

**LIMITED PRACTICE BOARD**  
**Meeting Minutes for May 13, 2025**  
Virtual Meeting  
9:00 a.m.

**LPB Members Present**

- ☒ Angela Balconi
- ☐ Kim Chose
- ☒ Carla Higginson
- ☒ Jeff Leghorn
- ☒ Tom Peterson, Chair
- ☒ Nate Scott
- ☐ Lori Smith
- ☒ Ursula Jennings
- ☒ Lisa Hamilton

**Liaisons and Staff Present**

- ☒ Cathy Biestek, WSBA Staff Liaison
- ☐ Renata de Carvalho Garcia, RSD Director
- ☐ Bobby Henry, RSD Associate Director
- ☐ Todd Bloom, BOG Liaison
- ☐ Katherine Skinner, RSD Lead
- ☒ Anne Trent, RSD Paralegal

**PUBLIC SESSION**

**Call to Order**

The meeting was called to order at 9:07 a.m. The Chair confirmed that a quorum was present.

**March 11, 2025, Meeting Minutes**

The Limited Practice Board (Board) approved the March 11, 2025, meeting minutes. Carla abstained.

**Client Protection Fund assessment on LPOs**

The Client Protection Board (CPB) voted to approve the inclusion of LPOs in the client protection fund assessment. Historically, LPOs were not assessed for participation in the fund but one claim involving an LPO was paid out, prompting renewed discussion. Based on this, the CPB recommended to the Budget and Audit (B&A) Committee that LPOs be included in the assessment. The Board opposed this recommendation, citing the additional financial burden it would place on LPOs. LPOs are already regulated by multiple entities, including the Department of Financial Institutions. LPOs are required to maintain a bond and insurance and are almost always affiliated with escrow or title companies, which are themselves insured, bonded, and subject to regulatory oversight. The Board argued that this additional assessment would be an unreasonable burden, especially given the existing protections already in place for LPO clients.

Carla, who is also a member of the CPB, shared that the CPB will be submitting an updated recommendation to the B&A Committee that no CPF assessment be imposed on LPOs for FY2026. The CPB also voted to form a subcommittee to explore potential amendments to APR 15, removing reference to LPOs and LPO clients so that LPO clients would not be eligible to receive gifts from the CPF for monetary losses resulting from LPO misconduct. The Board unanimously agreed that no CPF assessment should be imposed on LPOs for the FY2026 budget year. The Board will present this position in a formal letter to the B&A Committee. WSBA staff will prepare an initial draft of the letter for Tom to review. The Board will consider the topic of suggested amendments to APR 15 at a future meeting.



**Committee on Professional Ethics Procedures**

Angie reported that she attended a meeting with a subcommittee of the Committee on Professional Ethics (CPE) that is considering the process and procedures for considering corresponding limited license RPCs when reviewing attorney RPCs for recommended changes, and Angie and a representative from the LLLT Board will work with the subcommittee to provide input on the formulation of the CPE's process and procedures.

**TAXICAB**

Tom participated in the TAXICAB meetings. There was a final recommendation made, the protocol was adopted, and the Supreme Court approved it as submitted.

**LPB member FY2026 applications accepted May 1-30**

The volunteer application period is open, and applications will be accepted until May 30th. The Board will have two attorney member positions that need to be filled with term starting 10/1/2025. Two current members are eligible to re-apply.

**Public Comments**

None.

**Adjournment**

The meeting adjourned at 10:04 a.m.

Respectfully submitted,

Cathy Biestek  
WSBA Staff Liaison to the Limited Practice Board