



BOARD OF LEGAL SPECIALIZATION

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

Wednesday, March 10 - 4:00 p.m.
via Zoom on-line meeting

MINUTES

Approved April 14, 2021

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 – A

Michael Goldberg – Z

Georgette Hasiotis - Z

Kimberly Heldt - A

Abe Lai - Z

Phoebe Moffatt – Z

Blake Moscatello - Z

Jeffrey Neff - Z

Elizabeth Ortiz - Z

OTHER ATTENDEES:

State Bar Staff, Connie Hay & Sarah Corpening

Minutes taken by: Connie Hay

1. Call to Order

Meeting was called to order by Wendi Sorensen
4:00 p.m.

2. Call to the Public – No public attendees

3. Approval of minutes.

The minutes of the February 10, 2021 General Session and Executive Session meetings were reviewed.

Motion for approval by: Jim Anderson

Second by: Georgette Hasiotis

Chair call for Vote: Unanimous; Motion Passes

4. Construction Defect Law.

Attorney Bob Willis petitions the BLS to create a Construction Defect Law board certified specialty. He believes it will further the BLS mission as it takes above-average knowledge and experience to properly and efficiently resolve construction defect matters for clients, and a specialty will allow property owners and industry professionals to connect with a recognized qualified attorney that can successfully handle all disputes. The area is complex in that a single case will involve multiple parties, multiple issues, and can be on multiple tracks simultaneously with lots of moving parts and different people involved. Additionally, the area is governed by

specific statutes, case law, rules, and terminology, and claims are resolved through all types of forums (state, federal and tribal courts, administrative courts, and alternative dispute resolution processes) and quite often through a combination of those forums. In the Courts these cases fall under Complex Tier 2 or 3 categories, and knowledge of building codes, the Condominium Act, the Purchase Act, Planned Communities Act, and indemnity are imperative.

Questions and discussion of the proposed Standards followed.

5. Executive Session.

Motion to move into Executive Session by: Maureen Anders

Second by: Jeff Neff

Chair call for Vote: Unanimous; Motion Passes

Convene into Executive Session

4:34 p.m.

Reconvene into General Session

4:39 p.m.

6. Specialist Recertification Applications

Motion to approve Estate & Trust Advisory Commission recommendations for recertification:

1. Matthew Donovan
2. Teresa Lancaster
3. Lou Silverman
4. Michael Tucker
5. Mark Valentine
6. Mark Wilson
7. Robin Merrill

By: Jim Anderson

Second by: James Cross

Abstentions: None

Chair call for Vote: Unanimous; Motion Passes

Motion to approve Family Law Advisory Commission recommendations for recertification:

1. James F Wees
2. Douglas Gardner

By: Jeff Neff

Second by: James Cross

Abstentions: None

Chair call for Vote: Unanimous; Motion Passes

Motion to approve Real Estate Advisory Commission recommendations for recertification:

1. Andrew "Andy" Abraham
2. Robert G Anderson
3. C. Adam Buck
4. James F Byrne
5. Paul D Ellsworth
6. Robert J Itkin

7. Barrett L Kime
8. J Gregory Lake
9. Richard V Mack
10. Thomas J McDonald
11. Dale S Zeitlin
12. Lynn T Ziolk

By: Jeff Neff

Second by: Phoebe Moffatt

Abstain: Wendi Sorensen abstains (Andrew Abraham); and
James Cross abstains (Dale Zeitlin)

Chair call for Vote: Unanimous; Motion Passes

Motion to approve Workers Compensation Advisory Commission recommendations for recertification:

1. Dennis Kurth
2. Thomas Whitley
3. Veronique Pardee
4. Benjamin Manion
5. John Main
6. Jean Gage

By: Jim Anderson

Second by: Jeff Neff

Abstentions: None

Chair call for Vote: Unanimous; Motion Passes

6. Growing Legal Specialization.

Standards for some areas of specialty need to be reviewed, for instance the Criminal Law standards currently include a requirement for appellate work when many attorneys practice in either pre- or post-conviction work but not both. Michael Goldberg and Elizabeth Ortiz volunteered to establish a Criminal Law Standards Review Committee to research and report back with suggestions. Additionally, James Cross volunteered to review the Bankruptcy Law Standards.

Action Item: Connie Hay to provide Criminal Law Review Committee with Standards and contact information, and James Cross with the Bankruptcy Law Standards and advisory commission contact information.

7. Date of next meeting:

April 14, 2021 – 4 p.m.

Motion to adjourn by: James Cross

Second by: Jim Anderson

Chair call for Vote: Unanimous; Motion Passes

Meeting adjourned: 5:00 p.m.