



The State Bar *of California*

OPEN SESSION

AGENDA ITEM

54-118 JULY 2020

BOARD EXECUTIVE COMMITTEE III.D

DATE: July 15, 2020

TO: Members, Board Executive Committee
Members, Board of Trustees

FROM: Mark Broughton, Board Executive Committee Appointments Liaison
Juan De La Cruz, Board Executive Committee Appointments Liaison

SUBJECT: Appointment of Chair, Vice-Chair, and Members of the Client Security Fund Commission

EXECUTIVE SUMMARY

This agenda item seeks approval of recommendations for the appointment of Chair, Vice-Chair, one attorney member, and one public member of the Client Security Fund Commission. After consideration of the applications received, and the recommendations of the existing members of the commission, the Appointments Liaisons recommend the appointment of Robert C. Bowman, Jr. to the position of Chair, and Jordan Wright to the position of Vice-Chair. The Appointment Liaisons also recommend the appointment of Melanie O'Day to fill the attorney member vacancy, and Joseph Dimino to fill the public member vacancy. These recommendations are consistent with the commission's recommendations.

BACKGROUND

The Client Security Fund reimburses victims who have lost money or property due to theft or an equivalent dishonest act committed by a California lawyer acting in a professional capacity. To administer the Client Security Fund, the Board of Trustees established the Client Security Fund Commission. At its May 28, 2020 meeting, the commission voted to recommend the appointment of Robert C. Bowman, Jr. to the position of Chair, and Jordan Wright to the position of Vice-Chair. The commission further resolved to recommend the appointment of Melanie O'Day to fill an attorney member vacancy, and Joseph Dimino to fill a public member vacancy.

In this review, and historically, when reviewing applications for appointment, the State Bar has not only sought diversity in professional background, but also in gender, age, race, nationality, ethnicity, geographic region, sexual orientation, disability, and life experience. The State Bar also considers proven commitment to volunteer work or a strong indication of capacity or desire for making the expected time commitment to the commission. Another important consideration has been whether an applicant's work and/or life experience would be helpful in making determinations on applications to the Client Security Fund, especially if an area of experience is lacking among the current membership.

DISCUSSION

We recommend the appointment of Robert C. Bowman, Jr. to the position of Chair of the commission, and Jordan Wright to the position of Vice-Chair.

Robert currently serves as an attorney member and Vice-Chair of the commission. Robert has been a successful member of the commission since 2017, and his term is scheduled to end in September 2020. He is currently the owner and sole shareholder of the Law Office of Bowman and Associates in Sacramento. Robert's practice includes employment law, civil litigation, and family law, in addition to other general practice areas. Much of his practice consists of representing plaintiffs in bringing employment and discrimination actions against employers. He remains active in the legal community by serving as a member of the California Employment Lawyers Association and a pro tem judge in El Dorado County. Robert's skill set and experience will be invaluable to the commission through its next term, as he brings his vast knowledge of family law and employment law to the commission. He has been an instructor for both the University of the Pacific and the University of Phoenix, and is an active volunteer in his community. Robert has demonstrated his desire and ability to devote his time to the commission.

Jordan currently serves as a public member. Jordan's verified commitment to public service and his prior experience as a government advisor and liaison has made him an invaluable addition to the commission. After achieving his MA in Public Policy from Claremont Graduate University, and his BA in Political Science from the University of California, Riverside, Jordan has exhibited a history of serving his community as a member of several boards, commissions, and committees. Jordan is currently a policy advisor for the San Bernardino County Board of Supervisors, where he advises the Board on issues related to health and human services. He has been a dedicated and reliable member of the commission, and his knowledge and experience within the public sector provide a relevant perspective when evaluating applications.

We also recommend the appointment of Melanie O'Day to fill an attorney member vacancy, and Joseph Dimino to fill a public member vacancy.

Melanie is an attorney who works for the Financial Industry Regulatory Authority (FINRA). Whereas Melanie is an attorney, she does not practice law in her current position; she conducts investigative exams of securities brokers and works with FINRA attorneys to determine which charges to pursue and what restitution might be appropriate. She believes her work prepares her for reviewing claims and applying the rules for fund eligibility. Melanie is also an active

volunteer with multiple organizations, including the ABA, the Junior League, and the LA Conservancy. She states that her career as a financial regulator demonstrates her commitment to helping victims of fraud and would make her an asset to the commission.

Joseph is the sole proprietor of a tax and financial services company. He prepares tax returns and advises more than 500 clients on their finances and retirement plans, and he represents clients before the IRS and the Franchise Tax Board. Joseph has experience analyzing complex financial problems and reviewing financial statements. He brings the perspective of a nonattorney who works with a large number of clients, and he has expressed his interest in serving on a commission with the primary objective of protecting the public from dishonest attorney conduct. Joseph also served in the military.

FISCAL/PERSONNEL IMPACT

None

AMENDMENTS TO RULES OF THE STATE BAR

None

AMENDMENTS TO BOARD OF TRUSTEES POLICY MANUAL

None

STRATEGIC PLAN GOALS & OBJECTIVES

Goal: None – core business operations

RECOMMENDATIONS

Should the Board Executive Committee concur in the proposed action, passage of the following resolution is recommended:

RESOLVED, that the Board Executive Committee recommends that the Board of Trustees approve the appointment of the following new members to serve on the Client Security Fund Commission for a four year term:

1. Melanie O'Day to serve as an attorney member of the Client Security Fund Commission; and
2. Joseph Dimino to serve as a public member of the Client Security Fund Commission.

FURTHER RESOLVED, that the Board Executive Committee recommends that the Board of Trustees approve the recommendation to appoint the following members to serve as Chair and Vice-Chair of the Client Security Fund Commission:

1. Robert C. Bowman, Jr. to serve as Chair of the Client Security Fund Commission for the 2020–2021 commission year; and
2. Jordan Wright to serve as of Vice-Chair of the Client Security Fund Commission for the 2020–2021 commission year.

Should the Board of Trustees concur in the proposed action, passage of the following resolution is recommended:

RESOLVED, that the Board of Trustees, upon recommendation of the Board Executive Committee, approves the recommended appointments for members and officers of the Client Security Fund Commission.

ATTACHMENT(S) LIST

None