



BOARD OF LEGAL SPECIALIZATION

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

Wednesday, March 13, 2024 - 4:00 p.m.
via **Zoom**

MINUTES

Approved April 10, 2024

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 - Z

State Bar Staff: Randal Westbury

Minutes taken by: Randal Westbury

1. Call to Order (Quorum Present)

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

2. Call to the Public –

Public Member: Jeff Gross – Chair, Real Estate Advisory Commission

3. Approval of minutes

The minutes of the February 14, 2024, 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 February 14, 2024, Executive Session meeting were reviewed.

Motion for approval by: Jim Cross

Second by: Cynthia Braun

Chair calls for vote: Unanimous, motion passes

4. Motion to move into Executive Session for purposes of reviewing recommendations for Certifications and Recertifications:

BLS Chair Wendi Sorensen confirmed all meeting materials have been circulated and received by attending members.

Motion made by: Phoebe Moffatt

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

Convene into Executive Session

4:02 pm.

Reconvene to General Session

4:37 pm

5. Discussion of April 5, 2024 SOS (BLS Summit) meeting:

Wendi Sorensen asked the BLS Administrator to provide details regarding the agenda topics and background on the Summit meeting. Randal Westbury stated that it's been a year since the last Summit meeting and apologized it's taken so long to schedule the meeting. He continued with news of the following items:

1. The Specialist of Year award was approved by the BLS and State Bar so nominations for the award would be sent to all specialists in May for the return vote to be tallied in June. The winner of the award would be selected in June/July and announced in December. The idea is to have the winner meet at the winter SOS meeting and the BOG president present the winner with the award. The winner would also be published in the December Arizona Attorney Magazine.
2. The Revisions to the Rules was submitted to the Supreme Court in March. The revisions would help clear some of the confusion to the Rules and also provide more defined directions to some of the regulations. Randal Westbury commented that maybe the BLS would update and refine the Rules every two years to ensure the Rules reflected the current industry standards.
3. The Peer Review Metrics have been a concern over the past few years and the BLS is asking the Advisory Commissions to become more involved in determining weight categories of requirements.
4. The new "Paraprofessional" designation has been approved by the Court and it's an item the BLS and Commissions would need to determine if the applicants can apply for specialization. Kendra Owens-Johnson provided details that the State Bar recognizes the paraprofessional and assigns a bar number. She continued that technically, they have the same privileges as attorneys so it's possible they may seek the specialist's certification.

Randal Westbury concluded that he's received eight of the ten confirmations and he's expecting it to be a productive meeting.

6. Real Estate Advisory Commissions' Recommendation and Response to Remanded file of 2022 Applicant:

1. Jason Smith

Motion to approve applicant passed Section III of 2022 Exam and applicant approved to retake Section I and Section II of exam on April 20, 2024 made by: Jim Cross

Second by: Jeff Neff

Chair calls for recusals: none

Chair calls for discussion: none

Chair calls for vote: Unanimous, motion passes

7. Tax Law Advisory Commission's Recommendation for Recertification of 2023 applicant:

1. Giselle Alexander

Motion made by: Jeff Neff

Second by: Jim Cross

Chair calls for recusals: none

Chair calls for discussion: none

Chair calls for vote: Unanimous, motion passes

8. Administrative Law Advisory Commission's Recommendation of 2023 Initial Certification Applicants to sit for exam:

1. Nicholas Enoch
2. Michael Raine
3. Peter Schelstraete

Motion made by: Jim Anderson

Second by: Phoebe Moffatt

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

9. Construction Defect Advisory Commission's Recommendation of 2023 Initial Certification Applicants to sit for exam:

1. Gregory Gillis
2. Andrew Peshek

Motion made by: Jim Cross

Second by: Jeff Neff

Chair calls for recusals: Phoebe Moffatt

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

10. Family Law Advisory Commission's Recommendation of 2023 Initial Certification Applicants to sit for exam:

1. Elisabeth Benavidez
2. Kylie Bigelow
3. Ariel Cohn
4. Stephanie Harper Easterling
5. Kaine Fisher
6. Michael Lincoln
7. Lisa Monnette
8. Jennifer Ruben
9. Giancarlo Sapelli
10. Daniel Wilcox
11. Brian Winter
12. Kaytlyn Yrun-Duffy

Motion made by: Jim Anderson

Second by: Jim Cross

Chair calls for recusals: Phoebe Moffatt

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

11. Family Law Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Steven Ellsworth
2. Christina Hamilton
3. Jennifer Manzi
4. Mitchell Reichman
5. Melvin Sternberg

Motion made by: Jim Cross

Second by: Jeff Neff

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

12. Workers' Compensation Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Javier A Puig
2. Brian A Weekley

Motion made by: Jeff Neff

Second by: Jim Cross

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

13. Recommendation of Revocation of Workers' Compensation Specialization Designation:

1. John Main

Motion made by: Jim Cross

Second by: Jeff Neff

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

14. Date of next meeting: [April 10, 2024](#)

15. Adjourn – 5:04 pm