

State Bar of Michigan | 2017-2018 COMMITTEE ANNUAL REPORT

Article VI § 6, Bylaws of the State Bar of Michigan

No later than May 1 of each year, the chair of each committee and sub entity of the Bar, with the assistance of the staff liaison, shall report to the Executive Director on a form provided by the State Bar on the activities and accomplishments of the committee or sub entity.

Unauthorized Practice of the Law

Jurisdiction: · Propose and support measures to educate the public and the legal profession about unauthorized practice of law issues.
· Provide guidance concerning matters involving the alleged unauthorized practice of the law, including filing and prosecuting actions to enjoin the unauthorized practice.

Co-Chair

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Member

Term Ending: 2018

P80152 Farah Raid Hashim Al-khersan, Ann Arbor
P38633 David R. Brake, Lansing
P72511 Sean Michael Cowley, Detroit
P75132 Kathleen M. Hawkins, Jackson
P68725 Peter M. Neu, Holt
P20667 James Albert Smith, Clinton Township

Term Ending: 2019

P52724 Barbara BakerOmerod, Owosso
P69745 Howard H. Brauckmuller, Troy
P40861 Christopher G. Hastings, Grand Rapids
P58801 Lisa M. Robinson Martin, Novi
P74476 Jason Michael Renner, Troy
P29832 William D. Renner, II, Coldwater
P44184 Meghan Kennedy Riordan, Detroit
P53974 Kandra K. Robbins, Lansing
P35047 Phillip A. Schaedler, Adrian

Term Ending: 2020

P11444 James Booth Burr, Jr., Grand Rapids
P61778 David M. Dell, Bloomfield Hills
P47904 Richard M. Delonis, Southfield
P66167 David R. Dyki, Troy
P59050 Katherine Sue Gardner, Frankenmuth
P72255 Ronald D. Griffith, Jr., Saline
P28487 Michael A. Gunderson, Detroit

P39731 Daniel E. Manville, East Lansing
P56994 David S. McDaniel, Ann Arbor
P17874 Philip M. Moilanen, Jackson

Advisor

P56521 Stephen J. Gobbo, Lansing
P33991 Nora M. Hudson, Detroit

State Bar Liaison

Amy Emmons, Lansing
P53603 Danon D. Goodrum-Garland, Lansing
P45515 Laurin' C. Roberts Thomas, Lansing

Committee Meeting Schedule:

Please attach any additional information needed regarding Committee meetings as an addendum.

**Please keep meeting descriptions brief.*

Meeting Type Description	Date	Location
Meeting Type Regularly scheduled meeting	April 27, 2017	State Bar Building
Description Made recommendations regarding UPL complaints, received detailed report on planning for the "Who Should You Trust?" senior education program scheduled for October 2017, and received reports of six other Subcommittees.*		
Meeting Type Regularly scheduled meeting	July 27, 2017	State Bar Building
Description Made recommendations on UPL complaints, received detailed report on planning for the "Who Should You Trust?" senior education program scheduled for October 2017, and received reports of five other Subcommittees.		
Meeting Type Regularly scheduled meeting	November 2, 2017	State Bar Building
Description Introductions and orientation of new members, received info on ABA UPL School, Senate Bill 385, and Regulatory Objectives Workgroup, made recommendations on UPL complaints, and received reports from six Subcommittees.		
Meeting Type Regularly scheduled meeting	February 1, 2018	State Bar Building
Description Adopted detailed report of UPL Strategic Planning Committee, made recommendations regarding UPL complaints, and received info on antitrust litigation and Regulatory Objectives Workgroup.		
Meeting Type		
Description		
Meeting Type		
Description		

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Resources provided by the State Bar of Michigan in support of committee work:

The State Bar provides staff support via the administrative assistance of a paralegal and two staff counsel who provide legal services and manages the State Bar's UPL Department.

The State Bar also provides meeting facilities, food and beverage for meetings, SBM Connect, teleconferencing services, meeting materials, document production services, and a small budget to support the UPL Committee's community outreach projects. In addition, the State Bar staff provides informational pamphlets to SBM members, the general public, and to other institutions serving the public to educate the public and legal profession about the UPL.

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Committee Activities and Strategic Goal Accomplishments:

Please list each accomplishment/activity, and indicate which strategic plan area it supports by checking the corresponding boxes.

<p>On October 11, 2017, as a result of the community outreach planning efforts of the UPL Trust Mills Subcommittee, the UPL Committee in conjunction with the SBM Probate and Estate Planning, Elder Law and Disability Rights, and the Consumer Law Sections presented the "Who Should You Trust?" seminar at 136 senior centers in 51 counties across Michigan to warn about estate planning scams and "trust mills" and provide practical estate planning information. This was a substantial expansion of the program first done in August 2012, at 28 senior centers, in 9 counties across Michigan.</p>	<p> <input type="checkbox"/>G1 <input checked="" type="checkbox"/>G2 <input checked="" type="checkbox"/>G3 <input type="checkbox"/>G4 <input type="checkbox"/>S1 <input type="checkbox"/>S1 <input checked="" type="checkbox"/>S1 <input type="checkbox"/>S1 <input type="checkbox"/>S2 <input checked="" type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S3 <input checked="" type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input checked="" type="checkbox"/>S5 <input type="checkbox"/>S5 <input checked="" type="checkbox"/>S6 <input type="checkbox"/>S6 </p> <p style="text-align: center;">Reset Section</p>
<p>Through its Subcommittee structure (see list under other information), the UPL Committee continues to prepare public and member educational materials on hot topic UPL subject matters and explore opportunities to participate in and/or develop meaningful outreach programming in partnership with relevant Sections and other professionals.</p>	<p> <input type="checkbox"/>G1 <input checked="" type="checkbox"/>G2 <input checked="" type="checkbox"/>G3 <input type="checkbox"/>G4 <input type="checkbox"/>S1 <input type="checkbox"/>S1 <input checked="" type="checkbox"/>S1 <input type="checkbox"/>S1 <input type="checkbox"/>S2 <input checked="" type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S3 <input checked="" type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input checked="" type="checkbox"/>S5 <input type="checkbox"/>S5 <input checked="" type="checkbox"/>S6 <input type="checkbox"/>S6 </p> <p style="text-align: center;">Reset Section</p>
<p>The UPL Committee routinely reviews UPL complaints to determine follow-up needed, if any, and to make recommendations regarding matters that may require litigation to resolve.</p>	<p> <input type="checkbox"/>G1 <input type="checkbox"/>G2 <input checked="" type="checkbox"/>G3 <input type="checkbox"/>G4 <input type="checkbox"/>S1 <input type="checkbox"/>S1 <input checked="" type="checkbox"/>S1 <input type="checkbox"/>S1 <input type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S2 <input type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S3 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S4 <input type="checkbox"/>S5 <input type="checkbox"/>S5 <input type="checkbox"/>S6 <input type="checkbox"/>S6 </p> <p style="text-align: center;">Reset Section</p>
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REPORT Future Goals and Activities:

The Committee is scheduled to meet on April 26, 2018, and July 26, 2018. The UPL Subcommittees develop their meeting schedules during the bar year based on ongoing projects.

The Committee will continue its focus on developing educational resources to further its goal of informing the public and SBM membership on UPL concerns. The Committee is actively using the "gold standard" senior education program, "Who Should You Trust?," to develop comparable outreach programming around its other subcommittee structure in partnership with SBM Sections and other relevant professionals.

Other Information:

In addition to any other important information, please indicate the titles of any workgroups or subcommittees, and attach their annual report as an addendum.

UPL Strategic Planning Subcommittee - convenes annually, typically in January

Co-Chairs: Barbara BakerOmerod and Sean Cowley

Members: David Dyki, Katherine Gardner, Philip Moilanen, Peter Neu, Meghan Kennedy Riordan, James Smith

Purpose: To provide input to the UPL Committee regarding its focus for the bar year to meet its jurisdictional mandate.

UPL Family Law Outreach Subcommittee

Chair: Katherine Sue Gardner

Members: Barbara BakerOmerod, Nora Hudson, David McDaniel, William D. Renner, II, and Phillip Schaedler

Purpose: To educate and inform members and the public with regard to UPL issues in Family Law.

UPL Immigration Subcommittee

Chair: Meghan Kennedy Riordan

Members: Farah Raid Hashim Al-khersan, Howard Brauckmuller, Stephen Gobbo, Daniel Manville, Kandra Robbins

Purpose: To educate and inform members and the public with regard to UPL issues in Immigration Law.

UPL Real Property Outreach Subcommittee

Chair: David Brake

Members: Lisa Martin, David Dell, and Richard Delonis

Purpose: To educate and inform members and the public with regard to UPL issues in Real Property.

UPL Communication Subcommittee

Co-Chairs: Peter Neu and Lisa Martin

Members: Sean Cowley, Katie Branigan Hawkins, James Booth Burr, Phillip Schaedler, David Dyki, James Smith, and Nora Hudson

Purpose: To use effective communication tools to educate members and the public about UPL issues.

UPL Trust Mills & Estate Planning Outreach

Chair: Katie Branigan Hawkins

Members: James Booth Burr, Michael Gunderson, Nora Hudson, Elder Law Section, Probate & Estate Section, and Consumer Law Section

Purpose: To warn and educate seniors about trust mills through the "Who Should You Trust?" senior education program sponsored every other year.

UPL Social/Web-based Media Subcommittee

Chair: David Dyki

Members: Chris Hastings, Philip Moilanen, and Jason Renner

Communications Staff Participation: Samantha Meinke

Purpose: To seek out and develop educational materials for dissemination through Social Media, seeking content and input from other sub-committees.

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Approved by	Approved	Name
Chair		
Co-chair	s/	Barbara BakerOmerod and Sean Cowley
Staff Liaison	s/	Danon D. Goodrum-Garland
Other		

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