



## BOARD OF LEGAL SPECIALIZATION

State Bar of Arizona  
4201 N. 24<sup>th</sup> Street, Suite 100  
Phoenix, Arizona 85016

Wednesday, August 10, 2022 - 4:00 p.m.  
via **Zoom**

### MINUTES

Approved January 11, 2023

#### MEMBER ATTENDANCE:

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

Wendi Sorensen - Z

James Cross - Z

James Anderson – Z

Cynthia Braun - Z

Robert Denison – Z

Michael Goldberg – A

Kimberly Heldt - Z

Phoebe Moffatt – Z

Blake Moscatello - A

Jeffrey Neff - Z

Elizabeth Ortiz - A

Teresa Welborn - Z

State Bar Staff: Sarah Corpening; Randal Westbury

Minutes taken by: Randal Westbury

#### 1. Call to Order

Meeting was called to order by Wendi Sorensen  
4:01 p.m.

#### 2. Call to the Public – Jacquelyne Mingle

#### 3. Approval of minutes

The minutes of the July 13, 2022 General Session meeting were reviewed.

Motion for approval by: Cynthia Braun

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

The minutes of the July 13, 2022 Executive Session meeting were reviewed.

Motion for approval by: Cynthia Braun

Second by: Jim Anderson

Chair calls for vote: Unanimous, motion passes

#### 4. Motion to move into Executive Session for purposes of reviewing recommendations certification

Motion by: Bob Denison

Second by: Jim Cross  
Chair calls for vote: Unanimous, motion passes

Convene into Executive Session  
4:03 pm.

Reconvene to General Session  
4:41 pm

**5. Motion to approve the recommendation of Family Law Advisory Commission to deny initial certification:**

- 1) Travis Owen
- 2) Sam Gordon

By: Jeff Neff  
Second: Jim Anderson  
Chair calls for recusals: none  
Chair calls for discussion: none  
Chair call for vote: Unanimous, motion passes

**6. Review of a pending application for recertification in Estate & Trust Law Motion to remand the file back to the Estate & Trust Advisory Commission for additional investigation of the application.**

By: Jeff Neff  
Second: Jim Anderson  
Chair calls for recusals: none  
Chair calls for discussion: none  
Chair call for vote: Unanimous, motion passes

**7. Review of BLS Rules & Regulations:**

The BLS Rules & Regulations, Standards for Certification and the application forms completed by the applicants for certification and recertification were discussed with respect to consistency in requirements and adequacy of the application forms to capture the requirements. The Chair appointed Phoebe Moffatt and Teresa Welborn to conduct a review of the documents and report back to BLS.

**Administrator Updates – Randal Westbury**

- The Advisory Commission appointments/reappointments have been approved and the Advisory Commissions have been sent the 2022-2023 Rosters.

**8. Date of next meeting: September 14, 2022.**

**9. Adjourn – 4:50 pm**