

UTAH STATE BAR VISION

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

UTAH STATE BAR MISSION

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

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Utah State Bar Commission
Friday, February 14, 2025
Utah State Bar – Law & Justice Center
Salt Lake City, Utah

Zoom Link: <https://us02web.zoom.us/j/81527494738>

Agenda

- 1. 9:00 a.m. President's Welcome and Reports: Cara Tangaro**
 - 05 Mins.* 1.1 NCBP Meeting Report: Kim Cordova
 - 10 Mins.* 1.2 ABA House of Delegates Report: **Tiffany Shimada**
 - 10 Mins.* 1.3 Legislative Update
 - 05 Mins.* 1.4 Spring Convention Report
 - 01 Mins.* 1.5 St. George Room Reservations Reminder (TAB 1, Page 4)

- 2. 9:30 a.m. Action Items**
 - 10 Mins.* 2.1 Select Dorothy Merrill Brothers Award Recipient (TAB 2, Page 6)
 - 10 Mins.* 2.2 Select Raymond Uno Award Recipient (TAB 3, Page 10)
 - 10 Mins.* 2.3 Well-Being Impact Award (TAB 4, Page 17)
 - 10 Mins.* 2.4 Proposed Fractional Section: **Jeff Holman** (TAB 5, Page 20)
 - 10 Mins.* 2.5 Section Administrative Fees: **Elizabeth Wright and Nathan Severin** (TAB 6, Page 26)

- 3. 10:30 a.m. Information Items**
 - 10 Mins.* 3.1 New Well-being Consultant: **Liz Silvestrini**
 - 10 Mins.* 3.2 Report from Law Related Education: **Princess Gutierrez** (TAB 7, Page 29)

- 11:15 a.m. Adjourn**

CONSENT AGENDA

(TAB 8, Page 34)

(Approved by policy if no objections are raised)

1. Minutes of January 10, 2025 Commission Meeting

ATTACHMENTS

(TAB 9, Page 39)

1. December 2024 Financial Statements

2025

February 18	Zoom Meeting re: GRC Vote Review 4:00 p.m.		Telephone/Video Conference
February 25	Zoom Meeting re: GRC Vote Review 4:00 p.m.		Telephone/Video Conference
March 6	Executive Committee Meeting	Noon	Telephone/Video Conference
March 13	Commission Meeting	1:00 p.m.	St. George, Utah
March 13-15	Utah State Bar Spring Convention		St. George, Utah
April 1	Bar Election - Balloting Begins		
April 2 - 5	Western States Bar Conference		Wigwam Resort, Arizona
April 9 - 10	ABA Day in Washington DC		
April 15	Bar Election - Balloting Ends		
May TBD	Admission Ceremony	Noon	Salt Palace Convention Center
May 8	Executive Committee Meeting	Noon	Telephone/Video Conference
May 16	Commission Meeting	9:00 a.m.	Law & Justice Center
May 22-24	Jackrabbit Bar		Black Desert Resort, St. George
June 5	Executive Committee Meeting	Noon	Telephone/Video Conference
June 13	Commission Meeting	9:00 a.m.	Law & Justice Center
June 26	ANNUAL UTAH STATE BAR MEETING	9:00 a.m.	This is the Place Heritage Park
August 6 - 12	ABA Annual Meeting		Toronto, ON

Utah State Bar Commission Meeting

T A B 1

2025 "Spring Convention in St. George" Accommodations

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

Hotel	Nightly Rate (Does NOT include tax)	Block Size	Release Date	Miles from Dixie Center to Hotel
Comfort Inn & Suites 138 E Riverside Dr., St. George Please call 435-628-8544 and request to book under the Utah State Bar block.	\$200	10-King 10-2 Queen	2/11/25	.5
Courtyard St. George 185 S. 1470 E., St. George (435) 986-0555	\$269	10-King 10-2 Queen	2/11/25	4
Fairfield Inn 1660 S. Convention Center Dr., St. George (435) 673-6066	\$185 \$199	10-King 5-2 Queen	2/11/25	0.3
Hilton Garden Inn 1731 S. Convention Center Dr., St. George (435) 634-4100	\$185 \$195	5-King 5-2 Queen	2/11/25	0.1
Holiday Inn 1808 S. Crosby Way, St. George (435) 628-8007	\$185 \$205	10-King 10-2 Queen	2/11/25	0.5
Holiday Inn Express & Suites, St. George North 2450 N. Town Center Dr., Washington Please call 435-986-1313 and request to book under the Utah State Bar Spring Convention.	\$107	10-King 10-2 Queen	2/13/25	11.5
Hyatt Place 1819 S. 120 E., St. George (435) 656-8686	\$199 \$209	10-King 10-2 Queen	2/11/25	0.3
My Place Hotel, St. George 1644 S. 270 E., St. George (435) 674-4997	25% off daily rate	22 rooms (any available)	Until sold out	.6
Red Lion Hotel 850 S. Bluff St., St. George Please call 435-628-4235 and request to book under the Utah State Bar block.	\$159	6-King 15-2 Queen	2/03/25	2
Tru by Hilton 1251 S. Sunland Dr., St. George (435) 634-7768	\$191	10-King 5-2 Queen	2/11/25	1

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

Utah State Bar Commission Meeting

T A B 2

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: February 14, 2025

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

CRITERIA: Awarded to a Utah State Bar attorney whose professionalism, public service, and dedication improves the legal profession, enhances the administration of justice, and the delivery of legal services in Utah. The award recipient should have a history of encouraging new efforts and engaging in significant activity on behalf of the advancement of women in the legal profession.

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Jill Coil	<i>No</i>	Kara North
Kate Conyers	<i>2016 Young Lawyer of the Year</i>	Anne Freeland, Women Lawyers of Utah
Tara Isaacson	<i>2015 Professionalism</i>	Katie Filler
Amber McFee	<i>No</i>	Micah Scholes
		Leilani Whitmer
Leilani Whitmer	<i>No</i>	Dani Blandon

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2025 to review the nominations for the Dorothy Merrill Brothers Award. The Committee discussed the merits of each nominee and finally agreed upon recommending Jill Coil to the Bar Commission for consideration.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2024	Hon. Diana Hagan	Adrienne Bell, Kendra Brown, Monica Call, Jill Coil, Melissa Holyoak, Annette Jan, Hon. Linda Jones, Kara North, Emily Paulos, Hon. David Sam, Scarlet Smith, Gretta Spendlove, Juliette White
2023	Ashley Peck	Jill Coil, Mary Deiss Brown, Hon. Michele Christiansen-Forster, Heidi Goebel, Hon. Ann Marie McCliff Allen, Rachel Ortiz, Michelle Quist
2022	Jessica Andrew	Jill Coil, Lorie Nelson, Hon. Laura Scott, Gretta Spendlove
2021	Aida Neimarlija	Jill Coil, Amy Fowler, Elisa Harris, Angelina Tsu
2020	Jennifer Tomchak	Aida Neimarlija, Judge Laura Scott, Angelina Tsu
2019	Jacey Skinner	Ann Marie Taliaferro
2018	Ellen Maycock	Ann Marie Taliaferro
2017	Hon. Michele Christiansen	Marlesse Jones
2016	Barbara Hjelle	Joni K. Jones
2015	Patrice Arent	
2014	Terrie McIntosh	Peggy Hunt, Elaina Maragakis, Aida Neimarlija, Lori Nelson
2013	Charlotte L. Miller	Lori Nelson
2012	Hon. Sandra N. Peuller	Kelly De Hill, Elizabeth Dunning, Jennifer Lee, Lori Nelson
2011	Lauren I. Scholnick	
2010	Evelyn J. Furse Melanie J. Vartabedian Lisa A. Yerkovich	Joanna Sagers, Rashelle Perry, Kathy Dryer
2009	Hon. Carolyn B. McHugh	Lori Nelson
2008	Constance Lundberg Susan Peterson	Steven Waterman
2007	Irene Warr	Kate Toomey, Christine Fitzgerald Solits
2006	Janet H. Smith	Hon. Carolyn McHugh, Julie K. Morriss
2005	Annette W. Jarvis	Michaela D. Andruzzi, Ellen O'Hara

2004	Paul M. Warner	Commissioner Susan Bradford, Charlotte Miller
2003	Denise Dragoo	Nelda Bishop, Kristen Clayton, Bonnie Mitchell, Debra Moore and Judi Gretta Sorensen
2002	Hon. Pamela T. Greenwood	Karin Hobbs
2001	Laura M. Gray	Hon. Tina Campbell, Laura M. Gray, Patricia M. Leath, Hon. Pamela Greenwood, Charlotte Miller; and Marilu Peterson (non-lawyer)
2000	Katherine D. Pullins (non-lawyer)	Hon. David K. Winder
1999	Rosalie M. Reilly	
1998	James B. Lee	Attorney General Jan Graham, Hon. Pam Greenwood, Glenn C. Hanni; Hon. Leslie A Lewis, Patricia M. Leith, Hon. Kay Lindsay, Charlotte L. Miller, Toni Marie Sutliff, Irene Warr
1997	Anne Milne	
1996	Patricia W. Christensen	
1995	Hon. Christine M. Durham	

Christy Abad

From: info@utahbar.org
Sent: Monday, January 27, 2025 11:56 AM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Kara H. North

Bar Number

13564

Email Address

kara@moxielawgroup.com

Date

01/27/2025

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Jill Coil

Award

Dorathy Merrill Brothers Award (Spring Convention)

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

Jill Coil is deserving of the Dorathy Merrill Brother's Award due to the work and policies within her firms to advance women in the practice of law within the State of Utah. She started Coil Law (a family law firm), and established progressive and supportive workplace policies, including, unlimited PTO, 8 weeks of parental leave after birth or adoption of a child, and allows attorneys to flex between PT and FT, or remote work as it benefits their work/life balance. These policies are very unique in law generally, but are very mindful of working mothers, and enables us to stay within the practice, while still caring for our families. In 2020, Jill established Moxie Law Group, which is the first, Female-led, personal injury firm in Utah (excluding solo practitioners). When less than 1% of the Utah State bar are women, practicing personal injury law (approximately 60 total within Utah), Moxie is another firm which enables women to thrive, grow, lead, and balance their personal or familial responsibilities. The same supportive policies that Jill established within Coil, are found within Moxie. Further, Jill actively mentors the attorneys within her firms. She teaches them about dealing with difficult clients, calendar management, maintaining a healthy and positive mindset, and goal setting. Jill is a trailblazer. She started the tech firm, SimpleEnding, to increase access to justice for low-income individuals seeking access to high-quality, self-help, divorce documents. Jill Coil truly is one of a kind and is quietly doing more for women in the practice of law in Utah than she gets credit for. Jill's support and cheerleading has caused me to fall in love with law again and remember the "why" behind what we do. I'm grateful to call Jill my partner within our firm and know that regardless of whether she receives this award or not, she'll continue to do incredible things.

Please select one:

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

Utah State Bar Commission Meeting

T A B 3

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: February 14, 2025

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

CRITERIA: Awarded to a Utah State Bar attorney whose professionalism, public service, and dedication improves the legal profession, enhances the administration of justice, and the delivery of legal services in Utah. The award recipient should have a history of encouraging new efforts and engaging in significant activity on behalf of the advancement of minorities in the legal profession.

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Kent Cottam	No	Idania (Dani) Blandon
Hon. Dianna Gibson	No	Utah Minority Bar Association Brit Merrill, Women Lawyers of Utah
Abby Dizon-Maughan	2021 Young Lawyer	R. Shane Johnson

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2025 to consider the nominations for the 2025 Raymond S. Uno Award. The committee agreed upon recommending **Abby Dizon-Maughan** for the award.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2024	Hon. Shauna Graves-Robertson	Kim Cordova, Abby Dizon-Maughan, Gabriela Mena, Hon. Christina Ortega, Eduardo Reyes Chavez, Hon. Andrew Valdez
2023	Sade Turner	Heidi Chamorro, Gabriela Mena, James Sorenson
2022	Ross I. Romero	Abby Dizon-Maughan, Prof. Erika George, Cheryl Mori
2021	Engels Tejada	No other nominees.
2020	Melinda Bowen	Hon. Lynn W. Davis, James A. Sorenson, Engels Tejada
2019	Yvette Donosso	
2018	Hon. Augustus G. Chin	
2017	Hon. Vernice Trease	Trystan Smith
2016	Reyes Aguilar, Carl Hernandez	
2015	Andrea Martinez Griffin	
2014	Janise K. Macanas	Larry EchoHawk, Douglas Matsumori
2013	Cecilia Romero	
2012	Prof. David Dominguez	S. Grace Acosta, Augustus Chin, Hakeem Ishola, Doug Matsumori, Darold J. McDade, Sean Reyes, J. Craig Swapp, Phillip Uipi, Hon. Andrew Valdez
2011	Nathan D. Alder	
2010	Trystan Smith	Carlos Esqueda
2009	Cheryl Miyuki Mori	
2008	Su Chon	
2007	Judge Glen K. Iwasaki	Judge Glen K. Iwasaki, Sean D. Reyes
2006	Mona Burton	Douglas Matsumori
2005	Cheryl D. Luke	Filia H. "Phil" Uipi
2004	Marlene Gonzalez	Barbara Melendez, Filia H. "Phil" Uipi
2003	F. John Hill	James C. Bradshaw, Gus Chin, Barbara Dickey, Marlene Gonzalez, Darold J. McDade, Mark R. Moffat
2002	Robert L. Flores	Darold J. McDade
2001	Hon. Tyrone E. Medley	Gus Chin

2000	Sherrie Hayashi	
1999	Jimi Mitsunaga	
1998	Hon. Raymond Uno	
1997	Michael N. Martinez	
1996	John Martinez	
1995	Hon. William A. Thorne, Jr.	

R. SHANE JOHNSON
Attorney & Counselor at Law

February 6, 2025

Dear Utah State Bar,

I write to nominate bar member Abigail Dizon-Maughan (Utah Bar No.14436) for the Raymond S. Uno Award. My nomination is late, because when I phoned Ms. Dizon-Maughan to discuss her credentials, we got to talking, and we got sidetracked with a project to create an outreach campaign to undocumented folks in Utah who may fall under the scope and hammer of the new administration's anti-immigrant campaign.

To this end, within a few days, Ms. Dizon Maughan coordinated a panel of willing professionals to present on the new startling issues facing Utah's immigrant community. Particularly, Ms. Dizon-Maughan coordinated at a moment's notice the following online panel scheduled for February 13, 2025, at 6 p.m. to include the following panelists:

"Crimmigration": Adam Crayk
Immigration: Marlene Gonzalez
Asset protection: Andrew Zaugg
Child custody: Nicole Salazar-Hall
Interpreter: Liliam Llanos
Host/Moderator: Abby Dizon-Maughan

As this example exemplifies, and as Ms. Dizon-Maughan's resume (attached) attests, she is more than worthy of the award. She's been doing Ray Uno crap since I've known her (16 years or thereabout).

Sincerely,

R. Shane Johnson

R. Shane Johnson (Utah Bar No. 14217)

ABIGAIL M. DIZON-MAUGHAN

6646 GOLDEN ACRE COVE

WEST VALLEY CITY, UT 84128

801-573-0550 ♦ ABBY.DIZON.MAUGHAN@GMAIL.COM**LEGAL EXPERIENCE**

Parsons Behle & Latimer, Salt Lake City, Utah October 2021 – Present
Senior Associate Trial Attorney, Commercial Litigation

- Manage commercial litigation cases involving complex legal issues.
- Supervise litigation team, including junior associates and paralegals.
- Significant deposition, hearing, and trial experience.
- Create and lead the firm's Attorney of Color Group.

Lewis Brisbois Bisgaard & Smith, Salt Lake City, Utah October 2021 – Present
Associate Trial Attorney, General Liability Litigation

- Manage a case load of 60+ active cases.
- Frequent interactions with clients and opposing parties to successfully negotiate resolution.
- Participate in the firm's diversity committee as the only minority and female attorney in the Salt Lake office.

Burbidge Mitchell, Salt Lake City, Utah September 2017 – December 2020
Associate Trial Attorney, Complex Commercial and Catastrophic Personal Injury (Plaintiff)

- Manage commercial litigation cases involving complex legal issues, including without limitation breach of contract claims.
- Research nuanced legal issues and draft motions, including dispositive motions.
- Collaborate with partners and experts during discovery phases to identify and address legal and medical issues.
- Appear at hearings and depositions.

ADM Legal Defense, Salt Lake City, Utah May 2014 – September 2017
Founding and Managing Attorney, Criminal Defense

- Represented individuals charged with felony and/or misdemeanor crimes in state or federal courts, including murder, rape, and drug distribution.
- Awarded CJA contract. (2015-2017)
- Gained significant trial experience.

Arnold & Wadsworth, Salt Lake City, Utah May 2013 – May 2014
Associate Attorney, Criminal Defense

- Represented individuals charged with traffic, drug, or alcohol related offenses.
- Drafted motions and supporting memoranda. Topics included evidence suppression and dismissal of charges.
- Negotiated settlement agreements with prosecutors.

BAR LEADERSHIP

Utah State Bar, Admissions Committee
Co-Chair, November 2022-Present

BAR LEADERSHIP (CONT.)

Utah State Bar, Litigation Section*Secretary, June 2022 – Present**Treasurer, Elected (term begins June 2022)***Utah Center for Legal Inclusion***Member, Fiduciary Board, June 2022-Present**Mentorship Committee Member, 2018-Present**Diversity and Inclusion Committee Member, 2018-Present***Spring 2020 and Spring 2021 Conventions Planning Committees***Co-Chair, October 2019-March 2020 and September 2020-March 2021***Utah State Bar Leadership Academy***Class of 2020-2021***Utah State Bar Commission***Ex-Officio Representative of the Utah Minority Bar Association, 2017-2018***Utah Minority Bar Association***Immediate Past President, 2018**President, 2017**President-Elect, 2016**Social Committee Chair, 2014-2015***PROFESSIONAL ORGANIZATIONS**

Utah State Bar and Federal Bar for the District of Utah, Bar Number 14436

American Bar Association,

Women Lawyers of Utah

Utah Minority Bar Association

Salt Lake County Bar Association

David K. Watkiss-Sutherland II Inn of Court

Utah State Bar Litigation Section

CIVIC LEADERSHIP

Utah Moms for Racial and Social Equity*Co-Founder, 2020-Present***Filipino-American National Historical Society – Utah***Founding Member, 2020-Present***West Valley City Professional Standards Review Board***Chairperson, 2014-Present**Member, 2013-2014***NAACP – Salt Lake Branch***Criminal Justice Committee Chairperson, 2013-Present*

AWARDS AND ACHIEVEMENTS

Living Color Honoree, Utah Business Magazine, 2022
Super Lawyers/Thomson Reuters Rising Star, 2017-2022
University of Utah, S.J. Quinney College of Law Young Alumna of the Year, 2019
Utah State Bar Outstanding Mentor, 2017-2019
NAACP-Salt Lake Branch President's Award, 2015

EDUCATION

University of Utah, S.J. Quinney College of Law May 2012
 Salt Lake City, Utah
Juris Doctor

Organization Memberships

- Outlaws, *1L Representative, Vice President*
- Utah Student Association of Criminal Defense Lawyers, *Vice President, President*
- Rainbow Law Utah, *Director of Public Relations*
- Minority Law Caucus, *UMBA Liaison*
- S.J. Quinney College of Law Student Ambassador
- Student Bar Association, *3L Representative*
- Hartland Citizenship Class, *Student Coordinator*

Awards and Achievements

- Graduated with Honors
- Pro Bono Initiative Certificate
- CALI Award, *Refugees and Aliens*
- Outstanding Academic Achievement Award, *Legislative Process*

University of Phoenix May 2007
 Salt Lake City, Utah
Master of Business Management

University of Utah December 2003
 Salt Lake City, Utah
Bachelor of Science, Political Science

Utah State Bar Commission Meeting

T A B 4

**UTAH STATE BAR AWARDS COMMITTEE
AWARD RECOMMENDATION**

TO: Utah State Bar Commission

DATE: February 14, 2025

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

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

NOMINEES:

NOMINEE	AWARD HISTORY	NOMINATOR
Cara Tangaro	No	Justice Paige Petersen

RECOMMENDATION:

The Utah State Bar Awards Committee met on February 7, 2025 to consider the nominations for the 2025 Utah Legal Well-being Impact Award. The committee agreed upon recommending **Cara Tangaro** for the award.

PAST RECIPIENTS and NOMINEES:

	Past Recipients	Other Nominations That Year
2023	Martha Knudson	
2024	Danielle Hawkes	

Christy Abad

From: info@utahbar.org
Sent: Monday, February 3, 2025 4:11 PM
To: Christy Abad
Subject: New submission from Nomination Bar Awards

Nominator Name

Justice Paige Petersen

Email Address

ppetersen@utcourts.gov

Date

02/01/2025

I The Above, Desire to Nominate the Following

Utah State Bar Member

Nominee's Name

Cara Tangaro

Award

THE UTAH LEGAL WELL-BEING IMPACT AWARD (Spring Convention)

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

Cara Tangaro has dedicated much time and energy to supporting lawyer well-being in Utah over the last 7 years. She has been there from day 1. In 2018, she joined the Utah Supreme Court's task force, which kicked off our efforts to better support lawyer well-being in Utah. When we formed the permanent Well-Being Committee for Legal Professionals, she served on it for years as a co-chair and member. As a Bar commissioner and now the Bar president, she has supported lawyer well-being efforts, including making Tava available to lawyers and their families.

Please select one:

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

Utah State Bar Commission Meeting

T A B 5

Utah State Bar
Application for New Section
Fractional Counsel Section

Dear Commissioners,

As an active member of the Utah State Bar for close to 20 years now, it's a pleasure to present this proposal for a new and uniquely positioned section of the Bar—the **Fractional Counsel Section**.

I submit this proposal on behalf of our 25+ charter members listed on the attached Membership Schedule. It's exciting to see a relatively diverse group of attorneys come together for this proposal, in part, because the proposed section stands out from the currently available sections that predominantly focus on individual, substantive areas of law.

In contrast to existing sections, the Fractional Counsel Section will directly support practitioners with different substantive legal expertise, from different sizes of law practices (e.g., solo, small firm, and "Biglaw"), inclusive of all geographies across the state.

The practice of "fractional" lawyering is a growing field within the rapidly developing "fractional" executive industries across businesses, generally. In essence, "fractional" legal counsel roles straddle both sides of private practice and corporate practice, at the same time. In some ways, fractional engagements are similar to, but also different from, traditional executive roles. Many of these differences are compounded for legal counsel, largely due to ethical rules and obligations.

Here are some of the unique issues that attorneys must deal with when engaging in fractional roles:

- **Structuring Fractional Engagements** - scope of representation is very open-ended, both in terms of duration and substantive legal areas; this has potential impact on malpractice liability;
- **Supporting Client Team Integration** - Fractional roles are often integrated into client organization charts, with reporting and managerial functions;
- **Managing Legal Resources** - Fractional or Outside General Counsel roles compress all the typical GC functions into an fractional time commitment and budget, often including the management of other outside legal counsel;
- **Addressing Ethical Challenges** - ethical obligations related to competent advocacy demands can multiply with more integrated roles across multiple client companies, as well as the expectations of individual executives at each company;
- **Exploring Alternative Compensation Models** - creative billing methodologies are common to provide sufficient services in a timely and efficient manner, while reserving billable capacity for expanded scope issues;
- **Utilizing Executive Leadership Skills** - Attorneys in more integrated roles are expected to navigate executive leadership relationships differently than more compartmentalized and distant outside counsel roles.

Utah State Bar
Application for New Section
Fractional Counsel Section

Consequently, the rise of fractional legal roles calls for a more focused approach to fostering the best practices for attorneys to competently and ethically straddle the separate, but complementary, roles as both law firm partners and business partners.

It is within this context that we, as charter members, feel the time is right to launch and foster a new section that caters directly to the mix of substance and process, law and business, advocacy and partnership that is required of fractional counsel.

Within this section, with the broader support of the Bar, we aim to achieve the following Purpose and Objectives:

Purpose: Create a network where fractional attorneys can share experiences, challenges, and solutions specific to their roles, fostering collaboration and mutual support.

Objectives:

- 1) Promote the benefits of fractional legal services within the broader legal and client communities, highlighting the flexibility, cost-effectiveness, and strategic value fractional counsel can provide.
- 2) Develop and promulgate best practices that enable fractional counsel to effectively operate in hybrid legal/business roles across multiple client organizations to increase the availability of helpful legal advice within the community.
- 3) Assist with frameworks to manage conflicts of interest, navigate dual ethical obligations (in-house vs. outside counsel), and maintain professional boundaries while deeply integrated within client organizations.
- 4) Offer programs that help fractional attorneys build leadership capacity, strategic thinking, and business management skills, empowering them to serve as key partners in their clients' success.

For the reasons outlined above, and in alignment with the Purpose and Objectives above, we have gathered the names of 25+ charter members who have provided written confirmation indicating their intent to become charter members of the Fractional Counsel Section. In a show of enthusiastic interest regarding this charter membership, many of these Utah attorneys expressed highly supportive sentiments, including the following:

"I'm interested in your work creating a new section with the Bar. After many years in the tech space, I started providing fractional work. I think a new section with a focus on that work would be a huge help as the sector continues to grow."

"Definitely interested! This is a great idea."

"I would love to be included on that list. This sounds great, and can't wait to see it develop."

"Absolutely! I fully support this and would love to be involved."

Utah State Bar
Application for New Section
Fractional Counsel Section

"This sounds great. I'd love to participate."

"I'd love to be involved in this new section. Let me know how I can help!"

*"Saw that you are looking to start a fractional GC section in Utah. I'd love to help!
When is the first meeting?"*

"Appreciate your efforts. Much needed."

Funny enough, when a colleague licensed in another state heard about our initiative her reaction was, "Hey State Bar of Georgia - can we get a similar section for our state?" Suffice it to say I think the Utah State Bar has the opportunity to be on the forefront of this movement, similar to how it has embraced the legal sandbox and taken other progressive positions recently.

By way of logistics, our charter members are prepared to provide the required initial startup funds of \$500 from their initial member dues, which we plan to assess at \$40 per year. This amount is in line with other section dues, which range from \$15-50 per year. Initial member dues will go toward establishing the section, recruiting additional members, and initializing our event calendar for members and the broader Bar participants.

Our charter members also propose to adopt the attached Section Bylaws, which have been drafted in accordance with the model bylaws provided by the Bar.

Finally, I will continue to act as the Organizing Officer for this proposed section, until the time when we are able formalize the section and conduct official elections to fill the Chair, Vice Chair, and Secretary officer roles outlined in the Bylaws. Several of the charter members have also expressed a desire to help with any further organizing activities and eventual officer roles and duties.

By way of credentials, I have participated extensively in other sections of the Bar, including committee and officer positions over 10 years with the Intellectual Property Section (Chair, 2011-2012) and several years with the Corporate Counsel Section (Chair, 2019-2020). I've been intimately involved in planning section CLEs, semi-annual seminars (e.g., the Fall Forum), and annual conferences (e.g., the IP Summit), bringing in a diversity of local and national (even international) speakers, from practitioners to federal judges to USPTO leadership and even a legal comedian. I've provided service on the Government Relations Committee of the Bar. I helped establish the continuing student scholarship program through the IP Section. I also helped with initial efforts to establish the USPTO's Pro Bono Patent Program here in Utah (as well as an unsuccessful bid to bring a satellite USPTO office to Utah, which ultimately was awarded to Colorado). And, importantly, I've had the pleasure of working closely with several staff members at the Bar during my prior tenures with other sections.

I am also very familiar with the practice challenges and opportunities related to outside and/or fractional general counsel roles. In fact, I've built my current practice over the last several

Utah State Bar
Application for New Section
Fractional Counsel Section

years around pioneering the concept of a “fractional legal team” which essentially outsources a fully staffed in-house legal team to startups and scaling companies in ecommerce, SaaS, and tech.

I am passionate about building community with my legal and business peers and think we are at a pivotal time, following the “work from home” movement of Covid and leading into the broader fractional executive trends growing across professional services industries, generally.

It is with sincere gratitude for my membership in the Bar and my desire to continue contributing to an engaging community that I ask for your support in approving the proposal for the Fractional Counsel Section of the Utah State Bar.

Sincerely,

/s/Jeff Holman

Utah State Bar
Application for New Section
Fractional Counsel Section

MEMBERSHIP SCHEDULE

The following list of Utah attorneys have provided written confirmation indicating their intent to become charter members of the Section.

Please note, charter members have provided their confirmation via email and/or other messaging channels. All charter members will provide further contact information, as may be required, for final approval of this application.

	<u>Name</u>	<u>Contact</u>
1	Jeff Holman	jeff@intellectualstrategies.com
2	Trevor Bradford	trevor@intellectualstrategies.com
3	Derek Parry	derek@noscitur.com
4	Adam Wardel	adam.wardel@wardellaw.org
5	Pattie Christensen	pchristensen@utahestateplanners.com
6	Michael Wunderli	michael@wwpartners.co
7	Nathan Nelson	nathan@presivolaw.com
8	Rich Goates	rich.goates@goateslawgroup.com
9	Jedi Knight	jedediah.knight@newburnlaw.com
10	Chris Takemori	chris.takemori@viacustomers.com
11	Michael Wadsworth	mww@clydesnow.com
12	Adam Revelli	arevelli@kba.law
13	Josh Freeman	josh@freemanlovell.com
14	Michael Thomas	michael.thomas@freemanlovell.com
15	James Thayer	james@thayer.site
16	Pual Burghardt	paul@gcassociateslaw.com
17	Rob Cutler	Robcutler09@gmail.com
18	Adam Neville	adam@adamnevillelaw.com
19	Joseph May	Joe.may@savvi.legal
20	Ross Crandall	ross@intellectualstrategies.com
21	Danny Hopkinson	dannyhopkinson@gmail.com
22	Howard Young	hcyoungslc@gmail.com
23	Freedom Hansen	fhansen@hbaa.law
24	Chad Burgin	cburgin@burginlaw.com
25	Steven Joffee	sjoffee@michaelbest.com
26	Elle O'Brien	elle@utahbusinessattorneys.com
27	Aaron Stringer	astringer@redclifflegal.com
28	Jennifer Kohler	Jennifer@kohlerlawgroup.com
29	Stephanie Warner	StephanieWarnerlaw@outlook.com
30	Jeff Warr	jwarr@ampleo.com

Utah State Bar Commission Meeting

T A B 6

Utah State Bar[®]

M E M O R A N D U M

TO: Board of Bar Commissioners

FROM: Elizabeth A. Wright
Nathan Severin

RE: Section Administrative Fees

DATE: February 7, 2025

Background

As part of our ongoing efforts to ensure financial sustainability and operational efficiency, we have conducted a review of our administrative fee structure for sections. This review has identified a need to adjust the current fee to adequately cover rising costs associated with the administrative services we provide to sections. We propose a fee based on a section's proportional annual revenue that will be determined each year after sections dues are collected.

The Bar's operational costs have increased significantly since the current fee was established sometime before 2005. Maintaining the current fee structure is no longer sufficient to cover these expenses. Without adjustment, the gap between actual costs and collected fees will continue to widen.

Current Fees

Currently the Bar charges sections an annual fee of \$7 per section member. The fee is charged after the licensing process when our Finance Department calculates how many

people joined a section during licensing. The fee has been \$7 since at least 2005, which is the first year for which we have electronic financial records.

Purpose of Fee

The fee covers the Bar's administrative costs and services provided to the section and includes:

1. Time spent by the Finance Department collecting the dues, issuing checks, preparing monthly financial statements, and issuing payments on behalf of the sections.
2. IT Department support and website support.
3. Contract review and approval by General Counsel.
4. CLE staff time spent on section support, including section communications, mailings, e-mail notices, setting up events for registration, assisting with obtaining MCLE accreditation, entering attendance for CLEs, and ordering section lunches if needed.¹
5. Membership database resources.
6. Credit card fees.
7. Zoom account licenses.

For the 2025 licensing year, the traceable cost of these services was \$104,612 and the amount collected from sections for these services was \$65,576.

Fee Structure

Bar staff proposes reviewing annually as part of the budgetary process charging a total fee to each section based on proportional revenue rather than a flat, per-member fee, to cover the Bar's traceable administrative costs. This structure better distributes costs among all sections consistently as a percentage of the total gross fees charged. Each effective fee reflects the resources allocated to an individual section based on its size.

With Commission approval the new fee structure will begin for the 2025-2026 fiscal year.

¹ This administrative fee does not and is not intended to cover the CLE and other Bar staff time and overhead resources allocated for the planning of individual section seminar events, which are defined as generally lasting two or more hours. Staff time and overhead are billed directly to these events and is accounted for differently.

Utah State Bar Commission Meeting

T A B 7



BOARD OF DIRECTORS

Hon. Augustus G. Chin,

Millcreek/Cottonwood Heights Justice Court

Hannah Andrews, Foley & Lardner

Bruce R. Baird, PCCC Attorney at Law

Patrick C. Burt, Kipp and Christian, P.C.

T. Richard Davis, Chair-elect

Dentons Durham Jones & Pinegar

Tina Hatch, Board Chair

Salt Lake City School District

Kyle Kaiser, Utah Attorney General's Office

Thomas A. Mitchell,

*Wallace Stegner Center
S.J. Quinney College of Law*

Michelle M. Oldroyd,

*Utah State Bar; Director of CLE and
Professional Education*

Sydney Sell, Holland and Hart

Amy Smedley, Savage Company

History and Mission

The national Law-Related Education (LRE) movement began over fifty-five years ago. The mission of LRE nationally and Utah Law Related Education is two-fold:

- To provide law-related and citizenship education through interactive educational experiences and curricula which foster in youth and communities an understanding of the law, the legal system, and their rights and responsibilities as engaged citizens.
- To help our youth develop knowledge and skills to be effective, engaged citizens.

Impact and Growth

Kathy Dryer had been the long-time Executive Director and retired in Spring of 2024. Kathy focused on getting the programs off the ground and she did a wonderful job. Princess Gutierrez was hired as her replacement and in almost one year as Executive Director.

The impact that LRE has had on students and teachers, as well as its growth potential, is significant. All LRE programs make an impact on elementary and secondary school students within and outside of Salt Lake County, spanning Northern and Southern counties in the State. Program directors and the Executive Director have been working together to identify areas for growth and effective change for all programs and those served.

Organizational Updates

- Hired new Executive Director, Princess Gutierrez in March 2024
- Hired bookkeeper, Jennifer Cordova, March 2024
- Hired new Peer Court Director, Ermiya Fanaeian in July 2024
- Hired new We the People Director, Jeremy Adriano, will begin April 2025
- LRE organization financial audit underway
- Several organizational updates to processes, information tracking and policies have been taking place since July 2024

Programs & Activities

Mock Trial

The Mock Trial Program is the ultimate law-related education experience for junior high and high school students. The program is dedicated to promoting the understanding and appreciation of the American Judicial System through an academic competition.

By familiarizing students with legal concepts, rights, and responsibilities, they develop critical thinking skills, ethical judgment, and respect for the rule of law. Early exposure to legal education promotes conflict resolution, enhances decision-making abilities that students will benefit from in their future endeavors. Through comprehensive law-related education, students not only become better equipped to navigate the complexities of the legal system but also contribute positively to their communities by upholding justice and equality.



- For 2025, 37 High school teams and 16 Junior High teams are participating in the State competitions.
- The 2025 competitions are currently taking place and finals will be held in March, the winner of the High School competition will have the opportunity to attend the national competition.

We the People-The Citizen and The Constitution

The primary goal of *We the People-The Citizen and the Constitution* is to promote civic competence and responsibility among the nation's elementary and secondary students. What makes this program so successful is the design of its instructional program, including a simulated congressional hearing which is the culminating activity for the program.

The foundation of the program is the classroom curriculum. It provides students with critical-thinking exercises, problem-solving activities, and cooperative learning techniques help develop intellectual and participatory skills. LRE's key role is providing curriculum training for teachers and guiding them through the steps for the Middle School and High School competitions that LRE hosts along with other partners.

Updates:

- Our current program director will be stepping away after 10 years and we have hired a new director to begin April 2025
- MOU was signed with Utah Valley University in October 2024, solidifying the partnership between LRE and UVU's Center for Constitutional Studies.
 - In the past year, we have conducted over 200 teacher curriculum trainings for elementary and secondary teachers in collaboration with Utah Valley University's Center for Constitutional Studies.
- 2025 Competitions will be taking place Feb 7 and March 26
 - 8 middle schools are participating in the final competition on Feb 7
 - 4 high schools are participating in the final competition on March 26, the winner will have the opportunity to attend the national competition.

We the People-Project Citizen

A curricular program for high school, middle school, and youth groups, promoting competent and responsible participation in local and state government. The program helps young people learn how to monitor and influence public policy.

Updates:

- We have retired this program in order to fully analyze how it can work better alongside the other We the People program. It may be another 1-2 years until we bring it back. We want to have the new We the People director be well-versed in the other program first.

Salt Lake Peer Court

Salt Lake Peer Court provides an alternative approach to juvenile justice in which youth referred for minor offenses are sentenced by a jury of their peers. Using a restorative justice-based approach, Salt Lake Peer Court provides early intervention for a variety of offenses. The program holds the referred youth accountable for their actions; provides educational experiences to assist them in building the skills necessary to change their problem behaviors; and helps them strengthen their ties to school, community, and positive peer role models.



The overall goal of the program is to combat the disproportionate involvement of marginalized youth in the juvenile justice system, by promoting positive connections, focusing on repairing harm, emphasizing accountability, and allowing community and victim input.

Updates:

- From January-December 2024, 99 Total students were referred to the program. Of those 99 students, 36 graduated the program.
- Demographics:
 - Gender Identification: 33 Female 66 Male
 - Hispanic: 36 Non-Hispanic: 63
 - Student Grade Levels: 4= 1 5= 3 6= 5 7= 17 8= 16 9= 23 10= 16 11= 17 12= 1
- There were 99 parents and guardians involved (one for each student), and parents must be involved with their student through the process.
- There were 45 youth Peer volunteers participating in the panels each week, in the training provided, and in one-to-one support with their youth mentees throughout their time in the program.
- 5 adult mentors worked with the youth volunteers.
- We worked with 20 counselors and 6 administrative staff in the following school districts, Salt Lake, Granite, and Murray.
- Up to 20 School Resource Officers are being trained and providing referrals to the program.
- Community Partnerships: 3 School Districts Utah State Bar Utah State Courts Salt Lake Police Departments Utah Youth Court Association Other community nonprofits: Comunidades Unidas, Spyhop, Community Writing Center, Boys and Girls Club

LRE Staff

- Princess Gutierrez, Executive Director of Utah Law Related Education
- Ermiya Fanaeian, Salt Lake Peer Court Director
 - Marian Figueroa, Salt Lake Peer Court program coordinator
 - Marian will be leaving the organization to pursue a master's degree. We will be hiring 2 part-time coordinators in her place to begin July 2025.
- Melissa Orton, Mock Trial Director
 - 4-6 seasonal staff during the mock trial season
- Dawn Harvey, We the People--the Citizen and the Constitution Director
 - Jeremy Adriano will begin in April 2025 in her stead
 - 2-4 coordinators mentoring teachers on the curriculum

Volunteers

Over 600+ committed and dedicated attorneys, law students, community members, and youth volunteer with Utah LRE each year.

- In our *mock trial* program, they volunteer as judges for our junior high and high school mock trials and as attorney coaches for mock trial teams.
- For our *We the People--The Citizen and the Constitution* program, they volunteer their time to be judges, facilitators, and timers at our junior high and high school district and mock congressional hearings.
- Our *Salt Lake Peer Court* student volunteers adjudicate and mentor the referred youth.



In-Kind Support

- The Utah State Bar provides: 1) Office space free-of-charge for Utah Law Related Education, and 2) Rooms free-of-charge for meetings, trainings, Mock Trial competitions, and court sessions for Salt Lake Peer Court at the Law and Justice Center.
- Access to courtrooms in the Scott M. Matheson Courthouse, provided by the Administrative Office of the Courts for our Mock Trial Program. Judges at West Jordan Third District Court and West Valley Justice Court offered their courtrooms.
- Utah Valley University, through their Center for Constitutional Studies, hosts our We the People Teacher Trainings and our High School We the People State Competition, free-of-charge. Teachers receive a stipend and mileage, in addition to lodging for teachers traveling more than 100 miles.
- Over 6,000 hours are donated by 600+ attorneys and other community volunteers.
- Weber State University is hosting We the People State Junior High School Competition.

Financial Narrative

LRE's current 2024-2025 budget is: \$298,540

We are grateful for the continued support from the Utah State Bar and Utah Bar Foundation, which have been instrumental in the continued success of Utah Law Related Education. LRE programs are also supported by the following organizations:

- Utah State_Courts \$45,000
- Masonic Foundation \$2,500
- George and Dolores Dorè Eccles Foundation \$6,000
- R. Harold Burton Foundation \$6,000
- Salt Lake City School District MOU with support at \$30,000 for Salt Lake Peer Court for the 2024-2025 school year.
- Granite School District MOU with support at \$6,000 for Salt Lake Peer Court for the 2024-2025 school year.
- LRE has begun to seek more corporate and individual support by reaching out to local law firms for sponsorship and executing an End of Year individual campaign that we hope will continue to grow each year.

Utah State Bar Commission Meeting

T A B 8

Utah State Bar Commission Meeting Minutes

Friday, January 10, 2025

Utah State Bar – Law & Justice Center

Salt Lake City, Utah

ZOOM Link: <https://us02web.zoom.us/j/82361960332>

In Attendance: President Cara Tangaro, Kim Cordova, Miriam Alred (Zoom), Tom Bayles, Brett Chambers, Christian Clinger, Matt Hansen, Chrystal Mancuso-Smith, Mark Morris, Shawn Newell, Olivia Shaughnessy, Tyler Young.

Ex-Officio Members: Nate Alder, Jennifer Carver, Erik Christiansen (Zoom), Tiffany Shimada, Ezzy Khaosanga, Britt Merrill (Zoom), Nick Stiles, Katie Woods.

Not in Attendance: Rick Hoffman. Ex-Officio members: Dean Elizabeth Kronk Warner, Dean David Moore, Eli McCann, Andy Gonzalez.

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

1. President's Welcome and Reports: Cara Tangaro

Ms. Tangaro welcomed and introduced Tiffany Shimada, the newest Bar ABA Delegate.

1.1 Report on Meeting with Governor Cox

Ms. Tangaro, Ms. Cordova and Ms. Wright met with Gov. Cox and his counsel. Ms. Tangaro reported on the meeting that was held right before the holidays. Gov. Cox shared that he is against Judicial Elections. Gov. Cox is open to meeting once a year with Commission leadership to build the relationship and open communication lines.

1.2 Report on Jacey Skinner

Ms. Tangaro reported the Jacey Skinner has signed a 6-month contract as an additional lobbyist for the Utah State Bar. She will cooperate with Foxley & Pignanelli, and roles and responsibilities will be divided and defined.

1.3 Review Legislative Phone Conference Calendar

Ms. Tangaro informed and invited the Commission to the Governmental Relations Conference Calls. They will take place every Tuesday at 4pm via Zoom. The Governmental Relations Committee Will vote on whether to take a position on legislation. The Commission meets to review the recommendations and vote on whether the Bar should take a position.

1.4 Spring Convention Report

Ms. Wright informed the Commission that Spring Convention registration will open January 21st and discussed the packed agenda & event schedule with YLD

and WLU events taking place. Ms. Abad will register commissioners for the convention for those that want to attend.

1.5 St. George Room Reservations Reminder

Ms. Wright advised to book lodging now before they are sold out and then submit reimbursement. Lodging in St. George sells out quickly.

1.6 Bar Elections Reminder

Ms. Tangaro reminded the Commission that Commission Election Petitions are due February 3rd, 2025. There is 1 seat in each 3rd Division, 2nd Division and 5th Divisions. Elections are in April. Even sitting commissioners who are up for re-election need to submit a petition. Talk to Ms. Abad for assistance.

1.7 Save the Date: Annual Meeting, Swearing-in, and Dinner

Ms. Tangaro announced the Annual meeting, swearing-in ceremony and dinner will take place on June 26th at This is The Place Heritage Park. The Annual Meeting and a keynote speaker will take place first, followed by a dinner.

2. Action Items

2.1 Nominate Tyler Young to be President-elect Candidate

Mr. Clinger made a motion to appoint Mr. Young as Present-elect. Mr. Hansen seconded, and the motion was unanimously approved.

2.2 Appoint replacement of Commissioner John Rees

After discussion, Mr. Clinger made a motion to appoint Ms. Shaughnessy for Mr. Rees's seat. Ms. Tangaro seconded, and the motion was unanimously approved. Ms. Tangaro made a motion to appoint Jessica Couser for Ms. Shaughnessy's seat. Ms. Mancuso-Smith seconded, and the motion was unanimously approved.

2.3 Appoint Bar Commission Representative to Legal Services Innovation Committee

Ms. Tangaro made a motion to appoint Mr. Chambers to be the Legal Services Innovation Committee Representative. Mr. Young seconded, and the motion was unanimously approved.

2.4 Approve Spring Convention Scholarships

Ms. Wright reminded the Commission that last year scholarships included complimentary registration and a \$500 lodging stipend. The scholarship recipients gave the Bar positive feedback about how valuable they found the convention. Scholarships were offered to young lawyers, small firm lawyers and government lawyers in an effort to encourage attendance by these groups who historically attend conventions in smaller numbers. The hope is they will experience the value of conventions firsthand and attend again on their own and encourage their colleagues to attend. Mr. Clinger made a motion to approve 12

\$500 scholarships, Mr. Chambers seconded, and the motion was unanimously approved.

2.5 Approve Fractional Counsel Section

The Commission discussed the application to create a new section. Ms. Wright shared the Utah State Bar rules about the formation of new sections. Mr. Alder and Mr. Clinger questioned why existing sections like the Business Law Section, Corporation Counsel and Securities section cannot meet the needs of these practitioners. Ms. Wright proposed that the item be tabled until the next meeting so that the proponents of the new section could address the questions and concerns. This agenda item will be tabled to next commission meeting, and Mr. Holman will be invited to come present the Fractional Counsel Section.

3. Information Items

3.1 Proposed MCLE Rule Changes: Chrystal Mancuso-Smith

Ms. Mancuso-Smith explained the MCLE Board's proposed rule changes include allowing 6 regular CLE credits to roll over to the next compliance year. Professionalism and ethics credits will not roll over. The requirement will still be 12 credits every year, but those that earn more than 12 credits in a compliance year can roll over up to 6 credits to the next year. Those licensed in other states used to submit a written request to use credits earned in other jurisdictions for credit in Utah. Proposed rules will allow self-reporting and eliminate the need for a written request. The proposed rules will be presented to the Court in February and go out for comment if the Court approves the changes.

4. Other Items

4.1 Well-being Committee for Legal Profession

Ms. Wright announced Liz Silvestrini has signed a contract to be the Well-Being Consultant for the Bar. Ms. Silvestrini is a lawyer and a licensed therapist.

4.2 Meeting with AG

Mr. Hansen asked about setting up a meeting with the newly elected Attorney General Derek Brown. Mr. Hansen will work with Mr. Clinger to set up a private meeting with Mr. Brown to build the relationship. Ms. Tangaro shared that she has a lunch meeting with Senator Brammer and appellate practitioners on January 15th to which Mr. Brown has been invited

4.3 Audit Update

Ms. Wright reported that staff received a draft of the Audit in November. Ms. Wright, Maribeth LeHoux, and Nathan Severin met with the Court auditor to discuss the Bar's corrections and clarifications to the draft. Staff hopes to have a final copy of the audit for the February Commission meeting.

4.4 Supreme Court Productivity

Mr. Stiles shared the Supreme court has been conducting data on cases and opinions filed through the Supreme Court and Justices to evaluate the Supreme Court Productivity. Mr. Stiles can share data with the Commission where appropriate.

Adjourn

The Commission adjourned at 10:52 am.

CONSENT AGENDA

The Commission approved by consent the following items:

- Minutes of the November 8, 2024 Commission Meeting

Utah State Bar Commission Meeting

T A B 9

UTAH STATE BAR
Budget and Finance Committee
Financial Results as of December 31, 2024
and for the six months then ended

FINANCIAL STATEMENT HIGHLIGHTS

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

	Actual	Budget	Fav (unfav) \$ Variance	Fav (unfav) % Variance
YTD Revenue	6,019,428	6,011,095	8,333	0%
YTD Expenses	4,008,289	4,047,845	39,557	1%
YTD Net Profit/(Loss)	2,011,139	1,963,249	47,890	2%

YTD net profit is \$2,011,139 and is \$47,890 than budgeted.

YTD Net Profit –Cash Basis: Adding back year-to-date depreciation expense of \$86,397 and deducting capital expenditures of \$92,706 the cash basis year-to-date net profit is (\$6,309) lower.

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

LPP: The LPP Licensing Revenue was budgeted for 2024-25 with Licensing since that is where it had historically been coded; however, it is being separated out this year, and therefore shows a favorable variance of \$20,705 YTD.

Summer Convention: The Summer Convention's revenue is (\$8,837) less than budgeted attributable to registration fees, while expenses are essentially flat at (\$2,961) more than budgeted, netting an (\$11,798) unfavorable variance YTD.

Fall Forum: Registration for the Fall Forum began in October. Budgeted gross revenue has fallen short of expectations by \$94,855 YTD. Although the Fall Forum is not expected to close with a net loss, the budget-to-actuals will reflect an unfavorable variance.

Member Services: Section Support Fees are (\$24,452) less than expected YTD. A change in the annual licensing form required licensees to re-select their respective sections for 2024-2025. Section membership overall decreased, and as a result, the revenues did also.

Advertising revenue is 13% more than budgeted for the Bar Journal YTD. The Utah Bar Foundation granted \$10,000 to the Wills for Heroes program for new computers as well as travel costs. Program services expense is (\$27,959) more than budgeted, partly resulting from expenses incurred with the grant income. Overall, a (\$39,958) shortfall exists here.

UTAH STATE BAR
Budget and Finance Committee
Financial Results as of December 31, 2024
and for the six months then ended

ADDITIONAL COMMENTS

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

Operations Reserve - 4 Months' Operations	\$2,545,647
Capital Replacement Reserve – Equipment	200,000
Capital Replacement Reserve – Building	600,000
Technology/Contracts Reserve - Database & Tava Contracts	<u>154,375</u>
Total	\$3,500,022
Estimated current cash reserve as of December 31, 2024	<u>\$4,194,789</u>
Sufficient/ (Deficient) Cash Reserve	<u>\$ 694,767</u>

**Utah State Bar
Income Statement
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
Admissions	229,125	249,400	236,640	12,760	105%	704,655	35%
NLTP	42,900	41,400	43,749	(2,349)	95%	81,531	51%
LPP	1,350	7,605	939	6,666	810%	1,728	440%
OPC	9,420	17,108	11,552	5,555	148%	37,160	46%
CLE	233,207	191,955	185,723	6,232	103%	653,768	29%
Summer Convention	51,102	52,240	61,077	(8,837)	98%	61,077	86%
Fall Forum	88,925	119,070	213,925	(94,855)	56%	213,925	56%
Spring Convention	2,390	16,980	-	16,980	-	203,085	8%
Member Services	217,044	225,328	224,022	1,306	101%	323,751	70%
Public Services	36,091	14,080	21,110	(7,030)	67%	65,164	22%
Bar Operations	4,890,810	4,992,344	4,917,277	75,067	102%	5,354,656	93%
Facilities	72,493	90,418	95,080	(4,662)	95%	207,086	44%
Innovation in Law	51,634	1,500	-	1,500	-	5,500	27%
Total Revenue	5,926,490	6,019,428	6,011,095	8,333	100%	7,913,085	76%
Expenses							
Admissions	338,998	372,612	360,623	(11,990)	103%	635,844	59%
NLTP	32,914	37,734	37,808	74	100%	74,101	51%
LPP	33,757	28,525	42,564	14,039	67%	81,491	35%
OPC	839,380	875,336	871,446	(3,890)	100%	1,716,979	51%
CLE	240,811	235,762	234,205	(1,557)	101%	699,838	34%
Summer Convention	18,524	40,013	37,052	(2,961)	108%	37,052	108%
Fall Forum	65,796	39,614	78,512	38,898	50%	78,512	50%
Spring Convention	(9,857)	-	-	-	-	113,832	0%
Member Services	470,067	516,549	475,285	(41,264)	109%	987,659	52%
Public Services	423,211	345,027	331,042	(13,985)	104%	550,182	63%
Bar Operations	1,161,615	1,168,374	1,230,047	61,673	95%	2,402,613	49%
Facilities	222,829	236,136	235,281	(855)	100%	480,568	49%
Innovation in Law	57,803	112,375	113,981	1,606	99%	227,821	49%
Total Expenses	3,895,849	4,008,058	4,047,845	39,788	99%	8,086,493	50%
Other							
Gain (Loss) - Disposal Of Assets	-	(231)	-	-	-	-	-
Net Profit (Loss)	\$ 2,030,642	\$ 2,011,139	\$ 1,963,249	\$ 47,890	102%	\$ (173,408)	-1160%
Depreciation	76,576	86,397	78,071	(8,326)	111%	156,142	
Cash increase (decrease) from operations	2,107,683	2,095,585	2,041,320	54,265	103%	(17,266)	
Changes in operating assets/liabilities	(4,423,774)	(4,257,886)	(4,257,886)			20,000	
Capital expenditures	(120,465)	(92,706)	(52,000)	(40,706)	178%	(52,000)	
Net change in cash	\$ (2,436,556)	\$ (2,255,006)	\$ (2,268,565)	\$ 13,559	99%	\$ (49,266)	

**Utah State Bar
Income Statement - Consolidated By Account
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	22,275	34,925	23,818	11,107	147%	207,627	17%
4002 · Admissions - Attorney Exam Fees	33,575	23,375	36,228	(12,853)	65%	70,380	33%
4003 · Admissions - Retake Fees	15,050	20,000	11,265	8,735	178%	18,169	110%
4004 · Admissions - Laptop Fees	21,600	26,030	30,520	(4,490)	85%	136,265	19%
4005 · Admissions - Application Forms	5,000	7,500	5,100	2,400	147%	12,207	61%
4006 · Transfer App Fees	41,000	51,300	36,592	14,708	140%	80,414	64%
4008 · Attorney - Motion	66,300	68,850	70,809	(1,959)	97%	137,107	50%
4009 · House Counsel	11,050	7,650	10,104	(2,454)	76%	20,208	38%
4010 · Section/Local Bar Support fees	105,462	79,581	108,212	(28,631)	74%	110,077	72%
4011 · Admissions LPP	1,100	900	670	230	134%	1,400	64%
4020 · NLTP Fees	42,900	41,400	43,749	(2,349)	95%	81,531	51%
4021 · Lic Fees > 3 Years	3,868,635	3,943,585	3,952,964	(9,379)	100%	4,015,774	98%
4022 · Lic Fees < 3 Years	206,020	228,210	202,332	25,878	113%	226,299	101%
4023 · Lic Fees - House Counsel	57,895	61,605	58,918	2,687	105%	63,411	97%
4024 · Lic Fees LPP	5,275	6,275	5,059	1,216	124%	5,894	106%
4025 · Pro Hac Vice Fees	91,375	104,825	99,178	5,647	106%	250,781	42%
4026 · Lic Fees - Inactive/FS	120,595	120,640	122,050	(1,410)	99%	121,543	99%
4027 · Lic Fees - Inactive/NS	222,180	221,235	226,922	(5,687)	97%	226,494	98%
4030 · Certs of Good Standing	9,800	10,280	9,932	348	104%	21,423	48%
4039 · Room Rental-All parties	23,925	29,925	29,416	509	102%	61,598	49%
4042 · Food & Beverage Rev-All Parties	34,406	38,420	42,363	(3,942)	91%	101,187	38%
4051 · Meeting - Registration	106,892	120,580	226,227	(105,647)	53%	396,662	30%
4052 · Meeting - Sponsor Revenue	59,900	57,250	55,075	2,175	104%	87,398	66%
4053 · Meeting - Vendor Revenue	9,625	20,460	8,875	11,585	231%	24,525	83%
4061 · Advertising Revenue	124,215	147,366	130,438	16,928	113%	221,566	67%
4063 · Modest Means revenue	3,750	5,050	2,149	2,901	235%	5,000	101%
4071 · Mem Benefits - Lexis	305	316	308	8	103%	957	33%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,214	3,442	4,599	(1,157)	75%	11,163	31%
4081 · CLE - Registrations	180,063	178,352	152,453	25,899	117%	475,000	38%
4082 · CLE - Video Library Sales	23,063	15,769	9,176	6,593	172%	36,436	43%
4090 · Tenant Rent	13,000	21,000	21,000	-	100%	42,000	50%
4095 · Miscellaneous Income	6,230	20,072	21,770	(1,698)	92%	33,904	59%
4096 · Late Fees	72,800	66,000	73,143	(7,143)	90%	88,905	74%
4104 · In Kind Rev-Facilities & Other	-	1,100	-	1,100	-	-	0%
4200 · Seminar Profit/Loss	7,018	2,100	22,381	(20,280)	9%	129,429	2%
Investment income	225,703	222,987	155,000	67,987	144%	310,000	72%
Total Revenue	5,845,357	6,009,428	6,011,095	(1,667)	100%	7,859,944	76%
Program Service Expenses							
5001 · Meeting Facility-external only	54,440	66,069	52,904	(13,164)	125%	76,929	86%
5002 · Meeting facility-internal only	12,446	15,207	14,218	(989)	107%	28,658	53%
5013 · ExamSoft	23,706	21,858	23,706	1,848	92%	29,929	73%
5014 · Questions	45,763	52,996	47,482	(5,514)	112%	68,147	78%
5015 · Investigations	450	506	449	(57)	113%	900	56%
5016 · Credit Checks	1,093	1,558	962	(596)	162%	3,237	48%
5017 · Medical Exam	160	819	46	(773)	1780%	320	256%
5025 · Temp Labor/Proctors	6,670	5,446	6,670	1,224	82%	7,856	69%
5030 · Speaker Fees & Expenses	2,166	7,500	1,635	(5,865)	459%	12,250	61%
5031 · Speaker Reimb. - Receipt Req'd	2,889	2,147	1,185	(963)	181%	15,345	14%
5035 · Awards	2,898	2,664	2,360	(304)	113%	5,511	48%
5037 · Grants/ contributions - general	4,000	5,500	1,566	(3,934)	351%	41,550	13%
5040 · Witness & Hearing Expense	311	258	956	698	27%	1,620	16%
5041 · Process Serving	712	263	836	573	31%	1,049	25%
5047 · Casemaker	1,949	1,728	1,412	(316)	122%	2,603	66%
5055 · Legislative Expense	26,576	26,382	26,858	476	98%	54,291	49%
5056 · Program Special Activities	33,708	30,075	33,708	3,633	89%	63,708	47%
5060 · Program Special Activities	(25,000)	45,342	-	(45,342)	-	-	0%
5061 · LRE - Bar Support	60,000	70,000	70,000	-	100%	70,000	100%
5062 · Law Day	-	-	250	250	0%	13,652	0%
5063 · Special Event Expense	34,510	180	13,348	13,168	1%	13,500	1%
5064 · MCLE Fees Paid	21,821	18,428	16,391	(2,037)	112%	47,959	38%
5070 · Equipment Rental	15,792	41,907	17,771	(24,136)	236%	37,128	113%
5075 · Food & Bev-external costs only	133,090	113,143	132,730	19,587	85%	423,048	27%
5076 · Food & beverage - internal only	21,874	26,885	23,120	(3,765)	116%	51,556	52%
5079 · Soft Drinks	4,527	2,770	3,787	1,018	73%	7,216	38%
5084 · In Kind Exp-Facilities & other	-	2	-	(2)	-	-	-
5085 · Misc. Program Expense	3,295	7	-	(7)	-	125	6%
5090 · Commission Expense	22,886	25,179	22,362	(2,817)	113%	44,725	56%
5099 · Blomquist Hale	164,098	-	-	-	-	-	0%
5100 · Wellness Benefits	-	163,948	162,780	(1,168)	101%	325,560	50%
5702 · Travel - Lodging	24,949	6,520	26,527	20,007	25%	47,272	14%
5703 · Travel - Transportation/Parking	7,260	4,550	11,941	7,391	38%	26,600	17%
5704 · Travel - Mileage Reimbursement	1,947	1,086	3,112	2,026	35%	6,559	17%
5705 · Travel - Per Diems	1,528	1,378	1,868	490	74%	4,032	34%
5706 · Travel - Meals	-	1	450	450	0%	900	0%

Utah State Bar Income Statement - Consolidated By Account December 31, 2024

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
5707 · Travel - Commission Mtgs	1,875	11,020	13,250	2,230	83%	26,500	42%
5805 · ABA Annual Meeting	3,906	12,804	7,480	(5,324)	171%	9,145	140%
5810 · ABA Mid Year Meeting	1,330	-	-	-	-	7,500	0%
5815 · Commission/Education	-	-	10,250	10,250	0%	20,500	0%
5820 · ABA Annual Delegate	-	-	2,500	2,500	0%	2,500	0%
5840 · President's Expense	9,000	9,000	9,000	-	100%	18,000	50%
5850 · Leadership Academy	283	194	-	(194)	-	16,000	1%
5865 · Retreat	41,519	25,754	42,000	16,246	61%	45,300	57%
5866 · Wellbeing Committee	60,162	40,000	30,323	(9,677)	132%	30,323	132%
5960 · Overhead Allocation - Seminars	-	-	19,727	19,727	0%	0	0%
5970 · Event Revenue Sharing - 3rd Pty	21,999	11,731	21,043	9,312	56%	93,066	13%
Total Program Service Expenses	853,181	872,801	879,316	6,516	99%	1,820,237	48%
Salaries & Benefit Expenses							
5510 · Salaries/Wages	1,818,852	1,871,403.03	1,895,230	23,827	99%	3,696,984	51%
5605 · Payroll Taxes	139,040	140,666	150,924	10,258	93%	295,759	48%
5610 · Health Insurance	149,341	153,559	169,002	15,443	91%	354,690	43%
5620 · Health Ins/Medical Reimb	6,334	7,256	6,536	(720)	111%	13,156	55%
5630 · Dental Insurance	8,742	8,572	8,432	(141)	102%	16,791	51%
5640 · Life & LTD Insurance	10,722	10,959	10,717	(243)	102%	21,369	51%
5645 · Workman's Comp Insurance	2,221	1,703	1,260	(442)	135%	2,520	68%
5650 · Retirement Plan Contributions	133,582	138,795	157,752	18,956	88%	318,597	44%
5655 · Retirement Plan Fees & Costs	4,500	7,752	7,366	(386)	105%	14,733	53%
5660 · Training/Development	3,334	4,278	6,421	2,143	67%	10,511	41%
Total Salaries & Benefit Expenses	2,276,690	2,344,943	2,413,650	68,707	97%	4,745,131	49%
General & Administrative Expenses							
6680 · Commercial Credit Card Rebate	-	(1,349)	-	1,349	-	(2,071)	65%
7025 · Office Supplies	9,758	8,981	8,733	(247)	103%	18,184	49%
7033 · Operating Meeting Supplies	2,910	2,469	2,744	275	90%	5,035	49%
7035 · Postage/Mailing, net	22,806	33,716	31,705	(2,011)	108%	63,828	53%
7040 · Copy/Printing Expense	66,990	74,618	66,853	(7,765)	112%	140,602	53%
7041 · Copy/Print revenue	(9,342)	(3,743)	(9,048)	(5,305)	41%	(17,228)	22%
7045 · Internet Service	14,143	793	14,869	14,077	5%	21,562	4%
7050 · Computer Maintenance	151,376	111,516	125,239	13,723	89%	247,042	45%
7055 · Computer Supplies & Small Equip	8,697	11,278	6,975	(4,303)	162%	10,359	109%
7089 · Membership Database Fees	43,861	69,717	76,905	7,188	91%	154,146	45%
7100 · Telephone	28,847	17,666	14,257	(3,408)	124%	28,144	63%
7105 · Advertising	7,292	227	10,215	9,988	2%	18,478	1%
7110 · Publications/Subscriptions	6,564	4,257	6,098	1,841	70%	11,580	37%
7115 · Public Relations	-	1,200	-	(1,200)	-	-	0%
7120 · Membership/Dues	12,622	10,181	12,176	1,996	84%	13,556	75%
7135 · Bank Service Charges	(80)	1,394	750	(644)	188%	1,500	93%
7136 · ILM Service Charges	10,650	10,321	10,739	418	96%	20,251	51%
7140 · Credit Card Merchant Fees	62,436	68,681	52,126	(16,555)	132%	182,400	38%
7141 · Credit Card surcharge	(1,632)	(1,984)	(1,277)	707	155%	(3,069)	65%
7150 · E&O/Off & Dir Insurance	37,332	36,825	37,241	416	99%	74,487	49%
7160 · Audit Expense	42,586	43,291	43,438	147	100%	43,438	100%
7175 · O/S Consultants	19,840	37,904	11,177	(26,727)	339%	26,804	141%
7176 · Bar Litigation	5,741	9,441	9,391	(50)	101%	14,265	66%
7179 · Payroll Adm Fees	4,508	4,708	3,912	(796)	120%	7,824	60%
7180 · Administrative Fee Expense	798	636	2,065	1,429	31%	4,563	14%
7190 · Lease Interest Expense	1,535	1,216	-	(1,216)	-	-	0%
7195 · Other Gen & Adm Expense	8,229	9,041	6,841	(2,199)	132%	12,963	70%
Total General & Administrative Expenses	558,561	568,560	544,125	(24,435)	104%	1,103,818	52%
In Kind Expenses							
7103 · InKind Contrib-UDR & all other	8,197	8,683	8,288	(395)	105%	15,754	55%
Total In Kind Expenses	8,197	8,683	8,288	(395)	105%	15,754	55%
Building Overhead Expenses							
6015 · Janitorial Expense	16,781	17,605	15,722	(1,883)	112%	31,445	56%
6020 · Heat	12,561	7,924	12,904	4,979	61%	33,355	24%
6025 · Electricity	27,416	32,260	27,701	(4,559)	116%	49,641	65%
6030 · Water/Sewer	7,885	9,782	7,119	(2,663)	137%	11,599	84%
6035 · Outside Maintenance	9,980	9,604	14,559	4,954	66%	29,117	33%
6040 · Building Repairs	8,866	6,757	7,056	299	96%	14,112	48%
6045 · Bldg Mtnce Contracts	14,226	19,713	14,397	(5,316)	137%	28,793	68%
6055 · Real Property Taxes	12,820	11,950	12,396	446	96%	24,000	50%
6060 · Personal Property Taxes	650	750	582	(168)	129%	1,500	50%
6065 · Bldg Insurance/Fees	11,457	10,330	11,960	1,630	86%	23,921	43%
6070 · Building & Improvements Depre	47,038	54,276	50,196	(4,080)	108%	100,391	54%
6075 · Furniture & Fixtures Depre	9,973	10,804	10,334	(470)	105%	20,668	52%
7065 · Computers, Equip & Sftwre Depr	19,565	21,317	17,541	(3,776)	122%	35,083	61%
Total Building Overhead Expenses	199,220	213,072	202,467	(10,605)	105%	403,625	53%

**Utah State Bar
Income Statement - Consolidated By Account
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Total Expenses	3,895,849	4,008,058	4,047,845	39,788	99%	8,086,493	50%
Other							
4300 · Gain (Loss) - Disposal Of Assets	-	(231)	-	231		-	0%
4120 · Grant Income	81,134	10,000	-	(10,000)		53,141	19%
	81,134	9,769	-	(9,769)	0%	53,141	18%
Net Profit (Loss)	\$ 2,030,642	\$ 2,011,139	\$ 1,963,249	\$ 47,890	102%	\$ (173,408)	-1160%

**Utah State Bar
Admissions
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4001 · Admissions - Student Exam Fees	22,275	34,925	23,818	11,107	147%	207,627	17%
4002 · Admissions - Attorney Exam Fees	33,575	23,375	36,228	(12,853)	65%	70,380	33%
4003 · Admissions - Retake Fees	15,050	20,000	11,265	8,735	178%	18,169	110%
4004 · Admissions - Laptop Fees	21,600	25,600	30,520	(4,920)	84%	136,207	19%
4005 · Admissions - Application Forms	5,000	6,000	5,100	900	118%	6,707	89%
4006 · Transfer App Fees	41,000	51,300	36,592	14,708	140%	80,414	64%
4008 · Attorney - Motion	66,300	68,850	70,809	(1,959)	97%	137,107	50%
4009 · House Counsel	11,050	7,650	10,104	(2,454)	76%	20,208	38%
4095 · Miscellaneous Income	3,375	2,200	3,400	(1,200)	65%	6,136	36%
4096 · Late Fees	9,900	9,500	8,804	696	108%	21,700	44%
4200 · Seminar Profit/Loss	-	-	-	-	-	-	-
Total Revenue	229,125	249,400	236,640	12,760	105%	704,655	33%
Expenses							
Program Services	122,327	143,118	126,539	(16,579)	113%	165,520	86%
Salaries & Benefits	159,929	174,445	176,652	2,207	99%	349,499	50%
General & Administrative	45,371	43,388	46,402	3,014	94%	98,819	44%
Building Overhead	11,371	11,661	11,030	(632)	106%	22,006	53%
Total Expenses	338,998	372,612	360,623	(11,990)	103%	635,844	59%
Net Profit (Loss)	\$ (109,873)	\$ (123,212)	\$ (123,983)	\$ 770	99%	\$ 68,811	-179%

**Utah State Bar
NLTP
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4020 · NLTP Fees	42,900	41,400	43,749	(2,349)	95%	81,531	51%
4081 · CLE - Registrations	-	-	-	-	-	-	-
4096 · Late Fees	-	-	-	-	-	-	-
4200 · Seminar Profit/Loss	-	-	-	-	-	-	-
Total Revenue	42,900	41,400	43,749	(2,349)	95%	81,531	51%
Expenses							
Program Services	950	793	1,209	416	66%	2,015	39%
Salaries & Benefits	20,346	26,166	25,436	(730)	103%	50,344	52%
General & Administrative	9,195	9,953	10,386	434	96%	20,192	49%
Building Overhead	2,424	822	777	(44)	106%	1,550	53%
Total Expenses	32,914	37,734	37,808	74	100%	74,101	51%
Net Profit (Loss)	\$ 9,986	\$ 3,666	\$ 5,941	\$ (2,275)	62%	\$ 7,430	49%

**Utah State Bar
LPP
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4004 · Admissions - Laptop Fees	-	430	-	430		59	733%
4011 · Admissions LPP	1,100	900	670	230	134%	1,400	64%
4024 · Lic Fees LPP	200	6,275	269	6,006	2332%	269	2332%
Total Revenue	1,300	7,605	939	6,666		1,728	440%
Expenses							
Program Services	11,650	8,300	11,650	3,350	71%	20,219	41%
Salaries & Benefits	18,170	16,515	25,334	8,819	65%	50,191	33%
General & Administrative	1,998	2,889	4,804	1,915	60%	9,531	30%
Building Overhead	1,939	822	777	(45)	106%	1,550	53%
Total Expenses	33,757	28,525	42,564	14,039	67%	81,491	35%
Net Profit (Loss)	\$ (32,457)	\$ (20,920)	\$ (41,626)	\$ 20,705	50%	\$ (79,764)	26%

**Utah State Bar
OPC
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4095 · Miscellaneous Income	1,350	2,150	2,052	98	105%	4,969	43%
4200 · Seminar Profit/Loss	8,070	14,958	9,500	5,457	157%	32,192	46%
Total Revenue	9,420	17,108	11,552	5,555	148%	37,160	46%
Expenses							
Program Services	6,333	6,620	10,883	4,263	61%	15,420	43%
Salaries & Benefits	715,149	761,290	750,462	(10,829)	101%	1,489,075	51%
General & Administrative	75,748	68,362	73,156	4,794	93%	138,767	49%
Building Overhead	42,150	39,063	36,944	(2,118)	106%	73,716	53%
Total Expenses	839,380	875,336	871,446	(3,890)	100%	1,716,979	51%
Net Profit (Loss)	\$ (829,959)	\$ (858,228)	\$ (859,893)	\$ 1,665	100%	\$ (1,679,818)	51%

**Utah State Bar
CLE
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4052 · Meeting - Sponsor Revenue	34,000	9,000	30,175	(21,175)	30%	52,198	17%
4081 · CLE - Registrations	180,063	178,352	152,453	25,899	117%	475,000	38%
4082 · CLE - Video Library Sales	23,063	15,769	9,176	6,593	172%	36,436	43%
4095 · Miscellaneous Income	(25)	-	-	-		-	
4104 · In Kind Rev-Facilities & Other	-	1,100	-	1,100		-	
4200 · Seminar Profit/Loss	(3,893)	(12,266)	(6,081)	(6,185)	202%	87,666	-14%
Total Revenue	233,207	191,955	185,723	6,232	103%	599,102	32%
Expenses							
Program Services	126,797	118,283	110,217	(8,065)	107%	456,399	26%
Salaries & Benefits	78,299	87,457	86,442	(1,015)	101%	171,160	51%
General & Administrative	28,738	23,492	31,079	7,587	76%	59,494	39%
Building Overhead	6,977	6,531	6,467	(64)	101%	12,785	51%
Total Expenses	240,811	235,762	234,205	(1,557)	101%	699,838	34%
Net Profit (Loss)	\$ (7,604)	\$ (43,807)	\$ (48,482)	\$ 4,675	90%	\$ (100,736)	43%

**Utah State Bar
Summer Convention
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	50,102	39,990	50,077	(10,087)	80%	50,077	80%
4052 · Meeting - Sponsor Revenue	1,000	2,250	1,000	1,250	225%	1,000	225%
4053 · Meeting - Vendor Revenue	-	-	-	-		-	
4054 · Meeting - Material Sales	-	-	-	-		-	
4055 · Meeting - Sp Ev Registration	-	-	-	-		-	
4095 · Miscellaneous Income	-	10,000	10,000	-	100%	10,000	100%
Total Revenue	51,102	52,240	61,077	(8,837)	86%	61,077	86%
Expenses							
Program Services	16,353	36,345	33,281	(3,064)	109%	33,281	109%
Salaries & Benefits	736	406	755	349	54%	755	54%
General & Administrative	1,436	2,262	3,016	754	75%	3,016	75%
In Kind	-	1,000	-	(1,000)		-	
Building Overhead	-	-	-	-		-	
Total Expenses	18,524	40,013	37,052	(2,961)	108%	37,052	108%
Net Profit (Loss)	\$ 32,578	\$ 12,227	\$ 24,025	\$ (11,798)	51%	\$ 24,025	51%

**Utah State Bar
Fall Forum
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	56,150	80,590	176,150	(95,560)	46%	176,150	46%
4052 · Meeting - Sponsor Revenue	23,900	21,600	23,900	(2,300)	90%	23,900	-
4053 · Meeting - Vendor Revenue	8,875	11,880	8,875	3,005	134%	8,875	134%
4055 · Meeting - Sp Ev Registration	-	-	-	-	-	-	-
4095 · Miscellaneous Income	-	5,000	5,000	-	100%	5,000	-
Total Revenue	88,925	119,070	213,925	(94,855)	56%	213,925	56%
Expenses							
Program Services	60,626	34,178	73,215	39,037	47%	73,215	47%
Salaries & Benefits	1,879	2,399	1,941	(458)	124%	1,941	124%
General & Administrative	3,291	3,037	3,356	319	90%	3,356	90%
Building Overhead	-	-	-	-	-	-	-
Total Expenses	65,796	39,614	78,512	38,898	50%	78,512	50%
Net Profit (Loss)	\$ 23,129	\$ 79,456	\$ 135,413	\$ (55,957)	59%	\$ 135,413	59%

**Utah State Bar
Spring Convention
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4051 · Meeting - Registration	640	-	-	-	-	170,435	0%
4052 · Meeting - Sponsor Revenue	1,000	8,900	-	8,900	-	10,300	86%
4053 · Meeting - Vendor Revenue	750	8,080	-	8,080	-	15,650	52%
4054 · Meeting - Material Sales	-	-	-	-	-	-	0%
4055 · Meeting - Sp Ev Registration	-	-	-	-	-	1,700	0%
4095 · Miscellaneous Income	-	-	-	-	-	5,000	0%
Total Revenue	2,390	16,980	-	16,980		203,085	8%
Expenses							
Program Services	(10,000)	-	-	-	-	99,938	0%
Salaries & Benefits	65	-	-	-	-	9,197	0%
General & Administrative	78	-	-	-	-	4,697	0%
Building Overhead	-	-	-	-	-	-	0%
Total Expenses	(9,857)	-	-	-	-	113,832	0%
Net Profit (Loss)	\$ 12,247	\$ 16,980	\$ -	\$ 16,980		\$ 89,253	19%

**Utah State Bar
Member Services
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	86,310	64,225	88,677	(24,452)	72%	90,065	71%
4061 · Advertising Revenue	124,215	147,366	130,438	16,928	113%	221,566	67%
4071 · Mem Benefits - Lexis	305	316	308	8	103%	957	33%
4072 · Royalty Inc - Bar J, MBNA, LM,M	6,214	3,442	4,599	(1,157)	75%	11,163	31%
4095 · Miscellaneous Income	-	-	-	-	-	-	-
4120 · Grant Income	-	10,000	-	10,000	-	-	-
4200 · Seminar Profit/Loss	-	(21)	-	(21)	-	-	-
Total Revenue	217,044	225,328	224,022	1,306	101%	323,751	70%
Expenses							
Program Services	269,112	293,923	265,964	(27,959)	111%	553,297	53%
Salaries & Benefits	94,826	109,693	103,016	(6,677)	106%	207,265	53%
General & Administrative	97,925	105,265	98,762	(6,503)	107%	212,165	50%
Building Overhead	8,204	7,668	7,543	(126)	102%	14,931	51%
Total Expenses	470,067	516,549	475,285	(41,264)	109%	987,659	52%
Net Profit (Loss)	\$ (253,023)	(291,220)	\$ (251,263)	\$ (39,958)	116%	\$ (663,908)	44%

**Utah State Bar
Public Services
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4052 · Meeting - Sponsor Revenue	-	8,500	-	8,500		-	
4053 · Meeting - Vendor Revenue	-	500	-	500		-	
4063 · Modest Means revenue	3,750	5,050	2,149	2,901	235%	5,000	101%
4095 · Miscellaneous Income	-	30	-	30		23	130%
4120 · Grant Income	29,500	-	-	-		53,141	0%
4200 · Seminar Profit/Loss	2,841	-	18,961	(18,961)	0%	7,000	0%
Total Revenue	36,091	14,080	21,110	(7,030)	67%	65,164	22%
Expenses							
Program Services	138,072	121,167	117,220	(3,947)	103%	126,819	96%
Salaries & Benefits	226,052	192,547	171,090	(21,457)	113%	341,506	56%
General & Administrative	51,367	25,221	36,971	11,749	68%	70,362	36%
Building Overhead	7,720	6,092	5,761	(330)	106%	11,496	53%
Total Expenses	423,211	345,027	331,042	(13,985)	104%	550,182	63%
Net Profit (Loss)	\$ (387,120)	\$ (330,947)	\$ (309,931)	\$ (21,016)	107%	\$ (485,018)	68%

**Utah State Bar
Bar Operations
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4010 · Section/Local Bar Support fees	19,152	15,356	19,535	(4,179)	79%	20,012	77%
4021 · Lic Fees > 3 Years	3,868,635	3,943,585	3,952,964	(9,379)	100%	4,015,774	98%
4022 · Lic Fees < 3 Years	206,020	228,210	202,332	25,878	113%	226,299	101%
4023 · Lic Fees - House Counsel	57,895	61,605	58,918	2,687	105%	63,411	97%
4024 · Lic Fees LPP	5,075	-	4,790	(4,790)	0%	5,625	0%
4025 · Pro Hac Vice Fees	91,375	104,825	99,178	5,647	106%	250,781	42%
4026 · Lic Fees - Inactive/FS	120,595	120,640	122,050	(1,410)	99%	121,543	99%
4027 · Lic Fees - Inactive/NS	222,180	221,235	226,922	(5,687)	97%	226,494	98%
4029 · Prior Year Lic Fees	-	-	-	-	-	-	-
4030 · Certs of Good Standing	9,800	10,280	9,932	348	104%	21,423	48%
4052 · Meeting - Sponsor Revenue	-	7,000	-	7,000	-	-	-
4060 · E-Filing Revenue	-	-	-	-	-	20,741	0%
4061 · Advertising Revenue	-	-	-	-	-	-	-
4095 · Miscellaneous Income	1,530	692	1,317	(626)	52%	2,776	25%
4096 · Late Fees	62,850	56,500	64,339	(7,839)	88%	67,205	84%
4200 · Seminar Profit/Loss	-	(571)	-	(571)	-	2,571	-22%
Investment Income	225,703	222,987	155,000	67,987	144%	310,000	72%
Total Revenue	4,890,810	4,992,344	4,917,277	75,067	102%	382,552	1278%
Expenses							
Program Services	70,393	73,857	91,407	17,550	81%	187,257	39%
Salaries & Benefits	821,873	794,865	887,238	92,373	90%	1,703,711	47%
General & Administrative	230,477	263,069	216,223	(46,846)	122%	441,564	60%
In Kind	758	247	823	576	30%	1,509	16%
Building Overhead	38,113	36,337	34,357	(1,979)	106%	68,572	53%
Total Expenses	1,161,615	1,168,374	1,230,047	61,673	96%	2,402,613	49%
Other Income/Expense							
4300 · Gain (Loss) - Disposal Of Assets	(231)	(231)	-	(231)	-	-	n/a
Net Profit (Loss)	\$ 3,728,964	3,823,739	\$ 3,687,230	\$ 136,509	104%	\$ (2,020,061)	-189%

**Utah State Bar
Facilities
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4039 · Room Rental-All parties	23,925	29,925	29,416	509	102%	61,598	49%
4042 · Food & Beverage Rev-All Parties	34,406	38,420	42,363	(3,942)	91%	101,187	38%
4043 · Setup & A/V charges-All parties	1,161	1,072	2,301	(1,229)	47%	2,301	47%
4090 · Tenant Rent	13,000	21,000	21,000	-	100%	42,000	50%
4095 · Miscellaneous Income	-	-	-	-	-	-	-
4103 · In - Kind Revenue - UDR	-	-	-	-	-	-	-
Total Revenue	72,493	90,418	95,080	(4,662)	95%	207,086	44%
Expenses							
Program Services	40,161	36,216	37,181	965	97%	85,756	42%
Salaries & Benefits	86,132	78,886	86,414	7,528	91%	173,704	45%
General & Administrative	8,776	13,706	9,359	(4,347)	146%	17,741	77%
In Kind	7,439	7,436	7,465	29	100%	14,245	52%
Building Overhead	80,321	99,893	94,862	(5,030)	105%	189,123	53%
Total Expenses	222,829	236,136	235,281	(855)	100%	480,568	49%
Net Profit (Loss)	\$ (150,337)	\$ (145,719)	\$ (140,201)	\$ (5,517)	104%	\$ (273,483)	53%

**Utah State Bar
Innovation in Law
December 31, 2024**

	Actual LYTD	Actual YTD	Budget YTD	Fav (Unfav) variance	% of Budget	Total Budget	YTD % of Tot Budget
Revenue							
4005 · Admissions - Application Forms	-	1,500	-	1,500		5,500	27%
4095 · Miscellaneous Income	-	-	-	-		-	
Total Revenue	-	1,500	-	1,500		5,500	27%
Expenses							
Program Services	407	-	550	550	0%	1,100	0%
Salaries & Benefits	53,235	100,275	98,872	(1,403)	101%	196,783	51%
General & Administrative	4,161	7,916	10,611	2,695	75%	22,043	36%
In Kind	-	-	-	-		-	
Building Overhead	-	4,184	3,948	(236)	106%	7,895	53%
Total Expenses	57,803	112,375	113,981	1,606	99%	227,821	49%
Net Profit (Loss)	\$ (57,803)	\$ (110,875)	\$ (113,981)	\$ 3,106	97%	\$ (222,321)	50%

Utah State Bar Balance Sheet

	12/31/2024	06/30/2024
ASSETS		
Current Assets		
Cash in Bank	217,068	3,849,334
Invested Funds	6,608,358	5,228,377
Total Cash/Investments	<u>6,825,426</u>	<u>9,077,710</u>
Accounts Receivable	104,472	163,419
Prepaid Expenses	412,264	296,716
A/R - Sections	167,283	135,852
Total Other Current Assets	<u>684,019</u>	<u>595,988</u>
Total Current Assets	<u>7,509,445</u>	<u>9,673,699</u>
Fixed Assets		
Property & Equipment	5,279,453	5,189,469
Accumulated Depreciation	(4,361,411)	(4,276,965)
Land	633,142	633,142
Total Fixed Assets	<u>1,551,183</u>	<u>1,545,646</u>
TOTAL ASSETS	<u>9,060,629</u>	<u>\$ 11,219,344</u>
LIABILITIES & EQUITY		
Liabilities		
Current Liabilities		
AP Trade	38,215	179,017
Other Accounts Payable	8,836	136,455
Accrued Payables	482,882	555,584
Cap Lease Oblig - ST	2,513	2,193
A/P - Sections	4,480	226,225
Deferred Revenue	56,203	3,662,167
Total Current Liabilities	<u>593,129</u>	<u>4,761,641</u>
Long Term Liabilities		
Capital Lease Oblig	5,323	6,666
PPP Loan		
Total Long Term Liabilities	<u>5,323</u>	<u>6,666</u>
Total Liabilities	<u>598,452</u>	<u>4,768,306</u>
Equity		
Unrestricted Net Assets (R/E)	6,451,038	6,448,128
Fund Balance - Current Year	2,011,139	2,910
Total Equity	<u>8,462,177</u>	<u>6,451,038</u>
TOTAL LIABILITIES & EQUITY	<u>\$ 9,060,629</u>	<u>\$ 11,219,344</u>

**INSTITUTIONAL LIQUIDITY
MANAGEMENT**
Balance Sheet Classification
ILM-UT ST BAR (3176)

Base Currency: USD As of 12/31/2024

Dated: 01/03/2025

CE

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
38141W273	GOLDMAN:FS GOVT INST	386,787.73	AAA	4.390	12/31/2024	4.410	4.410	386,787.73	0.00	1.0000	0.00	386,787.73
CCYUSD	Receivable	1,332.53	AAA	0.000	12/31/2024	0.000	0.000	1,332.53	0.00	1.0000	0.00	1,332.53
50045VP48	Komatsu Finance America, Inc.	150,000.00	A-1+	0.000	02/04/2025	4.829	4.439	149,355.42	0.00	99.5703	0.00	149,355.42
62479UD40	MUFG Securities (Canada), Ltd.	350,000.00	A-1+	0.000	03/04/2025	4.732	4.513	347,197.08	0.00	99.1992	0.00	347,197.08
--	--	688,120.26	AAA	--	01/31/2025	4.567	4.488	684,672.76	0.00	--	0.00	684,672.76

ST

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
637839AB1	NATIONAL SECURITIES CLEARING CORP	350,000.00	AAA	1.500	04/23/2025	5.630	4.613	345,673.63	970.22	99.0411	991.67	347,635.52
74258LET2	PRINCIPAL LIFE GLOBAL FUNDING II	350,000.00	A+	1.375	01/10/2025	5.921	7.031	349,622.08	-120.13	99.6577	2,285.94	351,787.89
025816CY3	AMERICAN EXPRESS CO	350,000.00	A	3.950	08/01/2025	4.574	4.609	348,748.60	-71.25	99.6221	5,760.42	354,437.77
949764HB3	Wells Fargo Bank, National Association	250,000.00	AA+	5.400	10/31/2025	5.453	5.451	249,896.37	0.00	99.6585	36.99	249,933.36
254676BR9	Discover Bank	100,000.00	A	5.400	11/07/2025	5.453	5.434	99,957.53	0.00	99.9575	798.90	100,756.44
313082DR3	FEDERAL HOME LOAN BANKS	1,000,000.00	A-1+	4.395	04/19/2025	4.482	4.462	1,000,000.00	40.00	100.0040	10,127.78	1,010,167.78
20272A6M3	Commonwealth Bank of Australia	400,000.00	A-1+	4.560	04/10/2025	4.569	4.559	399,999.87	0.00	100.0000	1,144.56	401,144.42
3133ERUS8	FEDERAL FARM CREDIT BANKS FUNDING CORP	800,000.00	A-1+	4.400	04/23/2025	4.488	4.448	800,000.00	44.00	100.0055	7,226.89	807,270.89
44988GF86	ING (U.S.) Funding LLC	400,000.00	A-1+	4.550	03/25/2025	4.584	4.639	400,000.00	0.00	100.0000	310.00	400,310.00
65557RFP0	Nordea Bank AB (publ), Finnish Branch	150,000.00	A-1+	4.550	03/24/2025	4.581	4.550	149,999.69	0.00	99.9998	153.87	150,153.35
85324TT22	Standard Chartered Bank	350,000.00	A-1+	0.000	06/02/2025	4.629	4.578	343,320.44	0.00	98.0916	0.00	343,320.44
--	--	4,500,000.00	AA+	--	05/04/2025	4.797	4.783	4,487,218.22	662.84	--	28,836.80	4,516,917.86

LT

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
525ESC1Y5	LEHMAN ESCROW	300,000.00	NA	0.000	01/01/2049	--	5,947.526	0.00	210.00	0.0700	0.00	210.00
46647PCZ7	JPMORGAN CHASE & CO	400,000.00	A+	4.080	04/26/2026	4.825	4.290	399,017.48	678.14	99.9239	2,946.67	402,642.27
3133ERQW4	FEDERAL FARM CREDIT BANKS FUNDING CORP	800,000.00	AAA	4.510	08/26/2026	4.601	4.576	800,000.00	170.40	100.0213	3,735.78	803,906.18
--	--	1,500,000.00	AA+	--	07/18/2025	4.878	6.615	1,199,017.48	1,058.54	--	6,682.44	1,208,768.44

Summary

Identifier	Description	Current Units	Rating	Coupon	Effective Maturity	Book Yield	Yield	Base Book Value	Base Net Total Unrealized Gain/Loss	Market Price	Base Accrued Balance	Base Market Value + Accrued
--	--	6,888,120.26	AA+	--	07/11/2025	4.744	4.884	6,570,908.44	1,921.38	--	35,519.25	6,606,349.06

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

UTAH STATE BAR
Membership Statistics
December 31, 2024

<u>STATUS</u>	<u>12/31/23</u>	<u>12/31/24</u>	<u>Change</u>
Active	9,129	9,306	177
Active under 3 years	896	1,051	155
Active Emeritus	346	376	30
In House Counsel	135	146	11
Foreign Legal Counsel	4	3	(1)
LPP	26	35	9
Military Spouse	-	-	-
Subtotal - Active	10,536	10,917	381
Inactive - Full Service	827	818	(9)
Inactive - No Service	2,085	2,067	(18)
Inactive Emeritus	533	608	75
Inactive House Counsel	13	16	3
Inactive LPP	3	3	-
Subtotal - Inactive	3,461	3,512	51
Total Active and Inactive	13,997	14,429	432
 <u>Supplemental Information</u>			
Paralegals	158	176	18
 <u>Active Attorneys by Region</u>			
1st Division (Logan - Brigham)	222	221	(1)
2nd Division (Davis - Weber)	1,011	1,060	49
3rd Division (Salt Lake)	5,671	5,760	89
4th Division (Utah)	1,485	1,522	37
5th Division (Southern Utah)	583	611	28
Out of State	1,564	1,743	179
Total Active Attorneys	10,536	10,917	381