551,668          | 20%                    |
| <b>Net Profit (Loss)</b>               | <b>\$ (129,891)</b> | <b>\$ (59,118)</b> | <b>\$ (89,149)</b> | <b>\$ 30,031</b>        | <b>66%</b>     | <b>\$ 86,897</b> | <b>-68%</b>            |

**Utah State Bar  
NLTP  
August 31, 2025**

|                            | Actual<br>LYTD    | Actual<br>YTD  | Budget<br>YTD     | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget | YTD % of<br>Tot Budget |
|----------------------------|-------------------|----------------|-------------------|-------------------------|----------------|-----------------|------------------------|
| <b>Revenue</b>             |                   |                |                   |                         |                |                 |                        |
| 4020 · NLTP Fees           | 6,000             | 6,000          | 5,715             | 285                     | 105%           | 74,576          | 8%                     |
| 4081 · CLE - Registrations | -                 | -              | -                 | -                       |                | -               |                        |
| 4096 · Late Fees           | -                 | -              | -                 | -                       |                | -               |                        |
| 4200 · Seminar Profit/Loss | -                 | -              | -                 | -                       |                | -               |                        |
| Total Revenue              | 6,000             | 6,000          | 5,715             | 285                     | 105%           | 74,576          | 8%                     |
| <b>Expenses</b>            |                   |                |                   |                         |                |                 |                        |
| Program Services           | -                 | -              | -                 | -                       |                | 782             | 0%                     |
| Salaries & Benefits        | 5,506             | 8,963          | 8,682             | (281)                   | 103%           | 50,046          | 18%                    |
| General & Administrative   | 3,354             | 3,062          | 3,003             | (59)                    | 102%           | 19,129          | 16%                    |
| Building Overhead          | 265               | 273            | 275               | 2                       | 99%            | 1,684           | 16%                    |
| Total Expenses             | 9,125             | 12,298         | 11,961            | (338)                   | 103%           | 71,640          | 17%                    |
| <b>Net Profit (Loss)</b>   | <b>\$ (3,125)</b> | <b>(6,298)</b> | <b>\$ (6,246)</b> | <b>\$ (52)</b>          | <b>101%</b>    | <b>\$ 2,936</b> | <b>-215%</b>           |

**Utah State Bar  
LPP  
August 31, 2025**

|                                 | Actual<br>LYTD    | Actual<br>YTD  | Budget<br>YTD      | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget    | YTD % of<br>Tot Budget |
|---------------------------------|-------------------|----------------|--------------------|-------------------------|----------------|--------------------|------------------------|
| <b>Revenue</b>                  |                   |                |                    |                         |                |                    |                        |
| 4004 · Admissions - Laptop Fees | 230               | 173            | 230                | (58)                    | 75%            | 603                | 29%                    |
| 4011 · Admissions LPP           | 200               | -              | 145                | (145)                   | 0%             | 1,448              | 0%                     |
| 4024 · Lic Fees LPP             | 5,825             | 8,025          | 5,476              | 2,549                   | 147%           | 6,275              | 128%                   |
| 4096 · Late Fees                | -                 | -              | -                  | -                       |                | -                  |                        |
| Total Revenue                   | 6,255             | 8,198          | 5,851              | 2,347                   |                | 8,325              | 98%                    |
| <b>Expenses</b>                 |                   |                |                    |                         |                |                    |                        |
| Program Services                | 8,800             | 9,200          | 9,350              | 150                     | 98%            | 17,100             | 54%                    |
| Salaries & Benefits             | (21)              | 6,837          | 8,132              | 1,295                   | 84%            | 49,321             | 14%                    |
| General & Administrative        | 1,670             | 1,346          | 1,542              | 196                     | 87%            | 7,280              | 18%                    |
| Building Overhead               | 265               | 273            | 275                | 2                       | 99%            | 1,684              | 16%                    |
| Total Expenses                  | 10,714            | 17,656         | 19,299             | 1,643                   | 91%            | 75,385             | 23%                    |
| <b>Net Profit (Loss)</b>        | <b>\$ (4,459)</b> | <b>(9,459)</b> | <b>\$ (13,449)</b> | <b>\$ 3,990</b>         | <b>70%</b>     | <b>\$ (67,060)</b> | <b>14%</b>             |

**Utah State Bar  
OPC  
August 31, 2025**

**Revenue**

4095 · Miscellaneous Income  
4200 · Seminar Profit/Loss  
Total Revenue

**Expenses**

Program Services  
Salaries & Benefits  
General & Administrative  
Building Overhead  
Total Expenses

**Net Profit (Loss)**

| Actual<br>LYTD | Actual<br>YTD | Budget<br>YTD | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget | YTD % of<br>Tot Budget |
|----------------|---------------|---------------|-------------------------|----------------|-----------------|------------------------|
| 650            | 350           | 920           | (570)                   | 38%            | 3,892           | 9%                     |
| -              | -             | -             | -                       | -              | 41,379          | 0%                     |
| 650            | 350           | 920           | (570)                   | 38%            | 45,272          | 1%                     |
| 2,423          | 1,960         | 3,278         | 1,317                   | 60%            | 22,973          | 9%                     |
| 258,593        | 274,361       | 259,443       | (14,918)                | 106%           | 1,576,460       | 17%                    |
| 26,047         | 23,177        | 28,394        | 5,217                   | 82%            | 139,397         | 17%                    |
| 12,591         | 12,968        | 13,083        | 114                     | 99%            | 80,069          | 16%                    |
| 299,654        | 312,466       | 304,198       | (8,268)                 | 103%           | 1,818,899       | 17%                    |
| \$ (299,004)   | \$ (312,116)  | \$ (303,278)  | \$ (8,838)              | 103%           | \$ (1,773,627)  | 18%                    |

**Utah State Bar  
CLE  
August 31, 2025**

|                                       | Actual<br>LYTD   | Actual<br>YTD      | Budget<br>YTD    | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|---------------------------------------|------------------|--------------------|------------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                        |                  |                    |                  |                         |                |                  |                        |
| 4052 · Meeting - Sponsor Revenue      | -                | 10,000             | -                | 10,000                  |                | 54,819           | 18%                    |
| 4081 · CLE - Registrations            | 85,079           | 59,644             | 76,998           | (17,354)                | 77%            | 618,305          | 10%                    |
| 4082 · CLE - Video Library Sales      | 10,275           | 10,594             | 4,719            | 5,875                   | 225%           | 45,000           | 24%                    |
| 4095 · Miscellaneous Income           | -                | -                  | -                | -                       |                | -                |                        |
| 4104 · In Kind Rev-Facilities & Other | -                | -                  | -                | -                       |                | -                |                        |
| 4200 · Seminar Profit/Loss            | -                | -                  | -                | -                       |                | 4,909            | 0%                     |
| Total Revenue                         | 95,354           | 80,238             | 81,717           | (1,479)                 | 98%            | 668,214          | 12%                    |
| <b>Expenses</b>                       |                  |                    |                  |                         |                |                  |                        |
| Program Services                      | 24,270           | 52,438             | 12,913           | (39,525)                | 406%           | 438,046          | 12%                    |
| Salaries & Benefits                   | 29,824           | 29,470             | 24,794           | (4,676)                 | 119%           | 149,452          | 20%                    |
| General & Administrative              | 10,285           | 6,985              | 8,037            | 1,052                   | 87%            | 42,968           | 16%                    |
| Building Overhead                     | 2,152            | 2,178              | 2,253            | 75                      | 97%            | 13,687           | 16%                    |
| Total Expenses                        | 66,531           | 91,072             | 47,998           | (43,074)                | 190%           | 644,152          | 14%                    |
| <b>Net Profit (Loss)</b>              | <b>\$ 28,823</b> | <b>\$ (10,834)</b> | <b>\$ 33,719</b> | <b>\$ (44,553)</b>      | <b>-32%</b>    | <b>\$ 24,062</b> | <b>-45%</b>            |

**Utah State Bar  
Summer Convention  
August 31, 2025**

|                                     | Actual<br>LYTD   | Actual<br>YTD    | Budget<br>YTD    | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|-------------------------------------|------------------|------------------|------------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                      |                  |                  |                  |                         |                |                  |                        |
| 4051 · Meeting - Registration       | 39,790           | -                | 40,790           | (40,790)                | 0%             | 40,790           | 0%                     |
| 4052 · Meeting - Sponsor Revenue    | 2,250            | 1,000            | 2,295            | (1,295)                 | 44%            | 2,295            | 44%                    |
| 4053 · Meeting - Vendor Revenue     | -                | -                | -                | -                       |                | -                |                        |
| 4054 · Meeting - Material Sales     | -                | -                | -                | -                       |                | -                |                        |
| 4055 · Meeting - Sp Ev Registration | -                | 16,667           | -                | 16,667                  |                | -                |                        |
| 4081 · CLE - Registrations          | 10,000           | -                | 10,000           | (10,000)                | 0%             | 10,000           | 0%                     |
| 4095 · Miscellaneous Income         | -                | -                | -                | -                       |                | -                |                        |
| Total Revenue                       | 52,040           | 17,667           | 53,085           | (35,418)                | 33%            | 53,085           | 33%                    |
| <b>Expenses</b>                     |                  |                  |                  |                         |                |                  |                        |
| Program Services                    | 36,047           | 794              | 2,487            | 1,693                   | 32%            | 2,487            | 32%                    |
| Salaries & Benefits                 | 406              | 513              | 414              | (98)                    | 124%           | 414              | 124%                   |
| General & Administrative            | 2,256            | 2,025            | 2,618            | 593                     | 77%            | 2,618            | 77%                    |
| In Kind                             | 1,000            | -                | -                | -                       |                | -                |                        |
| Building Overhead                   | -                | -                | -                | -                       |                | -                |                        |
| Total Expenses                      | 39,709           | 3,331            | 5,519            | 2,188                   | 60%            | 5,519            | 60%                    |
| <b>Net Profit (Loss)</b>            | <b>\$ 12,331</b> | <b>\$ 14,336</b> | <b>\$ 47,566</b> | <b>\$ (33,230)</b>      | <b>30%</b>     | <b>\$ 47,566</b> | <b>30%</b>             |

**Utah State Bar  
Fall Forum  
August 31, 2025**

|                                     | Actual<br>LYTD  | Actual<br>YTD    | Budget<br>YTD   | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|-------------------------------------|-----------------|------------------|-----------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                      |                 |                  |                 |                         |                |                  |                        |
| 4051 · Meeting - Registration       | -               | -                | -               | -                       |                | 100,000          | 0%                     |
| 4052 · Meeting - Sponsor Revenue    | 5,850           | 3,000            | 3,250           | (250)                   | 92%            | 12,000           | -                      |
| 4053 · Meeting - Vendor Revenue     | 1,200           | 10,450           | 1,452           | 8,998                   | 720%           | 18,000           | 58%                    |
| 4055 · Meeting - Sp Ev Registration | -               | -                | -               | -                       |                | -                | -                      |
| 4095 · Miscellaneous Income         | -               | -                | -               | -                       |                | 10,000           | -                      |
| Total Revenue                       | 7,050           | 13,450           | 4,702           | 8,748                   | 286%           | 140,000          | 10%                    |
| <b>Expenses</b>                     |                 |                  |                 |                         |                |                  |                        |
| Program Services                    | -               | -                | -               | -                       |                | 113,588          | 0%                     |
| Salaries & Benefits                 | -               | -                | -               | -                       |                | 2,471            | 0%                     |
| General & Administrative            | 225             | 192              | 561             | 369                     | 34%            | 5,860            | 3%                     |
| In Kind                             | -               | -                | -               | -                       |                | 3,000            | -                      |
| Building Overhead                   | -               | -                | -               | -                       |                | -                | -                      |
| Total Expenses                      | 225             | 192              | 561             | 369                     | 34%            | 124,918          | 0%                     |
| <b>Net Profit (Loss)</b>            | <b>\$ 6,825</b> | <b>\$ 13,258</b> | <b>\$ 4,141</b> | <b>\$ 9,117</b>         | <b>320%</b>    | <b>\$ 15,082</b> | <b>88%</b>             |

**Utah State Bar  
Spring Convention  
August 31, 2025**

|                                     | Actual<br>LYTD  | Actual<br>YTD   | Budget<br>YTD   | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget  | YTD % of<br>Tot Budget |
|-------------------------------------|-----------------|-----------------|-----------------|-------------------------|----------------|------------------|------------------------|
| <b>Revenue</b>                      |                 |                 |                 |                         |                |                  |                        |
| 4051 · Meeting - Registration       | -               | -               | -               | -                       |                | 115,000          | 0%                     |
| 4052 · Meeting - Sponsor Revenue    | 2,550           | -               | 2,488           | (2,488)                 | 0%             | 16,000           | 0%                     |
| 4053 · Meeting - Vendor Revenue     | -               | 3,200           | -               | 3,200                   |                | 22,000           | 15%                    |
| 4054 · Meeting - Material Sales     | -               | -               | -               | -                       |                | -                | 0%                     |
| 4055 · Meeting - Sp Ev Registration | -               | -               | -               | -                       |                | 4,000            | 0%                     |
| 4095 · Miscellaneous Income         | -               | -               | -               | -                       |                | 10,000           | 0%                     |
| Total Revenue                       | 2,550           | 3,200           | 2,488           | 712                     | 129%           | 167,000          | 2%                     |
| <b>Expenses</b>                     |                 |                 |                 |                         |                |                  |                        |
| Program Services                    | -               | -               | -               | -                       |                | 113,684          | 0%                     |
| Salaries & Benefits                 | -               | -               | -               | -                       |                | 3,710            | 0%                     |
| General & Administrative            | -               | 70              | -               | (70)                    |                | 6,476            | 1%                     |
| In Kind                             | -               | -               | -               | -                       |                | -                | 0%                     |
| Building Overhead                   | -               | -               | -               | -                       |                | -                | 0%                     |
| Total Expenses                      | -               | 70              | -               | (70)                    |                | 123,870          | 0%                     |
| <b>Net Profit (Loss)</b>            | <b>\$ 2,550</b> | <b>\$ 3,130</b> | <b>\$ 2,488</b> | <b>\$ 642</b>           | <b>126%</b>    | <b>\$ 43,130</b> | <b>7%</b>              |

**Utah State Bar  
Member Services  
August 31, 2025**

|                                        | Actual<br>LYTD     | Actual<br>YTD      | Budget<br>YTD      | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|----------------------------------------|--------------------|--------------------|--------------------|-------------------------|----------------|---------------------|------------------------|
| <b>Revenue</b>                         |                    |                    |                    |                         |                |                     |                        |
| 4010 · Section/Local Bar Support fees  | -                  | -                  | -                  | -                       |                | 113,584             | 0%                     |
| 4052 · Meeting - Sponsor Revenue       | -                  | 1,250              | -                  | 1,250                   |                | -                   |                        |
| 4061 · Advertising Revenue             | 67,085             | 51,259             | 68,903             | (17,644)                | 74%            | 262,950             | 19%                    |
| 4071 · Mem Benefits - Lexis            | 316                | 309                | -                  | 309                     |                | -                   |                        |
| 4072 · Royalty Inc - Bar J, MBNA, LM,M | -                  | 1,218              | -                  | 1,218                   |                | 7,778               | 16%                    |
| 4095 · Miscellaneous Income            | -                  | -                  | -                  | -                       |                | -                   |                        |
| 4120 · Grant Income                    | -                  | -                  | -                  | -                       |                | -                   |                        |
| 4200 · Seminar Profit/Loss             | -                  | -                  | -                  | -                       |                | -                   |                        |
| Total Revenue                          | 67,401             | 54,035             | 68,903             | (14,868)                | 78%            | 384,312             | 14%                    |
| <b>Expenses</b>                        |                    |                    |                    |                         |                |                     |                        |
| Program Services                       | 82,751             | 75,889             | 80,262             | 4,373                   | 95%            | 541,694             | 14%                    |
| Salaries & Benefits                    | 36,378             | 39,268             | 41,871             | 2,603                   | 94%            | 261,471             | 15%                    |
| General & Administrative               | 35,351             | 32,013             | 37,088             | 5,075                   | 86%            | 201,088             | 16%                    |
| In Kind                                | -                  | -                  | -                  | -                       |                | 847                 | 0%                     |
| Building Overhead                      | 2,519              | 2,556              | 2,634              | 78                      | 97%            | 16,018              | 16%                    |
| Total Expenses                         | 156,999            | 149,725.97         | 161,855            | 12,129                  | 93%            | 1,021,118           | 15%                    |
| <b>Net Profit (Loss)</b>               | <b>\$ (89,598)</b> | <b>\$ (95,691)</b> | <b>\$ (92,952)</b> | <b>\$ (2,739)</b>       | <b>103%</b>    | <b>\$ (636,806)</b> | <b>15%</b>             |

**Utah State Bar  
Public Services  
August 31, 2025**

|                                  | Actual<br>LYTD      | Actual<br>YTD       | Budget<br>YTD       | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|----------------------------------|---------------------|---------------------|---------------------|-------------------------|----------------|---------------------|------------------------|
| <b>Revenue</b>                   |                     |                     |                     |                         |                |                     |                        |
| 4052 · Meeting - Sponsor Revenue | 3,500               | 3,500               | 3,088               | 412                     | 113%           | 7,500               | 47%                    |
| 4053 · Meeting - Vendor Revenue  | 500                 | -                   | -                   | -                       | -              | -                   | -                      |
| 4063 · Modest Means revenue      | 2,050               | (100)               | 1,904               | (2,004)                 | -5%            | 8,754               | -1%                    |
| 4095 · Miscellaneous Income      | 20                  | 10                  | 20                  | (10)                    | 50%            | 40                  | 25%                    |
| 4120 · Grant Income              | -                   | -                   | -                   | -                       | -              | 10,000              | 0%                     |
| 4200 · Seminar Profit/Loss       | -                   | -                   | 1,015               | (1,015)                 | 0%             | 1,015               | 0%                     |
| Total Revenue                    | 6,070               | 3,410               | 6,027               | (2,617)                 | 57%            | 19,809              | 17%                    |
| <b>Expenses</b>                  |                     |                     |                     |                         |                |                     |                        |
| Program Services                 | 92,860              | 80,048              | 83,793              | 3,745                   | 96%            | 132,547             | 60%                    |
| Salaries & Benefits              | 57,562              | 67,649              | 65,274              | (2,375)                 | 104%           | 399,846             | 17%                    |
| General & Administrative         | 8,153               | 9,289               | 8,413               | (877)                   | 110%           | 51,543              | 18%                    |
| Building Overhead                | 1,964               | 2,274               | 2,040               | (234)                   | 111%           | 12,486              | 18%                    |
| Total Expenses                   | 160,539             | 159,261             | 159,520             | 260                     | 100%           | 596,423             | 27%                    |
| <b>Net Profit (Loss)</b>         | <b>\$ (154,469)</b> | <b>\$ (155,851)</b> | <b>\$ (153,493)</b> | <b>\$ (2,357)</b>       | <b>102%</b>    | <b>\$ (576,614)</b> | <b>27%</b>             |

**Utah State Bar  
Bar Operations  
August 31, 2025**

|                                         | Actual<br>LYTD      | Actual<br>YTD       | Budget<br>YTD       | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget       | YTD % of<br>Tot Budget |
|-----------------------------------------|---------------------|---------------------|---------------------|-------------------------|----------------|-----------------------|------------------------|
| <b>Revenue</b>                          |                     |                     |                     |                         |                |                       |                        |
| 4010 · Section/Local Bar Support fees   | -                   | -                   | -                   | -                       | -              | 16,206                | 0%                     |
| 4021 · Lic Fees > 3 Years               | 3,889,450           | 3,978,850           | 3,977,674           | 1,176                   | 100%           | 4,085,659             | 97%                    |
| 4022 · Lic Fees < 3 Years               | 174,850             | 215,750             | 177,007             | 38,743                  | 122%           | 260,788               | 83%                    |
| 4023 · Lic Fees - House Counsel         | 60,860              | 59,470              | 63,354              | (3,884)                 | 94%            | 67,211                | 88%                    |
| 4024 · Lic Fees LPP                     | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| 4025 · Pro Hac Vice Fees                | 49,100              | 44,725              | 51,208              | (6,483)                 | 87%            | 224,829               | 20%                    |
| 4026 · Lic Fees - Inactive/FS           | 119,550             | 121,350             | 122,139             | (789)                   | 99%            | 123,528               | 98%                    |
| 4027 · Lic Fees - Inactive/NS           | 216,195             | 221,445             | 221,170             | 275                     | 100%           | 225,574               | 98%                    |
| 4029 · Prior Year Lic Fees              | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| 4030 · Certs of Good Standing           | 3,220               | 3,440               | 3,290               | 150                     | 105%           | 22,379                | 15%                    |
| 4051 · Meeting - Registration           | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| 4052 · Meeting - Sponsor Revenue        | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| 4060 · E-Filing Revenue                 | -                   | -                   | -                   | -                       | -              | 8,000                 | 0%                     |
| 4061 · Advertising Revenue              | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| 4095 · Miscellaneous Income             | 575                 | -                   | 375                 | (375)                   | 0%             | 500                   | 0%                     |
| 4096 · Late Fees                        | 33,500              | 28,700              | 32,608              | (3,908)                 | 88%            | 58,500                | 49%                    |
| 4200 · Seminar Profit/Loss              | -                   | -                   | -                   | -                       | -              | -                     | -                      |
| Investment Income                       | 76,622              | 77,296              | 58,333              | 18,962                  | 133%           | 350,000               | 22%                    |
| Total Revenue                           | 4,623,922           | 4,751,026           | 4,707,158           | 43,867                  | 101%           | 409,000               | 1131%                  |
| <b>Expenses</b>                         |                     |                     |                     |                         |                |                       |                        |
| Program Services                        | 41,569              | 38,160              | 44,914              | 6,754                   | 85%            | 172,852               | 22%                    |
| Salaries & Benefits                     | 262,672             | 288,736             | 270,302             | (18,434)                | 107%           | 1,642,101             | 18%                    |
| General & Administrative                | 126,355             | 126,361             | 126,434             | 73                      | 100%           | 554,501               | 23%                    |
| In Kind                                 | -                   | 820                 | 500                 | (319)                   | 164%           | 3,003                 | 27%                    |
| Building Overhead                       | 11,713              | 12,147              | 12,170              | 23                      | 100%           | 74,481                | 16%                    |
| Total Expenses                          | 442,308             | 466,225             | 454,321             | (11,903)                | 103%           | 2,446,937             | 19%                    |
| <b>Other Income/Expense</b>             |                     |                     |                     |                         |                |                       |                        |
| 4300 · Gain (Loss) - Disposal Of Assets | (231)               | -                   | -                   | -                       | -              | -                     | n/a                    |
| <b>Net Profit (Loss)</b>                | <b>\$ 4,181,382</b> | <b>\$ 4,284,801</b> | <b>\$ 4,252,837</b> | <b>\$ 31,964</b>        | <b>101%</b>    | <b>\$ (2,037,937)</b> | <b>-210%</b>           |

**Utah State Bar  
Facilities  
August 31, 2025**

|                                        | Actual<br>LYTD     | Actual<br>YTD   | Budget<br>YTD      | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|----------------------------------------|--------------------|-----------------|--------------------|-------------------------|----------------|---------------------|------------------------|
| <b>Revenue</b>                         |                    |                 |                    |                         |                |                     |                        |
| 4039 · Room Rental-All parties         | 7,125              | 7,400           | 7,080              | 320                     | 105%           | 58,650              | 13%                    |
| 4042 · Food & Beverage Rev-All Parties | 9,619              | 9,311           | 10,624             | (1,313)                 | 88%            | 82,523              | 11%                    |
| 4043 · Setup & A/V charges-All parties | -                  | -               | -                  | -                       | -              | 1,126               | 0%                     |
| 4090 · Tenant Rent                     | 5,000              | 7,000           | 5,000              | 2,000                   | 140%           | 42,000              | 17%                    |
| 4095 · Miscellaneous Income            | -                  | -               | -                  | -                       | -              | -                   | -                      |
| 4103 · In - Kind Revenue - UDR         | -                  | -               | -                  | -                       | -              | -                   | -                      |
| Total Revenue                          | 21,744             | 23,711          | 22,704             | 1,007                   | 104%           | 184,299             | 13%                    |
| <b>Expenses</b>                        |                    |                 |                    |                         |                |                     |                        |
| Program Services                       | 10,946             | 9,041           | 12,901             | 3,860                   | 70%            | 84,171              | 11%                    |
| Salaries & Benefits                    | 25,354             | 29,249          | 27,894             | (1,355)                 | 105%           | 170,840             | 17%                    |
| General & Administrative               | 3,068              | 3,153           | 2,965              | (189)                   | 106%           | 28,027              | 11%                    |
| In Kind                                | 1,300              | 1,300           | 1,166              | (134)                   | 111%           | 14,904              | 9%                     |
| Building Overhead                      | 32,262             | 33,177          | 33,413             | 236                     | 99%            | 205,154             | 16%                    |
| Total Expenses                         | 72,930             | 75,921          | 78,339             | 2,418                   | 97%            | 503,097             | 15%                    |
| <b>Net Profit (Loss)</b>               | <b>\$ (51,185)</b> | <b>(52,210)</b> | <b>\$ (55,635)</b> | <b>\$ 3,425</b>         | <b>94%</b>     | <b>\$ (318,798)</b> | <b>16%</b>             |

**Utah State Bar  
Innovation in Law  
August 31, 2025**

|                                       | Actual<br>LYTD     | Actual<br>YTD      | Budget<br>YTD      | Fav (Unfav)<br>variance | % of<br>Budget | Total<br>Budget     | YTD % of<br>Tot Budget |
|---------------------------------------|--------------------|--------------------|--------------------|-------------------------|----------------|---------------------|------------------------|
| <b>Revenue</b>                        |                    |                    |                    |                         |                |                     |                        |
| 4005 · Admissions - Application Forms | -                  | -                  | 93                 | (93)                    | 0%             | 1,500               | 0%                     |
| 4095 · Miscellaneous Income           | -                  | -                  | -                  | -                       | -              | -                   | -                      |
| Total Revenue                         | -                  | -                  | 93                 | (93)                    | 0%             | 1,500               | 0%                     |
| <b>Expenses</b>                       |                    |                    |                    |                         |                |                     |                        |
| Program Services                      | -                  | 481                | 50                 | (431)                   | 962%           | 2,050               | 23%                    |
| Salaries & Benefits                   | 31,466             | 33,484             | 33,272             | (212)                   | 101%           | 200,744             | 17%                    |
| General & Administrative              | 1,760              | 2,086              | 1,160              | (926)                   | 180%           | 10,627              | 20%                    |
| In Kind                               | -                  | -                  | -                  | -                       | -              | -                   | -                      |
| Building Overhead                     | 1,349              | 1,725              | 1,401              | (324)                   | 123%           | 8,576               | 20%                    |
| Total Expenses                        | 34,575             | 37,777             | 35,883             | (1,893)                 | 105%           | 221,998             | 17%                    |
| <b>Net Profit (Loss)</b>              | <b>\$ (34,575)</b> | <b>\$ (37,777)</b> | <b>\$ (35,791)</b> | <b>\$ (1,986)</b>       | <b>106%</b>    | <b>\$ (220,498)</b> | <b>17%</b>             |

# Utah State Bar Balance Sheet

|                                       | 8/31/2025            |
|---------------------------------------|----------------------|
| <b>ASSETS</b>                         |                      |
| Current Assets                        |                      |
| Cash in Bank                          | 693,686              |
| Invested Funds                        | 8,245,221            |
| Total Cash/Investments                | 8,938,907            |
| Accounts Receivable                   | 98,715               |
| Prepaid Expenses                      | 366,858              |
| A/R - Sections                        | 207,970              |
| Total Other Current Assets            | 673,544              |
| Total Current Assets                  | 9,612,451            |
| Fixed Assets                          |                      |
| Property & Equipment                  | 5,323,582            |
| Accumulated Depreciation              | (4,440,496)          |
| Land                                  | 633,142              |
| Total Fixed Assets                    | 1,516,228            |
| <b>TOTAL ASSETS</b>                   | <b>11,128,679</b>    |
| <b>LIABILITIES &amp; EQUITY</b>       |                      |
| Liabilities                           |                      |
| Current Liabilities                   |                      |
| AP Trade                              | 196,260              |
| Other Accounts Payable                | 219,438              |
| Accrued Payables                      | 544,255              |
| Cap Lease Oblig - ST                  | 3,084                |
| A/P - Sections                        | 356,340              |
| Deferred Revenue                      | 67,290               |
| Total Current Liabilities             | 1,386,668            |
| Long Term Liabilities                 |                      |
| Capital Lease Oblig                   | 2,933                |
| Total Long Term Liabilities           | 2,933                |
| Total Liabilities                     | 1,389,601            |
| Equity                                |                      |
| Unrestricted Net Assets (R/E)         | 6,162,908            |
| Fund Balance - Current Year           | 3,576,170            |
| Total Equity                          | 9,739,078            |
| <b>TOTAL LIABILITIES &amp; EQUITY</b> | <b>\$ 11,128,679</b> |

ZIONS

CORPORATE INVESTMENTS  
& LIQUIDITY MANAGEMENT

## Balance Sheet Classification

Base Currency: USD As of 08/31/2025

ILM-UT ST BAR (3176)

Dated: 09/09/2025

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 | 422,929.75    | AAA    | 4.140  | 08/31/2025         | 4.180      | 4.160 | 422,929.75      | 0.00                                | 1.0000       | 0.00                 | 422,929.75                  |
| CCYUSD     | Receivable           | 3,118.10      | AAA    | 0.000  | 08/31/2025         | 0.000      | 0.000 | 3,118.10        | 0.00                                | 1.0000       | 0.00                 | 3,118.10                    |
| 641062AE4  | NESTLE HOLDINGS INC  | 384,000.00    | AA-    | 3.500  | 09/24/2025         | 4.464      | 4.615 | 383,761.08      | -75.96                              | 99.9180      | 5,861.33             | 389,546.45                  |
| ---        | ---                  | 810,047.85    | AA+    | ---    | 08/11/2025         | 4.289      | 4.361 | 809,808.93      | -75.96                              | ---          | 5,861.33             | 815,594.30                  |

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 |
|------------|-----------------------------------------|---------------|--------|--------|--------------------|------------|-------|-----------------|-------------------------------------|--------------|----------------------|-----------------------------|
| 91324PDW9  | UNITEDHEALTH GROUP INC                  | 220,000.00    | A+     | 1.250  | 01/15/2026         | 4.548      | 4.858 | 217,377.92      | -328.34                             | 98.6589      | 351.39               | 217,400.97                  |
| 64952WDW0  | NEW YORK LIFE GLOBAL FUNDING            | 405,000.00    | AA+    | 0.850  | 01/15/2026         | 4.451      | 4.347 | 399,727.89      | 1.04                                | 98.6985      | 439.88               | 400,168.80                  |
| 74368CBQ6  | PROTECTIVE LIFE GLOBAL FUNDING          | 398,000.00    | AA-    | 5.366  | 01/08/2026         | 4.540      | 4.341 | 399,108.12      | 262.59                              | 100.3444     | 3,262.83             | 402,633.54                  |
| 949764HB3  | Wells Fargo Bank, National Association  | 250,000.00    | AA     | 5.400  | 10/31/2025         | 5.453      | 5.449 | 249,979.48      | 0.00                                | 99.9918      | 38.99                | 250,016.47                  |
| 254676BR9  | Discover Bank                           | 100,000.00    | NR     | 5.400  | 11/07/2025         | 5.453      | 5.359 | 99,990.82       | 0.00                                | 99.9908      | 1,716.16             | 101,706.99                  |
| 58769JAP2  | MERCEDES-BENZ FINANCE NORTH AMERICA LLC | 389,000.00    | A      | 4.900  | 01/09/2026         | 4.446      | 4.353 | 389,609.95      | 106.20                              | 100.1841     | 2,753.26             | 392,469.40                  |
| 3133ERQW4  | FEDERAL FARM CREDIT BANKS FUNDING CORP  | 800,000.00    | AA+    | 4.480  | 08/28/2026         | 4.494      | 4.416 | 800,000.00      | 613.60                              | 100.0767     | 599.33               | 801,212.93                  |
| 0605SJLL1  | BANK OF AMERICA CORP                    | 175,000.00    | A+     | 4.510  | 06/05/2026         | 4.535      | 5.108 | 175,000.00      | -781.90                             | 99.5532      | 570.01               | 174,788.11                  |
| 912797RH2  | UNITED STATES TREASURY                  | 102,000.00    | A-1+   | 0.000  | 01/08/2026         | 4.272      | 3.903 | 100,492.05      | 88.11                               | 98.6080      | 0.00                 | 100,580.16                  |
| ---        | ---                                     | 2,839,000.00  | AA     | ---    | 03/18/2026         | 4.605      | 4.570 | 2,831,286.23    | -38.71                              | ---          | 9,729.84             | 2,840,977.37                |

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      | 5,351.583 | 0.00            | 240.00                              | 0.0800       | 0.00                 | 240.00                      |
| 59217GBY4  | METROPOLITAN LIFE GLOBAL FUNDING I | 400,000.00    | AA-    | 3.450  | 12/18/2026         | 4.148      | 4.139     | 396,500.84      | 21.76                               | 99.1306      | 2,798.33             | 399,320.73                  |
| 46647PBT2  | JPMORGAN CHASE & CO                | 404,000.00    | A+     | 1.045  | 11/19/2026         | 4.918      | 4.707     | 400,986.22      | -251.75                             | 99.1917      | 1,196.18             | 401,930.64                  |
| 55608JAR9  | MACQUARIE GROUP LTD                | 400,000.00    | A+     | 1.340  | 01/12/2027         | 5.189      | 4.413     | 395,552.39      | -31.59                              | 98.8802      | 729.56               | 396,250.36                  |
| 06368EDC3  | BANK OF MONTREAL                   | 405,000.00    | A      | 0.949  | 01/22/2027         | 4.868      | 4.544     | 399,393.28      | -81.50                              | 98.5955      | 416.37               | 399,728.15                  |
| 02665WDZ1  | AMERICAN HONDA FINANCE CORP        | 400,000.00    | A-     | 1.300  | 09/09/2026         | 4.208      | 4.287     | 388,492.69      | -383.89                             | 97.0272      | 2,484.44             | 390,593.24                  |
| 05565ECA1  | BMW US CAPITAL LLC                 | 403,000.00    | A      | 3.450  | 04/01/2027         | 4.475      | 4.179     | 396,754.53      | 1,755.32                            | 98.8883      | 5,793.13             | 404,312.97                  |
| 04685A3R0  | ATHENE GLOBAL FUNDING              | 380,000.00    | A+     | 5.339  | 01/15/2027         | 4.554      | 4.343     | 383,914.53      | 1,072.59                            | 101.3124     | 2,592.38             | 387,579.50                  |
| 57629YBS5  | MASSMUTUAL GLOBAL FUNDING II       | 250,000.00    | AA+    | 5.090  | 04/09/2027         | 4.859      | 4.818     | 250,930.73      | 167.02                              | 100.4391     | 1,908.84             | 253,006.59                  |
| 61690UBF0  | MORGAN STANLEY BANK NA             | 250,000.00    | AA-    | 5.038  | 10/15/2026         | 4.888      | 4.799     | 250,425.43      | 250.82                              | 100.2705     | 1,679.10             | 252,355.35                  |
| 44891ADU8  | HYUNDAI CAPITAL AMERICA            | 397,000.00    | A-     | 4.875  | 06/23/2027         | 4.593      | 4.426     | 398,915.85      | 1,136.68                            | 100.7689     | 3,655.71             | 403,708.24                  |
| 3130B6V60  | FEDERAL HOME LOAN BANKS            | 570,000.00    | AA+    | 4.570  | 07/08/2026         | 4.570      | 4.377     | 570,000.00      | 889.20                              | 100.1560     | 3,834.99             | 574,724.19                  |
| 3130B7K29  | FEDERAL HOME LOAN BANKS            | 325,000.00    | AA+    | 4.125  | 08/20/2027         | 4.125      | 4.196     | 325,000.00      | -435.82                             | 99.8659      | 335.16               | 324,899.33                  |
| ---        | ---                                | 4,884,000.00  | A+     | ---    | 01/09/2027         | 4.607      | 4.694     | 4,556,868.29    | 4,358.83                            | ---          | 27,424.19            | 4,588,649.31                |

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 |
|------------|-------------|---------------|--------|--------|--------------------|------------|-------|-----------------|-------------------------------------|--------------|----------------------|-----------------------------|
| ---        | ---         | 8,533,047.85  | AA-    | ---    | 08/11/2028         | 4.575      | 4.618 | 8,197,961.48    | 4,244.16                            | ---          | 43,015.37            | 8,245,220.96                |

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

**UTAH STATE BAR**  
**Membership Statistics**  
**August 31, 2025**

| <u>STATUS</u>                     | <u>08/31/24</u> | <u>08/31/25</u> | <u>Change</u> |
|-----------------------------------|-----------------|-----------------|---------------|
| Active                            | 9,312           | 9,472           | 160           |
| Active under 3 years              | 790             | 960             | 170           |
| Active Emeritus                   | 399             | 443             | 44            |
| In House Counsel                  | 145             | 135             | (10)          |
| Foreign Legal Counsel             | 3               | 3               | -             |
| LPP                               | 32              | 40              | 8             |
| Military Spouse                   | -               | -               | -             |
| <b>Subtotal - Active</b>          | <b>10,681</b>   | <b>11,053</b>   | <b>372</b>    |
| Inactive - Full Service           | 850             | 841             | (9)           |
| Inactive - No Service             | 2,153           | 2,160           | 7             |
| Inactive Emeritus                 | 600             | 616             | 16            |
| Inactive House Counsel            | 18              | 27              | 9             |
| Inactive LPP                      | 3               | 3               | -             |
| <b>Subtotal - Inactive</b>        | <b>3,624</b>    | <b>3,647</b>    | <b>23</b>     |
| <b>Total Active and Inactive</b>  | <b>14,305</b>   | <b>14,700</b>   | <b>395</b>    |
| <u>Supplemental Information</u>   |                 |                 |               |
| Paralegals                        | 194             | 190             | (4)           |
| <u>Active Attorneys by Region</u> |                 |                 |               |
| 1st Division (Logan - Brigham)    | 215             | 218             | 3             |
| 2nd Division (Davis - Weber)      | 1,024           | 1,046           | 22            |
| 3rd Division (Salt Lake)          | 5,680           | 5,821           | 141           |
| 4th Division (Utah)               | 1,468           | 1,531           | 63            |
| 5th Division (Southern Utah)      | 596             | 624             | 28            |
| Out of State                      | 1,698           | 1,813           | 115           |
| <b>Total Active Attorneys</b>     | <b>10,681</b>   | <b>11,053</b>   | <b>372</b>    |

Utah State Bar Commission Meeting

**T A B 9**

# UTAH STATE BAR COMMISSION MEETING

## MINUTES

Homestead Resort, Midway, Utah

Friday, August 22, 2025

**In Attendance:** President Kim Cordova, Brett Chambers, Mark Morris, Ezzy Khaosanga, Shawn Newell, Olivia Shaughnessy, Jess Couser, Chrystal Mancuso-Smith, Miriam Allred, and Tyler Young.

**Ex-Officio Members:** Nate Alder, Jennifer Carver, Erik Christiansen, Nick Stiles, Holly Nelson, Alex Vandiver, Wayne Latu, and Eli McCann.

**Not in Attendance:** Tom Bayles, Christian Clinger, and Rick Hoffman and Ex-Officio members Katie Woods, Cara Tangaro, Dean Kronk Warner, Dean Moore, and Tiffany Shimada.

**Also in Attendance:** Executive Director Elizabeth A. Wright, Assistant Executive Director Aubrey Schade, General Counsel Maribeth LeHoux, Communications Director Jennifer Weaver.

### 1. President's Welcome and Reports

#### 1.1 Retreat Schedule and Events

Ms. Wright discussed the schedule for the evening, including dinner at 6:30. Tomorrow breakfast will be before the meeting, which begins at 8:30. The retreat meeting will be about crisis management/communications and communication strategies.

#### 1.2 Report on "Commission Speaks" in Vernal

As part of an effort to connect with lawyers and judges outside of the Wasatch front, Mr. Young organized a CLE in Vernal, which took place in July. Over 20 people attended, including two judges, one of whom presented. In addition to the CLE, they discussed JPEC. Mr. Young intends to hold 10-12 more meetings in rural areas and smaller cities throughout the state.

#### 1.3 Report on National Conference of Bar Presidents Meeting

Ms. Cordova provided a report on the national conference, which included a focus on AI. Ms. Wright talked about the National Conference of Bar Executives meeting she attended.

#### 1.4 Report on New Mexico State Bar Annual Conference

Ms. Tangaro discussed the conference which she attended. Bryan Johnston (*Just Mercy*) was the guest speaker. Discussions included ideas for generating income.

#### 1.5 Report on Attorney Oath Video

Ms. Wright discussed the video, which included different attorneys reciting the attorney oath. The video focuses on the importance of the oath and what it means.

## **1.6 Dates to Calendar**

Ms. Wright highlighted the following dates and upcoming events:

- Access to Justice Summit – October 3, 2025. 8-5 at the Utah Law and Justice Center
- Admissions Ceremony – October 7, 2025 at the Grand Theatre and Salt Lake Community College South City Campus
- Fall Forum – November 13-14, 2025 at Little America. Ms. Cordova emphasized the importance of having more commissioners there. Ms. Khaosanga suggested a panel with commissioners
- November 19 – annual lawyer/legislator breakfast. 7:30 am at the Capitol
- September – Constitution Day. There is info and materials on the website created for lawyers and the public. This is the Bar's first initiative of civic education

## **2. Information Items**

### **2.1 Court Response to Bar Audit**

Ms. Cordova discussed the audit conducted by the Court Auditor with the assistance of the State Auditor. Before the Court audit was reviewed and accepted by the Utah Supreme Court, former State Auditor John Dougall took it upon himself to write a letter to the legislature giving his opinion about Bar license fees and programs he sees as useful or inappropriate. The legislature is very interested in Mr. Dougall's letter because it is critical of the Supreme Court. Accordingly, the legislative Rules and Review and General Oversight Committee scheduled a hearing to discuss Mr. Dougall's opinions about the regulation of the practice of law in Utah. Elizabeth Wright and the Court's lobbyist Michael Drechsel appeared before the Committee. The Commission discussed the hearing.

### **2.2 ABA House of Delegates Meeting and ABA Annual Meeting**

Mr. Christiansen provided an update on the Annual ABA Meeting. Ms. Shimada, Mr. Alder, and Ms. Khaosanga attended. He discussed the importance of involvement, and some of the important resolutions that passed.

## **3. Action Items**

### **3.1 Appoint 2<sup>nd</sup> Division Commissioner to Replace Matt Hansen**

Ms. Cordova discussed the opening created by Mr. Hansen's appointment to the bench. It is a full 3-year term since he just ran. The Commission discussed both candidates, who were both extremely qualified. The Commission requested statements of interest from the candidates and would vote by email once they have the additional requested materials.

### **3.2 Appoint YLD ABA Delegate**

After a discussion about the candidates, Ms. Cordova made a motion to appoint Nicole Johnson as the YLD ABA delegate. Ms. Khaosanga seconded, and the motion was approved, with one Commissioner voting in opposition.

### **3.3 Appoint Committee Chairs**

Update: For the Awards Committee Adam Bondy and Martin Stulz (both current committee members) are nominated as chairs.

Update: For the Innovation in Law Committee, Nick Haffen and Anastacia Boyko are nominated as chairs.

Ms. Allred made a motion to appoint the Committee Chairs as presented, including the updates. Ms. Mancuso-Smith seconded, and the motion was unanimously approved.

### **3.4 Appoint Commission Liaisons**

The Commission discussed the role of committee liaisons. Ms. Couser and Ms. Allred switched their positions (UPL to Ms. Couser and Lawyers Helping Lawyers to Ms. Allred).

Ms. Cordova made a motion to approve the Commission Liaison appointments. Ms. Allred seconded, and the motion was unanimously approved.

### **3.5 Purchase Table for Legal Aid Society**

The Legal Aid Society Benefit will be on October 3, 2025. The cost to purchase a table is \$1750. Ms. Cordova made a motion to purchase a table for the Legal Aid Society benefit. Mr. Young seconded, and the motion was unanimously approved.

### **Adjournment.**

The Commission adjourned at 6:05 pm.

### **Consent Agenda.**

The Commission approved by consent the following items:

- Minutes of the June 13, 2025 Commission Meeting
- 2025-2026 Committee Charges



BYLAWS OF THE APPELLATE PRACTICE SECTION  
OF THE UTAH STATE BAR

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**Article 1. Identification**

**1.1 Creation.** The Appellate Practice Section of the Utah State Bar ("the Section") was established pursuant to Article II, section 2 of the bylaws of the Utah State Bar ("the Bar") to accomplish the purposes set forth therein.

**1.2 Purpose.** The purposes of the Section shall be: to inform, educate, and train members of the Bar about written and oral appellate advocacy; to provide a forum for identifying, analyzing, and taking action on issues or current developments of particular concern to appellate practitioners; to create a professional organization through which appellate practitioners can provide input to the judicial system, the judicial advisory committees on rules of practice, the judicial nominating commissions, the legislature, the media, and the public about appellate practice and the appellate courts; and to undertake such other services as may be of benefit to members of the legal profession and the public.

**1.3 Limitations.** These bylaws have been adopted subject to the applicable Utah statutes and bylaws of the Bar.

**1.4 Principal Office.** The principal office of the Section shall be maintained in the offices of the Bar.

**1.5 Fiscal Year.** The fiscal year of the Section shall coincide with that of the Bar.

**Article 2. Membership**

**2.1 Enrollment.** Any Bar member in good standing may, upon request of the Secretary of the Bar, be enrolled as a member of the Section upon payment of annual Section dues in the amount, and for the purposes, approved by the Board of Commissioners of the Bar.

**2.2 The Membership.** Members enrolled as provided in section 2.1 of these bylaws shall constitute the Membership of the Section

**2.3 Dues.** The Section shall impose annual dues in the amount of \$2+5.00, which shall be collected by the Bar along with Bar membership dues or by the Section at Section meetings. Complimentary membership shall be offered to the current judges and justices of the Utah Court of Appeals and Utah Supreme Court.

### Article 3. Meetings of the Membership

**3.1 Annual Meeting.** The annual meeting of the Membership shall be held at a time determined by the Executive Committee of the Section and following notice to the Membership.

**3.2 Quorum.** The members of the Section present at any meeting shall constitute a quorum for the transaction of Section affairs.

**3.3 Controlling Vote.** Action of the Section shall be by majority vote of the Section members present.

**3.4 Agenda/Elections.** Section Officers and any other non-appointed Executive Committee members shall be elected at the annual meeting of the Section by plurality vote of the Section members present.

**3.5 Special Meetings.** Special Meetings of the Membership of the Section may be called by any Section Officer, to be held at such time and place as the Section Officers may determine.

### Article 4. The Executive Committee

**4.1 Powers.** The Executive Committee shall be vested with the powers and duties necessary for the administration of the affairs of the Section.

**4.2 Composition.** The Executive Committee shall be composed of the Officers of the Section, up to two Section members elected at the annual meeting of the Section, and any additional members a majority of the Section Officers may appoint. The Executive Committee shall have no more than 25 members, excluding the Section Officers.

**4.3 Controlling Vote.** Action of the Executive Committee shall be by majority vote of the Executive Committee. A member of the Executive Committee may vote in absentia by instructing the Section's Secretary/Treasurer in writing of the manner in which such vote is to be cast.

**4.4 Meetings.** The annual meeting of the Executive Committee shall be held in conjunction with the annual meeting of the Section. Monthly meetings of the Executive Committee shall be held at a time and place (including virtually) as designated by the Section Officers of the Section. Special meetings of the Membership may be called by any Section Officer, to be held at such time and place as the Section Officers may determine. A meeting is not essential to action by the Executive Committee, provided response to any proposed Section action is elicited from all members of the Executive Committee.

**4.5 Terms.** Executive Committee members shall serve a renewable term of two (2) years, expiring on the date of the annual meeting. To renew their term, the member shall provide a written request to the Chair and Chair-Elect prior to the annual meeting in the year their term expires. If a member does not request to renew their term by the annual meeting, their term expires and the Officers of

the Section shall make the position available and a new member elected from the general membership at the annual meeting.

**4.6. Minimum Participation.** All members of the Executive Committee shall attend no less than 50% of the monthly meetings of the Executive Committee, absent good cause. Any Executive Committee member who does not attend at least 50% of the monthly meetings ~~may~~ shall be released from their duties as an Executive Committee member, unless good cause is shown and determined at the sole discretion of the Section Officers.

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## Article 5. Officers

**5.1 Officers.** The Officers of the Section ("Section Officers") shall be the Chair, the Chair-Elect, and the Secretary/Treasurer.

**5.2 Chair.** The Chair shall preside at all meetings of the Section and of the Executive Committee. The Chair shall formulate and present at each annual meeting of the Bar a report of the work of the Section during the preceding year. The Chair shall perform such other duties as usually pertain to the office or as may be delegated by the Executive Committee.

**5.3 Chair-Elect.** Upon the death, resignation, or during the disability of the Chair, or upon the Chair's refusal to act, the Chair-Elect shall perform the duties of the Chair for the remainder of the Chair's term office, except in cases of disability, in which the Chair-Elect shall perform the duties of the Chair only during so much of the remaining term as the disability continues. The Chair-Elect, or any designated member of the Section's Executive Committee, will act as liaison to the Bar's Governmental Relations Committee.

**5.4 Secretary/Treasurer.** The Secretary/Treasurer shall be the custodian of all books, papers, documents, and other property of the Section. The Secretary/Treasurer shall keep a true record of all accounts and of the meetings of, and actions taken by, the Section and of the Executive Committee. In conjunction with the Chair, and as authorized by the Executive Committee, the Secretary/Treasurer shall attend generally to the business of the Section. Article 6. Elections

**6.1 Elective Offices.** At the Section's first annual meeting, the Membership shall elect a Chair, a Chair-Elect, and a Secretary/Treasurer, and up to two Section members to serve on the Executive Committee. At subsequent annual meetings, the Membership shall elect a Secretary/Treasurer and ~~up to two~~ Section members to serve on the Executive Committee sufficient to fill all vacancies on the Executive Committee.

**6.2 Vacancies During Terms of Office.** In the event of a vacancy in the office of Chair-Elect, the Secretary/Treasurer shall automatically succeed to the office of Chair-Elect. The Chair may then call a Special Meeting for an election to fill a vacancy in the office of the

Secretary/Treasurer. In the event that the Secretary/Treasurer is vacant at the time of the office of Chair-elect becomes vacant, the Chair may call a Special Meeting for an election to fill the vacancies in both offices.

**6.3 Chair.** The Chair-elect shall automatically succeed to the office of the Chair at the end of the Chair's term of office. In the event the office of Chair-Elect is vacant at the end of the Chair's term of office, the Secretary/Treasurer shall automatically succeed to the office of the Chair. In the event that both the offices of Chair-Elect and Secretary/Treasurer are vacant at the end of the Chair's term of office, a Chair shall be elected at the annual meeting in accordance with sections 6.5 and 6.6 of this Article.

**6.4 Chair-Elect.** The Secretary/Treasurer shall automatically succeed to the office of the Chair-Elect at the end of the Chair-Elect's term of office. In the event that the office of the Secretary/Treasurer is vacant at the end of the Chair-Elect's term of office or the Secretary/Treasurer has succeeded to the office of Chair, a Chair-Elect shall be elected at the annual meeting in accordance with section 6.5 and 6.6 of this Article.

**6.5 Nominations.** Nominations for any office or elected position, whether at the annual meeting of the Section or at other times to fill vacancies in these offices and positions, shall be made from the floor by a Section member.

**6.6 Voting.** All elections shall be by written ballot or virtual voting, unless otherwise ordered by resolution duly adopted by the Section at the meeting at which the election is being held. Each Section member, including each Officer and Executive Committee Member, is entitled to vote.

**6.7 Terms of Office.** Each Section Officer's and each other Executive Committee member's term of elect office shall begin (a) with the adjournment of the annual meeting or other meeting held to fill a vacancy in an office or position following his or her election or (b) the time her or she succeeds to office pursuant to sections 6.2, 6.3, or 6.4, and shall end at the adjournment of the next annual meeting at which a successor Section Officer or other Executive Committee member has been elected.

## **Article 7. Substantive Responsibilities**

**7.1 Committees.** The Chair may appoint committees to perform such duties and exercise such powers as the Executive Committee may direct.

## **Article 8. Amendments**

**8.1 Amendment of Bylaws.** These bylaws may be amended at any meeting of the Section by a majority vote of the Section members present and voting, provided that no amendment so adopted shall become effective until approved by the Board of Commissioners of the Bar.

Originally approved by Commission: January 27, 1994

2005 Amendments approved by Commission: July 13, 2005

2007 Amendments approved by Commission: December 7, 2007

2025 Amendments approved by Commission:



Board of Bar Commissioners  
 Attention: Kim Cordova  
 Utah State Bar  
 645 South 200 East, Suite 310  
 Salt Lake City, Utah 84111-3834

10/08/2025

Re: ***Fund for Client Protection  
 Meeting of September 26, 2025***

Dear President Tangaro:

The following is a report of the meeting of the Fund for Client Protection a/k/a Client Security Fund which was held September 26, 2025 at the Law and Justice Center. The members of the Committee who were present are Steve Farr, Linda Barclay Mount, David Leta, Brad Mumford, and Yuchen Cook. Also present were Christine Greenwood and Barbara Townsend, Office of Professional Conduct Disciplinary Counsel, and Staff Liaison Christine Critchley. The Committee considered various claims and provides the following summary and recommendations:

A.     **Claimant:**                     **Amber Stephens**  
           **Involved Attorney:**       **Richard L. King**  
           **Disciplinary Status:**       **Deceased 1/04/2025**

**FACTS:** Mr. King was hired by Ms. Stephens to represent her in a class C misdemeanor case. Ms. Stephens paid Mr. King the sum of \$8,000 for his services. Some initial filings and work occurred but Mr. King became ill and died. The Committee agreed that Mr. King earned some of the attorney fees, but that the claimant should be refunded the unearned portion of the retainer.

**RECOMMENDATION:** The Committee unanimously recommended that Ms. Stephens be awarded the sum of \$6,000.

B.     **Claimant:**                     **Royce Mailolo**  
           **Involved Attorney:**       **Richard L. King**  
           **Disciplinary Status:**       **Deceased 1/04/2025**

**FACTS:** Mr. Mailolo paid \$10,000 to Mr. King for representation on a child custody matter and modifications to previous decree. Mr. King provided some initial work on the case, but then became ill and died. The Committee agreed that Mr. King had done some work, but the claimant should be refunded most of the retainer that he paid.

**RECOMMENDATION:** The Committee unanimously recommended that Mr. Mailolo be awarded the sum of \$9,000.

C.     **Claimant:**                             **Teren Young**  
           **Involved Attorney:**         **Richard L. King**  
           **Disciplinary Status:**        **Deceased 1/04/2025**

**FACTS:** Ms. Young hired Mr. King to represent her in a child custody matter. She paid Mr. King the sum of \$10,000. The Committee found that Mr. King had not performed any meaningful services.

**RECOMMENDATION:** The Committee unanimously recommended that Ms. Young be awarded the sum of \$10,000.

D.     **Claimant:**                             **Justin Anthony**  
           **Involved Attorney:**         **Richard L. King**  
           **Disciplinary Status:**        **Deceased 1/04/2025**

**FACTS:** Mr Anthony's father paid Mr. King \$50,000 to represent their son in a criminal matter. Mr. King appeared at a couple of hearings and did some initial work on the case but then became ill and died. The committee agreed that Mr. Anthony's parents are owed the unearned portion of the retainer up to the maximum \$20,000 award the Fund can pay out.

**RECOMMENDATION:** The Committee unanimously recommends that Mr. Anthony's father, David K. Anthony, be awarded the sum of \$20,000.

E.     **Claimant:**                             **Bryan Engelbert**  
           **Involved Attorney:**         **Richard L. King**  
           **Disciplinary Status:**        **Deceased 1/04/2025**

**FACTS:** Mr. Engelbert paid a fee of \$11,600 to Mr. King to represent him in a defamation matter. Mr. King represented the client during a couple of minor status hearings and did perform some meaningful legal services before becoming ill. The Committee unanimously agreed that Mr Engelbert should be reimbursed the unearned portion of the retainer.

**RECOMMENDATION:** The Committee recommends that Mr. Engelbert be awarded \$5,000.

F.     **Claimant:**                             **Brady Gale**  
           **Involved Attorney:**         **Richard L. King**  
           **Disciplinary Status:**        **Deceased 1/04/2025**

**FACTS:** Mr. Gale retained the services of Richard L. King. He paid Mr. King \$16,000 to represent him in two matters, a criminal case and a child custody case. Mr. King did perform some services on the criminal case but became ill and died before he could work on the custody case. The Committee agreed that Mr. Gale should be reimbursed for the portion of the unearned retainer.

**RECOMMENDATION:** The Committee recommends that Mr. Gale be awarded \$10,000.

|           |                             |                           |
|-----------|-----------------------------|---------------------------|
| <b>G.</b> | <b>Claimant:</b>            | <b>Amy Hadden</b>         |
|           | <b>Involved Attorney:</b>   | <b>Richard L. King</b>    |
|           | <b>Disciplinary Status:</b> | <b>Deceased 1/04/2025</b> |

**FACTS:** Ms. Hadden retained the services of Richard L. King. Her father paid Mr. King \$19,000 to represent her in a custody matter. Mr. King did some work on the case and the Committee deemed the value of Mr. King's services prior to Mr. King's death was worth \$10,500. The claimant stated that if she received an award, it should be paid to her father. The Committee unanimously agreed that Ms. Hadden's father be awarded the sum of \$8,500.

**RECOMMENDATION:** The Committee recommends that Ms. Hadden's father Tom Hadden be awarded \$8,500.

|           |                             |                                    |
|-----------|-----------------------------|------------------------------------|
| <b>H.</b> | <b>Claimant:</b>            | <b>Michael Cowles</b>              |
|           | <b>Involved Attorney:</b>   | <b>Jacque Ramos</b>                |
|           | <b>Disciplinary Status:</b> | <b>2-year suspension 3/24/2024</b> |

**FACTS:** Mr. Cowles retained the services of Jacque Ramos. He paid Ms. Ramos \$1,500 to represent him in a matter involving a branded title to his car and pursuing a fraud case against the dealership that sold it to him. No meaningful services were performed on the case. The Committee agreed that Mr. Cowles should receive the amount of his retainer back.

**RECOMMENDATION:** The Committee recommends that Mr. Cowles be awarded \$1,500.

|           |                             |                                           |
|-----------|-----------------------------|-------------------------------------------|
| <b>I.</b> | <b>Claimant:</b>            | <b>Deloris Nnah</b>                       |
|           | <b>Involved Attorney:</b>   | <b>Nicholas Chamberlain</b>               |
|           | <b>Disciplinary Status:</b> | <b>Delicensed/Disbarment on 8/25/2025</b> |
|           |                             | <b>Formerly suspended</b>                 |

**FACTS:** Ms. Nnah retained the services of Nicholas Chamberlain. She paid \$5,000 to represent her in a custody matter. Some meaningful services were performed on the case, but then the attorney was dishonest about the rest of the case, implying that things were done that weren't. The Committee agreed that Ms. Nnah should receive the unearned portion of the retainer.

**RECOMMENDATION:** The Committee recommends that Ms. Nnah be awarded \$2,500.

|           |                             |                                           |
|-----------|-----------------------------|-------------------------------------------|
| <b>J.</b> | <b>Claimant:</b>            | <b>Megan Norris</b>                       |
|           | <b>Involved Attorney:</b>   | <b>Nicholas Chamberlain</b>               |
|           | <b>Disciplinary Status:</b> | <b>Delicensed/Disbarment on 8/25/2025</b> |
|           |                             | <b>Formerly suspended</b>                 |

**FACTS:** Ms. Norris failed to appear to the hearing, and the committee did try to contact her during the hearing, but she did not respond. The case will be tabled for a future hearing.

**RECOMMENDATION:** The Committee unanimously recommends that the case be rescheduled.

The Committee has made recommendations that \$72,500. be paid out as compensation for the above-referenced claims. With these payments, the Fund's balance would be approximately \$140,608. Please contact me with any comments or questions

Sincerely,

UTAH STATE BAR FUND FOR CLIENT PROTECTION  
/s/ *Steve Farr*  
Acting Committee Chair

SWF/

cc: Committee members in attendance