



BOARD OF LEGAL SPECIALIZATION

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

Wednesday, February 14, 2024 - 4:00 p.m.
via **Zoom**

MINUTES

Approved **March 13, 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 –

No Public Members Present

3. Approval of minutes

The minutes of the January 10, 2024, General Session meeting were reviewed.

Motion for approval by: Jeff Neff

Second by: Jim Cross

Chair calls for vote: Unanimous, motion passes

The minutes of the January 10, 2024, Executive Session meeting were reviewed.

Motion for approval by: Jeff Neff

Second by: Robert Denison

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

4:01 pm.

Reconvene to General Session

5:05 pm

5. Bankruptcy Law Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Thomas Alen
2. Harold Campbell
3. Jody Corrales
4. Bradley Pack
5. Jimmie Dee Smith

Motion made by: Jim Cross

Second by: Phoebe Moffatt

Chair calls for recusals: none

Chair calls for discussion: none

Chair calls for vote: Unanimous, motion passes

6. Criminal Law Advisory Commission's Recommendation for 2023 applicant to sit for Initial Certification Exam:

1. Bradlee Rideout

Motion made by: Jeff Neff

Second by: Phoebe Moffatt

Chair calls for recusals: none

Chair calls for discussion: none

Chair calls for vote: Unanimous, motion passes

7. Criminal Law Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Bruce Blumberg
2. Trent Buckallew
3. Jason Gronski
4. Omer Gurion
5. Slade Lawson
6. Vicki Lopez
7. Julie McDonald
8. Craig Orent
9. Paul Ramos
10. John Trebon

Motion made by: Robert Denison

Second by: Jeff Neff

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

8. Estate and Trust Law Advisory Commission's Recommendation for 2023 Applicants to sit for Initial Certification Exam:

1. Melissa Ahlers
2. Debra Polly

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

9. Estate and Trust Law Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Mark Allen
2. John Becker
3. Joseph Gutterman
4. Ronald Larson
5. Hope Leibsohn
6. Phoebe Moffatt
7. Eliza Read
8. Kames Ryan
9. Susan K Smith
10. Alan Wilson

Motion made by: Jim Anderson

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 for Recertification Of 2023 Applicants:

1. Laura Belleau
2. Barry Brody
3. Luke Brown
4. Kiilu Davis
5. Steven Everts
6. Philip Gerard
7. Glenn Halterman
8. Angela Peacock
9. Annie Rolfe
10. Susan Schauf
11. Robert Schwartz
12. Edina Strum
13. Steven Wolfson

Motion made by: Phoebe Moffatt

Second by: Jim Cross

Chair calls for recusals: none

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

11. Personal Injury and Wrongful Death Advisory Commission's Recommendation For Recertification of 2023 Applicants:

1. James Abraham
2. Peter Akmajian
3. Allen Bucknell
4. Christian Henrichsen
5. David Hill
6. Louis Hollingsworth
7. Bradley Jardine
8. James Penny
9. Joel Robbins
10. Leighton Rockafellow
11. Thomas Ryan
12. K Thomas Slack
13. Georgia Staton
14. Timothy Tonkin

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

12. Real Estate Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Thomas Arendt
2. Fred Fathe
3. Kathleen Fox
4. Jeffrey Gross
5. Mark Lasee
6. Philippe Martinet
7. Jeffrey Neff
8. James Whitehill
9. David Wilhelmsen

Motion made by: Jim Anderson

Second by: Jim Cross

Chair calls for recusals: Jeff Neff

Chair calls for discussion: none

Chair call for vote: Unanimous, motion passes

13. Tax Law Advisory Commission's Recommendation for 2023 Applicants to sit for Initial Certification Exam:

1. Trisha Farrow
2. Lucas Frei

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

14. Tax Law Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Thomas Bade
2. John Becker
3. Steven Boss
4. Max Boyer
5. Thomas Georgiou
6. James Hinton
7. David Jojola
8. Derek Kaczmarek
9. Brandon Keim
10. Donald MacPherson
11. Bradley Nystedt
12. James Rossie Jr.
13. Susan K Smith
14. James Susa

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

15. Worker's Compensation Advisory Commission's Recommendation for Recertification of 2023 Applicants:

1. Kirk Barberich
2. M Ted Moeller
3. Chiko Oyolu

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

16. Date of next meeting: [March 13, 2024](#)

17. Adjourn – 5:27 pm