



BOARD OF LEGAL SPECIALIZATION

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

Wednesday, February 9, 2022 - 4:00 p.m.
via Zoom on-line meeting

MINUTES

Approved March 23, 2022

MEMBER ATTENDANCE:

P = Present; Z = Present via Zoom; T = Present Telephonically; A = Absent

Wendi Sorensen - Z

M. Maureen Anders - Z

James Anderson - Z

James Cross - Z

Robert Denison - Z

Michael Goldberg - Z

Georgette Hasiotis - Z

Kimberly Heldt - Z

Abe Lai - Z

Phoebe Moffatt - Z

Blake Moscatello - Z

Jeffrey Neff - Z

Elizabeth Ortiz - Z

OTHER ATTENDEES:

State Bar Staff: Sarah Corpening

Minutes taken by: Sarah Corpening

1. Call to Order

Meeting was called to order by Wendi Sorensen

4:05 p.m.

2. Approval of minutes.

The minutes of the January 12, 2022 General Session meeting were reviewed.

Motion for approval by: Jim Cross

Second by: Jim Anderson

Chair call for Vote: Unanimous; Motion Passes

The minutes of the January 12, 2022 Executive Session meeting were reviewed.

Motion for approval by: Jim Cross

Second by: Bob Denison

Chair call for Vote: Unanimous; Motion Passes

- #### 3. Criminal Law Standards.
- Elizabeth Ortiz and Michael Goldberg reporting. Elizabeth and Michael had a productive meeting with 2 members of the Criminal Law Advisory Commission regarding consideration of revision of the standards for certification. The Advisory Commission

members were open to considering an appellate track and a trial track but were resistant to lessening the experience requirements with respect to jury trials. They will bring the issues/discussion before the full advisory commission and invited Michael and Elizabeth to attend that meeting, the date if to be determined. Next steps are to await action by the advisory commission.

4. Executive Session.

Motion to move into Executive Session by: Jim Cross
Second by: Bob Denison
Chair call for Vote: Unanimous; Motion Passes

Convene into Executive Session
4:18 p.m.

Reconvene into General Session
4:22 p.m.

5. Motion to approve the recertification recommendations of Bankruptcy Advisory Commission for:

- a. Robert J. Berens
- b. Steven J. Brown
- c. Lawrence D. Hirsch
- d. Michael A. Jones

By: Bob Denison
Second by: Blake Moscatello

Chair call for recusals: Jim Cross = Michael A. Jones
Chair call for discussion or objection: None
Chair call for Vote: Unanimous; 1 recusal. Motion Passes

6. Motion to approve the recertification recommendations of Family Law Advisory Commission for:

- a. Keith A. Berkshire
- b. Mark Cord
- c. David N. Horowitz
- d. Lisa McNorton
- e. Michael Shew

By: Georgette Hasiotis
Second by: Michael Goldberg

Chair call for recusals: None
Chair call for discussion or objection: None
Chair call for Vote: Unanimous. Motion Passes

7. Motion to approve the recertification recommendations of Real Estate Law Advisory Commission for:

- a. Jeffrey T. Brei
- b. M. Brennan Ray
- c. Carl Raymond Sammartino
- d. Joyce Kline Wright
- e. Frank Tomkins
- f. James Frisch

By: Jeff Neff

Second by: Maureen Anders

Chair call for recusals: Wendi Sorensen = M. Brennan Ray

Chair call for discussion or objection: None

Chair call for Vote: Unanimous, 1 recusal. Motion Passes

8. Motion to approve the recertification recommendations of Personal Injury & Wrongful Death Advisory Commission for:

- a. Lloyd J. Andrews
- b. Steven A. Cohen
- c. David L. Curl
- d. D. Reid Garrey
- e. Glynn W. Gilcrease, Jr.
- f. Henry G. Hester
- g. Thomas J. Howar
- h. Theodore (Todd) Julian, Jr.
- i. Kathleen M. Kassmann
- j. Richard A. Kent
- k. Jan L. Kleinman
- l. Stanley J. Marks
- m. Ronald D. Mercaldo
- n. John A. Micheaels
- o. Timothy L. Moulton
- p. Michael R. Murphy
- q. William A. Nebeker
- r. John Edwards Osborne
- s. James R. Page
- t. Richard S. Plattner
- u. Buddy Rake, Jr.
- v. Willam H. Sandweg III
- w. Ted A. Schmidt
- x. Robert E Schmitt
- y. Silas H. Shultz
- z. Wendi A. Sorensen
- aa. S. Jon Trachta
- bb. Elliott G. Wolfe

By: Jim Cross
Second by: Maureen Anders

Chair call for recusals: Wendi Sorensen = Theodore (Todd) Julian, Jr.
Wendi Sorensen = Wendi Sorensen

Chair call for discussion or objection: None
Chair call for Vote: Unanimous, 2 recusals. Motion Passes

9. Motion to approve recertification recommendations of **Workers' Compensation Advisory Commission** for:

- a. Robert J. Forman
- b. Lisa M. LaMont
- c. Matthew Craig Fendon
- d. Rachel Parise Brozina

By: Phoebe Moffatt
Second by: Jeff Neff

Chair call for recusals: None
Chair call for discussion or objection: None
Chair call for Vote: Unanimous. Motion Passes

10. Motion to approve the recertification recommendations of **Estate & Trust Advisory Commission** for:

- a. Michael A. Friedman
- b. Catherine J. Leas
- c. T. Troy McNemar
- d. Robin L. Miskell
- e. Craig H. Wisnom

By: Phoebe Moffatt
Second by: Jim Cross
Chair call for recusals: none
Chair call for discussion or objection: None
Chair call for Vote: Unanimous; Motion Passes

11. **Administrator updates.** Sarah Corpening reporting.

Search for new BLS Administrator continues. Have interviewed two candidates, very few applicants. Until a replacement is found, Sarah will continue to handle BLS duties.

Administrative Law Advisory Commission: Following receipt of the letter from BLS to the advisory commission, they are grading the essays from all exam takers. The scores and results to be discussed at their next meeting to be held on February 25th.

Jim Cross will draft a letter of thanks to Connie Hay for her work with the BLS and advisory commissions.

12. Date of next meeting:
March 23, 2022 – 4 p.m.

9. Adjourn – 4:34 p.m.