



The State Bar of California

ACTION SUMMARY

Task Force on Access Through Innovation of Legal Services
Subcommittee on Alternative Business Structures/Multi-Disciplinary Practice
April 29, 2019
10:30 a.m. – 1:00 p.m.

The State Bar of California
180 Howard Street
Board Room, 4th Floor
San Francisco, CA 94105

Phone: 855-520-7605
Pass Code: 2535410212#

Members Present: Andrew Arruda (Chair), Mark Tuft (Vice-Chair), Jean Clauson, Bridget Gramme, and Joanna Mendoza

Not Present: Angelina Valverde

Others Present: Mimi Lee, Lauren McCurdy, Doan Nguyen, Toby Rothschild, and Andrew Tuft

ACTION SUMMARY

A. Chair's Report

1. **Roll Call**

The Chair called the meeting to order and asked staff to take a roll call of the task force members.

2. **Call for Public Comment**

The Chair inquired but there was no one present who wished to provide public comment.

3. **Chair's Report**

The Chair welcomed the members

4. **Approval of Action Summary from the April 8, 2019 Meeting**

Joanna Mendoza moved, and Jean Clauson seconded. The Motion was approved by unanimous roll call vote with five approved.

B. Action / Report and Recommendation

1. The Committee approved the following four recommendations:

- a. Lawyers in traditional practice and firms stay under the current regulatory framework with a mind towards expanding access to justice through innovation.
- b. We recommend that we widen the scope of our charter to include entities which may or may not have lawyer ownership or operational management and/or control.
- c. Entities can be composed of lawyers, non-lawyers or a combination of the two however, regulation would be required and may differ depending on the structure of the entity.
- d. Non-lawyers will be authorized to offer limited legal services as an exemption to UPL with appropriate regulation.

Andrew Arruda moved, and Joanna Mendoza seconded. The Motion was approved by unanimous roll call vote with five approved.

2. The Committee approved the following recommendation:

- a. Non-lawyers be authorized to offer limited legal services as an exemption to the unauthorized practice of law with appropriate legislation.

Joanna Mendoza moved, and Joanna Bridget seconded. The Motion was approved by unanimous roll call vote with four approved. Mark Tuft was absent for vote.

3. Discussion of assigned questions for next meeting:

- a. What will these entities be allowed to do and not allowed to do? (Andrew Arruda and Bridget Gramme)
- b. What exactly will be regulated? Individuals? Entity? Hybrid? (Joanna Mendoza)
- c. What organization(s) will regulate these individuals or entities? State Bar and Federal Body? (Jean Clauson)

ADJOURN

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The notice and agenda is available at: <http://board.calbar.ca.gov/Committees.aspx>.