



# The State Bar of California

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## ACTION SUMMARY

**Task Force on Access Through Innovation of Legal Services**  
**Subcommittee on Alternative Business Structures/Multi-Disciplinary Practice**  
**Monday, June 10, 2019**  
**10:00 a.m. – 3:00 p.m.**

**The State Bar of California**  
**180 Howard Street**  
**8th Floor, Room 8A**  
**San Francisco, CA 94105**  
**(415) 538-2116**

**Members Present:** Andrew Arruda (Chair), Mark Tuft (Vice-Chair), Bridget Gramme (by telephone), and Joanna Mendoza

**Not Present:** Jean Clauson, Angelina Valverde

**Others Present:** Gregory Fortescue (by telephone), Angela Marlaud, Lauren McCurdy, and Randall Difuntorum

To Join by Conference Call  
Toll-Free Dial-In Number: 1-855-520-7605  
Conference Code: 253-541-0212#

Additional Locations  
5998 Alcala Park, San Diego, CA 92110  
500 Grand Avenue, Suite 100, Des Moines, IA 50309

## 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 May 13, 2019 Meeting**  
No action was taken at the May 13, 2019 because there was no quorum.  
Therefore, there is no action summary.

**B. Action / Report and Recommendation**

1. Review Report on the Task Force Recommendation: Lawyers in traditional practice and firms stay under the current regulatory framework with a mind towards expanding access to justice through innovation  
*Ms. Mendoza moved, and Mr. Tuft seconded. The Motion was approved by unanimous roll call vote with four approved.*
2. Review Report on the Task Force Recommendation: Widen the scope of our charter to include entities which may or may not have lawyer ownership or operational management and/or control  
*Ms. Mendoza moved, and Mr. Tuft seconded. The Motion was approved by unanimous roll call vote with four approved.*
3. Review Report on the Task Force Recommendation: 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  
*The subcommittee was assigned to revise the report in accordance with the subcommittee's discussion.*
4. Review Report on the Task Force Recommendation: Non-lawyers will be authorized to offer limited legal services as an exemption to UPL with appropriate regulation  
*Ms. Gramme was assigned to revise the report in accordance with the subcommittee's discussion.*
5. Review Report on the Task Force Recommendation: New models being proposed would include individuals and entities working for-profit and would not be limited to not for profits.  
*Ms. Mendoza moved, and Mr. Tuft seconded. The Motion was approved by unanimous roll call vote with three approved.*

**ADJOURN**

*In compliance with the Americans with Disabilities Act, those requiring accommodations at this meeting should notify Lauren McCurdy at (415) 538-2107. Please provide notification at least 72 hours prior to the meeting to allow sufficient time to make arrangements for accommodations at this meeting.*