AGENDA

1. 9:00 a.m. President’s Report: Heather Thuet
   05 Mins. 1.1 Bar President-elect & Commission Election Results
   02 Mins. 1.2 Law Day Luncheon – May 6, 2022 (Tab 1, Page 3)

2. 9:15 a.m. Action Item
   20 Mins. 2.1 Donation to James B. Lee Justice Center: Anne Milne and Stewart Ralphs (Tab 2, Page 6)
   15 Mins. 2.2 Supreme Court Office of Legal Services Innovation Nick Stiles and John Lund
   30 Mins. 2.3 Sentencing Commission Appointments (Tab 3, Page 14)
   10 Mins. 2.4 Approve 2022-2023 Client Security Fund Assessment (Tab 4, Page 67)

3. 10:30 a.m. Information Items
   10 Mins. 3.1 Ideas for Incentivizing Pro Bono Work: Mark Baer
   05 Mins. 3.2 JIOP Funding: Erik Christiansen
   05 Mins. 3.3 Report on Western States Bar Conference: Katie Woods
   05 Mins. 3.4 Report on ABA Day: Erik Christiansen

4. 11:00 a.m. Executive Session

11:45 p.m. Adjourn

CONSENT AGENDA (Tab 5, Page 80)
(Approved without discussion by policy if no objection is raised.)

1. Minutes of March 10, 2022 Commission Meeting
4. Establish Mental Health Provider Review Committee.

ATTACHMENTS (Tab 6, Page 92)

1. March 2022 Financial Statement
<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Time</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 6</td>
<td>Law Day Luncheon</td>
<td>12:00 Noon</td>
<td>Grand America</td>
</tr>
<tr>
<td>May 17</td>
<td>Admission Ceremony</td>
<td>12:00 Noon</td>
<td>Virtual Event</td>
</tr>
<tr>
<td>May 20</td>
<td>Executive Committee</td>
<td>12:00 Noon</td>
<td>Zoom</td>
</tr>
<tr>
<td>May 26</td>
<td>Commission Meeting</td>
<td>9:00 a.m.</td>
<td>Law &amp; Justice Center</td>
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<tr>
<td></td>
<td>Lunch with Past Presidents and 50-year Pin Recipients</td>
<td>12:00 Noon</td>
<td>Brickyard Bar</td>
</tr>
<tr>
<td>May 26</td>
<td>Bar ReView: Attorneys Got Talent Auditions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>June 2-4</td>
<td>Jackrabbit Bar</td>
<td></td>
<td>South Dakota</td>
</tr>
<tr>
<td>June 29</td>
<td>Executive Committee</td>
<td>12:00 Noon</td>
<td>Zoom</td>
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<tr>
<td>June 30</td>
<td>Bar ReView: Attorneys Got Talent</td>
<td>5:30 p.m.</td>
<td>Brickyard Bar</td>
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<td></td>
<td>Final Show</td>
<td></td>
<td></td>
</tr>
<tr>
<td>July 6-9</td>
<td>Summer Convention at Loews Coronado</td>
<td></td>
<td>San Diego, CA</td>
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</tbody>
</table>
Law Day Luncheon 2022
Hosted by the Utah State Bar, Utah State Courts, Young Lawyers Division, and Utah Law Related Education

Friday, May 6, 2022
12 noon - 1:30 p.m.

Celebration held at the Grand America Hotel, Imperial Ballroom
555 South Main Street, Salt Lake City

AWARDS WILL BE GIVEN, HONORING:

Liberty Bell Award (Young Lawyers Division)
Pro Bono Publico Awards (Pro Bono Commission)
Scott M. Matheson Award (Utah Law Related Education)
Utah’s Junior & Senior High School Student Mock Trial Competition (Utah LRE)
Young Lawyer of the Year (Young Lawyers Division)

To RSVP for the luncheon and/or to sponsor a table please register here.
Individual seat $50, Tables can be sponsored for $500 each (10 seats per table)
Please email us at cle@utahbar.org with your organization name if you have reserved a table.

Registration for Non-Utah State Bar Members
Please fill out this form and submit it to cle@utahbar.org.

Michelle Oldroyd (801) 297-7033 CLE@utahbar.org
For other Law Day related activities, visit the Bar’s website: lawday.utahbar.org
Law Day Luncheon:

1. Chrystal Mancuso-Smith
2. Traci Gunderson
3. Andrew Morse
4. Heather Thuet
5. Greg Hoole
6. Nancy Sylvester
7.
8.
9.
10.
Next Generation of Justice

JAMES B. LEE JUSTICE CENTER
CAPITAL CAMPAIGN
We believe access to justice is a fundamental right

The mission of "and Justice for all" is to increase access to civil legal aid for the disadvantaged and for individuals with disabilities in Utah by creating and sustaining resources to ensure that Utahns across the state have access to the legal system, regardless of income level, disability, age or minority status.

OUR PRIORITIES

- Family safety and stability
- Safe, affordable housing
- Disability rights
- Consumer protection
- Education
- Protection of seniors & youth
- Health care and government benefits
- Immigration
- Income security
- Issues facing Native Americans, migrant workers and other marginalized groups

IMPACT OF OUR WORK

- **28,689 Utahns were assisted** last year, including 4,272 victims of domestic violence and 13,198 family law matters.

- Free family law programs provide **$1,146,816 in annual cost savings** to Utah taxpayers.

- Legal aid addresses child support and parenting plans, reducing demands on state welfare programs, the Office of Recovery Services and other social services.

- We address the most common civil legal problems among low-income households including issues of health, finances, housing, children and custody, education, income maintenance, and disability.

- Our work embodies the idea of an ounce of prevention is worth a pound of cure. For every $1 invested in legal programs, there is a social return of $9.08.

57%

57% of low-income households in Utah experienced at least one civil legal problem last year.

195,000

Low-income Utahns faced over 195,000 civil legal problems last year without legal help

- Justice Gap Study
  Utah Bar Foundation, 2020
James B. Lee Justice Center

In 1999, the Disability Law Center, Legal Aid Society of Salt Lake and Utah Legal Services created "and Justice for all" to jointly raise funds to better meet the critical legal needs of low-income Utahns. Two years later, "and Justice for all" acquired the Community Legal Center. This collaboration and co-location enabled us to significantly increase access to justice for disadvantaged Utahns.

The COVID epidemic disproportionately affected our clients — people with disabilities or chronic health conditions, domestic violence victims, senior citizens, and other vulnerable groups. Then our building suffered damage in the earthquake — and it is not insurable. The agencies had to adjust to remote services including on-line court hearings, but the Center’s aging technological infrastructure and open office design with limited confidentiality is no longer ideal for providing services.

After extensive assessment, research and input, AJFA decided to sell the current Community Legal Center and invest in a new facility with upgraded technology, functionality, and space solutions that will enable us to better serve our clients well into the 21st century.

With a very generous donation, the Florence J. Gillmor Foundation has chosen to name the new Community Legal Center after James B. Lee. A partner at Parsons Behle & Latimer, Mr. Lee was one of three original founders of Utah Legal Services, served on the Board of Legal Aid Society of Salt Lake, was instrumental in creating and sustaining "and Justice for all" and has been an example of service throughout his stellar legal career.

We have purchased the building and now we need your help to raise $3.6 million to build out and provide the furnishings, equipment and technology infrastructure for the new James B. Lee Justice Center.

To get involved please contact:
Staci Duke, Executive Director
staci@andjusticeforall.org
801.924.3169
Our vision for the future

Meeting the needs of present and future generations

After a year-long search we have purchased the land and building for the new Community Legal Center—a one-story brick building with a double-barrel roof and great industrial charm located at 960 South Main Street, easily accessible to public transportation and the Matheson courthouse. However, the building will require substantial retrofitting and buildouts.

Today we're launching the Next Generation of Justice Capital Campaign, a 12-month, $3.6 million effort to raise funds to remodel and furnish a new facility that will enable us to better address the changing civil legal needs of Utah's most at-risk citizens.

Completing the funding for the new Center now will enable us to focus on fundraising for client services and the acquisition and retention of experienced legal staff to provide those services.

THE NEXT GENERATION OF JUSTICE CAMPAIGN

<table>
<thead>
<tr>
<th>Description</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Architect, Engineer and Due Diligence</td>
<td>$51,500</td>
</tr>
<tr>
<td>Construction and Permits</td>
<td>$2,387,400</td>
</tr>
<tr>
<td>Furniture, Fixtures, and Accessories</td>
<td>$362,300</td>
</tr>
<tr>
<td>Technology Infrastructure</td>
<td>$300,000</td>
</tr>
<tr>
<td>Project Management</td>
<td>$270,000</td>
</tr>
<tr>
<td>Loan Interest</td>
<td>$91,000</td>
</tr>
<tr>
<td>Contingency Funds (5%)</td>
<td>$119,400</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$3,581,600</strong></td>
</tr>
</tbody>
</table>
Designed to be efficient, accessible, and sustainable

*Helping us better serve clients in a changing landscape*

The architects at AE Urbia made functionality the key focus when they designed the new James B. Lee Justice Center.

With the pandemic changing the way our clients access services, we wanted a space remote and hybrid employees could best serve them with drop-in offices and private areas for increasingly online client intake and hearings. These newly designed spaces, along with technology upgrades, will allow our staff to better serve clients from more geographic areas in less time.

AE Urbia also helped us meet one of our top goals—to have a facility that is fully disability accessible with interior, sidewalks, entrances, and other areas designed to make the building welcoming to clients of all abilities and needs.

- Provides cost savings and efficiencies that allows more money for programs
- Solar energy expected to reduce 60-75% of our electric bill over the current building
- Better online access for our clients, especially those who are rural

**RESPONSIBLE STEWARDSHIP**

The remodel will incorporate environmentally sound solutions to save money, reduce energy and water usage and fulfill our commitment to a greener space.

- High-efficiency windows, doors & lighting
- Solar electricity panels
- Building materials made from renewable resources whenever possible
- Upgraded roof insulation and HVAC system
- ENERGY STAR appliances & water-conserving plumbing fixtures
Join our fight for equity and fairness

Please consider supporting our efforts to provide quality, life-changing legal assistance to both current and future Utahns in need. Whether an immediate donation, or a pledge over the next several years, making a commitment now will make a big difference.

Naming opportunities are available starting at $15,000. The names of all donors who give $5,000 or more will be included on a beautiful “Champions of Justice” recognition wall installation prominently displayed in the Justice Courtyard in the center of our new building.

“I have been involved with “and Justice for all” for over 15 years, and I can tell you firsthand how thoughtful and responsible this organization is, not only with donations, but with the hearts and souls of the families who come to them for help when they are at their most vulnerable.”

-Gil Miller
AJFA Board President
Rocky Mountain Advisory

“and Justice for all”
205 N. 400 W. - SALT LAKE CITY, UT 84103
www.andjusticeforall.org
NEXT GENERATION OF JUSTICE CAMPAIGN
NAMING OPPORTUNITIES

- $1,000,000  JAMES B. LEE COMMUNITY LEGAL CENTER
- $300,000   AMERICA FIRST JUSTICE COURTYARD & CAFE
- $250,000   FLORENCE J. GILMOR RECEPTION / LOBBY
- $200,000   DISABILITY LAW CENTER CONFERENCE ROOM
- $100,000   ACCESSIBILITY FOR ALL PARKING
- $100,000   ARC OF JUSTICE ENTRANCE
- $100,000   VIRTUAL JUSTICE CONFERENCE CENTER
- $100,000   WELLNESS ROOM
- $75,000    SOLAR ENERGY
- $75,000    "ENVISIONING JUSTICE" ENERGY EFFICIENT WINDOWS
- $75,000    FUTURE LAWYER LAB - LAW CLERK WORKSPACE
- $50,000    UTAH STATE BAR FAMILY LAW SECTION INTAKE ROOM
- $40,000    INDIVIDUAL EXECUTIVE OFFICES (3 OF 4 STILL AVAILABLE)
- $25,000    ELECTRIC CHARGING STATIONS (2 AVAILABLE)
- $25,000    SERVER ROOM
- $20,000    SECURITY SYSTEM AND OUTDOOR LIGHTING
- $20,000    NEW FENCE AND SECURITY GATE
- $20,000    INDIVIDUAL STAFF OFFICES (MANY AVAILABLE)

The names of all donors who give $5,000 or more will be included on a beautiful “Champions of Justice” recognition wall installation prominently displayed in the Justice Courtyard in the center of our new building.

“and Justice for all”

205 N. 400 W. - SALT LAKE CITY, UT 84103

www.andjusticeforall.org
Title: Two Representatives to the Utah Sentencing Commission
Item: 2.3
Submitted by: Elizabeth Wright
Meeting Date: April 22, 2022

ITEM/ISSUE:
The Board of Bar Commissioners is seeking two representatives, each to serve a four-year term on the Utah Sentencing Commission.

The Utah Sentencing Commission is a legislatively created body charged with establishing sentencing guidelines and developing policy recommendations regarding the sentencing and release of adult and juvenile offenders. The Sentencing Commission is comprised of 27 members representing all facets of the justice system, including judges, prosecutors, defense attorneys, legislators, victims, law enforcement, treatment specialists, ethnic minorities, corrections officials, parole authorities, and others.

The Utah Sentencing Commission:
- Publishes Guidelines
- Advises all three branches of government on sentencing policy
- Conducts research
- Reviews and makes recommendations on legislation
- Tracks legislative changes to sentencing statutes
- Tracks judicial decisions related to sentencing issues
- Assists the legislature in the review and study of sentencing issues
- Conducts training and education throughout the state
- Responds to public comment and inquiries

The Commission promotes evidence-based sentencing policies that effectively address the three separate goals of criminal sentencing: Risk Management, Risk Reduction & Restitution.

The Bar will nominate:
1. an attorney in private practice who is a member of the Utah State Bar, experienced in criminal defense, and
2. an attorney who is a member of the Utah State Bar, experienced in the defense of minors in juvenile court.

APPLICANTS:
1. Liza Bacon
2. Brent Baker
3. Joshua Baron
4. Beau Blackley
5. Edward Brass
6. Lisa Crawford-Blanchard
7. Ralph Dellapiana
8. Richard Gallegos
9. Shawn Howell
10. Erik Jacobsen
11. John Johnson
12. Michael Langford
13. Skye Lazaro
14. Jonathan Nish
15. Jonathan Paz
16. Alexander Ramos
17. Joseph Rupp
18. Pamela Vickrey
19. JoHanna Williams

PAST UTAH STATE BAR REPRESENTATIVES TO THE COMMISSION:

Rodney G. Snow 1993-1997
G. Fred Metos
Walter F. Budgen, Jr.
Mary S. Corporon
Scott Daniels
Randy Kester
Mark Moffat
Benjamin McMurray
Pamela Vickrey
Ed Brass
Richard P. Mauro

1997-1999
2000
2000-2004
2004-2008
2004-2008
2009-2013
2009-2013
2014-2022
2018-2022
2014-2016

CURRENT COMMISSION:

Pam Vickrey, Chair (Term expired)
Juvenile Defense Attorney
Utah State Bar

Tom Ross
Director, CCJJ

Carrie Cochran
Board of Pardons & Parole

Rep. Marsha Judkins
House of Representatives

Rep. Andrew Stoddard
House of Representatives

Sen. Gene Davis
State Senate

Sen. Daniel Thatcher
State Senate

John K Warwick
Equity and Inclusion Representative

MayKela Cox
Citizen Representative

Brian Nielsen
Director, Department of Corrections

Brett Peterson
Director, Juvenile Justice Services

Rick Westmoreland
Youth Parole Authority

Judge Diana Hagen
Utah Court of Appeals

Judge Camille Neider
District Court Judge

Judge Vernice Trease
District Court Judge

Judge Brody L. Keisel
Juvenile Court Judge

Judge Sharon Sipes
Juvenile Court Judge

Sheriff Michael Smith
Utah Sheriffs Association

Chief Craig Black
Utah Chiefs of Police Association

Richard Mauro
Director, Salt Lake Legal Defenders

Craig Barlow
Assistant Attorney General
Utah Attorney General’s Office

Ryan Robinson
Prosecutor
Statewide Association of Prosecutors

Patricia Cassell
Juvenile Prosecutor
Statewide Association of Prosecutors

Edward Brass (Term expired)
Defense Attorney
Utah State Bar

Wendy Davis-Cox
Adult Treatment

Christina Zidow, LCSW
Juvenile Treatment

Lillian Olvera-Arbon
Victim Representative
April 6, 2022

The Board of Bar Commissioners
c/o Christy Abad
cabad@utahbar.org

To Whom it May Concern:

My name is Liza Bacon and I am applying for the position of representative on the Utah Sentencing Commission. My experience aligns well with the qualifications you are seeking. I am an attorney in private practice who is a member of the Utah State Bar who has experience in criminal defense, and specifically, the defense of minors in juvenile court. Further, I am dedicated to public service and have a track record of working with others to advocate for justice.

I am an experienced criminal litigator, having represented both the state of Utah and children in Utah. I also have civil experience and have represented both plaintiffs and defendants. Notably, I served as a public defender of children in Utah for 3.5 years. I have experience working with members from all facets of the justice system, including judges, prosecutors, defense attorneys, legislators, victims, law enforcement, treatment specialists, ethnic minorities, corrections officials, parole authorities and others.

My experience and passion would be a good fit for the Commission, and I have a reputation of quickly becoming an asset when I join a team. If chosen for the position, I would take pleasure in the opportunity to learn from my partners and further my efforts to promote justice and an equal playing field within the criminal justice system.

Please review my accompanying resume. I am also happy to further discuss how my experience and background aligns to your needs.

Thank you for your time and consideration.

Sincerely,

Liza Bacon, Esq.
PROFESSIONAL EXPERIENCE

Kipp & Christian, P.C. Salt Lake City, UT  
*Associate Attorney*

- Represent and advise clients in matters involving civil litigation with an emphasis in professional malpractice.
- Interpret laws, ruling and regulations for professionals.
- Develop and progress litigation plan and strategy.
- Conduct and lead extensive document review projects.
- Propound and respond to written discovery.
- Take and defending depositions of party witnesses, fact witnesses, and expert witnesses.
- Assess and execute dispositive motion practice.
- Draft pleadings, discovery, and briefs.
- Appear and argue at motion hearings.
- Analyze policy coverage and provide liability analysis based on legal precedent.
- Prepare case for trial.

Utah Juvenile Attorney Defenders, Salt Lake City, UT  
*Public Defense Attorney*

- Defended accused juveniles charged with offenses ranging from misdemeanors to felonies, including serious youth offender allegations.
- Maintained case load of over 250 cases per year.
- Managed cases through all phases of the judicial process including conducting initial interviews with clients; represent juveniles at arraignments and all pre-trial proceedings, negotiate plea deals, file pretrial motions and make oral arguments at corresponding evidentiary hearings, conduct trials including direct and cross examination of witnesses, advocate for client through disposition and post-adjudication reviews, and make post adjudication motions.
- Retained and develop expert witnesses and lay witnesses in preparation of conducting evaluations on behalf of client, preparing a report on behalf of client, and testifying at trial and evidentiary hearings.
- Assigned to Third District Juvenile Drug Treatment Court.
- Attended drug court staffing and proceedings two days a month and represent all youth participating in the specialty court.
- Developed and operate monthly recovery night for drug court participants and alumni.
- With the Indigent Defense Commission, lead Utah Juvenile Record Expungement project on behalf of defense, including planning and executing clinics where defense attorneys partner with local court staff and prosecutors to initiate the expungement proceeding for attendees throughout the state of Utah.
- Established credibility and trust with clients, judges, opposing counsel, and experts.
- Conducted arraignments, competency hearings, trials, and other evidentiary hearings including preliminary hearings and retention hearings.
Liza Bacon
(801) 543-9624 | 1578 E. Harvard Ave, Salt Lake City, UT 84105 | LBacon@kippandchristian.com

Salt Lake County District Attorney's Office, Salt Lake City, UT 2015 – 2016
* Intern on Major Crimes and Special Victims Teams*
  - Appeared as Counsel as a third-year law student enrolled in the Prosecutor-Intern Program
    in trials, motion hearings, and preliminary hearings.
  -Prosecuted three trials related to charges of child abuse, fraud, and possession with intent to
    distribute.
  -Counseled victims; prepared witnesses for court appearances; drafted and filed exhibit lists,
    witness lists, and jury instructions.
  -Nominated by supervisor Sandi Johnson for the David T. Lewis Clinical Award for
    outstanding achievement in the Clinical Program.

Utah Court of Appeals, Salt Lake City, UT 2014
* Intern for Judge John A. Pearce*
  - Researched and Drafted Opinions including the opinion for one criminal case regarding the
    applicability of the Merger Doctrine or the Sondel Doctrine to charges of solicitation and
    aggravated arson.

Levin Simes LLP, San Francisco, CA 2009 - 2013
* Plaintiff's Personal Injury Trial Firm*
* Trial Paralegal, Litigation Manager and Bankruptcy Administrator*
  - Supported attorneys through case development, trial preparation, and trial.
  - Coordinated trials by providing litigation and logistical support, witness scheduling, exhibit
    preparation, and management of support staff.
  - Prepared and reviewed legal documents including Summary Judgment Motions.

EDUCATION

University of Utah S.J. Quinney College of Law, Salt Lake City, Utah
* Juris Doctor, GPA 3.389, May 2016*
  - CALI Award (highest grade), Criminal Process (Spring 2016)
  - Certificate of Accomplishment in Recognition of Excellence in the ABA Negotiation
    Competition (Fall 2015)
  - College of Law Outstanding Achievement Award, Arbitration (Fall 2014)

University of California, Berkeley, California
* Paralegal Certification, 2009*

Westminster College, Salt Lake City, Utah
* Bachelor of Arts, Economics, Emphasis in Environmental Science, Cum Laude, 2008*
  - Omicron Delta Epsilon International Economics Honors Society
COMMUNITY OUTREACH / PROFESSIONAL TRAINING

- What Should Utah Lawyers Know About Homelessness, Webinar 2022
- 2021 Summer Convention, Sun Valley, ID 2021
- Banter with the Bench, Webinar 2021
- Trial Academy Boot Camp Series, Webinar 2021
- From Nuts and Bolts to Zealous Advocacy: Tools for Enhancing Your Juvenile Defense Practice, Webinar 2020
- Utah Cannabis Law & Policy and Expungement, Webinar 2020
- Reduce the Impact of Gender Bias in the Legal Field, Webinar 2020
- Legislative Update and the Impact of Juvenile Court Proceedings, Webinar 2020
- Ethics of Representing Clients During the COVID-19 Pandemic, Webinar 2020
- Delinquency Defense During a Pandemic, Webinar 2020
- NOJOS Case Management & Treatment Team Conference, West Valley, UT 2020
- Specialty Courts Conference, Heber, UT 2019
- Expungement Clinic, Provo, UT 2019
- 2019 Annual DUI Seminar, Salt Lake City, UT 2019
- Juvenile Competency Defense Training, Park City, UT 2019
- National Juvenile Defender Leadership Summit, St. Paul, MN 2018
- Clean Slate Expungement Clinic, Ogden, UT 2018
- Stages of Advocacy: Advanced Juvenile Practice, Salt Lake City, UT 2018
- National Juvenile Defender Leadership Summit, Albuquerque, NM 2017
- New Lawyer Training Program, Salt Lake City, UT 2017
EDUCATION

J.D., University of Oregon School of Law, Eugene, Oregon
Managing Editor, *Journal of Environmental Law and Litigation*
B.A. Speech Communication, University of Utah, Salt Lake City, Utah
Member, Utah State Bar
Member, New York State Bar
U.S. Supreme Court
Tenth Circuit Court of Appeals
Second Circuit Court of Appeals
U.S. District Court for the Southern District of New York
U.S. District Court for the Eastern District of New York
U.S. District Court District of Utah
U.S. District Court District of Nevada
U.S. District Court Northern District of Texas
U.S. District Court Southern District of Texas
U.S. District Court District of Maryland

Experienced shareholder in Regulatory and Government Investigations, including matters with the SEC, CFTC, PCAOB and U.S. Department of Justice. Emphasis on Blockchain issues, complex SEC enforcement defense, accounting issues, and compliance issues for registrants and individuals.
EMPLOYMENT

Shareholder, Parsons Behle & Latimer, Member, Corporate and Government Investigations, Regulatory Compliance and Securities Enforcement Group. Advise RIAs, public and private funds, and other registrants in Compliance/SEC matters, FINRA matters, NASDAQ hearing panels or other exchange listing issues. Also handle State Securities Division, CFTC investigations and PCAOB matters.

Director and Shareholder, Clyde Snow & Sessions, Director, Shareholder and member of the Government and Corporate Investigations, Securities Enforcement and Litigation Group.

Partner, Ballard Spahr, Partner in national law firm’s Securities Practice Group.

Deputy General Counsel, Overstock.com, Inc., In-house counsel for NASDAQ-listed online retail company. Projects ranged from operations to SEC matters and general corporate governance.

Senior Special Counsel, United States Securities and Exchange Commission, Responsible for investigating and litigating violations of the federal securities laws.

Special Assistant United States Attorney, Department of Justice, District of Utah (concurrent with SEC position), Assisted in all phases of investigation and prosecution of criminal securities violations.

Law Clerk to the Honorable Bruce S. Jenkins, Chief, U.S. District Court, District of Utah, Conducted research and drafted opinions and jury instructions. Confered with Judge regarding pending criminal and civil matters, including analysis of pre-sentence reports, and review of sentencing guidelines questions.

PUBLICATIONS

Father Knows Best; The SEC Continues to Improperly Insert Itself Between Officers and Directors and Their Insurance Defense Policies (April 5, 2022) ABA Securities Litigation Journal

The SEC’s Division of Enforcement and COVID-19 (April 3, 2020)(LinkedIn Media Center)(ParsonsBehle Media Center)

Critical Steps in Protecting the Attorney-Client Privilege While
Interfacing with Compliance Consultants in SEC Investigations and Litigation, *ABA Securities Litigation Journal* (December 19, 2019)

Conduct-Based Bars and Injunctions in SEC Enforcement Proceedings, *ABA Securities Litigation Journal* (September 2012)

**AWARDS**

Utah Business Magazine Legal Elite, White Collar Defense, 2021

**Mountain States Super Lawyers:** Securities Litigation, Criminal Defense: White Collar, 2014

Utah Business Magazine Legal Elite, Civil Litigation, 2013

**Founder, Fraud College:** February 15, 2012 Designated as Anti-fraud Awareness Day by Governor Gary Herbert, February 2012

Recipient, SEC Chairman’s Award for Excellence

**PROFESSIONAL ACCOMPLISHMENTS**


Chair, Utah State Bar, Securities Section

Chair, Marriott Advisory Board

Member, Digital Currency and Ledger Defense Coalition

**RELATED NEWS:**

**Will SEC Be Told To Butt Out Of AML Reporting Enforcement?**
Law360 (July 25, 2021)

**Legalities of the GameStop Debacle,** KSL News, (January 28, 2021)
Gephardt: Former SEC Official Says GameStop Investors Could be In Legal Trouble (ksltv.com)
High Stakes Regulatory Risks for Utah Companies Doing Business Overseas, World Trade Center Utah (December 3, 2020)

Advisor Cases Question Privilege, Private Funds CFO, (February 10, 2020) (https://www.privatefundscfo.com/adviser-cases-questionprivilege/)

That DJ who just ad libbed may have cost you a violation of the testimonial rule, Regulatory Compliance Watch (September 20, 2018)

Days Count Down to Deadline to File for SEC Share Class Initiative, Regulatory Compliance Watch (May 24, 2018)

Former Columbus-area Businessman Agrees to Pay $3 million Fine Over Stock Scheme, The Columbus Dispatch (December 21, 2016)

Texas man ran $114 mln Ponzi scheme linked to drowsy driving – SEC, CNBC (August 3, 2015)

SEC Pressed For $1M Fees After Rare In-House Loss," Law360 (July 22, 2015)

SEC Falls Short In Admin Case Against Former Executives," Law360 (March 19, 2015)

SEC Says Ex-Penson Execs Violated Securities Lending Rule, Reuters (May 19, 2014)

Defunct Clearing Firm Employees Accused of SEC Violations, Law360 (May 19, 2014)

Ex-Zagg CEO Slams Investor Suit Over 'Exaggerations', Law360 (July 8, 2013)

Blamed over Stanford, SEC's Texas office plots comeback, Reuters (July 20, 2012)

SEC Claims Australian Man Ran $53 Million Forex Trading Fraud, Bloomberg News, September 18, 2012

How to Spot a Ponzi Scheme, Fox Business News, Money with Melissa Francis, July 18, 2012

LDS official: Don’t let trust blind you to scams, Salt Lake Tribune, February 15, 2012
Beware of affinity fraud 'predators' who exploit trust, LDS spokesman warns, Salt Lake Tribune (February 15, 2012)

Fleecing the Flock, The Economist, February 3, 2012

Regulator moves to sanction Utah investment advisors, Salt Lake Tribune (June 2011)

Another U.S Prosecutor Nominee is Out, Salt Lake Tribune (January 2011)

Ex-SEC Lawyer on Short List for U.S. Attorney, Main Justice, (September 29, 2010)

Wall Street's Naked Swindle, Rolling Stone, April 5, 2010

SEC's fraud case against Wyly brothers may be strong, experts say, Dallas News, August 7, 2010

Fraud Costs Utahns $1 billion, KSL.com, June 2010

Preying on the Faithful, Salt Lake Tribune, May 2010

Utah Lawyer Relishes High-stakes Battle, Salt Lake Tribune (May 17, 2009)

Reinstatement of the Uptick Rule, IA Week/IA Watch (April 6, 2009)

Stanford Still Shopping for a Legal Team, Houston Chronicle (March 13, 2009)

Stanford Official Charged With Lying to SEC Testified Without Her Own Lawyer, ABA Journal (March 4, 2009)

Lessons from the Stanford Scandal: Bring Your Own Lawyer, the American lawyer, (March 4, 2009)

Stanford Investment Chief Arrested in Fraud Case, Washington Post (February 27, 2009)

Impact of Short Sale Restrictions Studied, IA Week/IA Watch (February 9, 2009)
SPEAKING ENGAGEMENTS

Panelist, Association of Corporate Counsel, SEC Marketing and Advertising Rules, 2022 Annual Meeting (invited)

Keynote Speaker, Association of Certified Fraud Examiners, “Fighting Fraud in Utah” (March 3, 2020)

Speaker, Salt Lake Compliance Roundtable “Current Compliance Issues Facing Investment Advisors” (November 1, 2019)

Speaker, “Effective Use of Compliance Consultants,” Utah State Bar Annual Securities Law Workshop (Park City, UT - September 2018)


Panelist, The Impact of Anti-Money Laundering, Know Your Customer and SAR Rules; American Bar Association’s 11th Annual National Institute on Securities Fraud (January 2017)

Panelist, National Mortgage Bankers Association Risk Management, QA & Fraud Prevention Forum (Spotlight on Affinity Fraud), Los Angeles, CA (September 2016)

Panelist, ”SEC Exams: A CCO’s Game-Plan for Success,” IA Compliance Conference, The Full 360° View West (June 9, 2016)

Panelist, ”CCO Liability: Do you Know Your Vulnerabilities?” IA Compliance Conference (February 25, 2016)


Panelist, ”White Collar Fraud”, Utah State Bar Convention (July 2014)

Panelist, ”Accounting for Lawyers,” NBI, Salt Lake City (March 2011)
Founder, Fraud College, Utah Valley University, Provo (June 2010) and University of Utah (February 2012)

Panelist, "PCAOB Enforcement-The Nuclear Option for Small & Mid-Sized Firms", (April 2010)

Briefing, Senate Judiciary Committee on Activities of Hedge Funds and Independent Analysts, Washington, D.C. (June 2006)


"Litigation and Non-litigation Strategies to Combat Abusive Short Selling Tactics," RM Conference, San Francisco (February 2006)


References Available upon Request
Joshua Baron  
Criminal Defense Attorney  
2701 North Thanksgiving Way, #100  
Lehi, Utah 84043  
801.885.7435  
jbaron@sb-legal.net  

Experience  

SB Legal (formerly Sharif & Baron) / Attorney Founder  
April 2009 - PRESENT, SALT LAKE CITY, UTAH / LEHI, UTAH  
Won "not guilty" jury verdicts in aggravated burglary, cocaine distribution, sexual assault, and domestic violence cases  
Represented juveniles in delinquency cases including sexual assault, vandalism, drug possession, and expungement matters  

Salt Lake City Prosecutor's Office / Assistant City Prosecutor  
January 2008 - April 2009, SALT LAKE CITY, UTAH  
Prosecuted hundreds of DUI and domestic violence cases  
Won guilty jury verdicts in DUI, drug possession, and domestic violence cases  

Education  

J. Reuben Clark Law School at BYU / J.D.  
2004 - 2007, PROVO, UTAH  
Graduated cum laude  
Executive Director of Journal of Public Law  
Associate Editor of Education Law Journal  

Cal Poly, Pomona (CSU) / B.A. History  
January 2000 - March 2002, POMONA, CALIFORNIA  
Graduated at age 18 summa cum laude  

Service  

4th District Judicial Nominating Commission / Commissioner  
Aug 2020 - present  
Screen and nominate potential judges to serve in the Fourth Judicial District courts for the Governor to choose from  
Judges Sean M. Petersen, Denise Porter, and Robert A. Lund have been appointed during term
Ms. Abad,

My name is Beau Blackley. I have attached my resume and would like to be considered for one of the available positions on the Utah Sentencing Commission.

I am currently in private practice with my partner, Jennie Wingad. We are a private firm, but also have contracts for public defense work in multiple counties in the state.

I have many years of experience in both adult criminal defense and juvenile delinquency defense.

Please let me know if there is anything else you need from me.

Thank you,
Beau Blackley

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-------- Forwarded message --------
From: Utah State Bar <noreply@utahbar.org>
Date: Wed, Apr 6, 2022 at 2:28 PM
Subject: Openings for Utah Sentencing Commision
To: Beau Blackley <beau@blackleywingad.com>
Beau Dean Blackley, Esq.
2105 E. Murray Holladay Road, Suite 2
Holladay, UT 84117
beau@blackleywingad.com
(801)278-3700

PROFESSIONAL LEGAL EXPERIENCE

Blackley & Wingad, Attorneys at Law
Partner
Holladay, Utah
- Founding partner in boutique litigation law firm specializing in criminal law. The partners counsel clients through every stage of representation from the initial client interview to the end of the case.
- Motivated self-starter who is jointly responsible for the creation of the firm. Start-up processes included developing client management infrastructures, business management procedures, and marketing efforts.
- Tasked with managing all aspects of the law firm from fulfilling client needs to abiding by ethical responsibilities while also managing day-to-day operations.
- The firm represents private criminal clients as well as public defense clients via direct and conflict contracts with Utah, Uintah, Duchesne, and Salt Lake Counties.
- Career trial accomplishments include more than 25 jury trials to verdict and more than 25 bench trials.
- Currently the main contract counsel for Uintah County Public Defender on Juvenile Delinquency and Child Welfare cases.

Salt Lake Legal Defender Association
Trial Attorney
Salt Lake City, Utah
July 2018 – March 2020
- Hired directly into Felony division to assume the caseload of a senior attorney.
- Immediately handled felony cases ranging from Possession of a Controlled Substance to Sexual Assault and Murder.
- Mentor to Misdemeanor division attorneys in the office.

G. Eric Nielson and Associates
Litigation Associate (Temporary Contract)
Salt Lake City, Utah
April 2017 – August 2017
- Responsible for pre-trial preparation of complex medical malpractice cases. Preparation included intake interviews with clients, research, and drafting various legal documents for use at different stages of medical malpractice litigation.

Law Offices of Public Defender Carlos J. Martinez
Assistant Public Defender
Miami, Florida
July 2007 – June 2014
- Counseled indigent defendants through all stages of court proceedings, including first appearance hearings, pre-trial motion and report hearings, trial, and post-conviction motions.
- Served as advisory and training counsel for Dade and other Florida counties on all cases involving potential immigration consequences pursuant to the holding in Padilla v. Kentucky, 130 S. Ct. 1473 (2010) and its progeny.
- Managed an average caseload of 150 cases encompassing misdemeanors to life felonies.
- Conducted depositions of law enforcement, expert, and civilian witnesses.
- Previous Public Defender Departments: Adult Criminal Domestic Violence Misdemeanors, Juvenile Criminal Division, Early Representation Unit.
Certified Legal Intern
May – August 2006

Law Offices of Chavez and DeLeon
Associate
Miami, Florida
- Investigated, drafted, and filed complaints, interrogatories, and motions for cases ranging from wrongful death to municipal litigation, filed in the 11th Judicial Circuit of Florida.
Beau Dean Blackley, Esq.
2105 E. Murray Holladay Road, Suite 2
Holladay, UT 84117
beau@blackleywingad.com
(801)278-3700

BAR ADMISSIONS

State of Florida, September 2007
State of Utah, October 2016
United States District Court, Central District of Utah, May 2017

EDUCATION

University of Miami School of Law
Honors: Recipient of Dean’s Merit Scholarship (2005–2007)
Activities: Entertainment and Sports Law Society

Juris Doctor, May 2007

University of Utah
Major: Communication Studies; Honors Recipient
Thesis: “The Role of Communication in Alzheimer’s Caregiving”

Bachelor of Science, December 2002

Minors: French, Economics
Honors: Dean’s List (1999–2001), Recipient of President’s Award (1999–2000)

PROFESSIONAL REFERENCES

Lance Dean, Director, Uintah County Public Defender Office
152 E. 100 N., Vernal, UT 84078
(435)781-5350

Richard DeMaria, Executive Assistant Public Defender, Miami-Dade Public Defender’s Office
1320 NW 14th Street, Miami, FL 33125
(305)545-1901

The Honorable Mark Kouris, Presiding Judge, Third District Court, State of Utah
450 S. State Street, Salt Lake City, UT 84111
(801)238-7105
EDWARD K BRASS
560 South 300 East Suite 105
8013225678; 8018793777
ed@edbrasslaw.com

EDUCATION
JURIS DOCTORATE
University of Utah College of Law
August 1974-May 1977

B.S., POLITICAL SCIENCE
The Ohio State University

EXPERIENCE
CRIMINAL DEFENSE ATTORNEY
Edward K. Brass Law Office
April 1977 – Present

- Represent defendants in all types of cases throughout the State of Utah. I practice in State and Federal Courts as well as Juvenile Court. I have represented clients who are charged with any type of crime from misdemeanors to Capital cases. I have tried jury trials in every county in Utah.
- Research and write legal memoranda on a variety of issues in criminal law and procedure including but not limited to search/seizure, suppression, reliability and trustworthiness of child interviews, joinder, constitutional challenges, and other crimes evidence.
- Proficient legal research skills on Westlaw
- Have lectured on criminal law topics in past CLEs on many occasions.
- Appear in court as an advocate for clients on nearly a daily basis.
- Tried several hundred felony jury trials including homicide, rape, and sex crimes against children.
- In private criminal defense practice since April, 1977.
- Davis County Conviction Integrity Unit 2021-present.

OTHER
- CJA panel member for the United States District Court from 1977- present.
- Member of the Tenth Circuit Court of Appeals from 1977-present.
- Presenter on representing clients accused of a sex crime for NACDL 2011.
- Death Penalty certified.
- Legal Analyst and Sports Broadcaster from 1987-present.
- Volunteer at the SLC Mission.
- Presenter at seminars for new lawyers for the Utah State Bar.
- Presenter at prosecution seminars for the defense perspective and civility.
- Scott Matheson award for service to legal education (mock trial)
Lisa D. Crawford-Blanchard, 180 N. University Avenue, Suite #140, Provo, Utah 84601 • 801-602-9836 • lisac@utcpd.com

Legal Experience Supervising Attorney – Utah County Public Defenders Association; Provo, Utah – 2005 to present
  • Represent indigent defendants in misdemeanor and felony cases
  • Conduct legal research and draft pre-trial motions and memorandums
  • Participate in interviews, investigations, case resolutions and trial strategies
  • Courtroom appearances for all stages of district court criminal proceedings
  • Mentor, supervise and provide training for new attorneys and law students

Law Clerk/Bailiff – Fourth District Court; Provo, Utah – 2004 to 2005
  • Conducted legal research
  • Drafted judicial rulings and orders
  • Provided courtroom security

Law Clerk & Externships – 2002 to 2003
  • Utah County Public Defenders Association; Provo, Utah
  • Federal Public Defender, District of Utah; Salt Lake City, Utah
  • Utah Attorney General’s Office; Salt Lake City, Utah
  • United States Attorney’s Office, District of Utah; Salt Lake City, Utah

Education & Professional Training
  • Member of Utah Association of Criminal Defense Lawyers – 2005 to present
  • Member of Utah State Bar – 2004 to present
  • Certified Special Function Officer, Fred House Academy – 2004
  • Juris Doctorate – J. Reuben Clark Law School, Brigham Young University – 2003
  • Bachelor of Science, Psychology and Sociology – University of Utah – 1995
  • Certificate of Criminology & Corrections – University of Utah – 1995
  • Associate of Science, Behavioral Science – Utah Valley University – 1993

Other Work Experience Juvenile Probation Officer – Fourth District Juvenile Court; Provo, Utah – 1997 to 2001
  • Supervised juveniles placed on probation
• Conducted intake processing and preliminary interviews
• Drafted petitions, pre-disposition and probation violation reports
• Liaison with allied community agencies, therapists and schools

*Genesis Youth Center Counselor – Juvenile Justice Services; Draper, Utah – 1994 to 1997*
• Supervised juvenile offenders court-ordered into the community based program
• Implemented and monitored community work projects and daily activities
RALPH DELLAPIANA
275 East 200 South, Salt Lake City, UT 84111
801-680-3603
rdellapiana@sllda.com

I am interested in becoming a member of the Utah Sentencing Commission to use my long experience in Utah’s criminal justice system to help create policies that improve public safety and reduce recidivism.

LEGAL EXPERIENCE

1995 – PRESENT
TRIAL ATTORNEY, SALT LAKE LEGAL DEFENDER ASSOCIATION
Represent indigent criminal defendants in pretrial, trial, and post-conviction legal proceedings, including arranging for drug programs and mental health treatment as alternatives to incarceration.

LEGAL EDUCATION

1991-1994
JURIS DOCTOR, UNIVERSITY OF UTAH
- American Jurisprudence Award, Legal Research and Writing
- American Jurisprudence Award, Professional Responsibility
- Note & Comment Editor, Journal of Contemporary Law
- Judicial Intern for Utah Supreme Court Justice Christine Durham, 1992-1993

LEGAL COMMUNITY ACTIVITIES & AWARDS

- Utah Commission on Criminal and Juvenile Justice, Death Penalty Working Group, 2016-2018
- Distinguished Service Award, for Ensuring Justice and Due Process, Utah Association of Criminal Defense Lawyers, 2012
- Know Your Rights: Certificate of Appreciation from The Vietnamese American Community of Utah, 2019
- Chair, Capital Case Committee, Utah Association of Criminal Defense Lawyers, 2011-2018
- Mitsunaga Award, Salt Lake Legal Defender Association, 2012
RICHARD M. GALLEGOS
rich@rgallegos.com

863 E. 25th Street Ogden, Utah 84401 Phone: (801) 334-7424

EDUCATION

University of Utah - Salt Lake City, UT
1998 – Juris Doctor Degree
1997 – Trial Advocacy; Advanced Legal Research

Weber State University – Ogden, UT
1993 – Bachelor of Arts, Criminal Justice
Minor: History Area of Emphasis: Law Enforcement
Alpha Phi Sigma, Criminal Justice Honor Society

EMPLOYMENT/EXPERIENCE

Private Practice Ogden, UT October, 1998 - Present
Specializing in Criminal Defense some Personal Injury Law
- Substantial criminal defense courtroom experience including daily appearances, Rule 8 qualified
- Experience in operating and maintaining a small law office with two employees
- Work as a conflict/pro bono Guardian Ad Litem in civil cases
- Tried numerous Felony and Misdemeanor cases in several different counties with many acquittals
- Member, Second District Judicial Nominating Commission, 2016-2020

Davis County Public Defender Farmington, Utah January, 2001-Present
- Represent adults in criminal cases in the District Courts
- Handle Central Arraignment and Law & Motion calendars for various courts
- Currently assigned to Judge Michael Edwards & Rita Cornish law and motion calendars

Weber County Public Defender Ogden, Utah May 1999-December 2002
Juvenile Division
- Represent juveniles in all delinquency proceedings
- Includes cases involving certification hearings and serious youth offender
- Represent Parents in Abuse, Neglect and Termination of Parental Rights proceedings

Box Elder County Public Defender Brigham City, Utah April 1999 – December 2000
- Represents adults in criminal cases, District and Justice Courts
- Tried Numerous Felony and Misdemeanor cases, obtaining several acquittals
- Represents Juveniles in all delinquency proceedings
- Represents Parents in Abuse, Neglect and Termination of Parental Rights proceedings
Sr. Counselor, Mill Creek Youth Center Ogden, Utah August 1996 – October 1998
Division of Youth Corrections

- Advocate for severely delinquent youth working in conjunction with the UT Parole Authority
- Supervise and provide intense counseling for incarcerated youth
- Maintain security and safety in the facility
- Provide support to other staff on duty and diffuse potentially volatile situations
- Supervise line staff and other administrative duties as assigned

Minority Law Caucus Salt Lake City, Utah 1996-1997
Vice-President

- Helped manage the MLC budget, also purchased ESL books for local program-$800
- Assisted in operating and organizing golf tournament, auction, banquet, and scholarships
- Implemented a program targeting area high school and minority youth
- Targeted at-risk students and provided monthly counseling about future career choices

Judicial Intern Salt Lake City, Utah Fall Semester, 1996 (Aug-Dec)
Utah Third District Court, Honorable Andrew Valdez

- Observed weekly court sessions, researched various legal issues
- Drafted memoranda on court’s jurisdiction to adjudicate noncompliant parents
- Memoranda included legality of court proceedings concerning a Mexican runaway

Counselor/Youth Corrections Tech Roy Utah October 1990 – August 1996
MOWEDA Detention Center, Division of Youth Corrections

- Supervised and provided counseling for detained youth, including duties/goals of Mill Creek
- Assisted youth in developing necessary skills for community living/placement
- Focused on short-term treatment objectives for troubled youth

Intermountain Youth Care Ogden, Utah April 1991 – November 1993
Group Home Supervisor/Senior Counselor/Counselor

- Managed entire operation of youth group home, including staff/residents, and payroll
- Coordinated with other agencies implementing youth’s programs and providing services

PERSONAL

- Born July 31, 1965, Ogden, Utah.
- Married in 1990 with three children, now all adults.
- Interests include camping, hunting, riding horses, and any family activities.
- Also enjoy reading, studying history and watching old western movies.
Shawn Rice Howell  
Attorney  
Provo, Utah | 801-857-0646 | shawnricehowell@gmail.com

Summary
Personable and hard-working trial attorney with over 17 years of courtroom experience. Proven advocate, professional decorum, highly capable of handling heavy caseloads efficiently, effectively, and sensitively.

Work Experience

Utah County Public Defender Association  
2005-Present

• Senior Associate Attorney-representing court-appointed clients from initial appearance to resolution with a jury trial or plea. Skilled at presenting evidence and questioning witnesses at preliminary hearings and evidentiary hearings, jury selection, jury trials, advocating at sentencings and probation violation hearings, utilizing the state sentencing guidelines. Works well with people (everyone from the homeless, addicted and mentally-ill to prosecutors, law enforcement, expert witnesses, and judges).

• Chief Counsel-associate attorney duties with added supervisory and training responsibilities.

J. Reuben Clark Law School, Brigham Young University  
2020-2021

• Trial Advocacy Competition Coach & Part time Professor-training law students for participation in national trial advocacy competitions. Presiding over practice trials in the role of judge while implementing the Federal Rules of Evidence. Mentoring future lawyers in their courtroom skills of public speaking, Rules of Evidence, argument, issue-spotting, professionalism, and persuasion.

Fourth District Court  
2004-2005

• Judicial clerk-researched and wrote legal opinions for Judge Donald Eyre, Fourth District Court Judge.

• Bailiff-Special Functions Officer with hundreds of hours of courtroom observation and control.

Education

J. Reuben Clark Law School, Juris Doctor  
2004

• Editor of Education and Law Journal

• Completed Criminal Trial Practice, Street Law, and Mediation courses with mediator certification

Brigham Young University, Bachelor of Arts in Marketing Communications  
2001

Professional Organizations
Utah State Bar- member in good standing and practicing with no bar complaints since 2004
Criminal Law Division of Utah Bar
Women Lawyers of Utah

Skills
Public speaking, strategic-thinking, reliable, focused, patient, compassionate, detail-oriented
Erik G. Jacobson  
588 North 450 East  
Springville, Utah 84663  
(801) 636-2477  
ejacobson6@msn.com  

EDUCATION

JAMES E. ROGERS COLLEGE OF LAW, UNIVERSITY OF ARIZONA, Tucson, Arizona  
Juris Doctor Degree - May 2001  
- Pima County Bar Association Lawyers for Literacy  
- Executive Member PALS (Parents at Law School)  
- Research Assistant Career Services Office, 2000-2001

UNIVERSITY OF ARIZONA, Tucson, Arizona  
Bachelor of Science Public Administration/Criminal Justice – May 1997  
- Lawther Law Enforcement Scholarship 1996  
- Business School Dean's List (four semesters)

WORK EXPERIENCE

Utah County Juvenile Public Defender, American Fork Court, Provo, Utah  
Attorney: August 2009 – Present  
- Currently serving as the Provo Fourth District Juvenile Court Public Defender.  
- Currently managing a caseload of around 100 Child Welfare and Delinquency matters.  
- Previously served as the Provo Fourth District Court Public Defender.  
- Handled a caseload of around hundred felony related matters with curious judges.

Fillmore Spencer, LLC, Provo, Utah  
Attorney: February 2008 – August 2009  
- Practiced for a mid-sized law firm, concentrating on bankruptcy, business, and juvenile law.

Harris & Carter, Provo, Utah  
- Served as the Provo City Public Defender.  
- Handled a civil litigation caseload, including domestic, collections and bankruptcy.

Bass & Associates, Tucson, Arizona  
Associate Attorney: May 2005 – January 2006  
- Managed a nationwide network of creditor attorney’s for bankruptcy proceedings.  
- Supervised Arizona Litigation on behalf of major auto company, and major student loan servicer.  
- Screened bankruptcy cases nationally to make sure client is treated appropriately.

Pima County Attorney’s Office, Tucson, Arizona  
Deputy County Attorney: February 2003 – May 2005  
- Assigned to the Torts Unit of the Civil Division, handling prisoner civil rights actions.  
- Spent six months in a felony caseload handling gang related crimes  
- Previously managed a misdemeanor caseload consisting of up to 500 cases, primarily DUI.  
- Handled a daily court calendar of various hearings, and sentencing.  
- Tried six felony and 15 misdemeanor trials by jury.

AWARDS

- Parental Defense Alliance - 2014 Mentor of the Year Award  
- Utah County Child Abuse Prevention Team – 2015 Organization of the Year Award  
- Utah Board of Juvenile Justice – 2016 Youth Advocate of the Year
JOHN K. JOHNSON
712 East 10th Avenue
Salt Lake City, Utah 84103
Cell Telephone:  (801) 915-2616
Home Telephone: (801) 359-8189
Fax Telephone:   (801) 359-1088
E-Mail:          jkjohnson1080@hotmail.com

ADMITTED:
Utah State Bar-#3815  (1982)
U.S. District Court- 10th Circuit (1982)
U. S. District Court- 9th Circuit (1982)

EDUCATION:
Law School: California Western School of Law-J.D. (1980)
Undergraduate: University of Utah-B.S.-Marketing  (1976)
Language: Read and write Greek

EXPERIENCE:
August 2008-present  Solo Practitioner
General practice of law including business operations,
mediation, criminal defense and civil litigation.
August 2008-
Conflict Attorney for both Salt Lake
January 2014
Legal Defenders Association and Summit
County Public Defenders.

January 2015-present  Summit County Public Defender
Independent contractor and duties include indigent criminal
defense in Summit County Third District Court for Felony
and Juvenile matters; Summit County Drug Court and
Summit County Justice Court

March - August 2008  Contract Attorney
Eisenberg and Gilchrist
215 South State Street, Suite 900
Salt Lake City, Utah 84111
Preparation of and response to Plaintiff Asbestos Litigation
motions and discovery.

July 2007-March 2008  United States Army
Mobilized Reservist
Lieutenant Colonel
Office of Soldier’s Counsel/Administrative Law Section
Office of the Staff Judge Advocate
Fort Lewis, Washington

1992-August 2008  Deputy Salt Lake County District Attorney,
111 East 400 South, Suite 400,
Salt Lake City, Utah 84111-
Bench and jury trials and prosecution of 100s of major
January-June 2006
Unit Chief, Juvenile Team, Downtown Division

May 2006-July 2007
Unit Chief, Major Felony Team, Downtown Division

1995-July 2007
Instructor,
Salt Lake Community College
1575 South Street, Salt Lake City, Utah.
Paralegal instructor on courses in Evidence, Criminal Law
and Procedure, Introduction to Civil Litigation,
Real Estate Law, and Environmental Law.

1984- August 2008
United States Army Reserve,
Judge Advocate General’s Corps,
Stephen A. Douglas Armed Forces Reserve Center,
Salt Lake City, Utah 84105.
Involved in all facets in Military Law including
Separation Boards, Administrative Law, Claims
and Legal Assistance. (Retired-LTC-August 2008)

1991-1992
Assistant Utah Attorney General,
236 State Capital, Salt Lake City, Utah.
Prosecution of white collar felony cases.

1983-1991
Solo Practitioner,
Salt Lake City, Utah
Handled all matters of general practice including
Criminal Law defense, Domestic and Entertainment Law with
an emphasis on business operations.

1988-1991
Associate,
Kim Rilling and Associates, Salt Lake City, Utah.
Handled matters of juvenile defense, parental right
terminations and involuntary psychiatric hospitalizations.

1984-1991
Assistant Salt Lake City Prosecutor,
Salt Lake City, Utah.
Prosecution of misdemeanors and infractions.

PERSONAL:
Interests include domestic and international travel, golf, scuba, music and other performing arts.
Former Pro Tem Judge, Third District Court,
Former Volunteer Chair of Executive and Grants Committees, Salt Lake City Arts Council; Member of the Greater Avenues Community Council; Member of the Legal Advisory Committee for the Holy Trinity Greek Orthodox Church, Salt Lake City, Utah; Member of Hellenic Bar Association; SIX time recipient of Utah Business Magazine’s “Utah’s 100 Elite Attorneys” in the fields of “Criminal Law” or “Government” (January 2004, January 2006, January 2007, January 2009, and January 2015); National Academy of Criminal Defense Attorneys (NACDA) Utah’s Top Ten Attorney Award (August 2020)
MICHAEL J. LANGFORD

43 EAST, 400 SOUTH
SALT LAKE CITY, UTAH, 84111
TELEPHONE: 801-328-4090
FACSIMILE: 801-746-5613
e-mail: mjl@langfordramos.com

To the Board of Bar Commissioners:

As a criminal defense attorney in private practice with close to twenty years of practice, I believe I have much to offer to the Utah Sentencing Commission

My interest in joining this commission stems from my many years as a criminal defense attorney and an intimate familiarity with Utah sentencing law and procedure. I strongly believe I have much to offer in terms of my knowledge and perspective. Thank you in advance for your consideration. I have enclosed my resume for your review.

Sincerely,

Michael John Langford
PROFESSIONAL PROFILE

- Fluent in Spanish and French
- Utah District Court, Utah State Bar, 10th Circuit Court of Appeals
- Member of Utah Association of Criminal Defense Attorneys (UACDL)
- Life Member of National Association of Criminal Defense Lawyers (NACDL)
- Member of American Bar Association Criminal Justice Section, Probation and Parole Committee Member
- Member of Salt Lake County Bar Association Executive Committee
- Past Rocky Mountain Innocence Center Board Member and President
- Chair of Salt Lake County Justice Court Judicial Nominating Committee
- Past Board Member of the Utah State Commission on Minority Juvenile Justice, Multicultural Legal Center, Henry’s Fork Foundation, and Salt Lake County Children’s Justice Center

EDUCATION

NACDL White Collar Criminal Defense College 2013
  • Stetson University School of Law, Tampa, Florida
National Criminal Defense College (NCDC) 2009
  • Mercer Law School, Macon, Georgia
Creighton University School of Law, Omaha, Nebraska 2002
  • Juris Doctor, emphasis in criminal law and procedure
  • Creighton Law School International Moot Court Competition Finalist and Moot Court Board Member
Boston College, Chestnut Hill, Massachusetts 1996
  • Bachelor of Arts: political science

PROFESSIONAL EXPERIENCE

Criminal Defense Attorney 2005-Present
Salt Lake City, UT
  • Salt Lake Legal Defender Association conflict felony trial attorney since 2011.
  • Significant felony trial experience complex in cases such as homicide, money laundering, ponzi schemes, RICO, and distribution of controlled substances.
  • Experience arguing before the State and Federal Appellate Courts.

Associate Attorney 2003-2005
Atkin and Shields P. C.
  • Practice focused on complex commercial litigation.
  • Drafted numerous pleadings and memoranda, argued motions in federal and state courts.
  • Managed the entire discovery process for many cases and conducted depositions in- and out-of-state.
  • Secondary practice focused on white collar criminal defense in federal and state courts.

Assistant Journalist 1993-1995
KUTV, (CBS)
  • Served as assistant and field producer to Rod Decker and Brian Mullahey for Utah legislative sessions.
• Researched PAC contributions, conducted interviews with political candidates and legislators.

CLERKSHIP
• Pottawattamie County Attorney’s Office, Council Bluffs, Iowa 2002
• U.S. Attorney’s Office, Omaha, Nebraska 2001
• Utah Legal Defenders, Salt Lake City, Utah 2000

VOLUNTEER WORK AND HONORS
• Utah Business Magazine Legal Elite, Criminal Defense
• Mountain States Super Lawyer-Criminal Defense 2012-Present
• Utah State Bar Mentor
April 11, 2022

Via EMAIL to: cabad@utahbar.org
Christy Abad
Executive Assistant
UTAH STATE BAR
645 S 200 E
Salt Lake City, Utah 84111

Re: Utah Sentencing Commission

Dear Commissioners,

Please accept this letter of interest and application to the Utah Sentencing Commission. I have been defending clients in criminal cases since my arrival in Utah ten years ago. I am passionate about both the representation and the needs of my clients, seeking resolutions and sentencing recommendations that not only mitigate the potential sentence, but also address the needs of the individual, with ultimate goal that they do not come back into the system. I have represented a countless number of individuals over the years in everything from infractions to homicide and appeared in Justice and State courts across the State. Most importantly, I have forged great relationships with prosecutors, law enforcement, Adult Probation & Parole, treatment providers and private probation providers. My ability to work collaboratively for the interests of my clients is perhaps my greatest strength.

In addition to representing adult clients in Justice and State Courts, I have represented juvenile clients in cases ranging from misdemeanor traffic and possession charges to felony rape and a myriad of felonies in between. For a six-month period during my time at Salt Lake Legal Defenders I was assigned to the juvenile courts to provide representation in truancy cases. My experience in representing individuals includes negotiating terms of non-judicial determinations to sentencing, treatment and probation on more serious crimes.

I believe I bring a unique perspective to the Sentencing Commission. In 2019 I was awarded the Utah State Board of Pardons and Parole Contract to represent individuals before the Parole Board on parole violations. This experience has given me intimate knowledge of the current sentencing guidelines in all aspects of representation, from trial and sentencing to parole. It has also given me a deep understanding of how important these sentencing guidelines and policy recommendations are regarding sentencing, release and revocation of parole of adult and juvenile offenders.
Letter to Sentencing Commission
April 11, 2022

It would be a great honor to be a part of the work of the Commission. Thank you in advance for your time and attention to this matter.

Sincerely,

RAY QUINNEY & NEBEKER, PC

Skye E. Lazaro
SKYE LAZARO
RAY QUINNEY & NEBEKER
36 S State Street, Suite 1400, Salt Lake City, UT 84111
Phone: (801) 532-1500 / Email: slazar@rqn.com

LEGAL EXPERIENCE

Ray Quinney & Nebeker, Partner, Salt Lake City, Utah, August 2019-Present
Chair of the Firm’s White Collar, Criminal Defense & Government Investigations Section representing individuals in all aspects of criminal law in juvenile court, justice courts, state courts and federal courts throughout the State of Utah. Representative experience includes successfully defending, through plea agreements or trial, a broad range of criminal cases including domestic violence allegations, sex crimes, drug crimes, property crimes, DUI, white-collar crimes, homicide and violent crimes. Worked closely with, and opposed to, law enforcement, prosecuting agencies and AP&P.

State of Utah, Board of Pardons and Parole, Contract Representation, Salt Lake City, Utah September 2019-Present
Awarded a five-year contract beginning in September 2019 to provide legal representation for inmates and parolees that are alleged to have violated their Parole Agreement. Representation. This includes meeting with inmates and parolees after the Board of Pardons and Parole has issued a warrant and revoked their parole and defending them at Parole Violation and Evidentiary Hearings.

Injury Care Solutions, LLC, Corporate Counsel, Salt Lake City, Utah, March 2018- September 2019
Provide general corporate counsel, including oversight, coordination and execution of all internal and external legal affairs, contract drafting, negotiation and finalization, coordination and execution of business transactions in numerous states in the medical and finance field. Extensive involvement developing networks of medical providers, device companies and medical billing companies. Provide counsel to Executive Board and HR oversight and employee governance.

Lazaro Law Group, Sole Practitioner, Salt Lake City, Utah, April 2016- March 2018
Managing attorney and founder of boutique firm. Represented clients in all aspects of criminal law in juvenile courts, justice courts, state courts and federal courts throughout the State of Utah. Worked closely with, and opposed to, law enforcement, prosecuting agencies and AP&P.

Salt Lake Legal Defender Association, Trial Attorney, Salt Lake City, Utah, July 2012 -April 2016
Manages caseload of between 80-120 criminal defense clients. Represented clients in juvenile court, justice court and state court in Salt Lake County. Worked closely with, and opposed to, law enforcement, prosecuting agencies and AP&P.

Orange Legal Services, Document Review Attorney (Contract Work), Salt Lake City, Utah, January 2021-April 2012
Reviewed 300 pages of discovery per day using One-O Discovery Platform for a number of law firms.

Paul Ryan & Associates, Associate Attorney, Missoula, Montana, April 2008-November 2011
One of two attorneys in a fast-paced, high-case load firm focused primarily in the practice areas of criminal defense and personal injury. Gained extensive courtroom experience in civil and criminal cases in state, federal and appellate courts.

BAR ADMISSIONS, PROFESSIONAL REGISTRATIONS, AWARDS AND RECOGNITIONS

Member, State Bar of Montana (9089)
Member, State Bar of Utah Bar (14071)
Licensed in state and federal courts in Montana and Utah and the Ninth Circuit Court of Appeals
Utah State Bar- Criminal Law Section, Past Chair
Utah State Bar- Past Governmental Relations Committee Member
Salt Lake County Bar Association
Women Lawyers of Utah
David K Watkiss-Sutherland II Inn of Court
Aldon J. Anderson American Inn of Court
Utah Bar Association New Lawyer Training Program, Mentor
2017 Attorney to Watch, Attorney at Law Magazine
2018-2022 National Trial Lawyers Top 40 under 40
2018-2022 Utah Legal Elite, Utah Business Magazine
2020-2021 Mountain States Super Lawyers, Rising Star, Criminal Defense
EDUCATION

Juris Doctor
University of Montana, Andrew Blewitt III School of Law
  Phi Delta Phi
  Alternative Dispute Resolution and Mediation Focus Group
  Advanced Trial Advocacy Group
  Advanced Writing Award in Copyright, Patent & Trademark Law

Bachelor of Science: Political Science
Minor: Organizational Communication Studies, Business Administration
University of Montana
  American Paint Horse Association Scholarship (Zone One)
  Numerous Academic Scholarships

PERSONAL AND COMMUNITY INTERESTS

Cinderella Project- bringing prom to Homeless Youth of Salt Lake County
Homeless Youth Resource Center, VOA volunteer and advocate
Numerous community philanthropic causes
Hockey mom, yoga, exercise, equestrian and outdoor enthusiast
March 29, 2022

RE: Utah Sentencing Commission Application

To Whom it May Concern:

Thank you for the opportunity to be considered for appointment to the Utah Sentencing Commission. My name is Jonathan T. Nish, and I am a practicing criminal defense trial attorney with the law firm of Christensen & Jensen, PC. I have been in practice since 2013 and I have worked in the legal field since 2008. Criminal defense is my primary area of focus and I specialize in felony work, including homicide cases for which the State of Utah may seek the death penalty. I am qualified under Rule 8 of the Utah Rules of Criminal Procedure to represent persons charged with capital crimes and I am presently on the roster of attorneys considered for appointment to such cases.

I also serve as the Secretary/Treasurer of the Criminal Section of the Utah State Bar and the Director of Continuing Legal Education for the Utah Association of Criminal Defense Lawyers (UACDL). It would be my privilege to further serve the Utah Bar on the Utah Sentencing Commission.

My curriculum vitae and reference sheet can be found below. Thank you for your time and consideration.

Best regards,

CHRISTENSEN & JENSEN, P.C.

[Signature]
JONATHAN T. NISH
Phone: 801.807.8415
jonathan.nish@chrisjen.com
2533 Pinewood Lane
Layton, UT 84040

EDUCATION

JD    Saint Louis University School of Law, Juris Doctor    May 2013
BS    University of Phoenix, B.S. Business; Global Administration    August 2010
Other University of Utah, Music Education with Emphasis on Conducting    2001-2004

HONORS AND AWARDS

UACDL Attorney of the Year
2018

Death Penalty Qualified Attorney

PROFESSIONAL AFFILIATIONS

Utah Association of Criminal Defense Lawyers
    Director of Continuing Legal Education 2018 - Present
    Board of Directors Member 2019 - Present

Utah Bar Association Criminal Law Section Leadership, 2020 - Present

National Association of Criminal Defense Lawyers

COMMUNITY SERVICE

Skyward Symphony
    Artistic Director and Chairman of the Board of Directors, Davis County, Utah 2018 - Present

EMPLOYMENT HISTORY

Christensen & Jensen, PC April 2020 – Present
    Non-Equity Shareholder
    Trial Attorney

Morgan, Nish & Associates, PC October 2013 – April 2020
    Managing Partner
    Trial Attorney
REFERENCES

Mary Corporon  
Christensen & Jensen, PC  
801.323.5000  
Mary.corporon@chrisjen.com

Karra Porter  
Christensen & Jensen, PC  
801.323.5000  
Mary.corporon@chrisjen.com

Rick Lundell  
Lowrance, Lundell and Lofgren  
801.635.4006  
rlundell@bestattorneys.com

Grant W.P. “Bill” Morrison  
Morrison & Morrison  
801.359.7999  
gwpmorrison@gmail.com

Chad M. Steur  
Chad Steur Law  
801.635.4227  
chadsteur@hotmail.com

Judicial References

Judge Samuel Chiara  
Eighth District Court - Duchesne  
435.738.2753

Judge Gregory Lamb  
Eighth District Court – Vernal  
435.781.9300
Jonathan Z. Paz, Esq.
1547 E Lanebrook Lane, Millcreek UT 84124 Jonathan@LawPaz.com Cell: 310-863-2515
BAR MEMBERSHIP: UT State Bar Number 16923 – CA State Bar Number 280761
LANGUAGE: Fluent in Spanish

EDUCATION

University of Southern California, Gould School of Law
Juris Doctor
May 2011

University of California, Berkeley
Bachelor of Arts, Sociology
May 2006

PROFESSIONAL EXPERIENCE

Law Offices of Jonathan Z. Paz, LLC
Attorney
Salt Lake City, UT
Representing clients in both criminal and immigration matters. Defending felony and misdemeanor criminal cases in Justice and District Courts. Defending deportation cases using Asylum and Cancellation of Removal applications. Employing the zealfulness of a public defender with the care and attention to detail of a private attorney.
September 2018 - Present

Law Offices of Gage C. Herbst
Attorney
Salt Lake City, UT
Successfully represented clients in deportation hearings with asylum and cancellation of removal defenses. Guided clients through evidence collection process in both Spanish and English. Drafted novel pre-hearing briefs based on evidence and legal research. Prepared clients and expert witnesses to testify at hearings. Represented clients in Asylum and Adjustment of status interviews with Immigration Officers. Evaluated cases for different types of immigration relief.
January 2018 – September 2018

University of Southern California, Gould School of Law
Adjunct Professor; LLM. and M.S.L. Programs
Los Angeles, CA & Online
Professor of Criminal and Constitutional Law. Created in-person Criminal Law curriculum for LLM. program on Gould School of Law campus. Asked to make major revisions to LLM./M.S.L. Constitutional Law Online Course
August 2018 - Present

Orange County Public Defender
Attorney
Orange County, CA
Represented adult and juvenile clients charged with misdemeanor and felony penal code violations. Litigated twenty-one jury trials and over two dozen bench trials from pre-trial motions to closing arguments. Won acquittals in over half the trials including juvenile clients charged with strikes under California’s “Three Strikes Law.” Drafted and argued over forty motions including 4th Amendment motions, motions compelling discovery, and demurrers. Directed investigations of witnesses, locations and evidence. Conducted extensive legal research and over fifty probable cause hearings.
September 2012 - December 2016

BASTA, Inc. (Non-Profit Eviction Defense)
Attorney
Los Angeles, CA
Represented tenants in unlawful detainer matters in both bench and jury trials. Drafted and argued several successful motions including two motions for judgment on the pleadings, a motion to vacate a default judgment, a motion for attorney’s fees, and a motion for relief of forfeiture of a rental agreement for a 13-year tenant. Litigated two unlawful detainer jury trials, from pre-trial motions to closing arguments, and three successful unlawful detainer bench trials. Negotiated over a dozen favorable settlements using strategic fact analysis, case law, and relevant code sections.
December 2011 - September 2012

Los Angeles County District Attorney’s Office
Volunteer Law Clerk, Target Crimes Division
Los Angeles, CA
Wrote a successful opposition to a motion to compel the identity of a confidential informant. Prepared a ballistics chart and witness list for two different crimes against peace officer (CAPOS) cases. Synthesized evidence in a 20 year old cold case. Attended meetings with detectives, medical examiners, and a lineup in an armed robbery case.
September 2010 – January 2011

United States District Court, Central District of California
Extern for the Honorable Valerie Fairbank
Los Angeles, CA
Wrote decisions on Habeas Corpus petitions written by pro per inmates. Compiled motions and other court documents into case binders for civil and criminal trials. Conducted research and prepared memorandums.
January – May 2010 & September - December 2010
ALEXANDER E. RAMOS, ESQ.

PROFILES
In my sixteen years working in the criminal justice system I have come to intimately understand the frustrations that individuals experience as they make their way through its labyrinth. My role is to ensure my clients are seen as humans and not players.

EXPERIENCE

LANGFORD RAMOS, PLLC. | Partner & Trial Attorney
JANUARY 2019 - PRESENT
- Represent individuals charged with federal and state crimes.

FEDERAL PUBLIC DEFENDER, DISTRICT OF UTAH | Trial Attorney
AUGUST 2014 - DECEMBER 2018
- Represented indigent individuals charged with federal criminal offenses in trials and appeals including drug trafficking, illegal re-entry, child pornography, felon in possession, bank fraud, wire fraud, money laundering, firearms trafficking, and other offenses.1

SLC CRIMINAL DEFENSE FIRMS | Law Clerk
AUGUST 2005 - AUGUST 2014
- From 2005 to 2014, I worked with various criminal defense attorneys in the valley.2 All of them have been invaluable in my legal and personal development. They taught me the importance of personal integrity and commitment to defending the indigent. They scrutinized my research and writing skills and pushed me to excel. They have provided me with the foundation I need to become a defender.

EDUCATION

UNIVERSITY OF UTAH | Philosophy + Political Science, B.A.; J.D.3

SKILLS
NATIVE SPANISH SPEAKER; TACTFUL COMMUNICATOR; RESOURCEFUL & DETAILED ORIENTED; DAMAGE CONTROL SPECIALIST; MITIGATION MOGUL; RESEARCHER EXTRAORDINAIRE; HUSTLER.

1 I was the Federal Defender representative for the RISE Drug Court.
2 Jeremy Delicino, Stephen McCaughey, Edwin Wall, Clayton Simms, Jon Williams, Sam Meziani, Mark Kittrell, Kent Hart, and others.
3 President of the student chapter of the Utah Association of Criminal Defense Lawyers, externed at the Utah Juvenile Defenders Association, and completed the Innocence Clinic.
Ms. Abad,

Please accept my submission for appointment to the Utah Sentencing Commission as an attorney in private practice experienced in criminal defense. In addition to what is on my resume, I was also a final candidate for appointment to the Board of Pardons and Parole, as well as a finalist for appointment as the Taylorsville Justice Court Judge.

My resume is attached. References are available upon request. Please let me know if anything further is required.

Respectfully,
Joseph E. Rupp
Managing Attorney
Collins Rupp, P.C.
563 West 500 South, Suite 440
Bountiful, UT 84010
385.777.2753 office
801.910.2629 cell
joseph.rupp@collinsrupp.law

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Disclaimer: ATTORNEY/CLIENT RELATIONSHIP. No attorney client relationship with Collins Rupp, P.C. exists unless the client enters into a legal services agreement (LSA) that describes the nature and scope of the client’s representation. This firm’s client is the person or entity identified in the LSA and, unless otherwise stated in the LSA, does not include any affiliate, owner or constituent of such person or entity. Unless this firm agrees otherwise in writing, all work that this law firm does for a client is for the benefit of the client only, is not for the benefit of any third party and creates no third party beneficiary status for any person or entity except the client identified in the LSA.
JOSEPH E. RUPP
(801) 910-2629 • 1841 West 1300 South, Woods Cross, UT 84087 • joseph.rupp@collinsrupp.law

EXPERIENCE

**Utah Criminal Justice**
- Managing Attorney at Collins Rupp, P.C., specializing in criminal matters and conflict resolution
- Maintain an active case load of over 100 criminal matters. Daily direct involvement with all aspects of criminal matters, from pre-filing investigations to post conviction relief actions, including conducting preliminary hearings, plea negotiations, suppression, sentencing, orders to show cause, bench and jury trials
- Represented clients on over 1,100 matters in 103 different Utah Justice and District Courts
- Extensive experience synthesizing written, verbal, physical, and digital information; assessing facts in relation to statutory elements of accused crimes; and presenting appropriate resolutions to defendants in order facilitate informed decision-making in criminal matters
- Continuously coordinate with the Court, prosecutors, probation agencies, and other stakeholders in the development of Pre-Sentence Reports (PSRs) for convicted defendants. Review PSRs to ensure correctness and consistency with applicable statutory requirements and sentencing guidelines. Provide argument for and against PSR recommendations as appropriate
- Adept at providing zealous representation for defendants while maintaining exceptional professional relationships and open communication with courts, prosecutors, and law enforcement agencies
- Sensitive to, and respectful of, victim rights in sentencing, sanctions, and related decisions
- Active member Utah State Bar, Board Member Utah State Bar Young Lawyers Division

**Other Legal**
- Extensive experience with military justice system and addressing legal matters in foreign jurisdictions
- Reviewed and adjudicated performance evaluation disputes and appeals from throughout the Marine Corps as a member of the USMC Performance Evaluation Review Board
- Served as Convening Authority for Summary and Special Courts Martial to administer discipline and justice in the Armed Forces. Ordered pre-trial investigations. Preferred charges and assigned Court Members, as well as individual military counsel, for all proceedings. Reviewed pre-trial agreements, findings, and sentences and ordered appropriate final action in criminal matters. Ensured all actions were consistent with the Uniform Code of Military Justice (UCMJ) and host nation agreements
- Convening Authority for numerous administrative Judge Advocate Manual (JAGMAN) and criminal investigations. Ensured independent investigations with exceptional integrity to discover all relevant, reliable, and credible evidence and information bearing on a matter in order to make informed decisions about how to proceed. Ensured all decisions were fair and impartial and based on known facts
- Conducted monthly Non-Judicial Punishment (NJP) proceedings to address cases of misconduct and poor performance by officer or enlisted servicemembers. Proceedings included conducting investigations; evaluating the accused’s military service, nature of the incident, victim and witness availability; and determining appropriate administrative or disciplinary action based on particular facts
- Resolved all manner of legal matters involving military dependent family members subject to local (host nation) law and military installation policies

**Policy Development, Implementation, and Compliance**
- Established and led an interagency collaborative enterprise for the development and employment of non-traditional defense capabilities in support of national security objectives, to include stakeholder senior leadership coordination meetings, drafting national directives, and presenting coordinated efforts to the Secretary of Defense and Chairman, Chairman of Joint Chiefs of Staff (CJCS) for approval
- Joint Staff lead for DoD strategic multi-layered assessment, integrating U.S. government, civilian, and academic agencies to evaluate complex problems and develop solutions
- Created and implemented comprehensive Marine Corps-wide policy and procedures to transition entire workforce of helicopter pilots from the Marine Corps’ legacy assault support aircraft, the CH-46 helicopter, to the new MV-22 tilt-rotor aircraft that replaced the CH-46
- Developed innovative and effective policies and procedures that built relationships and trust across senior stakeholder leadership, facilitating rapid organizational response to emerging situations by enabling
expedited senior executive approval of time-sensitive high-risk activities. Concept was utilized by all USMC aviation, and supported ground forces in Iraq during 2004-2005

- Monitored and ensured compliance with all institutional policies and training requirements; regularly conducting in-house inspections to continually monitor 61 critical functional areas, maintain continuity during turnover, comply with governing directives, and align activities with business priorities
- Instituted formal policy, to include reporting and response protocols, for Workplace Harassment, Equal Opportunity Employment, Sexual Assault, Substance Abuse, and Suicide Prevention

Organizational Leadership
- Senior executive leading 450+ personnel that comprise the headquarters of 1st Marine Aircraft Wing, a dynamic organization composed of 7,200 personnel and 120 aircraft forward based in the Asia-Pacific
- Developed and implemented training program for executives assigned to Headquarters USMC fiscal activities. Improved peer-to-peer coordination, business partner integration, and incoming executives’ knowledge of stakeholders to ensure initiatives remained aligned with business priorities
- Skilled consultant, performed in numerous consultative capacities relating to leadership development strategy, talent acquisition, asset management, risk mitigation, and compliance
- Multiple national security related assignments; aviation liaison to U.S. Secret Service for U.S. President visit to Indonesia; special technical capabilities advisor to Secretary of Defense, CJCS, Combatant Commanders, and interagency partners on highly classified emergent capabilities
- Human factors council member providing insight to senior executives regarding junior executive performance considerations and mitigation of high-risk activities
- Instituted leadership-based interventions to establish standards of ethical behavior, decrease gender bias, promote bystander intervention, and reduce workplace and “off-duty” safety/disciplinary incidents

Human Capital Management
- Directly managed the global assignments and career development of 775 mid-level executives; supervised global assignment of 3,090 junior executives across 7 critical occupational fields
- Screened and evaluated thousands of executives to provide insight to senior leadership, and the executives themselves, regarding command assignments, talent, potential, technical ability, organizational and client needs, leadership development opportunities, and formal education programs
- Senior HCM advisor, directed all HCM activities for 7,200 personnel throughout Asia-Pacific region

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<th>Education</th>
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<tr>
<td><strong>Juris Doctor</strong>, S. J. Quinney College of Law, University of Utah 2016</td>
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<td>Certificate in Public Interest Law and Policy</td>
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<td>Outstanding Clinical Student Award, CALI Award in Real Estate Transactions and Finance</td>
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<tr>
<td>Outstanding Achievement in Business Organizations, Legal Research, Lawyering Skills, and Trial Advocacy</td>
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<tr>
<td><strong>Master of Arts (International Studies)</strong>, The Fletcher School of Law and Diplomacy, Tufts University 2006</td>
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<td>Commandant of the Marine Corps Fellow to International Security Studies Program</td>
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<td><strong>Bachelor of Arts (Spanish)</strong>, Weber State University 1993</td>
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Community

| Planning Commission Chairman, Planning Commission, Woods Cross, UT 2019 – Present |
| **Director/Volunteer Attorney**, Veteran’s Legal Clinic, Salt Lake City, UT 2015 – Present |
| Coordinate volunteer attorneys, U.S. Department of Veterans Affairs Veterans Justice Outreach representatives, law students, and paralegal support for monthly pro bono legal clinic |
| **Board Member**, Young Lawyer Division of the Utah Bar Association, Salt Lake City, UT 2018 – Present |
| **Bronze Minuteman Award Recipient**, Awarded by Utah National Guard 2021 |
| Recognition for community leaders and their extraordinary support and leadership to the citizens of Utah |
Dear Ms. Abad,

I am currently a member of the Utah Sentencing Commission. As one of Utah State Bar representatives my role has been to provide insight related to juvenile delinquency. Presently, I serve as the Chair of the Utah Sentencing Commission. I would like the opportunity to continue to serve as a Member of the Utah Sentencing Commission.

I have worked as an advocate for young people in the juvenile court system for 22 years. Since 2010, I have been the Executive Director of Utah Juvenile Defender Attorneys (UJDA). UJDA represents youth in delinquency cases.

This position has provided the opportunity for me to work with a broad range of perspectives with a commitment to the common goals being to strengthen safety in our community, foster confidence in the system, and promote respect for the fair administration of justice. For young people, this provides the opportunity to meet these goals and maximize the opportunity for our youth to reach their full potential as law abiding citizens.

UJDA provides legal representation to youth in all stages of delinquency cases. This includes detention hearings, arraignment, pre-trial hearings, motion practice, plea bargaining, dismissal, waiver, trial, disposition, post disposition reviews, and appeals. Due to the specialized nature of delinquency work, we also represent clients in unique contexts, such as: restitution hearings, competency proceedings, drug court, mental health court, and expungement. In addition, we handle highly-complicated, delicate and technical cases such as transfer to the adult system.

As a defense attorney for young people, I have years of specialized legal training and expertise in client management. My work also requires a working knowledge of the adult criminal justice system. This specialization provides me with a unique knowledge of the nuances and pitfalls of juvenile court as well as the special resources available for young clients.
The scope and nature of my work centers on public defense for young people. I keep abreast of the rapidly evolving juvenile jurisprudence which affects not only UJDA’s clients, but the juvenile justice system as a whole. Accordingly, I serve on a variety of committees and task forces. I work diligently to foster a positive working relationship with all the participants in the juvenile justice system.

In juvenile court you do not have the luxury of tunnel vision. The consequences on a young life and the future impact on the community are too grave. Therefore, I strived to zealously represent my clients while, simultaneously supporting the youth and their family through the court process. The goal is to change how each youth creates his or her future.

My experience and work as a courtroom advocate as well as my participation in various committees, boards and task forces has helped to establish a comprehensive perspective which I believe has been and, hopefully, will continue to be beneficial to the Utah Sentencing Commission.

Thank you for your consideration of my application.

Sincerely,

[Signature]

Pam Vickrey
Education

*University of Utah, College of Law* Juris Doctor 1999
Women’s Law Caucus, Program Coordinator 1997-1998
Recipient – Alex and Margaret E. Oser Merit Scholarship 1996-1997

*University of California, Santa Cruz* 1996
BA in Environmental Studies, Emphasis in Policy and Planning 1995-1996
Chancellor’s Undergraduate Internship/Scholarship 1995-1996
Completed Job Training Programs
* Assertiveness and negotiation as a component of conflict prevention
* Personal and organizational decision-making
* Time management, organizational skills and tools for stress management
* Professional business communication
* Team building
* Public speaking and group presentation
* Leadership development

Professional Experience

Member Good Standing Utah State Bar 2000 - Present

Utah Juvenile Defender Attorneys, LLC 2010 – Present
Utah Juvenile Defender Resource Center
Executive Director

Responsibilities include: day to day operations; budget development and management; staff development, recruitment, supervision, and evaluation; establishing and maintaining an appropriate work climate for achieving goals and objectives through training implementation; carrying out juvenile court and juvenile justice policies, procedures, and programs; and keeping educated and standards-based zealous representation of juveniles in delinquency cases the primary focus.

Public relations including speaking to parents, judges, court personnel, probation officers, caseworkers, local school districts, private a and state agencies providing treatment, mental health providers, local universities, and serving on numerous committees and boards to ensure an open and communication and collaborative effort toward problem solving.
Represent juveniles in all levels of the justice system charged with all ranges of offenses from misdemeanors, felonies, certification hearings, and serious youth offender cases; appear in court on a daily basis; work with all parties involved in the juvenile court and appellate proceedings.

Pappas & Associates – Assistant Attorney 2000 – 2010

(Formerly Rilling & Associates)
Represent juveniles in all levels of the justice system charged with all ranges of offenses from misdemeanors, felonies, certification hearings, and serious youth offender cases; appear in court on a daily basis; work with all parties involved in the juvenile court and appellate proceedings.

Subcontractor – Legal Representative 2002 – 2010

Subcontract to represent individuals in mental illness and retardation commitment hearings.

Mental Illness and Civil Commitment Contract 2002
Contract Administrator & Primary Legal Representative

Represented individuals in mental illness and retardation commitment hearings; oversaw the representation of Salt Lake County residents in Utah County in mental illness and retardation commitment hearings; administered the contract in a pro-active, efficient, reliable and accountable manner.

Guardian ad Litem – Law Clerk 1999 – 2000

Filed and prepared motions and court documents; communicated with clients and associated agencies; and appeared in court on behalf of clients under the third year practice rule.

Professional Affiliations

Second District Judicial Nominating Commission 2020 -Present

Juvenile Justice Oversight Committee 2017 – Present

Utah’s Indigent Defense Commission 2017- Present

Juvenile Justice Working Group 2016-2017

Judicial Council’s Indigent Representation Committee 2016

OJJDP Grant Access to Justice: Rural & Tribal Southwest Project 2016- 2018

National Juvenile Justice Network 2016-Present
Utah Sentencing Commission - Chair  Present
Utah Sentencing Commission Juvenile Law Subcommittee - Chair Present
Utah State Bar Juvenile Law Section - Chair 2014-2015
Utah State Bar Juvenile Law Section CLE Coordinator 2013-2014
Troubled Youth/Serving Promising Youth Planning Committee 2013- Present
Member National Association of Counsel for Children 2013-2014
CCIJ Youth Services/Receiving Center Funding Working Group Meeting 2013
Third District Juvenile Court Table of Ten 2012- Present
Juvenile Competency Attainment Project Utah State University 2012 – 2013
Utah Supreme Court Minor Redaction Subcommittee 2012 – 2013
Advisory Board Member Southwest Juvenile Defender Center 2012- Present
Legislative Committee, Utah Association of Criminal Defense Lawyers 2010 - Present
Utah Board of Juvenile Justice Chair 2008- 2018 2016-2018
Juvenile Competency Committee 2005- 2012
Member Utah State Bar Juvenile Law Section 2008 – Present
P.A.C. Committee for the Criminal Justice Department of the Salt Lake Community College 2007 - 2013
Salt Lake County Children’s Justice Center Advisory Board 2007 – 2013
Member Advisory Board that developed/created the first juvenile mental health court in Utah 2004
Juvenile Justice Advocates Board 2004 – Present
Member National Juvenile Defender Center 2002- Present
Member of the Southwest Juvenile Defender Center 2002 – Present
Co-Director of the Southwest Juvenile Defender Center 2018- Present
Member Utah Association of Criminal Defense Lawyers 2002 – Present
Supreme Court’s Advisory Committee on the Rules of Juvenile Procedure
Appointed by the Utah Supreme Court in 2001 to a four-year term; reappointed in 2005, 2009 and 2013.

Specialized Trainings, Presentations and Awards

Utah Board of Juvenile Justice Youth Advocate of the Year 2018
Voices for Utah Children Children’s Champion 2018
National Juvenile Defender Center Trailblazer Award and Juvenile Advocacy 2015
Crime and Justice Institute Conference The Evolution of Comprehensive State Legislative Reform 2018
Invited Participant PEW Charitable Trusts Conference on Getting Results in Juvenile Justice 2014
Presenter National Juvenile Defender Leadership Summit–
A Weighty Responsibility: Ending Indiscriminate Shackling of Your Clients in Court 2015
Holistic Case Management: Integrating Social Workers & Youth Advocates 2016
Developing a Culture of Advocacy in your Defense Office
Presenter Utah State Bar Juvenile Law Section – Role of Juvenile Defense Counsel 2014
Presenter for the Center for Children, Law & Policy at the University of Houston Law Center’s Thirteenth Annual Zealous Advocacy Conference – Juvenile Training Immersion Multi-system Representation 2014
Presenter Utah State Bar Juvenile Law Section – How Does Juvenile Competency Work 2014
Presenter Utah State Bar Juvenile Law Section – “Nooks and Crannies of Juvenile Immigration Law” 2014
Certified Trainer by the National juvenile Defender Center, Juvenile Training Immersion Program – first certified trainer in the state of Utah 2013
Presenter and Organizer Utah Association of Criminal Defense Lawyers Juvenile Law Seminars
2012, Spring 2013, and Fall 2013, December 2014, Spring 2015, Spring 2017
University of Utah College of Social Work Nomination for Outstanding Practicum Agency of the Year 2013
Department of Human Services Training for Forensic Evaluators RE: Juvenile Competency 2012

National Legal Aid and Defender Association (NLADA), Defender Legal Services 2012
Special Invitation Participant to Convening regarding US Supreme Court Case Graham v. Florida


JoHanna L. Williams  
P.O. Box 13, Monroe, UT 84754  
(435)896-7289  
jwilliams@llaw.com

April 14, 2022

Christy Abad  
Executive Assistant  
645 South 200 East,  
Salt Lake City, UT 84111  
cabad@utahbar.org

Dear Ms. Abad:

I am interested in being considered for the Utah Sentencing Commission bar representative as an experienced youth defender. I received my law degree in May 2007 from Thomas M. Cooley Law School in Lansing, Michigan. I was admitted to the Utah State Bar on October 30, 2007.

As evidenced by my resume, I believe my work experience shows I would be a great candidate as a bar representative for the Utah Sentencing Commission as a youth defender. Currently, I work as the Managing Public Defender in Sevier and Wayne Counties and as an Attorney with LLaw. Since 2020 I have also had the opportunity sit on the Advisory Board for the Utah Statewide Juvenile Delinquency Defense Training and Sustainable Capacity Project. The purpose of this project is to ensure that all youth involved in the juvenile justice system have access to specialized youth defense counsel and that youth defenders have the training resources and support they need.

Both my private practice and public defender positions have given me the opportunity to appear on numerous cases before the Justice, District and Juvenile Court judges in the Sixth District. I have also had the opportunity to act as a local community stakeholder for various boards and committees. This has given me a wide range of exposure to the various needs of the youth within our community.

In addition to my indigent defense experience within the Juvenile Court, I began my legal career as a law clerk at the Sixth District and Juvenile Courts. This gave me the unique opportunity to be familiar with many aspects of the District and Juvenile systems and become familiar with the challenges adjudicated and convicted members of our rural community’s face.

Based on my experience, I believe I would be a great asset to the Utah Sentencing Commission. Enclosed is a copy of my resume for your review. I look forward to your consideration.

Sincerely,

/s/  
JoHanna L. Williams
JoHanna L. Williams
P.O. Box 13, Monroe, UT 84754
(435) 896-7289
johanna0821@gmail.com

PROFESSIONAL SUMMARY
Currently the managing public defender of Sevier and Wayne Counties and the primary juvenile public defender for Sevier County and conflict juvenile public defender in Wayne County. Drafts grant applications to state authorities and secure funding for indigent defense. Many years of experience representing indigent defendants, both adult and juvenile, in all aspects of trial litigation. Currently provide strategic legal representation and guidance specifically concerning divorce, annulment, paternity actions, child custody, protective orders, adoptions, misdemeanor and felony criminal cases, estate planning, probate cases and a variety of children’s cases with 1Law legal services.

WORK HISTORY
01/2019 – Current
Managing Public Defender
Sevier County
  • Represent defendants, adult and youth, in all aspects of trial litigation.
  • Manage and supervise planning, development, preparation, reporting, budgeting, and monitoring all indigent defense services.
  • Supervise contracted indigent defense service providers.

07/2019 – Current
Managing Public Defender
Wayne County
  • See information as noted above for Sevier County.

02/2020 – Current
Advisory Board Member
Office of Juvenile Justice and Delinquency Prevention- Utah Statewide Juvenile Delinquency Defense Training and Sustainability Capacity Project
  • Provide access to training for attorneys representing youth in Utah.
  • Create and support standardization of youth defense practice across Utah.
  • Support development of specialized advocates for youth defense.

06/2011- Current
Associate Attorney
1Law, Richfield, Utah
  • Legal representation and guidance with family law, misdemeanor and felony criminal cases, estate planning, probate cases and specifically children’s cases.
  • Legal analysis, research, preparation of litigation and settlement documents.
  • Supervise and mentor office staff.

EDUCATION
Bar Admission State Bar of Utah, #11548, admitted 2007
Bachelor of Science in Criminal Justice, Minor English, May 2003 Weber State University, Ogden, Utah
COMMUNITY SERVICE

2021 – Present  
**Utah State Bar, New Lawyer Training Program**  
Mentor

2021 – Present  
**6th District Family Drug Court Organizing Committee and Drug Court Board**  
Member – Managing Public Defender

2017 – 2020  
**Sixth District Judicial Nominating Commission**  
Utah State Bar Representative

2014 – 2017  
**Sevier County Nominating Commission Chair**  
Utah State Bar Representative

2012 – 2014  
**Monroe City Pioneer Day Celebration Committee**  
Co-Chair 2014  
Contributing Member 2012, 2013
REPORT OF THE
UTAH STATE BAR.

Fund for
Client
Protection

Fiscal Year July 2021 – June 2022
History of the Fund for Client Protection

The Fund for Client Protection was approved and established by the Utah Supreme Court effective April 9, 1977. The fund was established to provide meaningful cost reimbursements to clients injured by a lawyer's dishonest acts. In 1990, the Committee adopted the Rules for Lawyers' Fund for Client Protection. The Supreme Court approved the rules August 3, 1990.

Mission of the Fund

The purpose of the Fund for Client Protection is to promote public confidence in the administration of justice and the integrity of the legal profession by reimbursing losses caused by the dishonest conduct of lawyers and Licensed Paralegal Practitioners (LPPs) admitted and licensed to practice law in this state.

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

Every lawyer and LPP has an obligation to the public to participate in the collective effort of the Bar to reimburse persons who have lost money or property as a result of the dishonest conduct of another lawyer or LPP. Contribution to the Lawyers' Fund for Client Protection is an acceptable method of meeting this obligation.

Each year during the licensing of Utah State Bar members, each attorney and LPP is assessed a small fee of up to $20.00, dependent on the amount needed to keep the fund solvent.
Recent Changes to the Rules of the Fund for Client Protection

Changes to Fund rules 14-904 and 14-912 were made as part of an overhaul of all Bar rules that mention the Office of Professional Conduct (OPC). The Court changed OPC rules to reflect that OPC is now under the supervision of the Court’s OPC Oversight Committee and to make changes recommended by the ABA’s disciplinary process review committee. These changes were effective December 15, 2020. The Court also changed all deadlines to be divisible by 7.

Fiscal Year July 2021 - June 2022

As contemplated by the Utah Supreme Court Rules of Professional Practice 14-904(c) from the Fund for Client Protection a/k/a Client Security Fund, the Committee submits the following report of its activity this past year and the claims which are pending but have not yet been reviewed.

During the past fiscal year, the Committee held four meetings to hear and make recommendations regarding fifteen claims concerning a total of nine attorneys. The number of claims filed against any one attorney ranged from one to four. The Committee has filed reports after each of its meetings. The reports detailed the claims which the Committee has reviewed and the recommendations as to those claims. Following is a brief summary of the past year’s activity.

<table>
<thead>
<tr>
<th>INCOME</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund for Client Protection Fees</td>
<td>$0</td>
</tr>
<tr>
<td>Restitution Revenue</td>
<td>0</td>
</tr>
<tr>
<td>Investment Income</td>
<td>750</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>$750</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPENSE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Claims Expenses</td>
<td>$18,107</td>
</tr>
<tr>
<td>Bank Service Charges</td>
<td>607</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>$18,714</strong></td>
</tr>
</tbody>
</table>

**Net Income** $17,965

Fiscal Year July 2021–June 2022
<table>
<thead>
<tr>
<th>Attorney</th>
<th># of claims made to the fund</th>
<th># of claims recommended for approval</th>
<th>total $ claimed</th>
<th>total $ paid from the fund</th>
<th>total $ pending approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>D. Brian Boggess</td>
<td>1</td>
<td>1</td>
<td>$3,500</td>
<td></td>
<td>$3,500</td>
</tr>
<tr>
<td>Thomas M. Burton</td>
<td>1</td>
<td>1</td>
<td>$8,300</td>
<td></td>
<td>$8,300</td>
</tr>
<tr>
<td>John C. Cooper</td>
<td>1</td>
<td>1</td>
<td>$1,500</td>
<td></td>
<td>$1,500</td>
</tr>
<tr>
<td>Tyler R. Goucher</td>
<td>1</td>
<td>1</td>
<td>$7,600</td>
<td>$4,100</td>
<td></td>
</tr>
<tr>
<td>Jesse P. Murff</td>
<td>1</td>
<td>1</td>
<td>$6,000</td>
<td>$1,500</td>
<td></td>
</tr>
<tr>
<td>J. Bruce Savage</td>
<td>4</td>
<td>4</td>
<td>$2,000</td>
<td>$2,000</td>
<td>$3,000 $2,250 $4,000</td>
</tr>
<tr>
<td>Kimberly J. Trupiano</td>
<td>2</td>
<td>0</td>
<td>$5,082 $2,500</td>
<td>$0</td>
<td>attorney paid claimant prior to hearing</td>
</tr>
<tr>
<td>Tineke E. Van Dijk</td>
<td>1</td>
<td>1</td>
<td>$500</td>
<td></td>
<td>$500</td>
</tr>
<tr>
<td>Richard G. Uday</td>
<td>3</td>
<td>3</td>
<td>$40,000 $30,000 $15,000</td>
<td>$20,000 $20,000</td>
<td>$15,000</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>15</td>
<td>13</td>
<td>$131,232</td>
<td>$47,600</td>
<td>$38,050</td>
</tr>
</tbody>
</table>

(8 cases pending Commission approval)

Report of the Fund for Client Protection
Prospective Claims

In order to establish the appropriate amount to be assessed to its membership, the Board also needs to be made aware of the number and amounts of prospective claims. As of the date of this report, there are 11 claims pending that have not been heard by the Fund for Client Protection Committee.

<table>
<thead>
<tr>
<th>Utah State Bar Fund for Client Protection Fiscal Year 2021-2022 Request</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bank Balance (as of 02/28/2022)</strong></td>
</tr>
<tr>
<td><strong>Less: Approved Claims awaiting final paperwork from claimant &amp; payment</strong></td>
</tr>
<tr>
<td><strong>Prospective Claims</strong></td>
</tr>
<tr>
<td><strong>Projected Fund Balance</strong></td>
</tr>
<tr>
<td><strong>Targeted Fund Balance</strong></td>
</tr>
<tr>
<td><strong>Projected Fund Deficiency</strong></td>
</tr>
<tr>
<td><strong>Current Active Attorneys/LPPs</strong></td>
</tr>
<tr>
<td><strong>Client Security Fund Required 2021-2022 Licensing Period</strong></td>
</tr>
<tr>
<td><strong>Preliminary Request</strong></td>
</tr>
<tr>
<td><strong>Actual Request</strong></td>
</tr>
<tr>
<td><strong>Estimated amt to be collected</strong></td>
</tr>
</tbody>
</table>

Conclusion

Because the Fund for Client Protection Committee recognizes its responsibility to the Court, the Bar, and its members, it carefully reviews each claim for both eligibility for payment as well as to determine the appropriate amount to be recommended for payment for each claimant. This can be seen in the information presented above.

The Fund for Client Protection provides meaningful relief to those victimized by dishonest lawyers or Licensed Paralegal Practitioners and elevates the overall integrity of the profession. These results demonstrate that the Fund remains “simply, the right thing to do.”
Article 9. Lawyers' Fund for Client Protection

Rule 14-901. Definitions.
As used in this article:

(a) "Bar" means the Utah State Bar;

(b) "Board" means the Board of Commissioners of the Utah State Bar;

(c) "Committee" means the Committee on Fund for Client Protection;

(d) "Dishonest conduct" means either wrongful acts committed by a lawyer or a licensed paralegal practitioner in the nature of theft or embezzlement of money or the wrongful taking of or conversion of money, property or other things of value, or refusal to refund unearned fees received in advance where the lawyer or licensed paralegal practitioner performed no service or such an insignificant service that the refusal to return the unearned fees constitutes a wrongful taking or conversion of money; and

(e) "Fund" means the Fund for Client Protection; and

(f) "Supreme Court" means the Utah Supreme Court.

Rule 14-902. Purpose and scope; establishment of Fund.
(a) The Fund is established to reimburse clients for losses caused by the dishonest conduct committed by lawyers admitted to practice in Utah or licensed paralegal practitioners licensed in Utah.

(b) The purpose of the Fund is to promote public confidence in the administration of justice and the integrity of the legal profession by reimbursing losses caused by the dishonest conduct of lawyers admitted and licensed to practice law in Utah or licensed paralegal practitioners licensed in Utah, occurring in the course of the lawyer/client, licensed paralegal practitioner/client or fiduciary relationship between the lawyer or licensed paralegal practitioner and the claimant.

(c) Every lawyer and licensed paralegal practitioner have an obligation to the public to participate in the collective effort of the Bar to reimburse persons who have lost money or property as a result of the dishonest conduct of another lawyer or licensed paralegal practitioner. Contribution to the Fund is an acceptable method of meeting this obligation.

(d) These rules shall be effective for claims filed after August 1990, and the Committee, which was previously authorized under the former resolution, may act under the terms of the former resolution on claims filed prior to the effective date of these rules.

Rule 14-902 Note.
By resolution of the Board of Commissioners of the Utah State Bar, a Client Security Fund was approved and established by the Supreme Court, effective April 9, 1977. The Fund was established to provide meaningful, prompt cost reimbursements to clients who had been injured by a lawyer's dishonest act. The original resolution did not provide sufficient rules and/or guidelines for the Committee that was embodied by the resolution to utilize in making its recommendations to the Board of Bar Commissioners. The American Bar Association has adopted, as of August 9, 1989, Model Rules for Lawyers' Fund for Client Protection. The following Rules adopt many of the principles from the American Bar Association Model Rules, as well as features from other states and from the prior resolution of the Board of Commissioners of the Utah State Bar, as approved by the Supreme Court.

Licensed Paralegal Practitioners were included in the Fund in 2019 after the Utah Supreme Court exercised its constitutional authority to govern the practice of law and authorized Licensed Paralegal Practitioners to provide limited legal services in the practice areas of: (1) temporary separation, divorce, parentage, cohabitant abuse, civil stalking and custody and support; (2) forcible entry and detainer; and (3) debt collection matters in which the dollar amount in issue does not exceed the statutory limit for small claims cases.

Supreme Court Rules of Professional Practice
Rule 14-903. Committee membership and terms; Board approval of Committee recommendations.
(a) The Committee shall consist of five lawyers, each to function for a period of five years. The initial membership of the Committee shall be comprised of those individuals who are members of the Committee existing under the former resolution at the time of the adoption of these rules. Subsequent appointments shall be for a term of three years or the term uniformly determined for all Committee members by the Board. Vacancies shall be filled by appointment by the president of the Bar, with the approval of the Board, for the unexpired term.

(b) The Board shall retain the capacity to make any final determination after considering the recommendations of the Committee. The Board, functioning with regard to the Fund, is under the supervision of the Supreme Court.

Rule 14-904. Funding.
(a) The Supreme Court will provide for funding by the lawyers licensed in this state in amounts adequate for the proper payment of claims and costs of administering the Fund subject to paragraph (c).

(b) All determinations regarding funding will be within the discretion of the Board, subject to the Supreme Court's approval.

(c) The Bar has authority to assess its members for purposes of maintaining the Fund at sufficient levels to pay eligible claims in accordance with these rules. The Committee must report annually to the Commission on a timely basis as to known prospective claims as well as total claims paid to date so that an appropriate assessment can be made for the upcoming fiscal year. After the assessment at the beginning of the fiscal year is determined, the Fund balance must be set in an amount of at least $200,000. The Bar will then report to the Supreme Court as to known prospective claims as well as total claims paid to date after which the final assessment and fund balance will be set with the Court's approval.

(d) A lawyer's failure to pay any fee assessed under paragraph (c) is cause for administrative suspension from practice until payment is received.

(e) Any lawyer whose actions have caused payment of funds to a claimant from the Fund must reimburse the Fund for all monies paid out as a result of the lawyer's conduct with interest at legal rate, in addition to payment of the assessment for the procedural costs of processing the claim and reasonable attorney fees incurred by the Office of Professional Conduct or any other attorney or investigator engaged by the Committee to investigate and process the claim as a condition of continued practice.

(1) In lawyer discipline cases for which the Fund pays an eligible claim, the lawyer's license to practice will be administratively suspended for non-payment until the lawyer has reimbursed the Fund.

Rule 14-905. Segregated bank account.
All monies or other assets of the Fund including accrued interest thereon shall be held in the name of the Fund in a bank account segregated from all other accounts of the Bar or any committees or sections, subject to the direction of the Board.

Rule 14-906. Committee meetings.
(a) The Committee shall meet as frequently as necessary to conduct the business of the Fund and to timely process claims.

(b) The chairperson shall call a meeting at any reasonable time, or upon the request of at least two Committee members.

(c) A quorum of any meeting of the Committee shall be three members.

(d) Minutes of the meeting shall be taken and permanently maintained.

Rule 14-907. Duties and responsibilities of the committee.
The Committee shall have the following duties and responsibilities:

(a) to receive, evaluate, determine and make recommendations to the Board relative to the individual claims;

(b) to promulgate rules of procedure not inconsistent with these rules;
(c) to provide a full report, at least annually, to the Board and to make other reports as necessary;

(d) to publicize its activities to the public and the Bar, subject to approval of the Board;

(e) to appropriately utilize Bar staff to assist in the Committee's performance of its functions effectively and without delay;

(f) to engage in studies and evaluations of programs for client protection and the prevention of dishonest conduct by lawyers and licensed paralegal practitioners; and

(g) to perform all other acts necessary or proper for the fulfillment of the purposes of the Fund and its effective administration.

**Rule 14-908. Conflict of interest.**

(a) A Committee member who has or has had a lawyer-client relationship or a financial relationship with a claimant or lawyer who is the subject of a claim shall not participate in the investigation or adjudication of a claim involving that claimant, lawyer or licensed paralegal practitioner.

(b) A Committee member with a past or present relationship, other than as provided in paragraph (a), with a claimant, the lawyer or the licensed paralegal practitioner whose alleged conduct is the subject of a claim, shall disclose such relationship to the Committee and, if the Committee deems appropriate, that Committee member shall not participate in any proceeding relating to such claim.

**Rule 14-909. Immunity.**

The Committee members, employees and agents of the Bar and claimant and lawyers who assist claimants are absolutely immune from civil liability for all acts in the course of their duties.

**Rule 14-910. Eligible claim.**

(a) The loss must be caused by the dishonest conduct of the lawyer or the licensed paralegal practitioner and shall have arisen out of the course of a lawyer/client, licensed paralegal practitioner/client, or fiduciary relationship between the lawyer or the licensed paralegal practitioner and the claimant and by reason of that relationship.

(b) The claim for reimbursement shall be filed within one year after the date of the final order of discipline.

(b)(1) In cases of the lawyer's or licensed paralegal practitioner's death, the claim for reimbursement shall be filed within one year of the lawyer's or licensed paralegal practitioner's date of death.

(b)(2) In cases of the lawyer's or licensed paralegal practitioner's formal disability, the claim for reimbursement shall be filed within one year of the date of the order of disability.

(c) If the subject of the application for reimbursement from the Fund is or arises out of loss occasioned by a loan or an investment transaction with a lawyer or licensed paralegal practitioner, each loss will not be considered reimbursable from the Fund unless it arose out of and in the course of the attorney/client relationship or licensed paralegal practitioner/client relationship; and but for the fact that the dishonest lawyer or licensed paralegal practitioner enjoyed an attorney/client or licensed paralegal practitioner/client relationship with the claimant, such loss could not have occurred. In considering whether that standard has been met the following factors will be considered:

(c)(1) the disparity in bargaining power between the lawyer or the licensed paralegal practitioner and the client in their respective educational backgrounds in business sophistication;

(c)(2) the extent to which the lawyer's or the licensed paralegal practitioner's status overcame the normal prudence of the claimant;

(c)(3) the extent to which the lawyer or licensed paralegal practitioner, by virtue of the attorney/client or licensed paralegal practitioner/client relationship with the claimant, became privy to information as to the client's financial affairs. It is significant if the lawyer or licensed paralegal practitioner knew of the fact that the client had available assets or was expecting to receive assets which were ultimately wrongfully converted by the lawyer or licensed paralegal practitioner;
(c)(4) whether a clear majority of the service arose out of a relationship requiring a license to practice law in Utah, as opposed to one that did not. In making this evaluation, consideration will be given to:

(c)(4)(A) whether the transaction originated with the lawyer or licensed paralegal practitioner;

(c)(4)(B) the reputation of the lawyer or licensed paralegal practitioner as to scope and nature of his/her practice and/or business involvement;

(c)(4)(C) the amount of the charge made for legal services, if any, compared to that for a finder's fee, if any; and

(c)(4)(D) the number of prior transactions of either a similar or different nature in which the client participated, either with the lawyer or licensed paralegal practitioner involved or any other lawyer, licensed paralegal practitioner, person or business organization;

(c)(5) the extent to which the lawyer or licensed paralegal practitioner failed to make full disclosure to the client in compliance with the Utah Rules of Professional Conduct, including disclosure of the lawyer's or licensed paralegal practitioner's financial condition and his/her intended use of the funds.

(d) Exceptions. Except as provided by paragraph (c), the following losses shall not be reimbursed:

(d)(1) loss incurred by spouses, children, parents, grandparents, siblings, partners and associates of the lawyer or licensed paralegal practitioner;

(d)(2) losses covered by any bond, surety, agreement or insurance contract to the extent covered thereby, including any loss to which any bonding agent, surety or insurer is subrogated to the extent of that subrogated interest;

(d)(3) losses of any financial institution which are recoverable under a "Banker's Blanket Bond" or similar commonly available insurance or surety contract;

(d)(4) any business entity controlled by the lawyer, licensed paralegal practitioner or any person or entity described in paragraph (d)(1);

(d)(5) any governmental entity or agency;

(d)(6) any assigned claims, third party claims, claims of heirs or estates of deceased claimants;

(d)(7) any claims where claimant has failed to exhaust all other reasonably available services or recovery methods;

(d)(8) any investment losses, as distinguished from legal fees, which might reasonably be characterized as:

(d)(8)(A) any pyramid or ponzie scheme;

(d)(8)(B) any investment in or loan to any offshore entity;

(d)(8)(C) any investment in or loan to an entity that claims that a benefit to the investor would be the evasion, avoidance, reduction or other sheltering of taxes that would be otherwise assessed on the investment; or

(d)(8)(D) any investment that promises such a high rate of return that a reasonable and prudent person would suspect that the venture is of unusually high risk.

(e) In cases of extreme hardship or special and unusual circumstances, the Committee may, in its discretion, recognize a claim which would otherwise be excluded under these rules.

Rule 14-911. Procedures and form; responsibilities of claimants to complete form.
(a) The Committee shall prepare and approve a form of claim for reimbursement.
(b) The form shall include at least the following information provided by the claimant under penalty of perjury:

(b)(1) the claimant’s name and address, home and business telephone, occupation and employer, and social security number for purposes of subrogation and tax reporting;

(b)(2) the name, address and telephone number of the lawyer or licensed paralegal practitioner who has dishonestly taken the claimant’s money or property;

(b)(3) the legal or other fiduciary services the lawyer or licensed paralegal practitioner was to perform for the client;

(b)(4) how much was paid to the lawyer or licensed paralegal practitioner;

(b)(5) the copy of any written agreement pertaining to the claim;

(b)(6) the form of the claimant’s loss involved (e.g. money, securities or other property) and the attachment of any documents that evidence the claimed loss such as cancelled checks, title instruments, deeds or stock certificates;

(b)(7) the amount of loss and the date when the loss occurred;

(b)(8) the date when the claimant discovered the loss and how the claimant discovered the loss;

(b)(9) the lawyer’s or licensed paralegal practitioner’s dishonest conduct and the names and addresses of any persons who have knowledge of the loss;

(b)(10) identification of whom the loss has been reported to (e.g. county attorney, police, disciplinary agency, or other person or entity), and a copy of any complaint and description of any action that was taken;

(b)(11) the source, if any, from which the loss could be reimbursed, including any insurance, fidelity or surety agreement;

(b)(12) the description of any steps taken to recover the loss directly from the lawyer, licensed paralegal practitioner or any other source;

(b)(13) the circumstances under which the claimant has been, or will be, reimbursed for any part of the claim (including the amount received or to be received, and the source), along with a statement that the claimant agrees to notify the Committee of any reimbursements the claimant receives during the pendency of the claim;

(b)(14) the existence of facts believed to be important to the Committee’s consideration of the claim;

(b)(15) the manner in which the claimant learned about the Fund;

(b)(16) the name, address and telephone number of the claimant’s present lawyer or licensed paralegal practitioner, if any;

(b)(17) the claimant’s agreement to cooperate with the Committee in reference to the claim, as required by the Utah or Federal Rules of Civil Procedure, in reference to civil actions which may be brought in the name of the Bar, pursuant to a subrogation and assignment clause, which shall also be contained within the claim;

(b)(18) the name and address of any other state fund to which the claimant has applied or intends to apply for reimbursement, together with a copy of the application; and

(b)(19) the statement that the claimant agrees to the publication of appropriate information about the nature of the claim and the amount of reimbursement, if reimbursement is made.

(c) The claimant shall have the responsibility to complete the claim form and provide satisfactory evidence of a reimbursable loss.

(d) The claim shall be filed with the Committee by providing the same to the Utah State Bar, Fund for Client Protection at the Law and Justice Center, 645 South 200 East, Salt Lake City, Utah 84111.
Rule 14-912. Processing claims.
(a) Whenever it appears that a claim is not eligible for reimbursement pursuant to these rules, the claimant must be advised of the reasons why the claim may not be eligible for reimbursement, and that unless additional facts to support eligibility are submitted to the Committee, the claim file will be closed. The Fund chair may appoint themselves or any Committee member to determine the eligibility of claims.

(b) A certified copy of an order disciplining a lawyer for the same dishonest act or conduct alleged in the claim, or a final judgment imposing civil or criminal liability therefor, is evidence that a lawyer committed such dishonest act or conduct.

(c) The Office of Professional Conduct must be promptly notified of each and every claim.

(d) The lawyer alleged to have engaged in dishonest conduct must be provided a copy of the claim and given an opportunity to respond to the Committee in writing within 21 days of receiving the claim.

(e) The Committee may request that testimony be presented. If desired, the lawyer or lawyer's representative must request an opportunity to be heard within 21 days of receiving a notice from the Committee that the Committee will process the claim.

(f) The Committee may make a finding of dishonest conduct for purposes of adjudicating a claim. Such a determination is not a finding of dishonest conduct for the purposes of professional discipline and further, represents only a recommendation to the Board. A claim may only be considered if the individual lawyer involved has been disciplined to a threshold level of a public reprimand or is no longer in practice.

(g) The claim will be determined on the basis of all available evidence, and notice must be given to the claimant and the lawyer of the final decision by the Board after a recommendation has been made by the Committee. The recommendation for approving or denying a claim requires the affirmative votes of a majority of the Committee members and a quorum of the voting Board members.

(h) Any proceeding on a claim will not be conducted according to technical rules relating to evidence, procedure, and witnesses. Any relevant evidence must be admitted if it is the sort of evidence on which responsible persons are accustomed to rely in the conduct of serious affairs, regardless of any common law or statutory rule that may make improper the admission of such evidence over objection in court proceedings. The claimant has the duty to supply relevant evidence to support the claim.

(i) The Board must determine the order and manner of payment and pay those claims it deems meritorious. Unless the Board directs otherwise, no claim will be approved during a pending disciplinary proceeding involving the same act or conduct as alleged in the claim. No determination or hearing will take place until all disciplinary proceedings are complete.

(j) The Board must advise both the claimant and the lawyer of the status of the Board's consideration of the claim and after having received the recommendation of the Committee, must also be informed of the final determination.

(k) The claimant may request reconsideration within 28 days of the denial or determination of the amount of the claim.

Rule 14-913. Payment of reimbursement.
(a) The Board may, from time to time, fix a maximum amount of reimbursement that is payable by the Fund. Initially, the maximum amount shall be $10,000 per claim and $25,000 total dollars within any given calendar year with regard to an individual lawyer or licensed paralegal practitioner.

(a)(1) There shall be a lifetime claim limit of $425,000 per lawyer or licensed paralegal practitioner.

(b) Claimant shall be reimbursed for losses in amounts to be determined by the Board after recommendations by the Committee. Reimbursement shall not include interest and other incidental and out-of-pocket expenses.

(c) Payment of reimbursement shall be made in such amounts and at such time as the Board approves and may be paid in lump sum or installment amounts. In the event that the Committee determines that there is a substantial likelihood that
claims against the lawyer or licensed paralegal practitioner may exceed either the annual or lifetime claim limits, claims may be paid on a pro rata basis or otherwise as the Board and the Committee determine is equitable under the circumstances.

(d) If a claimant is a minor or an incompetent, the reimbursement may be paid to any proper and legally recognized person or authorized entity for the benefit of the claimant.

Advisory Committee Notes
Rule 14-913 Amendment Note: The Bar changed from a calendar year to a fiscal year (July 1 to June 30) in 1990.

The Board approved increasing the yearly per claim award limit from $10,000 to $20,000 and to eliminate the yearly per lawyer claim limit of $25,000 on December 1, 2000.

The Board voted to reinstate the yearly lawyer cap of $25,000 on June 8, 2001.

The Board voted to raise the yearly per lawyer cap to $50,000 from the previously reinstated $25,000 cap on December 7, 2001.

The Board voted to raise the yearly per lawyer cap to $75,000 on October 29, 2010.

Rule 14-914. Reimbursement from the fund as a matter of grace.
No person shall have a legal right to reimbursement from the Fund, whether as claimant, beneficiary or otherwise, and any payment is a matter of grace.

Rule 14-915. Restitution and subrogation.
(a) A lawyer or licensed paralegal practitioner whose dishonest conduct results in reimbursement to a claimant shall be liable to the Fund for restitution, and the Bar may bring such action as it deems advisable to enforce such obligation.

(b) As a condition of reimbursement, a claimant shall be required to provide the Fund with a pro tanto transfer of the claimant's rights against the lawyer or licensed paralegal practitioner and their legal representative, estate or assigns; and of claimant's rights against any third party or entity who may be liable for the claimant's loss.

(c) Upon commencement of an action by the Bar as subrogee or assignee of a claim, it shall advise the claimant, who may then join in such action to recover the claimant's unreimbursed losses.

(d) In the event the claimant commences an action to recover unreimbursed losses against the lawyer, licensed paralegal practitioner or any other entity who may be liable for the claimant's loss, the claimant shall be required to notify the Bar of such action.

(e) The claimant shall be required to agree to cooperate in all efforts that the Bar undertakes to achieve restitution for the Fund.

Rule 14-916. Confidentiality.
Claims, proceedings and reports involving claims for reimbursement are confidential until the Committee recommends, and final determination is made by the Board, authorizing reimbursement to the claimant, except as provided below. After payment of the reimbursement, the Board may publicize the nature of the claim, the amount of reimbursement and the name of the lawyer or licensed paralegal practitioner. The name and address of the claimant shall not be publicized by the Bar, unless specific permission has been granted by the claimant.

Updated December 15, 2020
UTAH STATE BAR
BOARD OF BAR COMMISSIONERS
MINUTES

March 10, 2022 at 1 p.m.

ZOOM AND IN-PERSON MEETING

In Attendance:  President Heather Thuet, President-Elect Kristin “Katie” Woods, and Commissioners John Bradley, Traci Gunderson, Rick Hoffman, Greg Hoole, Chrystal Mancuso-Smith, Marty Moore, Mark Morris, Andrew Morse, Shawn Newell, Michelle Quist, and Tyler Young.

Ex-Officio Members:  Past-President Heather Farnsworth, Nate Alder, Erik Christiansen, Kim Cordova, Beth Kennedy (for Kim Neville), Brandon J. Mark, Grant Miller, Camila Moreno, Margaret Plane, and Nick Stiles.

Not in Attendance:  Commissioners Shawn Newell and Rick Hoffman; Ex Officio members Tonya Wright, Dean Gordon Smith, Dean Elizabeth Kronk-Warner, J. Ramzi Hamady.

Also in Attendance:  Executive Director Elizabeth A. Wright, General Counsel Nancy J. Sylvester, Deputy General Counsel for Admissions Carrie Boren, Well-being Committee Director Martha Knudsen, Finance Director Lauren Stout, Frank Pignanelli, Steve Styler, Sue Crisman, Dr. James Teufel.

Minutes:

Ms. Thuet called the meeting to order at 1:03 p.m.


Ms. Thuet reported that the next Bar Review would be the evening following the meeting at the Green Pig.

1.2 Donations for YLD Homeless Youth Resource Center for April 28th Spring Ball.
Ms. Thuet reported that there was still a need for business suit donations to the Homeless Youth Resource Center. The business suits may be brought to the Law and Justice Center.

1.3 2022 Summer Convention Planning Report.
Beth Kennedy reported on the Summer Convention. She reported that they were working on keynote speakers. She and Ms. Thuet noted that the theme is, in essence, about having difficult conversations. Ms. Thuet noted that there would be an activity for children to interact with judges.

1.4 Reminder to Make Coronado Hotel Reservations and Encourage Colleagues to Attend.
Ms. Thuet reminded commissioners to encourage their colleagues to attend Summer Convention and to make reservations as soon as possible. 300 registrants is the break even number.

2. Action Items

2.1 Create Committee to Review Mental Health Service Providers: Martha Knudson.
Ms. Knudson reported that the pandemic brought to light the importance of mental health and also pushed forth innovation in these spaces. She said there are some providers that offer coaching, for example, and online access. Ms. Knudson proposed studying Blomquist Hale and other service providers through an ad hoc committee that would then make a recommendation. Katie Woods, Andrew Morse, and Heather Farnsworth volunteered to liaise with the committee. Ms. Thuet also suggested that Billy Walker propose someone from OPC to join. Ms. Thuet asked Ms. Knudson to fill in the rest of the working group, including with a non-lawyer. Mr. Moore moved to create the committee; Mr. Young seconded. The motion carried. Ms. Knudson will come back next meeting with suggestions for other committee members.

2.2 Purchase Table for First Annual UCLI Luncheon Celebrating Justice Durham March 24 at City Creek Marriott. (Tab 1, Page 3)
Mr. Moore moved to purchase one table for the luncheon. Mr. Morris seconded. The motion carried.

2.3 Approve Changes to Admissions Rules: Carrie Boren and Nancy Sylvester. (Tab 2, Page 5)
Ms. Boren and Ms. Sylvester presented on proposed changes to the Admissions Rules. The proposed changes included the following: 1) for reciprocal admission purposes, removing the geographic limitations and reducing the time a lawyer must have practiced in another jurisdiction from 60 months to 36 months; 2)
updating how the practice of a law professor is considered for licensing purposes; and 3) updating the law student/law graduate practice rule to allow for one failed bar exam or eighteen months’ post-graduation work. Mr. Young moved to recommend the rules to the Supreme Court for circulation for comment. Mr. Bradley seconded. The motion carried.

3. Information Items.

3.1 Finance Update: Lauren Stout. (Tab 3, Page 29)
Ms. Stout reported on the finances, noting that they were in good shape. She observed that the Bar currently had more positive revenue flow than previously projected, likely in response to several pandemic shutdowns on live events due to COVID surges. She noted that cash reserves are also up but also observed that the Bar had less than one year of operating expenses in reserves. The Commission then had a discussion about how to best manage its assets and what an appropriate amount of reserves to have would be. The Budget and Finance Committee was tasked with continuing to discuss these issues. Ms. Stout noted that for budgeting purposes, having nine months of budget numbers is best for the next year’s budget forecast.

3.2 Legislative Session Report: Frank Pignanelli and Steve Styler. (Tab 4, Page 71)
Mr. Pignanelli and Mr. Styler reported on the session, noting that most of the bills that the Commission supported had passed and several that the Commission had opposed had failed. Mr. Pignanelli said that he felt that the courts needed to do more to engage with the Legislature outside of the session to gain more partnerships there, especially as Rep. Snow transitions into retirement. He also observed that Rep. Brammer is looking at creating a chancery court, which has been done in other states, and recommended a Bar-Court partnership to study this.

Ms. Woods noted that the Bar Reimagined survey is going to be ready soon and the Commission will need to provide feedback. She said the committee is looking at 3 areas: 1) current customer service; 2) adding services; and 3) improvements to existing services. She said she would soon be asking commissioners to prepare personal notes to the licensees in their divisions requesting that they provide feedback. She said she would also be asking departments at the Bar to fill in questions. She suspected that mid-May to early June is when the survey would roll out.
3.4  ABA Delegates’ Report: Kim Cordova.
Ms. Cordova reported that the ABA mid-year meeting was again online. She noted that the bills that were garnering support were for marginalized communities, such as asylum seekers, homeless youth, and veterans. Transparency in nursing homes, accommodations for lactating mothers, and voting rights, and elections were other issues that were supported.

3.5  Judicial Council Report: Margaret Plane.
Ms. Plane noted that the Council was very focused on funding retention and attraction of judicial assistants and its budget request had been approved by the Legislature. The judiciary also received funding to build a courthouse in Manti and the Wasatch County Justice Center will get some additional funding. The courts also received over $3 million in ARPA funds. She noted that the Council is thrilled about automatic expungements.

3.6 Office of Legal Services Innovation 2022 Summit Report: Heather Farnsworth, Sue Crismon, and Dr. James Teufel. (Tab 5, Page 77)
Ms. Crismon noted that the relationship between the Bar and the Office of Legal Services Innovation is a critical partnership. She said while the Bar is focused on regulating lawyers, the Office is focused on the A2J gap and regulating software providers and non-lawyers. She noted that the United States is the most restrictive legal market in the world. Most sandbox entities are ABS (alternative business structures). Dr. James Teufel reported on the Innovation Office’s statistics, which were included in the Commission’s packet. Dr. Teufel noted that there will be a fee collection structure. He also discussed that the reporting that is required of entities with respect to how much is being charged for a service. In response to a Commission question, Ms. Crismon said there is no application fee for the Sandbox but that licensing fees are charged upon exit from the sandbox, which is based upon an entity’s revenue. Dr. Teufal noted that there are quite a few non-profits in the Sandbox now.

4.  Adjournment.

The meeting adjourned at 3:45 p.m.

CONSENT AGENDA (Tab 6, Page 96)

The Commission approved the Minutes of the January 28, 2022 Commission Meeting without discussion.
Board of Bar Commissioners
Attention: Heather L. Thuet, Bar President
Utah State Bar
645 South 200 East, Suite 310
Salt Lake City, Utah 84111-3834

Re:  Fund for Client Protection
Meeting of March 18, 2022

Dear President Thuet:

The following is a report of the meeting of the Fund for Client Protection a/k/a Client Security Fund which was held March 18, 2022 remotely via Zoom. The members of the Committee that were present are Committee Chair Stephen Farr, Linda Barclay, Brad Mumford, Joanna Bell, Kaitlyn Gibbs, Mickell Jimenez and Robert Harrison. Also present were Diane Akiyama from the Office of Professional Conduct, Assistant Disciplinary Counsel and Staff Liaison Christine Critchley. The Committee considered various claims and makes the following factual analysis and recommendations:

A. Claimant: David Ferguson
   Involved Attorney: Richard Uday
   Disciplinary Status: Disbarred as of October 19, 2020 when resigned with discipline pending.

   FACTS: Mr. Ferguson and his mother, Debbie Lucero appeared at this hearing and Mr. Uday did not. Mrs. Lucero was the one who actually paid to Mr. Uday the retainer for the services rendered. Mr. Ferguson retained Mr. Uday to prepare appeals. First to the court of appeals and then to the supreme Court. Mr. Uday did not complete the work that he was to do on the appeal before the Supreme Court. He was paid a total of $25,000 to handle the appeal. With respect to appeal to the Supreme Court, he provided no services, did no work, failed to communicate with the client.

   RECOMMENDATION: The committee recommends that the Fund for Client Protection reimburse Mr. Ferguson the sum of $15,000 which was the amount of money allocated for the work that was not done with respect to the Supreme Court appeal. Said payment will be made directly to Debbie Lucero.

B. Claimant: Jeffrey Nagle
   Involved Attorney: Brian Boggess
   Disciplinary Status: 3 year suspension beginning July 15, 2021

   FACTS: Mr. Nagle appeared via Zoom. Mr. Boggess did not appear nor was he represented by anyone. Mr. Nagle hired Mr. Boggess and paid him the sum of $3,500 to perform legal services on his behalf. Specifically, he was to modify child support. A check with the Court reveals that no services were performed by Mr. Boggess on the Nagle case. There was nothing filed with the court. Mr. Boggess so far as Mr. Nagle was aware, filed nothing on his behalf, and communication ceased between the attorney and the client, and accordingly, no meaningful services were rendered to the client in exchange for the $3500 fee he had paid to his attorney.
**RECOMMENDATION:** The Committee recommends that Mr. Nogle be refunded the $3500 from the fund that he paid for attorney services.

C. **Claimant:** H. Mekenzi Sarbacker  
   **Involved Attorney:** Bruce Savage  
   **Disciplinary Status:** Deceased

**FACTS:** Sarbacker hired Bruce Savage to represent her on a DUI case. Mr. Savage was actively representing the client but unfortunately passed away prior to the time the case was resolved. Ms. Sarbacker had to hire another attorney to complete the work on her criminal case and accordingly, did not really receive any meaningful legal services from Mr. Savage that lead to the culmination of her case.

**RECOMMENDATION:** The Committee recommends that Ms. Sarbacker be repaid the sum of $2250, which is the total amount of money that she paid to Mr. Savage.

D. **Claimants:** Cory Cissel  
   **Involved Attorney:** Bruce Savage  
   **Disciplinary Status:** Deceased

**FACTS:** Mr. Cissel hired Mr. Savage to perform legal services for him. He paid $3000 to Mr. Savage for representation on a criminal matter. Mr. Savage passed away prior to the case being resolved.

**RECOMMENDATION:** The Committee recommends awards Mr. Cissel $3000.

E. **Claimants:** Wesley & Helen Thompson  
   **Involved Attorney:** Thomas Burton  
   **Disciplinary Status:** Disbarred on December 4, 2019. Suspended from practice on May 10, 2018.

**FACTS:** Mr. & Mrs. Thompson paid Mr. Burton the sum of $10,000 to provide legal services on their behalf. They claim that Mr. Burton did some work on the case but failed to return to the, the unused portion of the retainer fee which they claim to be in the amount of $8,300. The nature of the work Mr. Burton was supposed to do was to overturn a criminal conviction and seek damages against the government for wrongful prosecution. There was a problem as to whether or not Mr. Burton was hired as an attorney, a legal expert, or both.

**RECOMMENDATION:** The committee recommends that Mr. & Mrs. Thompson be awarded $8,300 which represents their claim for the unused portion from their retained fee which was not kept in a separate trust account as required by Rules adopted by the Utah State Bar Association regarding the holding of client funds.
The Committee has made recommendations that $32,050.00 be paid out as compensation for the above-referenced claims. With these payments, the Fund’s balance would be approximately $182,379.23. Please contact me with nay comments or questions.

Sincerely,

UTAH STATE BAR FUND FOR CLIENT PROTECTION

/s/ Stephen W. Farr

Stephen W. Farr
Committee Chair

SWF/nh
cc: Committee Members in Attendance
Board of Bar Commissioners  
Attention: Heather L. Thuet, Bar President  
Utah State Bar  
645 South 200 East, Suite 310  
Salt Lake City, Utah 84111-3834  

Re: Fund for Client Protection  
Meeting of April 15, 2022  

Dear President Thuet:

The following is a report of the meeting of the Fund for Client Protection a/k/a Client Security Fund which was held April 15, 2022 remotely via Zoom. The members of the Committee that were present are Committee Chair Stephen Farr, Linda Barclay, Robert Harrison, Kim Colton, Kaitlyn Gibbs, David Leta, Bradley Mumford and Joanna Bell. Also present were Barbara Townsend from the Office of Professional Conduct, Assistant Disciplinary Counsel and Staff Liaison Christine Critchley. The Committee considered various claims and makes the following factual analysis and recommendations:

A. Claimant: Susan Murphy  
Involved Attorney: Tineke Van Dijk  
Disciplinary Status: Other than the public reprimand, no other sanctions were imposed.

FACTS: Susan appeared by zoom and Ms. Van Dijk did not appear. Mr. Murphy hired Van Dijk to draft final papers for a divorce as well as a QDRO. The agreed upon fee for the services was $500 which was paid. Ms. Van Dijk completed the divorce but failed to complete the QDRO. There was an OPC investigation conducted. The OPC found that Ms. Van Dijk had failed to maintain contact with the client and had also misrepresented to the client regarding forms that were filed on the QDRO which were in fact not filed. The OPC issued a public reprimand. Ms. Murphy had to hire another attorney to complete the QDRO which cost her $1,200. The committee determined that she failed to act with diligence or promptness, failed to communicate with the client, and committed misconduct by making false and misleading statements to the client.

RECOMMENDATION: The committee recommends that the Fund for Client Protection reimburse Ms. Murphy $500.

B. Claimant: Sharal Harper  
Involved Attorney: David A Goodwill

FACTS: The claim was continued by the chair of the committee and it was agreed that the matter be reset for the next time the committee meets.

RECOMMENDATION: Notice will be sent out to both parties and that Ms. Goodwill will not be given any additional continuance.

C. Claimant: Arlene Reeder
Involved Attorney: John Cole Cooper  
Disciplinary Status: 3 year suspension beginning December 1, 2021

FACTS: Arlene appeared via zoom and Mr. Cooper did not appear. Arlene Reeder and John Cole Cooper entered into a written agreement. Cooper was going to provide Estate Planning documents. Mr. Cooper was associated with a company named Symmetry Financial Group who advertised that they would prepare estate planning documents. Ms. Reeder responded to their advertising and was met at her home by Mr. Cooper and another gentleman who claimed to represent Symmetry. Ms. Reeder paid Ms. Cooper (in the name of his wife), the sum of $1500 which was the full amount requested for the Estate Planning services. Thereafter, Mr. Cooper disappeared and did not respond to phone calls, emails, voicemails or text messages. Mr. Cooper failed to communicate with the client, failed to provide any legal services on behalf of the client and made false and misleading statements to the client. The OPC investigated the claim and as of December 1, 2021, Mr. Cooper commenced a 3-year suspension with the Utah State Bar.

RECOMMENDATION: The Committee recommends that the Fund pay back to Ms. Reeder the sum of $1,500.

D. Claimant: Hendricks Estate  
Involved Attorney: Bruce Savage  
Disciplinary Status: Deceased

FACTS: Gayle McKeachnie as the duly appointed personal representative of the Hendricks estate appeared. Mr. Hendricks had hired Mr. Savage to represent him on a domestic matter to collect child support owed to Mr. Hendricks. It was an oral contract but both sides acknowledge the money had been paid in the amount of $4,000, and a canceled check both front and back was produced demonstrating that. Mr. Savage unfortunately passed away prior to the time that any meaningful services could be performed. Mr. Savage had failed to deposit the retainer check into his trust account.

RECOMMENDATION: The Committee recommends that the Fund reimburse the Estate in the amount of $4,000.

E. Claimant: Evelyn Chevez  
Involved Attorney: Kimberly Trupiano

FACTS: This matter had been continued from the previous hearing on March 18, 2022 to determine whether Ms. Trupiano had paid to the claimant the agreed upon refund in the amount of $2500. Ms. Critchley reported that the money had in fact been paid and accordingly this matter has been fully resolved.
The Committee has made recommendations that $6,000.00 be paid out as compensation for the above-referenced claims. With these payments, the Fund’s balance would be approximately $176,379.23. Please contact me with any comments or questions.

Sincerely,

UTAH STATE BAR FUND FOR CLIENT PROTECTION

/s/ Stephen W. Farr

Stephen W. Farr
Committee Chair

SWF/nh
cc: Committee Members in Attendance
Proposed Members of Committee to Review Bar’s Mental Health Provider

Martha Knudson
Andrew Morse
Heather Farnsworth
Katie Woods
Emily Lee (OPC)
Brook Millard (Lawyers Helping Lawyers)
Tom Bayles (5th Division Commissioner)
Cara Tangaro (Solo/small firm lawyers, Co-Chair of Well-Being Committee)
Elizabeth Wright
Ben Johnson - (Attorney with psychology degree)
UTAH STATE BAR
Budget and Finance Committee
Financial Results as of March 31, 2022
and for the nine months then ended

FINANCIAL STATEMENT HIGHLIGHTS

The results of the financials for the first three quarters of the fiscal year show total revenues overreported compared to the budget, while expenses underreported, thus resulting in a favorable variance of $367,197 compared to the budget.

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

<table>
<thead>
<tr>
<th></th>
<th>Actual</th>
<th>Budget</th>
<th>Fav(unfav) $ Variance</th>
<th>Fav(unfav) % Variance</th>
</tr>
</thead>
<tbody>
<tr>
<td>YTD revenue</td>
<td>6,176,686</td>
<td>6,144,374</td>
<td>32,312</td>
<td>1%</td>
</tr>
<tr>
<td>YTD expenses</td>
<td>4,582,207</td>
<td>4,917,092</td>
<td>334,885</td>
<td>7%</td>
</tr>
<tr>
<td>YTD net profit/(loss)</td>
<td>1,594,478</td>
<td>1,227,281</td>
<td>367,197</td>
<td>30%</td>
</tr>
</tbody>
</table>

YTD net income is $1,227,281 and is $367,197 over budget.

**YTD Net Profit – Cash Basis:** Adding back year-to-date depreciation expense of $105,935 and deducting capital expenditures of $56,899, the cash basis year-to-date net profit is approximately $49,036 higher.

**Explanations for Departments with Net Profit Variances of $10k and 5% Over/Under Budget and/or significant activity:**

**Admissions:** YTD net profit for the first nine months of fiscal year 21/22 is $86,786 more than budgeted, as Admissions revenue is overperforming by $72,170 compared to the budget. It appears that most areas of Admissions revenue including student and attorney exam fees, laptop fees, transfer fees and house counsel fees are all performing better than budgeted. Expenses also appear to perform better than budgeted for now. However, with the completion of the February Bar Exam, we expect additional exam-related expenses to come in during the month of April. We also note that salaries are performing better than budget, which is mostly due to the lower than budget salaries and wages and is discussed below at the NLTP section.

**NLTP:** YTD net spending is $18,399 less than budgeted. NLTP revenue is performing $2,185 better than expected, but the reason for the larger than budgeted loss is due to expenses running higher than expected. Expenses for the department related to salaries and benefits are $23761 higher than budget due to the NLTP director (who is also the director of Admissions) spending more time on the NLTP program than budgeted. As the director for the two departments is filled by one person, the higher NLTP salaries and wages results in lower than budget salaries in Admissions. Additionally, during March, a new employee was hired to manage the NLTP program. As such, we expect the Admissions Director will spend less time on the NLTP program moving forward as the new employee takes over the NLTP duties.

**CLE:** For the first nine months of fiscal year 21/22, the CLE department’s revenue underreported $28,532 (9%) compared to the budget, while expenses overreported by $14,996 (5%) compared to the budget. CLE Registrations is the most significant revenue item for this department, which underreported by $89,502 compared to the budget. In-person CLE events continue to mostly be held virtually due to COVID pandemic and therefore are priced slightly lower than an in-person CLE. The CLE department continues to hold
events virtually and evaluate appropriate registration prices that promote attendance while also adequately providing a CLE-benefit to attending members. Video CLE sales also appear lower than budgeted by $22,788, which is due to the budget being based off prior year results and during the prior year, video sales were higher than usual due to the extended CLE reporting period.

Fall Forum: The Forum was held virtually each week from November through January, and registration revenues have performed better than budgeted. Revenues for the event are $17,007 higher than budgeted; and expenses are lower than expected due to the online format. The event is currently reporting a net profit of $55,936

Spring Convention: The Spring Convention that is currently held virtually each week beginning March 10th to May 12th has had positive turnout, with the event currently reporting a net profit of $51,389. Although the revenues are currently $37,214 less than budgeted, expenses are also lower than budgeted by $61,666, which has resulted in the overall net profit for the event at March month-end. As the event continues through April and part of May, we expect more revenues and expenses to come in but overall we are anticipating the virtual event will result in a favorable net profit.

Member Services: Member Services YTD net spending was $183,366 compared to budgeted net spending of $251,766, a difference of $68,401. The reason for the variance is mostly due to lower-than-budgeted expenses, most likely the result of limited spending in July, August and September due to budget delays and reduced activity throughout the year due to the pandemic. Also advertising revenues for Bar Journal ads are overreporting.

Public Services: Public Services YTD net spending is $52,216 less than budgeted, which is due to expenses running under budget. The FY 21/22 budget allowed for almost $20,000 in spending for the Tuesday Night Bar, however the program was moved to a virtual format and therefore very few expenses are necessary to run the program. Some of the lower expenses also appear to be the result of the timing of activities and payments compared to the budget, and we expect the expenses to catch up to the budget as the year progresses.

Facilities: Bar meeting room facilities continue to be underutilized due to the COVID pandemic, which has resulted in lower-than-budgeted revenues and expenses up through March. However, as the pandemic continues to show improvement, the Bar has been able to open its doors to welcome more in-person meetings, which will hopefully result in higher rental revenues in the coming months.
ADDITIONAL COMMENTS

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

<table>
<thead>
<tr>
<th>Reserve Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations Reserve (3 months’ operations)</td>
<td>$1,639,219</td>
</tr>
<tr>
<td>Capital Replacement Reserve (equipment)</td>
<td>$200,000</td>
</tr>
<tr>
<td>Capital Replacement Reserve (building)*</td>
<td>$372,930</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$2,212,149</strong></td>
</tr>
<tr>
<td>Estimated cash reserve at March 31, 2022</td>
<td><strong>$5,307,917</strong></td>
</tr>
<tr>
<td>Excess of current cash reserve over board-designated reserve</td>
<td><strong>$3,095,768</strong></td>
</tr>
</tbody>
</table>
# Utah State Bar

## Income Statement

March 31, 2022

<table>
<thead>
<tr>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Fav (Unfav) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Licensing</td>
<td>4,536,980</td>
<td>4,656,955</td>
<td>4,626,949</td>
<td>30,006</td>
</tr>
<tr>
<td>Admissions</td>
<td>375,626</td>
<td>454,935</td>
<td>382,765</td>
<td>72,170</td>
</tr>
<tr>
<td>NLTP</td>
<td>43,709</td>
<td>46,050</td>
<td>43,865</td>
<td>2,185</td>
</tr>
<tr>
<td>OPC</td>
<td>28,846</td>
<td>26,072</td>
<td>24,068</td>
<td>2,004</td>
</tr>
<tr>
<td>CLE</td>
<td>227,292</td>
<td>285,430</td>
<td>313,962</td>
<td>(28,532)</td>
</tr>
<tr>
<td>Summer Convention</td>
<td>-</td>
<td>197,225</td>
<td>141,640</td>
<td>55,585</td>
</tr>
<tr>
<td>Fall Forum</td>
<td>56,368</td>
<td>87,005</td>
<td>75,723</td>
<td>11,282</td>
</tr>
<tr>
<td>Spring Convention</td>
<td>55,042</td>
<td>55,975</td>
<td>93,189</td>
<td>(37,214)</td>
</tr>
<tr>
<td>Member Services</td>
<td>246,300</td>
<td>265,185</td>
<td>246,299</td>
<td>18,886</td>
</tr>
<tr>
<td>Public Services</td>
<td>45,649</td>
<td>40,222</td>
<td>32,632</td>
<td>7,590</td>
</tr>
<tr>
<td>Bar Operations</td>
<td>63,616</td>
<td>3,267</td>
<td>63,593</td>
<td>(60,326)</td>
</tr>
<tr>
<td>Facilities</td>
<td>28,548</td>
<td>58,364</td>
<td>99,689</td>
<td>(41,325)</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>5,707,975</td>
<td>6,176,686</td>
<td>6,144,374</td>
<td>32,312</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Licensing</td>
<td>137,717</td>
<td>136,627</td>
<td>129,838</td>
<td>(6,789)</td>
</tr>
<tr>
<td>Admissions</td>
<td>380,099</td>
<td>336,543</td>
<td>351,159</td>
<td>14,616</td>
</tr>
<tr>
<td>NLTP</td>
<td>77,216</td>
<td>46,870</td>
<td>26,286</td>
<td>(20,584)</td>
</tr>
<tr>
<td>OPC</td>
<td>1,080,707</td>
<td>1,104,881</td>
<td>1,146,386</td>
<td>41,506</td>
</tr>
<tr>
<td>CLE</td>
<td>200,456</td>
<td>325,473</td>
<td>310,477</td>
<td>(14,996)</td>
</tr>
<tr>
<td>Summer Convention</td>
<td>4,602</td>
<td>187,858</td>
<td>133,860</td>
<td>(53,998)</td>
</tr>
<tr>
<td>Fall Forum</td>
<td>26,701</td>
<td>31,068</td>
<td>75,722</td>
<td>44,654</td>
</tr>
<tr>
<td>Spring Convention</td>
<td>7,573</td>
<td>4,568</td>
<td>66,252</td>
<td>61,666</td>
</tr>
<tr>
<td>Member Services</td>
<td>416,060</td>
<td>448,550</td>
<td>498,065</td>
<td>49,515</td>
</tr>
<tr>
<td>Public Services</td>
<td>435,420</td>
<td>425,179</td>
<td>469,804</td>
<td>44,626</td>
</tr>
<tr>
<td>Bar Operations</td>
<td>1,159,863</td>
<td>1,283,810</td>
<td>1,361,158</td>
<td>77,348</td>
</tr>
<tr>
<td>Facilities</td>
<td>268,301</td>
<td>250,763</td>
<td>348,085</td>
<td>97,322</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>4,194,715</td>
<td>4,582,207</td>
<td>4,917,092</td>
<td>334,885</td>
</tr>
</tbody>
</table>

**Net Profit (Loss)**

$1,513,260 $1,594,478 $1,227,281 $367,197 130% $1,000 159448%

**Depreciation**

$124,728 $105,935 $128,871 $22,936 82% $169,056

**Cash increase (decrease) from operations**

$1,637,988 $1,700,413 $1,356,152 $344,261 125% $170,056

**Changes in operating assets/liabilities**

(2,283,442) (3,102,809) (3,102,809) - 100% $20,000

**Capital expenditures**

53,732 (56,899) (75,000) 18,101 76% (157,000)

**Net change in cash**

$591,722 $(1,459,295) $(1,821,657) $362,362 80% $33,056 4415%
# Utah State Bar Licensing
## March 31, 2022

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favor (Unfavor) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4010 - Section/Local Bar Support fees</td>
<td>17,180</td>
<td>17,880</td>
<td>17,524</td>
<td>356</td>
<td>102%</td>
</tr>
<tr>
<td>4004 - Admissions - Laptop Fees</td>
<td>575</td>
<td>455</td>
<td>587</td>
<td>(132)</td>
<td>78%</td>
</tr>
<tr>
<td>4006 - Transfer App Fees</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>4011 - Admissions LPP</td>
<td>2,255</td>
<td>950</td>
<td>2,255</td>
<td>(1,305)</td>
<td>42%</td>
</tr>
<tr>
<td>4021 - Lic Fees &gt; 3 Years</td>
<td>3,737,360</td>
<td>3,811,030</td>
<td>3,812,107</td>
<td>(1,077)</td>
<td>100%</td>
</tr>
<tr>
<td>4020 - NLTP Fees</td>
<td>750</td>
<td>-</td>
<td>765</td>
<td>(765)</td>
<td>0%</td>
</tr>
<tr>
<td>4022 - Lic Fees &lt; 3 Years</td>
<td>194,640</td>
<td>196,365</td>
<td>198,533</td>
<td>(2,168)</td>
<td>99%</td>
</tr>
<tr>
<td>4023 - Lic Fees - House Counsel</td>
<td>46,640</td>
<td>49,615</td>
<td>47,573</td>
<td>2,042</td>
<td>104%</td>
</tr>
<tr>
<td>4025 - Pro Hac Vice Fees</td>
<td>155,400</td>
<td>148,450</td>
<td>158,509</td>
<td>(10,059)</td>
<td>94%</td>
</tr>
<tr>
<td>4024 - Lic Fees LPP</td>
<td>2,150</td>
<td>3,600</td>
<td>2,193</td>
<td>1,407</td>
<td>164%</td>
</tr>
<tr>
<td>4026 - Lic Fees - Inactive/FS</td>
<td>116,260</td>
<td>117,815</td>
<td>118,586</td>
<td>(771)</td>
<td>99%</td>
</tr>
<tr>
<td>4027 - Lic Fees - Inactive/NS</td>
<td>219,135</td>
<td>221,550</td>
<td>223,518</td>
<td>(1,968)</td>
<td>99%</td>
</tr>
<tr>
<td>4029 - Prior Year Lic Fees</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>4030 - Certs of Good Standing</td>
<td>13,040</td>
<td>14,540</td>
<td>13,301</td>
<td>1,239</td>
<td>109%</td>
</tr>
<tr>
<td>4061 - Advertising Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td></td>
</tr>
<tr>
<td>4095 - Miscellaneous Income</td>
<td>200</td>
<td>55</td>
<td>203</td>
<td>(148)</td>
<td>27%</td>
</tr>
<tr>
<td>4096 - Late Fees</td>
<td>31,395</td>
<td>74,650</td>
<td>31,295</td>
<td>43,355</td>
<td>239%</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>4,536,980</td>
<td>4,556,955</td>
<td>4,626,949</td>
<td>30,006</td>
<td>101%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual</th>
<th>Budget</th>
<th>Favor (Unfavor) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>18,548</td>
<td>9,472</td>
<td>27,386</td>
<td>17,914</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>87,798</td>
<td>102,007</td>
<td>92,344</td>
<td>(9,663)</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>24,197</td>
<td>17,435</td>
<td>2,759</td>
<td>(14,676)</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>7,175</td>
<td>7,713</td>
<td>7,349</td>
<td>(364)</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>137,717</td>
<td>136,627</td>
<td>129,838</td>
<td>(6,789)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>Actual</th>
<th>Budget</th>
<th>Favor (Unfavor) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$4,399,263</td>
<td>$4,520,328</td>
<td>$4,497,111</td>
<td>$23,217</td>
<td>101%</td>
</tr>
</tbody>
</table>

Note: Includes LPP staff time and exam expense
# Utah State Bar Admissions

**March 31, 2022**

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual YTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favor (Unfavorable) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4001 - Admissions - Student Exam Fees</td>
<td>102,850</td>
<td>140,800</td>
<td>104,907</td>
<td>35,893</td>
<td>134%</td>
</tr>
<tr>
<td>4002 - Admissions - Attorney Exam Fees</td>
<td>57,525</td>
<td>65,325</td>
<td>58,676</td>
<td>6,649</td>
<td>111%</td>
</tr>
<tr>
<td>4003 - Admissions - Retake Fees</td>
<td>25,100</td>
<td>24,750</td>
<td>25,602</td>
<td>(852)</td>
<td>97%</td>
</tr>
<tr>
<td>4004 - Admissions - Laptop Fees</td>
<td>56,600</td>
<td>71,600</td>
<td>57,732</td>
<td>13,868</td>
<td>124%</td>
</tr>
<tr>
<td>4005 - Admissions - Application Forms</td>
<td>8,200</td>
<td>(850)</td>
<td>8,364</td>
<td>(9,214)</td>
<td>-</td>
</tr>
<tr>
<td>4006 - Transfer App Fees</td>
<td>31,500</td>
<td>46,100</td>
<td>32,130</td>
<td>13,970</td>
<td>143%</td>
</tr>
<tr>
<td>4008 - Attorney - Motion</td>
<td>61,200</td>
<td>60,350</td>
<td>62,424</td>
<td>(2,074)</td>
<td>97%</td>
</tr>
<tr>
<td>4009 - House Counsel</td>
<td>11,050</td>
<td>21,250</td>
<td>11,271</td>
<td>9,979</td>
<td>189%</td>
</tr>
<tr>
<td>4011 - Admissions LPP</td>
<td>3,001</td>
<td>3,910</td>
<td>3,059</td>
<td>851</td>
<td>128%</td>
</tr>
<tr>
<td>4095 - Miscellaneous Income</td>
<td>18,600</td>
<td>21,700</td>
<td>18,600</td>
<td>3,100</td>
<td>117%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>375,626</strong></td>
<td><strong>454,935</strong></td>
<td><strong>382,765</strong></td>
<td><strong>72,170</strong></td>
<td><strong>119%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual YTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favor (Unfavorable) variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>36,449</td>
<td>90,665</td>
<td>45,647</td>
<td>(45,019)</td>
<td>199%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>274,174</td>
<td>181,112</td>
<td>233,103</td>
<td>51,991</td>
<td>78%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>56,753</td>
<td>51,089</td>
<td>59,361</td>
<td>8,272</td>
<td>86%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>12,723</td>
<td>13,677</td>
<td>13,048</td>
<td>(629)</td>
<td>105%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>380,099</strong></td>
<td><strong>336,543</strong></td>
<td><strong>351,159</strong></td>
<td><strong>14,616</strong></td>
<td><strong>96%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>$ (4,474)</th>
<th>$ 118,392</th>
<th>$ 31,606</th>
<th>$ 86,786</th>
<th>275%</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Total Budget</th>
<th>YTD % of Tot Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>105,162</td>
<td>134%</td>
</tr>
<tr>
<td>58,191</td>
<td>112%</td>
</tr>
<tr>
<td>33,456</td>
<td>74%</td>
</tr>
<tr>
<td>63,444</td>
<td>133%</td>
</tr>
<tr>
<td>8,364</td>
<td>-</td>
</tr>
<tr>
<td>46,002</td>
<td>100%</td>
</tr>
<tr>
<td>83,232</td>
<td>73%</td>
</tr>
<tr>
<td>15,606</td>
<td>136%</td>
</tr>
<tr>
<td>200</td>
<td>0%</td>
</tr>
<tr>
<td>4,244</td>
<td>92%</td>
</tr>
<tr>
<td>21,000</td>
<td>103%</td>
</tr>
<tr>
<td><strong>438,901</strong></td>
<td><strong>86%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>$ (39,362)</th>
<th>-301%</th>
</tr>
</thead>
</table>
### Utah State Bar
#### NLTP
#### March 31, 2022

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) Variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4020 · NLTP Fees</td>
<td>42,900</td>
<td>46,050</td>
<td>43,758</td>
<td>2,292</td>
<td>105%</td>
</tr>
<tr>
<td>4081 · CLE - Registrations</td>
<td>619</td>
<td>-</td>
<td>631</td>
<td>(631)</td>
<td>0%</td>
</tr>
<tr>
<td>4200 · Seminar Profit/Loss</td>
<td>190</td>
<td>-</td>
<td>(524)</td>
<td>524</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>43,709</strong></td>
<td><strong>46,050</strong></td>
<td><strong>43,865</strong></td>
<td><strong>2,185</strong></td>
<td><strong>105%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) Variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>-</td>
<td>-</td>
<td>1,989</td>
<td>1,989</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>59,297</td>
<td>28,755</td>
<td>4,994</td>
<td>(23,761)</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>15,208</td>
<td>15,200</td>
<td>16,528</td>
<td>1,328</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>2,712</td>
<td>2,915</td>
<td>2,775</td>
<td>(140)</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>77,216</strong></td>
<td><strong>46,870</strong></td>
<td><strong>26,286</strong></td>
<td>(20,584)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) Variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(33,507)</td>
<td>$(820)</td>
<td>$17,579</td>
<td>$(18,399)</td>
<td>-5%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total YTD % of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>57,222</td>
</tr>
<tr>
<td>631</td>
</tr>
<tr>
<td>(699)</td>
</tr>
<tr>
<td>57,154</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) Variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$24,348</td>
<td>$24,348</td>
<td>$24,348</td>
<td>$24,348</td>
<td>-3%</td>
</tr>
</tbody>
</table>
# Utah State Bar
## OPC
### March 31, 2022

<table>
<thead>
<tr>
<th></th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Fav (Unfav) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Tot Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4095 · Miscellaneous Income</td>
<td>1,953</td>
<td>3,019</td>
<td>3,546</td>
<td>(527)</td>
<td>85%</td>
<td>4,000</td>
<td>75%</td>
</tr>
<tr>
<td>4200 · Seminar Profit/Loss</td>
<td>26,893</td>
<td>23,053</td>
<td>20,522</td>
<td>2,531</td>
<td>112%</td>
<td>46,893</td>
<td>49%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>28,846</td>
<td>26,072</td>
<td>24,068</td>
<td>2,004</td>
<td>108%</td>
<td>50,893</td>
<td>51%</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td>1,053</td>
<td>4,124</td>
<td>9,388</td>
<td>5,264</td>
<td>44%</td>
<td>14,285</td>
<td>29%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>950,173</td>
<td>958,296</td>
<td>981,304</td>
<td>23,008</td>
<td>98%</td>
<td>1,308,094</td>
<td>73%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>82,321</td>
<td>91,764</td>
<td>106,412</td>
<td>14,648</td>
<td>86%</td>
<td>130,074</td>
<td>71%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>47,160</td>
<td>50,697</td>
<td>49,282</td>
<td>(1,415)</td>
<td>103%</td>
<td>65,093</td>
<td>78%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>1,080,707</td>
<td>1,104,881</td>
<td>1,146,386</td>
<td>41,506</td>
<td>96%</td>
<td>1,517,546</td>
<td>73%</td>
</tr>
<tr>
<td><strong>Net Profit (Loss)</strong></td>
<td>$(1,051,861)</td>
<td>$(1,078,808)</td>
<td>$(1,122,318)</td>
<td>$43,510</td>
<td>96%</td>
<td>$(1,466,653)</td>
<td>74%</td>
</tr>
</tbody>
</table>
# Utah State Bar CLE
# March 31, 2022

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual YTD</th>
<th>Actual LYTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4052 - Meeting - Sponsor Revenue</td>
<td>11,500</td>
<td>7,250</td>
<td>14,999</td>
<td>(3,499)</td>
<td>77%</td>
<td>15,000</td>
<td>77%</td>
</tr>
<tr>
<td>4054 - Meeting - Material Sales</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4081 - CLE - Registrations</td>
<td>165,474</td>
<td>176,739</td>
<td>254,976</td>
<td>(89,502)</td>
<td>65%</td>
<td>315,000</td>
<td>53%</td>
</tr>
<tr>
<td>4082 - CLE - Video Library Sales</td>
<td>55,886</td>
<td>82,136</td>
<td>80,740</td>
<td>(24,854)</td>
<td>69%</td>
<td>173,085</td>
<td>32%</td>
</tr>
<tr>
<td>4084 - Business Law Book Sales</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4095 - Miscellaneous Income</td>
<td>175</td>
<td>-</td>
<td>175</td>
<td>-</td>
<td>DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4200 - Seminar Profit/Loss</td>
<td>52,394</td>
<td>(38,834)</td>
<td>36,753</td>
<td>89,147</td>
<td>-143%</td>
<td>(95,768)</td>
<td>-55%</td>
</tr>
<tr>
<td>Total Revenue</td>
<td>285,430</td>
<td>227,292</td>
<td>313,962</td>
<td>(28,532)</td>
<td>91%</td>
<td>407,317</td>
<td>70%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual YTD</th>
<th>Actual LYTD</th>
<th>Budget YTD</th>
<th>Favorable (Unfavorable) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>153,163</td>
<td>74,271</td>
<td>133,364</td>
<td>(19,799)</td>
<td>115%</td>
<td>202,596</td>
<td>76%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>143,679</td>
<td>90,453</td>
<td>143,679</td>
<td>15,298</td>
<td>89%</td>
<td>211,664</td>
<td>61%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>22,032</td>
<td>24,629</td>
<td>22,032</td>
<td>(10,619)</td>
<td>148%</td>
<td>33,093</td>
<td>99%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>11,402</td>
<td>11,103</td>
<td>11,402</td>
<td>125</td>
<td>99%</td>
<td>15,162</td>
<td>74%</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>310,477</td>
<td>200,456</td>
<td>310,477</td>
<td>(14,996)</td>
<td>105%</td>
<td>462,515</td>
<td>70%</td>
</tr>
</tbody>
</table>

| Net Profit (Loss) | 26,836 | (40,043) | 3,485 | (43,528) | -1149% | (55,198) | 73% |
# Utah State Bar
## Summer Convention
### March 31, 2022

## Revenue
<table>
<thead>
<tr>
<th>Description</th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorability</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4051 · Meeting - Registration</td>
<td></td>
<td>142,248</td>
<td>117,410</td>
<td>24,838</td>
<td>121%</td>
</tr>
<tr>
<td>4052 · Meeting - Sponsor Revenue</td>
<td></td>
<td>14,750</td>
<td>10,275</td>
<td>4,475</td>
<td>144%</td>
</tr>
<tr>
<td>4053 · Meeting - Vendor Revenue</td>
<td></td>
<td>13,800</td>
<td>6,550</td>
<td>7,250</td>
<td>211%</td>
</tr>
<tr>
<td>4055 · Meeting - Sp Ev Registration</td>
<td></td>
<td>13,235</td>
<td>7,405</td>
<td>5,830</td>
<td>179%</td>
</tr>
<tr>
<td>4095 · Miscellaneous Income</td>
<td></td>
<td>13,192</td>
<td>-</td>
<td>13,192</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td></td>
<td>197,225</td>
<td>141,640</td>
<td>55,585</td>
<td><strong>139%</strong></td>
</tr>
</tbody>
</table>

## Expenses
<table>
<thead>
<tr>
<th>Description</th>
<th>Actual</th>
<th>Budget</th>
<th>Favorability</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>15</td>
<td>166,793</td>
<td>(48,405)</td>
<td>141%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>4,387</td>
<td>15,956</td>
<td>(9,664)</td>
<td>254%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>200</td>
<td>5,109</td>
<td>4,071</td>
<td>56%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>4,602</td>
<td>187,858</td>
<td>(53,998)</td>
<td><strong>140%</strong></td>
</tr>
</tbody>
</table>

## Net Profit (Loss)
<table>
<thead>
<tr>
<th>Description</th>
<th>Actual</th>
<th>Budget</th>
<th>Favorability</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Profit</td>
<td>$(4,602)</td>
<td>$9,367</td>
<td>$7,780</td>
<td>$1,587</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
<th>YTD % of Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue</td>
<td>117,410</td>
<td>121%</td>
</tr>
<tr>
<td></td>
<td>10,275</td>
<td>144%</td>
</tr>
<tr>
<td></td>
<td>6,550</td>
<td>211%</td>
</tr>
<tr>
<td></td>
<td>7,405</td>
<td>179%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>141,640</td>
<td>139%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Description</th>
<th>Total</th>
<th>YTD % of Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expenses</td>
<td>118,388</td>
<td>141%</td>
</tr>
<tr>
<td></td>
<td>12,154</td>
<td>131%</td>
</tr>
<tr>
<td></td>
<td>11,098</td>
<td>46%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>141,640</td>
<td>133%</td>
</tr>
</tbody>
</table>

- #DIV/0! indicates division by zero.
<table>
<thead>
<tr>
<th></th>
<th>Actual</th>
<th>Actual</th>
<th>Budget</th>
<th>Fav (Unfav) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Total Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>LYTD</td>
<td>YTD</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4051 · Meeting - Registration</td>
<td>55,368</td>
<td>86,005</td>
<td>68,998</td>
<td>17,007</td>
<td>125%</td>
<td>68,999</td>
<td>125%</td>
</tr>
<tr>
<td>4052 · Meeting - Sponsor Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4053 · Meeting - Vendor Revenue</td>
<td>1,000</td>
<td>1,000</td>
<td>4,950</td>
<td>(3,950)</td>
<td>20%</td>
<td>4,950</td>
<td>20%</td>
</tr>
<tr>
<td>4055 · Meeting - Sp Ev Registration</td>
<td>-</td>
<td>-</td>
<td>1,775</td>
<td>(1,775)</td>
<td>0%</td>
<td>1,775</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>56,368</td>
<td>87,005</td>
<td>75,723</td>
<td>11,282</td>
<td>115%</td>
<td>75,724</td>
<td>115%</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td>18,732</td>
<td>21,269</td>
<td>64,464</td>
<td>43,195</td>
<td>33%</td>
<td>64,464</td>
<td>33%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>1,825</td>
<td>3,413</td>
<td>4,159</td>
<td>746</td>
<td>82%</td>
<td>4,160</td>
<td>82%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>6,145</td>
<td>6,386</td>
<td>7,099</td>
<td>713</td>
<td>90%</td>
<td>7,100</td>
<td>90%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>26,701</td>
<td>31,068</td>
<td>75,722</td>
<td>44,654</td>
<td>41%</td>
<td>75,724</td>
<td>41%</td>
</tr>
<tr>
<td><strong>Net Profit (Loss)</strong></td>
<td>$29,666</td>
<td>$55,937</td>
<td>$1</td>
<td>$55,936</td>
<td>5593681%</td>
<td>$-</td>
<td>#DIV/0!</td>
</tr>
</tbody>
</table>
## Utah State Bar
### Spring Convention
#### March 31, 2022

<table>
<thead>
<tr>
<th></th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Fav (Unf) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Tot Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4051 · Meeting - Registration</td>
<td>55,042</td>
<td>51,225</td>
<td>73,421</td>
<td>(22,196)</td>
<td>70%</td>
<td>97,895</td>
<td>52%</td>
</tr>
<tr>
<td>4052 · Meeting - Sponsor Revenue</td>
<td>-</td>
<td>-</td>
<td>10,125</td>
<td>(10,125)</td>
<td>0%</td>
<td>13,500</td>
<td>0%</td>
</tr>
<tr>
<td>4053 · Meeting - Vendor Revenue</td>
<td>-</td>
<td>-</td>
<td>8,213</td>
<td>(3,463)</td>
<td>58%</td>
<td>10,950</td>
<td>43%</td>
</tr>
<tr>
<td>4055 · Meeting - Sp Ev Registration</td>
<td>-</td>
<td>-</td>
<td>1,430</td>
<td>(1,430)</td>
<td>0%</td>
<td>1,907</td>
<td>0%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>55,042</td>
<td>55,975</td>
<td>93,189</td>
<td>(37,214)</td>
<td>60%</td>
<td>124,252</td>
<td>45%</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td>-</td>
<td>1,743</td>
<td>44,729</td>
<td>42,986</td>
<td>4%</td>
<td>94,989</td>
<td>2%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>5,595</td>
<td>1,110</td>
<td>12,467</td>
<td>11,357</td>
<td>9%</td>
<td>16,256</td>
<td>7%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>1,977</td>
<td>1,732</td>
<td>9,056</td>
<td>7,323</td>
<td>19%</td>
<td>13,007</td>
<td>13%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>7,573</td>
<td>4,586</td>
<td>66,252</td>
<td>61,666</td>
<td>7%</td>
<td>124,252</td>
<td>4%</td>
</tr>
<tr>
<td><strong>Net Profit (Loss)</strong></td>
<td>$ 47,469</td>
<td>$ 51,389</td>
<td>$ 26,937</td>
<td>$ 24,452</td>
<td>191%</td>
<td>$ -</td>
<td>#DIV/0!</td>
</tr>
</tbody>
</table>
# Utah State Bar
## Member Services
### March 31, 2022

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable / Unfavorable variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4010: Section/Local Bar Support fees</td>
<td>82,904</td>
<td>84,399</td>
<td>82,904</td>
<td>1,495</td>
<td>102%</td>
</tr>
<tr>
<td>4052: Meeting - Sponsor Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td>4061: Advertising Revenue</td>
<td>154,866</td>
<td>170,924</td>
<td>154,865</td>
<td>16,059</td>
<td>110%</td>
</tr>
<tr>
<td>4062: Subscriptions</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>-</td>
<td>100%</td>
</tr>
<tr>
<td>4071: Mem Benefits - Lexis</td>
<td>900</td>
<td>979</td>
<td>900</td>
<td>79</td>
<td>109%</td>
</tr>
<tr>
<td>4072: Royalty Inc - Bar J, MBNA, LM, M</td>
<td>7,590</td>
<td>8,853</td>
<td>7,590</td>
<td>1,263</td>
<td>117%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>246,300</strong></td>
<td><strong>265,185</strong></td>
<td><strong>246,299</strong></td>
<td><strong>18,886</strong></td>
<td><strong>108%</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual</th>
<th>Budget</th>
<th>Favorable / Unfavorable variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>170,509</td>
<td>192,567</td>
<td>199,838</td>
<td>7,271</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>128,878</td>
<td>117,316</td>
<td>140,523</td>
<td>23,207</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>102,861</td>
<td>125,149</td>
<td>143,536</td>
<td>18,387</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>13,812</td>
<td>13,518</td>
<td>14,168</td>
<td>650</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>416,060</strong></td>
<td><strong>448,550</strong></td>
<td><strong>498,065</strong></td>
<td><strong>49,515</strong></td>
</tr>
</tbody>
</table>

**Net Profit (Loss)**: $ (169,761) $ (183,366) $ (251,766) $ 68,401 73%

<table>
<thead>
<tr>
<th>Total</th>
<th>Actual</th>
<th>Favorable / Unfavorable variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget</td>
<td>YTD % of Tot Budget</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-------</td>
<td>----------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>82,904</td>
<td>102%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>195,858</td>
<td>87%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30</td>
<td>100%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1,200</td>
<td>-</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8,175</td>
<td>108%</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>293,977</strong></td>
<td><strong>90%</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Net Profit (Loss)</th>
<th>Actual</th>
<th>Favorable / Unfavorable variance</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>$ (390,570)</td>
<td>47%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Utah State Bar
## Public Services
### March 31, 2022

## Revenue
<table>
<thead>
<tr>
<th>Description</th>
<th>Actual LTYD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable/Unfavorable</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4063 · Modest Means revenue</td>
<td>8,975</td>
<td>8,675</td>
<td>9,409</td>
<td>(734)</td>
<td>92%</td>
</tr>
<tr>
<td>4093 · Law Day Revenue</td>
<td>-</td>
<td>-</td>
<td>2,025</td>
<td>(2,025)</td>
<td>0%</td>
</tr>
<tr>
<td>4095 · Miscellaneous Income</td>
<td>20</td>
<td>20</td>
<td>20</td>
<td>-</td>
<td>100%</td>
</tr>
<tr>
<td>4120 · Grant Income</td>
<td>39,576</td>
<td>27,178</td>
<td>21,178</td>
<td>6,000</td>
<td>128%</td>
</tr>
<tr>
<td>4200 · Seminar Profit/Loss</td>
<td>(2,922)</td>
<td>4,349</td>
<td>-</td>
<td>4,349</td>
<td>#DIV/0!</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td><strong>45,649</strong></td>
<td><strong>40,222</strong></td>
<td><strong>32,632</strong></td>
<td><strong>7,590</strong></td>
<td><strong>123%</strong></td>
</tr>
</tbody>
</table>

## Expenses

<table>
<thead>
<tr>
<th>Category</th>
<th>Actual LTYD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable/Unfavorable</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>102,277</td>
<td>118,338</td>
<td>150,950</td>
<td>32,612</td>
<td>78%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>251,276</td>
<td>259,258</td>
<td>269,227</td>
<td>9,969</td>
<td>96%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>73,229</td>
<td>38,297</td>
<td>40,792</td>
<td>2,495</td>
<td>94%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>8,637</td>
<td>9,285</td>
<td>8,835</td>
<td>(450)</td>
<td>105%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>435,420</strong></td>
<td><strong>425,179</strong></td>
<td><strong>469,804</strong></td>
<td><strong>44,626</strong></td>
<td><strong>91%</strong></td>
</tr>
</tbody>
</table>

## Net Profit (Loss)

<table>
<thead>
<tr>
<th>Description</th>
<th>Actual LTYD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Favorable/Unfavorable</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net Profit</td>
<td>$ (389,771)</td>
<td>$ (384,956)</td>
<td>$ (437,172)</td>
<td>$ 52,216</td>
<td>88%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Expenses</th>
<th>YTD % of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>68%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Total Revenue</th>
<th>YTD % of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>109%</td>
</tr>
</tbody>
</table>
## Utah State Bar
### Bar Operations
#### March 31, 2022

<table>
<thead>
<tr>
<th>Description</th>
<th>Actual LYTD</th>
<th>Actual YTD</th>
<th>Budget YTD</th>
<th>Fav (Unfav) variance</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>YTD % of Tot Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4031 · Enhanced Web Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4052 · Meeting - Sponsor Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
</tr>
<tr>
<td>4053 · Meeting - Vendor Revenue</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
</tr>
<tr>
<td>4060 · E-Filing Revenue</td>
<td>24,853</td>
<td>5,741</td>
<td>24,853</td>
<td>(19,112)</td>
<td>23%</td>
<td>24,853</td>
<td>23%</td>
</tr>
<tr>
<td>4103 · In - Kind Revenue - UDR</td>
<td>23</td>
<td>(2)</td>
<td>2</td>
<td>0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>4095 · Miscellaneous Income</td>
<td>20,585</td>
<td>547</td>
<td>20,586</td>
<td>(20,039)</td>
<td>3%</td>
<td>20,956</td>
<td>3%</td>
</tr>
<tr>
<td>4200 · Seminar Profit/Loss</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>#DIV/0!</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Investment Income</td>
<td>18,156</td>
<td>(3,021)</td>
<td>18,156</td>
<td>(21,177)</td>
<td>-17%</td>
<td>21,476</td>
<td>85%</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>63,616</td>
<td>3,267</td>
<td>63,593</td>
<td>(60,326)</td>
<td>5%</td>
<td>67,285</td>
<td>95%</td>
</tr>
<tr>
<td><strong>Expenses</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program Services</td>
<td>8,580</td>
<td>116,451</td>
<td>123,359</td>
<td>6,908</td>
<td>94%</td>
<td>178,877</td>
<td>65%</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>940,264</td>
<td>907,050</td>
<td>962,254</td>
<td>55,204</td>
<td>94%</td>
<td>1,304,037</td>
<td>70%</td>
</tr>
<tr>
<td>General &amp; Administrative</td>
<td>171,848</td>
<td>220,773</td>
<td>235,491</td>
<td>14,718</td>
<td>94%</td>
<td>298,000</td>
<td>74%</td>
</tr>
<tr>
<td>In Kind</td>
<td>4,910</td>
<td>1,342</td>
<td>4,910</td>
<td>3,568</td>
<td>27%</td>
<td>5,404</td>
<td>25%</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>34,261</td>
<td>38,195</td>
<td>35,144</td>
<td>(3,051)</td>
<td>109%</td>
<td>46,407</td>
<td>82%</td>
</tr>
<tr>
<td><strong>Total Expenses</strong></td>
<td>1,159,863</td>
<td>1,283,810</td>
<td>1,361,158</td>
<td>77,348</td>
<td>94%</td>
<td>1,832,725</td>
<td>70%</td>
</tr>
<tr>
<td><strong>Net Profit (Loss)</strong></td>
<td>$ (1,056,247)</td>
<td>$ (1,280,543)</td>
<td>$ (1,297,565)</td>
<td>$ 17,022</td>
<td>99%</td>
<td>$ (1,765,440)</td>
<td>73%</td>
</tr>
</tbody>
</table>
## Utah State Bar
### Facilities
#### March 31, 2022

<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual</th>
<th>Budget</th>
<th>Fav (Unfav)</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4039 · Room Rental-All parties</td>
<td>8,539</td>
<td>27,671</td>
<td>35,548</td>
<td>(7,877)</td>
</tr>
<tr>
<td>4042 · Food &amp; Beverage Rev-All Parties</td>
<td>4,271</td>
<td>16,060</td>
<td>48,311</td>
<td>(32,251)</td>
</tr>
<tr>
<td>4043 · Setup &amp; A/V charges-All parties</td>
<td>-</td>
<td>945</td>
<td>526</td>
<td>419</td>
</tr>
<tr>
<td>4090 · Tenant Rent</td>
<td>15,668</td>
<td>13,688</td>
<td>15,234</td>
<td>(1,546)</td>
</tr>
<tr>
<td>4095 · Miscellaneous Income</td>
<td>70</td>
<td>-</td>
<td>70</td>
<td>(70)</td>
</tr>
<tr>
<td>4103 · In - Kind Revenue - UDR</td>
<td>28,548</td>
<td>58,364</td>
<td>99,689</td>
<td>(41,325)</td>
</tr>
</tbody>
</table>

| Total Revenue | 135,457 | 43% |

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Actual</th>
<th>Budget</th>
<th>Fav (Unfav)</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Services</td>
<td>4,836</td>
<td>17,632</td>
<td>59,309</td>
<td>41,677</td>
</tr>
<tr>
<td>Salaries &amp; Benefits</td>
<td>127,895</td>
<td>112,538</td>
<td>143,539</td>
<td>31,001</td>
</tr>
<tr>
<td>General &amp; Administrative In Kind</td>
<td>(3,544)</td>
<td>(18,057)</td>
<td>4,334</td>
<td>22,391</td>
</tr>
<tr>
<td>Building Overhead</td>
<td>138,923</td>
<td>126,007</td>
<td>140,714</td>
<td>14,707</td>
</tr>
<tr>
<td>Total Expenses</td>
<td>268,301</td>
<td>250,763</td>
<td>348,085</td>
<td>97,322</td>
</tr>
</tbody>
</table>

<p>| Net Profit (Loss) | $ (239,753) | $ (192,399) | $ (248,396) | $ 55,998 | 77% | $ (317,269) | 61% |</p>
<table>
<thead>
<tr>
<th>Revenue</th>
<th>Actual (LTD)</th>
<th>Actual (YTD)</th>
<th>Budget</th>
<th>Var/Unvar</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>4001: Admissions - Student Exam Fees</td>
<td>107,850</td>
<td>140,800</td>
<td>104,907</td>
<td>15,993</td>
<td>154%</td>
</tr>
<tr>
<td>4002: Admissions - Attorneys Fees</td>
<td>57,525</td>
<td>65,325</td>
<td>65,674</td>
<td>349</td>
<td>999%</td>
</tr>
<tr>
<td>4003: Admissions - Recalc Fees</td>
<td>25,590</td>
<td>29,750</td>
<td>21,602</td>
<td>8,148</td>
<td>77%</td>
</tr>
<tr>
<td>4004: Admissions - LapTop Fees</td>
<td>57,175</td>
<td>72,505</td>
<td>58,310</td>
<td>14,195</td>
<td>24%</td>
</tr>
<tr>
<td>4005: Admissions - Application Forms</td>
<td>8,500</td>
<td>8,820</td>
<td>8,846</td>
<td>26</td>
<td>99.3%</td>
</tr>
<tr>
<td>4006: Transfer App Fees</td>
<td>31,500</td>
<td>46,310</td>
<td>32,130</td>
<td>14,180</td>
<td>143%</td>
</tr>
<tr>
<td>4007: Attorney - Action</td>
<td>61,290</td>
<td>60,350</td>
<td>62,424</td>
<td>1,074</td>
<td>102%</td>
</tr>
<tr>
<td>4008: House Counsel</td>
<td>11,050</td>
<td>21,500</td>
<td>11,072</td>
<td>9,478</td>
<td>85%</td>
</tr>
<tr>
<td>4009: Section/Local Bar Support Fees</td>
<td>108,004</td>
<td>102,179</td>
<td>100,458</td>
<td>1,721</td>
<td>102%</td>
</tr>
</tbody>
</table>
| 4010: Admissions - UPL | 2,255 | 910 | 2,535 | (1380) | 42%
| 4012: Admissions - Military Service | (36) | (36) | (36) | (36) | (36) |

**Total Revenue** | **1,668,199** | **1,649,507** | **1,627,199** | **26,312** | **99%**

<table>
<thead>
<tr>
<th>Program Service Expenses</th>
<th>Actual (LTD)</th>
<th>Actual (YTD)</th>
<th>Budget</th>
<th>Var/Unvar</th>
<th>% of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>5001: Meeting Facility-external only</td>
<td>15</td>
<td>19,574</td>
<td>14,908</td>
<td>4,666</td>
<td>152%</td>
</tr>
<tr>
<td>5002: Meeting Facility-internal only</td>
<td>8,629</td>
<td>12,626</td>
<td>12,499</td>
<td>127</td>
<td>1%</td>
</tr>
<tr>
<td>5003: Exam/Exams</td>
<td>14,542</td>
<td>21,826</td>
<td>14,524</td>
<td>(7,302)</td>
<td>22%</td>
</tr>
<tr>
<td>5014: Guestrooms</td>
<td>24,956</td>
<td>41,486</td>
<td>31,772</td>
<td>(9,714)</td>
<td>58%</td>
</tr>
<tr>
<td>5015: Investigations</td>
<td>713</td>
<td>1,425</td>
<td>989</td>
<td>(436)</td>
<td>44%</td>
</tr>
<tr>
<td>5016: Credit Checks</td>
<td>1,550</td>
<td>1,270</td>
<td>1,270</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5017: Medical Exam</td>
<td>600</td>
<td>600</td>
<td>600</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5020: Exam Scoring</td>
<td>775</td>
<td>775</td>
<td>775</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5025: Temp Labor/Proctors</td>
<td>50</td>
<td>50</td>
<td>50</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5030: Speaker Fees &amp; Expenses</td>
<td>7,550</td>
<td>11,959</td>
<td>10,132</td>
<td>1,827</td>
<td>158%</td>
</tr>
<tr>
<td>5031: Speaker Reimb - Reptual Cost</td>
<td>8,755</td>
<td>8,755</td>
<td>8,755</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5035: Awards</td>
<td>1,318</td>
<td>8,455</td>
<td>1,045</td>
<td>(191)</td>
<td>26%</td>
</tr>
<tr>
<td>5037: Grant/Contributions - general</td>
<td>500</td>
<td>9,990</td>
<td>9,990</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5040: Meals &amp; Housing Expenses</td>
<td>220</td>
<td>463</td>
<td>271</td>
<td>(192)</td>
<td>35%</td>
</tr>
<tr>
<td>5041: Phone Services</td>
<td>282</td>
<td>607</td>
<td>605</td>
<td>2</td>
<td>100%</td>
</tr>
<tr>
<td>5046: Court Reporting</td>
<td>1,040</td>
<td>1,156</td>
<td>1,156</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5049: Caterers</td>
<td>40,400</td>
<td>40,715</td>
<td>37,412</td>
<td>3,303</td>
<td>12%</td>
</tr>
<tr>
<td>5050: Legislative Expense</td>
<td>45,000</td>
<td>45,000</td>
<td>45,000</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5063: Program Special Activities</td>
<td>1,750</td>
<td>1,750</td>
<td>1,750</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5064: Legal Services</td>
<td>1,012</td>
<td>1,012</td>
<td>1,012</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5065: Legal Aid - Bar Support</td>
<td>60,000</td>
<td>60,000</td>
<td>60,000</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5066: Law Day</td>
<td>207</td>
<td>207</td>
<td>207</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5067: Special Event Expense</td>
<td>4,828</td>
<td>27,486</td>
<td>26,808</td>
<td>678</td>
<td>12%</td>
</tr>
<tr>
<td>5067: MKC Fees Paid</td>
<td>39,184</td>
<td>37,127</td>
<td>21,347</td>
<td>(15,780)</td>
<td>142%</td>
</tr>
<tr>
<td>5067: Equipment Rental</td>
<td>7,250</td>
<td>20,371</td>
<td>7,250</td>
<td>13,121</td>
<td>100%</td>
</tr>
<tr>
<td>5067: Food &amp; Bev-intrastate costs only</td>
<td>9,112</td>
<td>161,297</td>
<td>231,492</td>
<td>70,295</td>
<td>70%</td>
</tr>
<tr>
<td>5067: Food &amp; Beverage - interstate costs</td>
<td>3,898</td>
<td>12,257</td>
<td>2,824</td>
<td>9,433</td>
<td>70%</td>
</tr>
<tr>
<td>5067: Soft Drinks</td>
<td>1,314</td>
<td>3,718</td>
<td>3,718</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>5067: Misc, Program Expense</td>
<td>1,258</td>
<td>1,195</td>
<td>1,084</td>
<td>111</td>
<td>112%</td>
</tr>
<tr>
<td>5068: Commission Expense</td>
<td>35,062</td>
<td>24,572</td>
<td>23,007</td>
<td>1,565</td>
<td>81%</td>
</tr>
<tr>
<td>5069: Wills for Heroes</td>
<td>207</td>
<td>810</td>
<td>1,111</td>
<td>313</td>
<td>26%</td>
</tr>
</tbody>
</table>
| 5070: UPL Support | - | - | - | - | 0%
| 5071: Moscow Gala | 55,341 | 67,336 | 64,812 | 2,524 | 100% |
| 5072: Travel - Lodging | 7,065 | 27,305 | 30,975 | 3,670 | 100% |
| 5073: Travel - Transportation/Parking | 279 | 7,328 | 8,960 | 1,632 | 18% |
| 5074: Travel - Mileage Reimbursement | 1,995 | 4,809 | 7,647 | 2,838 | 77% |
| 5075: Travel - Per Diems | 10,100 | 2,024 | 10,044 | (8,020) | 100% |
| 5076: Travel - Meals | 793 | 793 | 793 | 0 | 100% |
| 5077: Travel - Commission Mktg | - | 38,570 | 28,872 | (9,698) | 155% |
| 5082: ADA Annual Meeting | 300 | 3,486 | 3,486 | 0 | 100% |
| 5083: ADA Mid Year Meeting | 7,738 | 5,794 | 5,794 | 0 | 100% |
| 5083: Commission/Education | 31,775 | 13,553 | 13,553 | 0 | 100% |
| 5083: ADA Annual Meeting | 1,238 | 5,789 | 5,789 | 0 | 100% |
| 5083: Western States Bar Conference | 205 | 9,859 | 9,859 | 0 | 100% |
| 5084: President's Expense | 13,643 | 13,500 | 13,500 | 0 | 100% |
| 5084: President's Reimbursement | - | - | - | - | 0%
| 5085: Agg Reform Task Force | - | - | - | - | 0%
| 5086: Leadership Academy | - | - | - | - | 0%
| 5087: Bar Review | 3,490 | 4,500 | 1,001 | 3,499 | 100% |
| 5087: Retros | 21,644 | 24,975 | 2,001 | 22,974 | 100% |
| 5088: Wellbeing Committee | 41,937 | 48,135 | 57,841 | 9,693 | 83% |
| 5088: Bar Membership Survey | 1,705 | 1,705 | 1,705 | 0 | 100% |
| 5088: UCL Support | - | - | - | - | 0%
<table>
<thead>
<tr>
<th>Department</th>
<th>Actual (YTD)</th>
<th>Actual Budget</th>
<th>Var (Unforgotten)</th>
<th>% of Budget</th>
<th>Total Budget</th>
<th>N of Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>5960 Overhead Allocation - Seminars</td>
<td>110,604</td>
<td>110,604</td>
<td>0</td>
<td>0%</td>
<td>110,604</td>
<td>0%</td>
</tr>
<tr>
<td>5970 Capital Reserve - 3rd Ply</td>
<td>98,952</td>
<td>98,952</td>
<td>0</td>
<td>0%</td>
<td>98,952</td>
<td>0%</td>
</tr>
<tr>
<td>5990 Total Program Service Expenses</td>
<td>209,556</td>
<td>209,556</td>
<td>0</td>
<td>0%</td>
<td>209,556</td>
<td>0%</td>
</tr>
<tr>
<td>5999 Total Salaries &amp; Benefit Expenses</td>
<td>2,502,053</td>
<td>2,503,998</td>
<td>0</td>
<td>0%</td>
<td>2,503,998</td>
<td>0%</td>
</tr>
<tr>
<td>7025 General &amp; Administrative Expenses</td>
<td>2,502,053</td>
<td>2,503,998</td>
<td>0</td>
<td>0%</td>
<td>2,503,998</td>
<td>0%</td>
</tr>
<tr>
<td>7100 Total General &amp; Administrative Expenses</td>
<td>2,502,053</td>
<td>2,503,998</td>
<td>0</td>
<td>0%</td>
<td>2,503,998</td>
<td>0%</td>
</tr>
<tr>
<td>7125 In Kind Expenses</td>
<td>5,120</td>
<td>5,120</td>
<td>0</td>
<td>0%</td>
<td>5,120</td>
<td>0%</td>
</tr>
<tr>
<td>7200 Building Overhead Expenses</td>
<td>32,143</td>
<td>21,062</td>
<td>12,082</td>
<td>173%</td>
<td>32,143</td>
<td>12,082</td>
</tr>
<tr>
<td>7300 Total Overhead Expenses</td>
<td>32,143</td>
<td>21,062</td>
<td>12,082</td>
<td>173%</td>
<td>32,143</td>
<td>12,082</td>
</tr>
</tbody>
</table>

**Total Expenses:** $4,248,715

**Net Profit (Loss):** $1,933,260
# Utah State Bar
## Balance Sheets

### ASSETS

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<th>6/30/2021</th>
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<td>Invested Funds</td>
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<td><strong>Total Cash/Investments</strong></td>
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<td><strong>Total Other Current Assets</strong></td>
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<td><strong>Fixed Assets</strong></td>
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<td>Property &amp; Equipment</td>
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<td>Accumulated Depreciation</td>
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<td>(4,184,165)</td>
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<td><strong>Total Fixed Assets</strong></td>
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<td>1,416,692</td>
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<td><strong>TOTAL ASSETS</strong></td>
<td><strong>$ 8,672,824</strong></td>
<td><strong>$ 10,036,110</strong></td>
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### LIABILITIES & EQUITY

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<td><strong>Liabilities</strong></td>
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**Summary**

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**Supplemental Information**

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**Active Attorneys by Region**

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<tr>
<td>2nd Division (Davis - Weber)</td>
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<tr>
<td>3rd Division (Salt Lake)</td>
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113