

Bobby Henry

From: Megan Chappell <megan@dctpw.com>
Sent: Tuesday, May 4, 2021 2:38 PM
To: steve@crosslandlaw.net
Cc: Brooks R. Holland (bholland@lawschool.gonzaga.edu); cinda.fernald@foster.com; J. Donald Curran; Bobby Henry
Subject: RE: Unidentified Trust Funds

This email is being sent by my assistant, Megan.

Please direct all responses to me at jdcvlc@dctpw.com

Hi Steve,

Below is a copy of my email to you dated April 27, 2021. Doug Ende has pointed out to me that the discussion draft of RPC 1.15 quoted in my below email only amends the RPCs. If the discussion draft is adopted by the Committee on Professional Ethics, there would need to be amendments to LLLT RPCs (as well as the LPORPC RPCs). The Committee on Professional Ethics (CPE) would be very grateful to learn whether the LLLT is receptive to such a rule change.

Don Curran

Delay, Curran, Thompson, Pontarolo & Walker, P.S.
601 West Main Ave., Ste. 1212
Spokane, WA 99201
(509) 455-9500
(509) 623-1446 (fax)
jdcvlc@dctpw.com

From: Megan Chappell
Sent: Tuesday, April 27, 2021 2:00 PM
To: 'steve@crosslandlaw.net' <steve@crosslandlaw.net>
Cc: Brooks R. Holland (bholland@lawschool.gonzaga.edu) <bholland@lawschool.gonzaga.edu>; 'cinda.fernald@foster.com' <cinda.fernald@foster.com>; J. Donald Curran <jdcvlc@dctpw.com>; 'roberth@wsba.org' <roberth@wsba.org>
Subject: Unidentified Trust Funds

This email is being sent by my assistant, Megan.

Please direct all responses to me at jdcvlc@dctpw.com

Hi Steve:

I am a member of a subcommittee of the Committee on Professional Ethics. The CPE is considering a proposal that would impact the Limited License Legal Technician (LLLT) in the same manner it would a lawyer.

The Legal Foundation of Washington (LFW) has requested an amendment to RPC 1.15A to require that unidentified property in a lawyer's trust account be remitted to the Legal Foundation of Washington rather than transferred to the Department of Revenue as abandoned property under the Uniform Unclaimed Property Act, Chapter 63.29 RCW.

The CPE would be grateful if the LLLT board would be notified of the possible change and advise of any concerns or suggestions. The next meeting of the CPE is June 4, 2021.

Unidentified property are funds that cannot be traced to an owner and is to be distinguished from unclaimed property, which are funds or assets which can be traced to a specific owner who cannot be located.

The proposal under consideration reads as follows:

(i) A lawyer who learns of unidentified funds in an IOLTA account must make periodic efforts to identify and return the funds to the rightful owner. If after 12 months of the discovery of the unidentified funds the lawyer determines that ascertaining the ownership or securing the return of the funds will not succeed, the lawyer must remit the funds to the Legal Foundation of Washington. No charge of ethical impropriety or other breach of professional conduct shall attend to a lawyer's exercise of reasonable judgment under this paragraph (i).

A lawyer who either remits funds in error or later ascertains the ownership of remitted funds may make a claim to the Legal Foundation of Washington, which after verification of the claim will return the funds to the lawyer.

(j) Definitions

(9) "Unidentified funds" are amounts accumulated in an IOLTA account that cannot be documented as belonging to a client, a third person, or the lawyer or law firm.

Comment 6 to RPC 1.15A reads:

[6] A lawyer has a duty to take reasonable steps to locate a client or third person for whom the lawyer is holding funds or property. If after taking reasonable steps, the lawyer is still unable to locate the client or third person, the lawyer should treat the funds as unclaimed property under the Uniform Unclaimed Property Act, RCW 63.29.

Comment 22 to RPC 1.15A states:

[22] An LLLT who is signatory to a trust account under paragraph (h)(9) is subject to independent professional-ethical obligations that correspond to a lawyer's obligations under this Rule. See LLLT RPC 1.15A. Partners and lawyers who individually or together with other lawyers possess comparable managerial authority in a law firm that employ LLLTs, or in which LLLTs are members, should also be aware of their obligations under Rule 5.10. These obligations extend to making reasonable efforts to establish internal policies and procedures designed to provide reasonable assurance that an LLLT's conduct in relation to the firm's trust account(s) is compatible with these Rules of Professional Conduct. A lawyer with managerial or supervisory authority over an LLLT who is signatory to a trust account under paragraph (h)(9) is also ethically obligated to make reasonable efforts to ensure that the LLLT's conduct is compatible with the LLLT's professional-ethical obligations. When a lawyer is a joint signatory on a trust account with an LLLT, a lawyer should exercise direct supervisory authority over the activities of the LLLT with respect to the account.

Thank you for your cooperation and assistance.

Don Curran

Delay, Curran, Thompson, Pontarolo & Walker, P.S.

601 West Main Ave., Ste. 1212

Spokane, WA 99201

(509) 455-9500

(509) 623-1446 (fax)

jdclvc@dctpw.com

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<p>Stephen Robert Crossland, Chair Active Lawyer Crossland Law Offices PO Box 566 Cashmere, WA 98815-0566 (509) 782-4418 steve@crosslandlaw.net 3rd term: 10/1/2018 – 9/30/2021</p>	<p>Christy Carpenter Active LLLT 2367 Tacoma Avenue South Tacoma, WA 98402-1409 253-457-0967 christy@mylllt.com 1st term: 10/1/2018 – 9/30/2021</p>
<p>Zachary Ashby Active Lawyer 8697 W Gage Blvd Kennewick, WA 99336-1035 (509) 572-3700 zca@pnwfamilylaw.com 1st term: 10/1/2019 – 9/30/2022</p>	<p>OPEN Public 1st term: 10/1/2019 – 9/30/2022</p>
<p>Sarah Bové Active LLLT 15600 Redmond Way Ste 201 Redmond, WA 98052-3862 (425) 243-4786 sarah@LTDivision.com 2nd term: 10/1/2020 – 9/30/2023</p>	<p>Jennifer Ortega Active LLLT 530 Industry Drive, Ste 240 Seattle, WA 98188 (866) 432-6529 Ext. 701 jennifer@LTDivision.com 1st term: 10/1/2019 -9/30/2022</p>
<p>Catherine Brown Active Lawyer 1200 5th Avenue, Suite 700 Seattle, WA 98101-1116 716-908-1597 catherineb@kcba.org 1st term: 10/1/2018 – 9/30/2021</p>	<p>Crystal Lambert-Schroeder Active Lawyer Lambert Law Office, PLLC 900 Washington Street, Ste 1010 Vancouver, WA 98660 (360) 737-1473 crystal@lambertlawpllc.com 2nd term: 10/1/2020 – 9/30/2023</p>
<p>Margaret Bridewell Active Lawyer 1504 Broadway St Bellingham, WA 98225-3038 (360) 527-3525 mabridewell@seanet.com 1st term: 10/1/2020 – 9/30/2023</p>	<p>Jennifer Petersen Active LLLT 2011 Young Street, Suite 202 Bellingham, WA 98225 (360) 733-3773 jen@saalawoffice.com 2nd term: 10/1/2020 – 9/30/2023</p>



<p>Judith Potter Public 4417 Lakeway Drive Bellingham, WA 98229-5119 jujupotterwa@gmail.com 360-303-8270 1st term: 10/1/2019 – 9/30/2022</p>	<p>OPEN Public 1st term: 10/1/2021 – 9/30/2024</p>
<p>Amy Riedel Public Associate Director for Student Access & Career Pathways, Adjunct Faculty Whatcom Community College, Kelly Hall 008 237 West Kellogg Road Bellingham, WA 98226 360-383-3194 ariedel@whatcom.edu 2nd term: 10/1/2018 -9/30/2021</p>	<p>OPEN WSBA Member 1st term: 10/1/2019 – 9/30/2022</p>
<p>Geoffrey Revelle Active Lawyer 5101 25th Ave NE Apt C435 Seattle, WA 98105-3297 (206) 714-0964 geoff.revelle@fisherbroyles.com 1st term: 10/1/2020 – 9/30/2023</p>	<p>ATJ Board Liaison Judge Fred Corbit Fred_corbit@waeb.uscourts.gov</p> <p>BOG Liaison P.J. Grabicki pjg@randalldanskin.com</p>
<p>Ex Officio Carolyn McKinnon, SBCTC Representative cmckinnon@sbctc.edu (360) 704-3903</p>	<p>Staff Liaison Robert (Bobby) Henry Associate Director, Regulatory Services Department (206) 727-8227 roberth@wsba.org</p>



Christine M Carpenter
WSBA #113LLLT
LLLT

Congressional District: 8

Applied Committee: Limited License Legal Technician Board

Application Reason: Having served on the LLLT for the last three years, I have been committed to advancing access to justice through licensing legal professionals. I have enjoyed working hard on this board, gain energy from interacting with my fellow board members, and would like to continue in my capacity as a board member for three more years.

History of Committee Service:

Limited License Legal Technician Board: 10/1/2018 - 9/30/2021

Employer: myLLLT.com, PLLC

Number of Lawyers: No response

Areas of Practice: No response

Years of Practice: 4

Years of Membership: 0

Learned of Service From: Other: Current volunteer

CHRISTINE M. CARPENTER
2367 Tacoma Ave S
Tacoma, WA 98402
(253) 457-0967
christy@myLLLT.com

SUMMARY

I am a Limited License Legal Technician in my solo law firm. I was licensed as a LLLT by the Washington State Bar Association in 2016. My prior experience includes over 20 years as a paralegal in non-profit, private firm, and government settings. Nearly all my experience is in family law.

EXPERIENCE

Self-Employed, myLLLT.com <i>Limited License Legal Technician</i>	9/2017 - present
McKinley Irvin, PLLC - Seattle, WA and Tacoma, WA <i>Family Law Paralegal</i>	7/2015 - 9/2017
Self-Employed <i>Contract Family Law Paralegal with McKinley Irvin</i>	7/2012 - 7/2015
McKinley Irvin, PLLC - Seattle, WA and Tacoma, WA <i>Family Law Paralegal</i>	2009 - 7/2012

Worked for the Managing Partner of the Seattle office (David Starks) and the sole partner of the Tacoma office (Marc Christianson). With respect to high-asset divorce and parenting matters:

- Prepared, reviewed and edited, filed, and distributed legal pleadings
- Prepared notebooks for motions, trials, settlement conferences, and mediations
- Reviewed complex tax returns and financial information, and summarized and organized that information into spreadsheets and tables
- Reviewed and indexed high volumes of financial, medical, and property documentation received via records subpoenas and from parties
- Maintained and updated attorney calendars
- Worked closely with clients, attorneys, mediators, and court personnel
- Managed my time efficiently as required by court and attorney deadlines

CITY OF COVINGTON, Covington, WA <i>Administrative/Legal Assistant, Community Development Dept.</i>	2006 - 2009
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As legal assistant in Legal Dept. for five months (in-house legal department dissolved):

- Performed legal research and wrote legal memoranda
- Drafted condemnation and criminal misdemeanor pleadings

- Screened defendants for public defense eligibility

As administrative/legal assistant in Community Development Dept.:

- Researched and assisted in revising land use provisions of the municipal code (code enforcement, development regulations, comprehensive plan amendment process, surface water management)
- Acted as liaison for the Census Bureau, completing local address and map update utilizing GIS software
- Drafted and administered contracts, paid invoices, and arranged for travel and registrations for department members
- Acted as clerk for the Planning Commission, preparing agendas and exhibits, recording meetings, and preparing minutes
- Completed inventory of all permitting forms, instituted numbering system, prioritized revisions, designed graphic for new forms, and created several online fillable "pdf" forms using Acrobat Pro/LiveCycle Designer
- Actively participated in City's "Green Team", with my work directly resulting in City Council's adoption of a "sustainability resolution"

GORDON W. WILCOX, INC. P.S., Seattle, WA

2002 - 2006

Family Law Paralegal

- Performed paralegal duties with respect to mainly high-asset divorce matters
- Drafted pleadings, declarations, correspondence, mediation and arbitration letters, trial briefs, interrogatories, requests for production, and subpoenas
- Interviewed clients and third parties
- Assisted clients in answering discovery requests
- Crafted highly-detailed parenting plans and child support orders
- Reviewed and summarized complex financial documents
- Worked with experts, including business and real estate appraisers, financial advisors, parenting evaluators, and medical and mental health professionals
- Prepared for trial: assembled trial notebooks, scheduled witnesses, prepared Joint Statement of Evidence, communicated with bailiff regarding trial date/time, etc.
- Performed legal research
- Entered agreed orders in *ex parte* department

LAW OFFICE OF RONALD C. MATTSON, Renton, WA

2000 - 2002

Family Law Paralegal

- Interviewed clients and third parties
- Drafted correspondence, pleadings, and settlement proposals
- Assembled trial notebooks
- Prepared discovery materials
- Performed legal research
- Performed some work in the areas of criminal defense, wills and probate, corporate law, and general civil litigation

KING COUNTY BAR ASSOCIATION, Seattle, WA

1996 - 1999

Paralegal and Program Coordinator, Self Help Plus Program

- Screened clients for financial eligibility
- Drafted family law pleadings for *pro se* clients
- Maintained database of clients for conflict checks
- Trained two law student interns each year
- Completed comprehensive training manual for law students
- Organized marketing and community outreach
- Participated in numerous CLE's and trainings on subjects of concern to indigent and vulnerable populations, mainly in the areas of family law, domestic violence, substance abuse, senior issues, public benefits and immigration

INTERNSHIPS, VARIOUS EMPLOYERS

1995 - 1996

Interned at Northwest Women's Law Center, the Department of Social and Health Services in Kent, and with two family law attorneys, Elizabeth Berns and Christina Misner.

CURRENT PROFESSIONAL AFFILIATIONS / VOLUNTEERING

- Member, Washington State Bar Association (2016-present)
- Member, Tacoma-Pierce County Bar Association (2016-present)
- Member, WSBA Limited License Legal Technician Board (2018-present)
- Member, WSBA Family Law Executive Committee (2019-present)
- Member, 2019 Washington State Child Support Work Group
- Member, WSBA Mandatory Malpractice Insurance Task Force (2018-2019)
- Co-Chair, KCBA Neighborhood Legal Clinics LLLT Clinic Subcommittee (2018)
- Volunteer, TPCBA Pro Se Family Law Clinic and USO Military Family Law Clinic

EDUCATION

University of Washington Law School
LLLT Program – Family Law 1, 2 & 3
Certificate of Completion, 2014

Edmonds Community College
A.T.A. Paralegal Program, 1995
G.P.A. 3.79

University of Washington
B.A. Political Science, 1990

REFERENCES

- To be provided upon request

Deanna George

WSBA #

INDIVIDUAL

Congressional District: Not Available

Applied Committee: Limited License Legal Technician Board

Application Reason: I am applying for this committee because I believe that my passion for advocacy and equity aligns greatly with the Board's values. Also, I believe that the advocacy and communication skills I gained while working with the Racial Equity Team to promote bills that reduce barriers to education for historically underserved populations, including those from low socioeconomic backgrounds, and racial minorities have greatly prepared me to fulfill my duties as a Board member.

Employer: AmeriCorps

Number of Lawyers: No response

Areas of Practice: No response

Years of Practice: No response

Years of Membership: 0

Learned of Service From: Colleague or friend

Deanna George
(253) 219-1259

dgeorge73027@tacomacc.edu

April 5, 2021

To: Limited License Legal Technician Board

I am very excited at the opportunity to serve on the LLLT Board (Board). I believe that my passion for advocacy and equity aligns greatly with the Board's values and makes me an exemplary candidate.

Through working with the State Board of Community and Technical Colleges this past year while I attended Tacoma Community College (TCC), I engaged in an assortment of activities as a legislative intern. I particularly enjoyed working with the Racial Equity Team to promote bills that reduce barriers to education for historically underserved populations, including those from low socioeconomic backgrounds, and racial minorities. I believe that these activities have greatly prepared me to fulfill my duties as a Board member.

In addition, I have learned how to communicate with people in a way that values and respects different points of view. This skill has been very useful to my service on the Workforce Education Investment Accountability and Oversight Board, where I help inform the legislature on the best use for the Workforce Education Investment Funds. And I believe it would also be useful to my service on the LLLT Board.

In closing, I believe that my experience and passions will enable me to be an asset to this Board. I thank you for taking the time to read this letter and for considering my candidacy.

Sincerely,

Deanna George

Ms. Nancy Carol Ivarinen
WSBA #21512
Active Attorney
Congressional District: 1

Applied Committee: Limited License Legal Technician Board
Application Reason:

History of Committee Service:

Consumer Protection Committee: 1/1/1996 - 9/30/1997

Consumer Protection Committee: 10/1/1999 - 9/30/2002

Professionalism Committee: 10/1/2001 - 9/30/2002

Consumer Protection Committee: 10/1/2002 - 9/30/2003

Practice of Law Board: 10/1/2003 - 9/30/2004

Disciplinary Board: 10/1/2010 - 9/30/2013

Disciplinary Board: 10/1/2011 - 9/30/2013

Limited License Legal Technician Board: 10/1/2014 - 9/30/2017

Disciplinary Selection Panel: 12/3/2015 - 9/30/2018

Limited License Legal Technician Board: 10/1/2017 - 9/30/2020

Disciplinary Selection Panel: 10/1/2018 - 9/30/2021

Employer: Nancy C. Ivarinen

Number of Lawyers: Solo

Areas of Practice: Collections, Construction, Consumer, Contracts, Debtor-Creditor, Estate Planning/ Probate/ Wills, Family, Foreclosure, General, Health, Housing, Landlord/Tenant, Legal Ethics, Legal Research and Writing, LGBTQ, Real Property<br /

Years of Practice: 32

Years of Membership: 28

Learned of Service From: Email from WSBA

NANCY C. IVARINEN

Attorney
1504 Broadway St.
Bellingham, WA 98225
(360) 527-3525

Attorney at Law since 1988 May 2011- present

General trial practice including: real estate, collections, evictions, liens, construction law, consumer law, contracts, landlord-tenant, elder law, wills and probate, domestic relations, and cases for the pro bono and Moderate Means programs.

Instructor and Program Coordinator 2003 - present

Whatcom Community College Paralegal Studies Program

AWARDS

Whatcom Community College Adjunct Faculty Excellence Award,
June 2017

Equal Access to Justice Award, the Joseph T. Pemberton Service Award
from LAW Advocates of Whatcom County, February 2014

Whatcom County Professional Woman of the Year, 2010; presented by
the Whatcom Women in Business.

WSBA Courageous Award, 2006

Skagit County Bar pro bono award

COMMUNITY SERVICE

Limited License Legal Technician Board, appointed by Washington Supreme Court,
2014 - 2020

Disciplinary Selection Panel; 2016 - present

Washington State Bar Association, Disciplinary Board 2010 – 2013; Chair 2012 -2013.

Practice of Law Board, appointed to 13-member board by Washington Supreme Court,
2002-2010; Board Chair 2009 - 2010

Washington State Bar Association, Consumer Protection Committee 1996 – 2002;
Committee Chair 2001 -2002

Skagit County Bar, Pro bono program Steering Committee
1993 - 2010

Skagit County Community Action Agency Board member
1995 - 2015

Street Law, Whatcom County Volunteer Lawyer Program
1993 to present

Town of Concrete, pro bono clinic for low-income clients with civil legal problems
1996 – 2006 (twice a month)

Whatcom County LAW Advocates, pro bono attorney panel
2011 - Present

PRESENTATIONS

LLLT Program, presented to the Skagit County Bar Association. February 2015.

Skagit County Bar Association, Forewarned is Forearmed: What Every Lawyer Needs to Know About Everyday Practice (*panel member*). December 2013

Skagit County Bar Association, Getting Paid: Ethics and Collecting Attorney Fees. November 2013

WSBA Webinar, Ethics for Providing Unbundled Legal Services. October 2012

Skagit County Bar Association, Landlord Tenant Law Update. Spring 2012

Whatcom County Bar Association and Skagit County Bar Association, Practical and Ethical Considerations of Providing Unbundled Legal Services. Fall 2011

The First International Symposium on Bone Conduction Hearing and Osseointegration, Perspectives of a BAHA Implant recipient, discussion panel, July 2007, Halifax, N.S., Canada.

Cochlear, Inc., presentation to Board of Directors about insurance reimbursement issues for durable medical equipment and BAHA hearing devices, in Denver, May 2006.

American Academy of Audiologists, Entific/Cochlear manufacturing representative and presentation to audiologists about BAHA hearing devices at convention in Salt Lake City, April 2004; Washington D.C., March 2005; and Minneapolis, April 2006.

Landlord-Tenant Law CLE: *Whatcom Volunteer Lawyer Program*, 1994, 1995, 2003, 2004, 2006, 2011; *Skagit Bar* 1994, 1997, 2003, 2005, 2012

Bellingham Police Department, Community based Landlord Tenant class on legal issues for providing crime free housing. 1999 to 2013

Landlord Tenant Law, presented to various non-legal community groups in Whatcom and Skagit County, 1992 to 2014

PREVIOUS EMPLOYMENT

Attorney at Law 2006 - 2011

Northwest Justice Project - Bellingham

Attorney for Project SAFER; providing representation to low-income victims of domestic violence and child abuse for domestic violence protection orders, dissolution and parentage actions.

Attorney at Law 1996 - 2006

General trial practice including, real estate, collections, evictions, liens, construction law, consumer law, contracts, landlord-tenant, elder law, wills and probate, and pro bono cases.

City Attorney 2003 - 2006 Town of Concrete

Act as attorney for the Town of Concrete. Duties include advising the Mayor and Town Council on legal issues, assisting with codification of ordinances including civil, criminal, building code and land use statutes.

Instructor 1996 - 2010 Skagit Valley Community College

Instruct on Real Estate Law and Administrative Law for paralegal program, teaching one to two quarters per year. Developed curriculum for real estate and administrative law classes.

Staff Attorney January 1, 1992 - December 31, 1995

Evergreen Legal Services, Bellingham, Washington

Housing law specialist, represented clients in civil cases including landlord-tenant administrative and consumer law. Provided education, outreach, and instruction to individual clients and non-profit organizations.

Staff Attorney 1988-1991

Idaho Legal Aid Services, Inc.

Represented clients in domestic violence divorces and custody cases involving child abuse, consumer law, landlord-tenant, unemployment appeals, Social Security and senior citizens' issues. Provided education, outreach, and assisted with the development of the Board of Community Guardians.

Jailer 1982-1985

Missoula County Sheriff's Department, Missoula, Montana.

Police Officer 1978-1982

Moscow Police Department, Moscow, Idaho.

DEGREES

University of Montana School of Law, Missoula, Montana
J.D., June 1988

Minnesota State University, Mankato, Minnesota, Bachelor of Science,
Cum Laude, May 1976

Thomi Leigh Manker-Pelech
WSBA #
Individual
Congressional District: 6

Applied Committee: Limited License Legal Technician Board

Application Reason: I have been a paralegal for 15+ years and I am a certified community mediator, certified GAL and certified CASA. I also previously completed the APR 6 program and have sat for the bar exam. I am currently in the last cohort of LLLT's and taking Family Law 3. I have applied to take the July LLLT exam.

Given my history as a paralegal, training and experience as a third party neutral and completion of the APR 6 program, I believe my skill set and knowledge will be an asset to the LLLT board. I have also worked in large law firms, small firms, with solo attorneys and as a freelance paralegal and can offer perspectives from all four.

Employer: No response

Number of Lawyers: No response

Areas of Practice: No response

Years of Practice: No response

Years of Membership: 0

Learned of Service From: Colleague or friend

Thomi Manker, RP

(206) 909-8726 • thomimanker@hotmail.com • Silverdale, WA

Certified Paralegal / Settlement Negotiator / Personal Injury & Family Law

PACE-certified paralegal and WSBA Rule 6 law clerk with 13+ years of experience managing personal injury cases. Top performer and team player, working seamlessly with supervising attorneys, staff, and clients on time-sensitive and complex cases. Solution-oriented, with strong interpersonal and analytical skills. Deep interest and volunteer experience in family law mediation and child advocacy.

Core Competencies & Skills

Case management • Legal & policy analysis • Investigations & discovery • Client communications
Team management • Drafting & reviewing settlements • Contract negotiation & analysis • Dispute resolution
Westlaw • Trail Works • MS Office (70+ wpm)

Professional Experience

Paralegal

Freelance/Contract | Seattle, WA | 2017 – Present

Began freelance paralegal work and LLLT program after serious car accident and related surgeries. Recruited by mentor and Rule 6 sponsor at Phillips Law Firm to provide contract paralegal services for her new firm.

- Draft settlement demands, medical billing summaries, and medical chronologies.
- Negotiate personal injury settlements and subrogation under attorney supervision.

Supervising Settlement Negotiator & Paralegal

Phillips Law Firm | Woodinville, WA | 2008 – 2017

Supported lead attorneys in all aspects of pre-litigation personal injury cases, specializing in settlement negotiation and catastrophic loss case management.

Case management & pre-litigation casework

- Independently managed 150-200 cases at any given time, overseeing all of firm's catastrophic loss cases.
- Personally responsible for \$1.6M/annually (avg) in paralegal fees between 2011 and 2016, representing ~20% of personal injury division's goals.
- Led case management for numerous complex automobile collision cases, including a case involving infant's death after a family member fell asleep driving. Managed insufficient policy limits, conflicts of interests, five settlement guardians ad litem, and communications with family.
- Coordinated independent medical exams, depositions, arbitrations, and client and expert meetings.
- Deep knowledge of case management and architecting, use of experts, efficient medical record review, negotiations, initial litigation steps, and client and adjuster interaction.

Negotiations, valuations & settlement work

- Negotiated firm's first \$1M settlement, working directly with client, expediting subrogation liens, recording collection, and drafting demand. Settlement offer received 15 days after demand receipt.
- Worked directly with insurance adjusters and clients to settle cases within attorney's valuation range.
- Navigated Medicare set asides and special needs trusts and estates for minors and incapacitated clients.
- Drafted settlement agreements, billing summaries, medical chronologies, and summons and complaints.
- Analyzed case valuations and support documentation (i.e., medical records, wage loss reports, police reports).
- Negotiated subrogation liens with state, federal, and private health insurance carriers. Provided analysis of case law and policy to determine right of insurers and medical providers to receive settlement proceeds.

Team management

- Managed pre-litigation program with 10-15 paralegals; hired and trained six settlement work-up processors.
- Liaison between pre-litigation and litigation teams, tracking settlements across firm's personal injury division.
- Created tracking and reporting system to provide overview of team productivity to firm owner, analyzing team's engagement on case management software and direct client communications.

Paralegal

Weiner & Lambka | Renton, WA | 2007 – 2008

Supported attorneys in all aspects of personal injury case management, negotiation, and initial litigation processes.

- Drafted settlement demand letters, summons and complaints, interrogatories, and mediation briefs.
- Compiled and submitted demand packages to insurance carriers.
- Provided case management, communicating with internal team, clients, and insurance adjusters.

Document Clerk

Fredrickson, Meazjeka & Grant, LLP | San Diego, CA | Summer 2006

Worked with legal team to maintain 300 case files, providing legal research and special project support.

Legal Intern

Law Offices Of Matt Dubin | Seattle, WA | Winter 2005

As the sole intern, responsible for case management of roughly 80 personal injury case files.

Education & Certifications

Washington State Bar Association

Limited License Legal Technician (LLLT) License, July 2021 (*expected*)

Relevant coursework: Family Law (dissolution, contested parenting, property division, child support, maintenance, domestic violence, parentage, referral issues, Washington State family court procedure); Community Property; Jurisdiction & Procedures; Legal Writing; Working with Clients in Crisis; Interviewing; LLLT Practice & Ethics.

National Federation of Paralegal Association

Paralegal Advanced Competency (PACE) Certification, 2020

Washington State Bar Association

APR 6 Law Clerk Program Certificate, 2016

King County Bar Association

Chapter 26 Guardian Ad Litem Certification, 2013

University of Washington

Paralegal Certification, 2007

Bachelor of Arts, Law, Society & Justice, 2005

Research assistant: Wrote case briefs for project on violence against women and children in media (Fall 2005).

Study abroad: Coordinated benefit events for local indigenous women and children in Costa Rica (Spring 2005).

Volunteer Experience

Kitsap County Dispute Resolution Center

Certified Level 2 Community Mediator, 2018 – Present

Participated in 17 mediations and 200+ training hours to date, including on domestic violence and family law matters

King County Superior Court, Family Court

Court Appointed Special Advocate (CASA) volunteer, 2017 – Present

Represent best interests of vulnerable children in family law cases

Active Memberships

National Federation of Paralegal Association | Washington State Bar Association | Washington State Association for Justice | Washington State Mediation Association | Washington State Paralegal Association | King County Bar Association