

## LIMITED LICENSE LEGAL TECHNICIAN (LLLT) BOARD

### Meeting Minutes for May 8, 2023

Meeting held in-person and via Zoom  
1:30 p.m.

#### LLLT Board Members in Attendance:

- |  |  |
|--|--|
| <input checked="" type="checkbox"/> Sarah Bové                 | <input checked="" type="checkbox"/> Crystal Lambert    |
| <input type="checkbox"/> Margaret Bridewell                    | <input checked="" type="checkbox"/> Phyllis Lykken     |
| <input checked="" type="checkbox"/> Jennifer Bull              | <input type="checkbox"/> Thomi Manker                  |
| <input checked="" type="checkbox"/> Christy Carpenter          | <input type="checkbox"/> Carolyn McKinnon (ex officio) |
| <input checked="" type="checkbox"/> Steve Crossland, Chair     | <input checked="" type="checkbox"/> Jennifer Ortega    |
| <input type="checkbox"/> John Darling                          | <input type="checkbox"/> Athan Papailiou               |
| <input type="checkbox"/> Deanna George                         | <input checked="" type="checkbox"/> Amy Riedel         |
| <input checked="" type="checkbox"/> Nancy Ivarinen, Vice Chair | <input type="checkbox"/> Nicole Searing                |

#### Liaisons in Attendance

- Sunitha Anjivel, BOG Liaison
- Lauren Boyd, BOG Liaison
- Cathy Biestek, WSBA Staff Liaison

#### Other WSBA Staff in Attendance:

- Renata de Carvalho Garcia, Chief Regulatory Counsel
- Bobby Henry, RSD Associate Director
- Terra Nevitt, Executive Director
- Kat Skinner, Law Clerk Lead
- Anne Trent, Paralegal

#### Others in Attendance During Some or All of the Meeting:

Charity Rotinski, Jaymi Trimble, Kellie Dightman, Chellie Anderson, CJ Sanders, Connie Major, LeeAnn Halpin, Priscilla Selden, Miryam Gordon, Melinda Jackson, Anna Casey, Lorena Mendoza, Ranae York, Melanie Poe, Andren Moyer, Christine Camper, Lesli Ashley

### PUBLIC SESSION

#### Call to Order / Preliminary Matters

The meeting was called to order at 1:30 p.m. by Chair Steve Crossland.

#### Meeting Minutes

The Board approved the March 13, 2023, meeting minutes.

#### Outreach and Press Update

The Board discussed an article published by the ABAJournal entitled Colorado Will License Paraprofessionals to Perform Limited Legal Work.



### **Committee Updates**

**CLE Committee** Nancy Ivarinen, Jennifer Ortega, Crystal Lambert, Christy Carpenter, Jen Bull and Sarah Bove are working to develop and schedule a mandatory CLE to explain the form to the LLLTs.

**Family Law Practice Area Committee** The FLPA Committee will complete their edits to the Real Property Division Form and its instructions at a work group on May 9th. They will work with the CLE Committee to create a CLE to explain the use of the form.

**Survey Committee** The Committee is considering reaching out to LLLTs to get testimonials from former clients and other information in order to capture the work being completed by and the impact of the LLLT license and to garner support for the program.

**Nominations Committee** Due to the potential downsizing of the Board from 15 members to 11, the Board will wait to actively recruit new Board members for FY2024.

### **Professional Liability Insurance Policy Limits**

The Board discussed LLLT professional liability insurance policy minimum and the homestead exemption with respect to real-property division and retirement-asset allocation matters. The Board considered ways to educate LLLTs on the issue and mentioned the possibility of a rule change limiting LLLTs work on these matters to their policy limits.

### **APR 28 Proposed Amendments Status Update**

The Board was informed that it is anticipated the Supreme Court will review the proposed amendment at their June meeting.

### **FY2024 Meeting Schedule**

The Board voted to have six meetings, four in person and two virtually. The Board will schedule two days for in-person meetings in May, using the second day only if needed.

### **Expense Reimbursement Forms and Process**

Anne Trent, the Regulatory Services Paralegal, gave a presentation regarding the expense reimbursement form and process.

### **Board Member and Public Comments**

The board took public comment from LLLT Miryam Gordon regarding timeliness of the uploading of Board meeting materials to the website in advance of the Board meetings.

### **Adjournment**

Meeting adjourned at 3:06 p.m. by Chair Steve Crossland

Respectfully submitted,

Cathy Biestek,  
WSBA Staff Liaison to LLLT Board