



BOARD OF LEGAL SPECIALIZATION

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

Wednesday, January 10, 2024 - 4:00 p.m.
via **Zoom**

MINUTES

Approved **February 14, 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 - A

Robert Denison – Z

Michael Goldberg – Z

Kimberly Heldt - Z

Phoebe Moffatt – A

Blake Moscatello - T

Jeffrey Neff - Z

Elizabeth Ortiz - Z

State Bar Staff: Randal Westbury and Kendra Owens-Johnson

Minutes taken by: Randal Westbury

1. Call to Order (Quorum Present)

Meeting was called to order by BLS Chair, Wendi Sorensen
4:02 p.m.

2. Call to the Public –

Public member Jeff Gross – Real Estate Advisory Commission Chair
Public member Jason Smith – Real Estate Initial Certification Applicant

3. Approval of minutes

The minutes of the November 8, 2023, General Session meeting were reviewed.

Motion for approval by: Robert Denison

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

The minutes of the November 8, 2023, Executive Session meeting were reviewed.

Motion for approval by: Robert Denison

Second by: Blake Moscatello

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. Attending members confirmed receipt of all meeting materials. The BLS Administrator commented that the Real Estate Advisory Commission recommended denial of applicant's initial certification based on exam results. .

The BLS Administrator continued that the applicant, Jason Smith, appeared before the Real Estate Advisory Commission and has requested to appear before the BLS to challenge the Advisory Commission's recommendation of denial. Wendi Sorensen commented the BLS will review the recommendations prior to the public members joining the executive session.

Motion made by: Jim Anderson

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

Convene into Executive Session

4:17 pm.

Reconvene to General Session

5:23 pm

5. Personal Injury and Wrongful Death Advisory Commission's Recommendation to Approve Applicant for Initial Certification:

1. Brian Allen

Motion made by: Robert Denison

Second by: Jim Cross

Chair calls for recusals: none

Chair calls for discussion: none

Chair calls for vote: Unanimous, motion passes

6. Review of final revision to BLS Rules and Regulations:

1. The BLS discussed the proposed revisions to the BLS Rules and Regulations. The BLS voted to accept and approve the proposed revisions to the Rules and Regulations and requested the BLS Administrator present the decision from the Board of Governor's and the Arizona Supreme Court.

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

7. Appearance of Real Estate Initial Certification Applicant Jason Smith:

Appearance of Real Estate Initial Certification applicant Jason Smith and Real Estate Chair, Jeff Gross. The BLS granted the request of applicant Jason Smith and remanded the initial certification application file back to the Real Estate Advisory Commission for further review with instructions to report back to the BLS within 60 days.

Motion made by: Jeff Neff

Second by: Jin Cross

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

8. Date of next meeting: February 14, 2024

9. Adjourn – 5:25 pm