



BOARD OF LEGAL SPECIALIZATION

State Bar of Arizona
4201 N. 24th Street, Suite 100
Phoenix, Arizona 85016

March 13, 2019
4:00 p.m.
Cholla Room, First Floor

Minutes (Approved April 10, 2019)

MEMBER ATTENDANCE:

P = Present; T = Present Telephonically; A = Absent

Bradley Jardine - P
M. Maureen Anders - T
James Anderson - T
Troy Bales - T
James Cross - P
Robert Denison - T
Monica Donaldson Stewart - A

Michael Goldberg - P
Abe Lai - T
Bridget O'Brien Swartz - T
Elizabeth Ortiz - T
David Shein - T
Wendi Sorenson - P

OTHER ATTENDEES:

State Bar Staff: Patrick Braatz

Minutes taken by Patrick Braatz

1. Call to Order

Called to order by: Bradley Jardine, Chair
Time: 4:04 p.m.

2. Call to the Public

Andria Jones, present as a guest only.

3. Review and Approval of minutes:

The minutes of the February 13, 2019 meeting were reviewed.
Motion for approval by: Wendi Sorenson
Seconded by: Michael Goldberg
Motion: Passed

The minutes of the February 13, 2019 Executive Session meeting were reviewed.
Motion for approval by: Wendi Sorenson
Seconded by: Michael Goldberg
Motion: Passed

4. Update from Advisory Commission on Standards Review

Patrick Braatz reported that 5 of the 8 Advisory Commissions have submitted their reports on the Standards Review and provided recommendations for possible change. It is hoped that all will be available before the April 10, 2019 Board Meeting. The time line for completing this item and having a report to the Supreme Court was established earlier and we are a bit behind.

Feb. 28, 2019: Revised standards for certification due from each Advisory Commission

March 2019: Revised standards submitted to General Counsel for review

April 10, 2019: Revised standards submitted to BLS for review/approval

May 24, 2019: Revised standards submitted to Board of Governors for review/approval

July 1, 2019: Revised standards submitted to Court for final approval.

5. Advisory Commissions update on Peer Review Confidentiality

Patrick Braatz reported that 4 of the Advisory Commissions have submitted a written report on the review of the current standards, they are Bankruptcy, Criminal Law, Real Estate and Workers' Compensation. The other 4 Advisory Commission have been working on the review and he will reach out to them to remind them that the deadline for submitting comments is February 28, 2019.

6. American Board of Certification (ABC) Renewal

Chair Jardine reviewed the letter by from the Real Estate Law Advisory Commission regarding the recent change that Peer Reviews were no longer confidential to the applicants. It was decided that Chair Jardine would contact the other 7 Advisory Commissions and seek their input and then report back at the March and April Meeting.

7. Executive Session. 4:34 PM

Motion to move into Executive Session by: Michael Goldberg
Second by: Wendi Sorenson
Motion: Passed

8. Reconvene into Open Session. 4:50PM

Motion to reconvene into open session by: Michael Goldberg
Second by: Wendi Sorenson
Motion: Passed

9. Consideration of Advisory Commission recommendations for Recertification and Certification as Specialists in the following areas:

Estate and Trust Law Advisory Commission

3 Recertification Candidates

Motion to accept the recommendations from the Estate and Trust Law Advisory Commission to recertify the list of specialists as presented by: Michael Goldberg

Second by: Jim Cross

James Anderson Recused

Motion: Passed

Family Law Advisory Commission

9 Recertification Candidates

Motion to accept the recommendations from the Family Law Advisory Commission to recertify the list of specialists as presented by: Michael Goldberg

Second by: Jim Cross

James Anderson Recused

Motion: Passed

Personal Injury and Wrongful Death Law Advisory Commission

24 Recertification Candidates

Motion to accept the recommendations from the Family Law Advisory Commission to recertify the list of specialists as presented by: Michael Goldberg

Second by: Wendi Sorenson

Bradley Jardine Recused

Motion: Passed

Tax Law Advisory Commission

1 Recertification Candidate

Motion to accept the recommendations from the Tax Law, to certify the list of specialists as presented by: Michael Goldberg

Second by: Jim Cross

Motion: Passed

10. Denial of Initial Certification Application

Motion to accept the recommendation from the Family Law Advisory Commission to deny initial certification to an applicant. by: Wendi Sorenson

Second by: Michael Goldberg

Motion: Passed

11. Consideration of request for Appeal and Request for Hearing

Motion to withdraw the Notice of Intent to Revoke Certification of Specialist pending the appeal of the Decision and Order Imposing Sanctions of the State Bar of Arizona.

By: Jim Cross

Second by: Michael Goldberg

Motion: Passed

12. Date of next meeting – April 10, 2019

13. Meeting adjourned: 4:54 p.m.