The names and addresses of 2021 SDCBA members are located at the SDCBA offices at 401 W. A Street, Suite 1100, San Diego, California.
LETTER FROM

2021 SDCBA PRESIDENT RENÉE N.G. STACKHOUSE & SDCBA EXECUTIVE DIRECTOR JILL EPSTEIN

2021 was a year of collaborating with the courts and community partners, advocating on social issues, and celebrating our re-opening after well over a year of COVID-19 restrictions.

We continued close collaboration with the United States District Court, Southern District of California, 4th District Court of Appeal, and San Diego Superior Court to keep the legal community updated on the impact of COVID-19 on our justice system. In addition to inviting local bar-related organizations to partner in those community events, we also included these organizations as partners in a wide range of diversity, equity, and inclusion programs.

Several significant incidents took place in 2021 and the SDCBA, as a champion of the justice system, stepped up with strong public statements. In January, the SDCBA issued a statement condemning the actions of those who sought to undermine our constitution and democracy. In March, we condemned criminal acts targeting the Asian-American and Pacific Islander Communities. In June, we denounced personal criticism of a federal judge. Each of these statements went through a thorough and thoughtful process, as designed by our Public Positions and Comment Guidelines.

After many months (16 to be exact!) of virtual programs and meetings because of COVID-19, we were thrilled to safely re-open in July. Our fully vaccinated staff came back to the office and our Bar Center welcomed members once again. We gracefully stepped into the “new normal” and our members joined us. Our in-person, outdoor 2021 Summer Social was a joyful gathering and our in-person Stepping Up to the Bar re-connected us.

Everything we did during the year was for you, our members. Our success depends on you. Our impact is measured by you. We hope we made you proud as we embraced our mission: To connect lawyers and support their success and fulfillment.

Yours,

Renée N.G. Stackhouse
2021 SDCBA President

Jill Epstein
Executive Director
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Our Sections continue to be the lifeblood of the organization, bringing together attorneys in different practice areas to share, collaborate, and learn — through live programming and via our ever-popular listserv communities. Thank you to all our 2021 Section leaders for supporting and perpetuating a fantastic experience for our members.

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2021 SDCBA

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* Denotes 2021 SDCBA Board Member

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- Rob Shaughnessy

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- James Maroulis
- Megan Moore
- Phil Stephen

**Leadership Academy Subcommittee**
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- Nicole Heeder
- Anna Romanskaya
- Cheryl Shitabata
- Heidi Weaver

**Leadership Speaker Series Subcommittee**
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- Megan Moore
- Anna Romanskaya
- Pauline Villanueva
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- Anna Romanskaya
- Matt Wechter

**Technology Committee**
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- Phil Stephen
- Matt Wechter

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- Stephanie Atkinson – Chair
- Jake Zindulka – Vice Chair
- Christopher Champine
- Sara Gold
- Stephanie Pengilley
- Alexi Silverman

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**NLD NEW LAWYER DIVISION**

The San Diego County Bar Association’s New Lawyer Division (NLD) is a community for law students and new lawyers in their first 7 years of practice. NLD organizes social events, educational programs, and community outreach opportunities. Membership is free and open to all SDCBA law student members and members in their first 7 years of practice.
DIVERSITY & INCLUSION

The SDCBA is fortunate to have an active and vibrant Committee on Diversity and Inclusion. The Committee’s purpose is to promote diversity, equity, inclusion, and improved access to justice in all aspects of the legal profession and the community. The Committee supports the SDCBA Diversity Fellowship Program, and includes the Anti-Racism Sub-Committee and the Different Abilities Sub-Committee.

Diversity Fellowship Program

The San Diego County Bar Association and the Association of Corporate Counsel — San Diego Chapter created the San Diego Diversity Fellowship Program (DFP) in 2009 as a response to the low number of diverse attorneys practicing law in San Diego County law firms, corporate legal departments, and public agencies. The Program provides an opportunity for talented diverse, first year and part-time second year law students to learn and develop skills necessary to be successful in the legal field while exposing participating employers to qualified individuals who might not otherwise be considered under traditional recruitment processes. In 2021, we were proud to host 22 fellows at 20 law firms and corporate legal departments over the summer.

Dialogue on Diversity

Highlighting the SDCBA’s commitment to diversity and inclusion, in collaboration with other San Diego diversity bar associations, these events foster a dialogue about a variety of equity issues in our community and beyond. Topics included:

- De-weaponizing Political Diversity
- Cultural Competence: Representing & Affirming LGBTQ+ Clients
- Barriers Obstructing Access to Justice in the Latinx Community
- The Intersectionality Between Race, Poverty and the Criminal Justice System

Exchange on Equity Roundtables

Open to the entire legal community, these roundtables provide a unique opportunity for dialogue on the intersection of race and justice in order to better promote anti-racism within our community and beyond. The following topics were covered:

- Leading as a Community Racial Equity Organizational Assessment
- Money Talks: How to be a financial activist for economic empowerment.
- San Diego Superior Court’s ABLE Committee – A Collective Look Within
- AAPI Hate, Accountability, and Allyship
- Ideas on Diversity, Equity & Inclusion (DEI) Practices for Your Organization
- Book Discussion - How to Be an Antiracist by Dr. Ibram X. Kendi
- Book Discussion: Caste – The Origins of Our Discontents by Isabel Wilkerson
- Being Your Whole Self in the Workplace
The original SDCBA Diversity Pledge was launched in 2007. Between then and 2021, our community and society have evolved significantly, necessitating a refresh and relaunch of the pledge. On March 9, 2021, after nearly a year of diligent work, the SDCBA Committee on Diversity and Inclusion was proud to launch the updated pledge, which by the end of the year has secured 54 area firms, government agencies, and legal organizations as signatories. The Diversity Pledge encourages law firms and other legal organizations to pledge to increase the number of diverse attorneys being hired and promoted to management and leadership positions within their organizations.

The Pledge:

Although San Diego County is a diverse community, that diversity is not represented at the management and leadership levels of many legal organizations relative to the demographics of our community. Clients and the public expect the San Diego legal community to reflect this diversity.

We recognize that diversity is an expansive, flexible, and evolving concept encompassing a set of characteristics, experiences, and conditions (whether actual or perceived) that reflects an individual’s membership in an underrepresented, underserved, or historically disadvantaged group. These characteristics include race, ethnicity, color, national origin, ancestry, sex, gender, gender identity, gender expression, sexual orientation, disability, and other relevant characteristics as the context requires, as well as the intersectionality of these characteristics and other groups historically underrepresented in the legal profession. Attorneys with any of these characteristics will be referred to throughout this document as “Underrepresented Attorneys.”

We pledge to use our best efforts to meet the following goals:

- **Hiring & Retention:** To hire and retain entry-level and lateral Underrepresented Attorneys who represent the diversity of the population of the County of San Diego and the surrounding region.
- **Promotion & Leadership:** To promote underrepresented attorneys to management, supervisory, executive, leadership, and similar senior positions.
- **Engagement of Outside Counsel:** To recommend the participation of underrepresented attorneys to staff a matter on behalf of the outside law firm.
- **Participation in Legal Community Diversity Initiatives:** To regularly and actively participate in diversity and inclusion events, volunteer initiatives, and diversity pathway programs organized by the San Diego County Bar Association (SDCBA), SDCBA Committee on Diversity and Inclusion, affinity bar associations, and other law-related organizations.

2021 Diversity Pledge Signatories

- Allen Matkins
- American Specialty Health
- Ames Karanjia LLP
- Antonyan Miranda, LLP
- Burke Williams & Sorensen LLP
- Casa Cornelia Law Center
- Casey Gerry Schenk Francavilla Blatt & Penfield LLP
- Children’s Legal Services of San Diego
- City of National City, Office of the City Attorney
- Cozen O’Connor
- Dentons US LLP
- Devaney Pate Morris & Cameron
- Dinsmore & Shohl LLP
- Duane Morris LLP
- Ferns & Britton, APC
- Foley & Lardner LLP
- Fragomen
- Haeggquist & Eck, LLP
- Higgs, Fletcher & Mack
- Hooper, Lundy & Bookman
- Horton, Oberrecht, & Kirkpatrick
- Hughes & Pizzuto, APC
- Jackson Lewis P.C.
- Jones Day
- Klinedinst PC
- Legal Aid Society of San Diego
- Littler Mendelson, P.C.
- Mandour & Associates, APC
- Meyers Nave
- Mintz
- Mission Personal Injury Lawyers, P.C.
- MoginRubin LLP
- Niddrie Addams Fuller Singh LLP
- Noonan Lance Boyer & Banach
- Paul Plevin
- Petit Kohn Ingrassia Lutz & Dolin PC
- Pillsbury Winthrop Shaw Pittman LLP
- Procopio, Cory, Hargreaves & Savitch LLP
- Rimon PC
- RJS Law
- San Diego Biz Law APC
- San Diego City Attorney’s Office
- San Diego County District Attorney’s Office
- San Diego County Public Defenders Office
- San Diego Volunteer Lawyer Program, Inc.
- Sandler, Lesny, Laube, Byer & Valdez LLP
- Schwartz Sernedjian Cauley & Evans LLP
- Selitzer Kaplan McMahon Vitek
- Shanf Faust Lawyers, Ltd.
- Shoecraft & Associates
- Sony Electronics Inc.
- Wilson Turner Kosmo LLP
- Wingert Crebing Brubaker & Juskie, LLP
- Wirtz Law APC
Thanks to our ability to rapidly pivot and innovate in response to the pandemic in 2020, the SDCBA was able to gain momentum in 2021, managing to keep membership numbers in the 8000 range, including attracting over 500 new attorney members. This was accomplished with our largest and most creative membership marketing campaign ever, along with offering attractive products and services that truly resonated with members.

The CLE Annual Pass was purchased by 347 members during its inaugural year. The CLE Annual Pass offers members unlimited free access to all live and pre-recorded CLE programming from our extensive on-demand library of CLE content. The pass is good throughout the calendar year and costs just $100.

Membership renewal and recruiting is now conducted primarily through digital means. Although paper applications and paying by check are still preferred by some members, the majority of membership has shifted to digital renewals and payment processing, helping us provide a better all-around member experience while saving thousands of dollars in direct mail costs as well as dozens of staff hours during our busiest time of the year.

First year attorneys are a larger crop of members than in recent years. The increase in our membership pipeline should help fight the downward trends we’ve been seeing in our newer attorney categories.

Many of our members work for 100% Club organizations — those where 100% of their attorney staff are SDCBA members. Many organizations choose to pay for this membership en masse as a benefit to its attorneys — yet, many of their attorneys have no idea they are SDCBA members! So in Fall 2021, we launched the monthly “100% Gazette” email, with content tailored specifically to 100% Club members. Response was immediately positive.
MEMBERSHIP CAMPAIGN

"WHY I BELONG"

Working hand-in-hand with the SDCBA Marketing team, we continued this email campaign launched in 2020, targeting attorneys in San Diego County who have either never been SDCBA members or let their membership lapse years ago. We identified them from a list available from the State Bar of California. This allowed us to reach out to the roughly 11,000 San Diego County attorneys who were not members.

The "Why I Belong" campaign features real, first-person testimonials from current SDCBA members, representing a wide diversity of voices, from Board members to new members, varied by ethnic background and gender too. The campaign provided a fresh alternative to the standard sales-copy approach to email solicitations.

The networking helped me in my decision to go solo and has brought in many referrals. The social aspect I get from these experiences is something I truly enjoy.

BRENDA LOPEZ
PATTERSON, LOPEZ, BANUELOS, KHITERMAN, LLP
SDCBA BOARD OF DIRECTORS

The SDCBA offers a whole menu of opportunities to connect, learn, grow, and succeed — in whatever ways that interest you.

JONAH A. TOLENO
PARTNER, SHUSTAK REYNOLDS & PARTNERS, P.C.

The SDCBA continuously supports its members’ success with a plethora of resources, tools, and ways to connect with a diverse community of legal professionals from all walks of life and all different practice areas.

SARCOUT “SED” ZANGANA
ASSOCIATE ATTORNEY, SO. CAL. REALTY LAW VICE-CHAIR, SDCBA COMMITTEE ON DIVERSITY AND INCLUSION

The SDCBA brings people together, into a community. Our association is rich with people eager and able to enhance your expertise and experiences as a lawyer.

WILSON SCHOOLEY
SAN DIEGO VOLUNTEER LAWYER PROGRAM, INC.
SDCBA BOARD OF DIRECTORS
The San Diego County Bar Association thanks all of the San Diego law firms, public agencies, and nonprofit legal organizations that have provided SDCBA membership to 100% of their attorneys in 2021. Your commitment to the San Diego legal community is greatly appreciated.

<table>
<thead>
<tr>
<th>Law Firms</th>
<th>Nonprofit Organizations</th>
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<tbody>
<tr>
<td>Ames Karanjia LLP</td>
<td>Law Offices of Beatrice L. Snider, APC</td>
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<td>Antonyan Miranda, LLP</td>
<td>Legal Aid Society of San Diego, Inc.</td>
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<td>Atkinson, Andelson, Loya, Ruud &amp; Romo</td>
<td>Lincoln Gustafson &amp; Cercos LLP</td>
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<td>Balestrieri Potocki &amp; Holmes</td>
<td>Littler Mendelson PC</td>
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<td>Beamer, Lauth, Steinley &amp; Bond, LLP</td>
<td>Mara Law Firm, APLC</td>
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<td>Bender &amp; Critz, APLC</td>
<td>McCloskey Waring Waisman &amp; Drury LLP</td>
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<td>Best Best &amp; Krieger LLP</td>
<td>McDougall Love Eckis Boehmer Foley Lyon &amp; Canals</td>
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<td>Blackmar, Principo &amp; Schmelter APC</td>
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<td>Blanchard, Krasner &amp; French APC</td>
<td>MoginRubin LLP</td>
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<td>Bobbitt, Pinckard &amp; Fields, APC</td>
<td>Moore, Schulman &amp; Moore, APC</td>
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<td>Bonnies R. Moss &amp; Associates</td>
<td>Musick, Peeler &amp; Garrett LLP</td>
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<td>Brierton Jones &amp; Jones, LLP</td>
<td>Neil, Dymott, Frank, McCabe &amp; Hudson APLC</td>
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<td>Burke, Williams &amp; Sorensen, LLP</td>
<td>Noonan Lance Boyer &amp; Banach LLP</td>
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<td>Casey Gerry Schenk Francavilla Blatt &amp; Penfield, LLP</td>
<td>Office of the Public Defender</td>
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<td>Christensen &amp; Spath LLP</td>
<td>Office of the San Diego City Attorney</td>
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<td>Cohelen Khoury &amp; Singer</td>
<td>Paul, Plevin, Sullivan &amp; Connaughton LLP</td>
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<td>Collinsonworth, Specht, Calkins &amp; Giampaoli, LLP</td>
<td>Pettit Kohn Ingrassia Lutz &amp; Dolin</td>
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<td>District Attorney's Office</td>
<td>Procopio, Cory, Hargreaves &amp; Savitch LLP</td>
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<td>Donald R. Holben &amp; Associates, APC</td>
<td>Pyle Sims Duncan &amp; Stevenson APC</td>
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<td>Dunn DeSantis Walt &amp; Kendrick, LLP</td>
<td>San Diego Unified Port District</td>
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<td>Selman Breitman, LLP</td>
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<td>Shoecraft Burton, LLP</td>
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<td>Shustak Reynolds &amp; Partners, PC</td>
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<td>Siegel, Moreno &amp; Stettler, APC</td>
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<td>Smith Steiner Vanderpool, APC</td>
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<td>Green Bryant &amp; French, LLP</td>
<td>Solomon Minton Cardinal Doyle &amp; Smith LLP</td>
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<td>Greene &amp; Roberts LLP</td>
<td>Solomon Ward Seidenwurm &amp; Smith, LLP</td>
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<td>Grimm, Vranjes &amp; Greer LLP</td>
<td>Solomon, Grindle, Lidstad &amp; Wintringer, APC</td>
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<td>Hahn Loeser &amp; Parks, LLP</td>
<td>Stoel Rives LLP</td>
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<td>Henderson, Caverly &amp; Pum LLP</td>
<td>Stokes Wagner, ALC</td>
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<td>Higgs Fletcher &amp; Mack LLP</td>
<td>Sullivan Hill Rez &amp; Engel, APLC</td>
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<td>Hoffman &amp; Forde</td>
<td>Thorsnes Bartolotta McGuire LLP</td>
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<td>Hooper, Lundy &amp; Bookman, PC</td>
<td>Tresp Law, APC</td>
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<td>Horton, Oberrecht, Kirkpatrick &amp; Martha, APC</td>
<td>Vanst Law</td>
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<td>Hughes &amp; Pizzuto, APC</td>
<td>Walsh McKeen Furcolo LLP</td>
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<td>Jackson Lewis PC</td>
<td>Wilson Turner Kosmo LLP</td>
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<td>Johnson Fistel LLP</td>
<td>Winet Patrick Gayer Creighton &amp; Hanes</td>
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<td>Judkins Glatt &amp; Rich LLP</td>
<td>Wingert Grebing Brubaker &amp; Juskie LLP</td>
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<td>JWB Family Law</td>
<td>Wirtz Law APC</td>
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<td>Kennedy &amp; Souza, APC</td>
<td>Witham Mahoney &amp; Abbott, LLP</td>
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<td>Klinedinst PC</td>
<td>Withers Bergman LLP</td>
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<td>Koeller Nebecker Carlson &amp; Haluck LLP</td>
<td>Wright, L'Estrange &amp; Ergastolo</td>
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<tr>
<td>Konoske Akiyama</td>
<td>Brust LLP</td>
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WITH GRATITUDE

The SDCBA gratefully acknowledges the generous commitment provided by members who support our community at the Patron and Friend membership levels.

SDCBA
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SDCBA
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Randall E. Kay
Marguerite C. Lorenz
Christine Murphy
Anne Perry
Kristi E. Pfister
Stella Shvil
Bar-Wide Annual Social Events

Each year the SDCBA hosts annual bar-wide social/networking events to connect and celebrate our legal community including:

» Law Student Welcome Reception & Legal Community Open House
» Judicial Reception celebrating our newly elected and appointed judges
» Awards Ceremony & Celebration of Community Service
» Summer Social
» Patron & 100% Club Appreciation Reception
» Membership Meeting
» Stepping Up to the Bar
Court Updates & Connections with the Bench

Leveraging our unique relationship with our local courts, we provided critical updates regarding court procedure related to the ongoing COVID-19 pandemic from the California Court of Appeals - 4th District, San Diego Superior Court, U.S. District Court - Southern District of California, U.S. Bankruptcy Court - Southern District of California and the U.S Tax Court - Southern District of California, as well as unique events dedicated to connecting with our local bench. Highlights included:

» State the Appellate Court: Annual Update
» State of the Bankruptcy Court: Perspectives from the Clerks of the Court
» State of the Court Address: San Diego Superior Court
» State of the Court Address: U.S District Court, Southern District
» Annual Bench Bar Media Event: Social Media Regulations & Cancel Culture: Free Speech & the Modern Media
» Annual Federal and State Tax Update
» Court Practice Series: California Court of Appeals, 4th District
» Court Practice Series: U.S Bankruptcy Court, Southern District of CA
» Break Outs with Bench: Juvenile Law, Civil Law, Criminal Law, Family Law, and Probate Law
» A New Look at Trials During COVID-19: A Perspective from the Bench & Trial Attorneys

Technology & Law Practice Management

Our weekly Tech Tuesdays and annual Law + Tech Summit provided essentials for law practice management for small and solo practitioners. Highlights included

» 4th Annual Law + Tech Summit
» Using Client Portals to Secure and Streamline Communications
» Finance for Lawyers - Fundamentals of Accounting and Finance
» Small/Solo Series - Making the Leap to Solo Practice
» Small/Solo Series - Must-Have Technology for New Law Firms
» Dialogue on Diversity: De-weaponizing Political Diversity
» Dialogue on Diversity: Culture Competencies – Representing & Affirming LBBTQ+ Clients
» Dialogue on Diversity: Barriers Obstructing Access to Justice in the Latinx Community
» Dialogue on Diversity: Barriers Obstructing Access to Justice in the Latinx Community
» Exchange on Equity Roundtable: San Diego

» Superior Court’s New Anti-Bias & Legal Equality (ABLE) Committee – A Collective Look Within
» Exchange on Equity Roundtable: AAPI Hate, Accountability, and Allyship
» Exchange on Equity Roundtable: Measure B – The People Have Spoken
» Annual Spring Celebration of Diversity Reception
» Annual Holidays Around the World Reception
» Annual Diversity Fellowship Program

Practice Area
The SDCBA’s 26 Sections by area of practice produced programs comprising of a variety of timely and relevant topics related to the practice of law. Highlights include:

» Best Practices in Virtual Arbitration
» Demystifying Family Law Appeals: What Trial and Appellate Attorneys Should Know
» Annual Corporate & LLC Update 2021
» Opening & Closing Statements with Renowned Trial Attorneys
» Construction Contract Termination: What to Do When a Project Goes Wrong
» Privacy & Cybersecurity: Incident Response
» 9th Annual Beer, Wine, and Spirits Virtual Law Update
» Estate Planning, Trust and Probate Law 2020 Year in Review

» How to get into IP Law with any background
» Roundtable: Exploring Careers in Juvenile Law
» What's New and Notable - Employment Law Update 2021
» Ethical and Legal Challenges of Providing On-site Healthcare to Protestors
» The Effects of COVID-19 on Landlord/Tenant Law
» California Income and Franchise Tax Litigation Update
» New Developments at the Workers' Compensation Appeals Board
Building Lawyers as Leaders

As of one of the six pillars of the SDCBA’s 2020-22 Strategic Goals, we continued to expand and provide unique opportunities for lawyers to craft and hone their leadership skills, as well as connect with open leadership positions in the San Diego community. Highlights include:

» Leadership Speaker Series: Governance Essentials for Leaders
» Leadership Speaker Series: Lawyers Serving on Corporate Boards
» Leadership Speaker Series: Pathways to a Judicial Career

Additionally, the SDCBA selected Scholars for the inaugural six-month/40-hour Leadership Academy, launching in January 2022.

New Lawyer Division (NLD)

Our thriving community of new lawyers and law students produced a variety of programs and networking events to provide unique opportunities to connect with other members in their initial stage of practice.

» Pro Tips for Law Students
» Court Practice Series: Bankruptcy Court
» Court Practice Series: California Court of Appeal, 4th District
Creation of the SDCBA CLE Center™

This 1-stop CLE shop (a rebrand of the SDCBA's CLE Catalog) was created to address all of the CLE requirements for a lawyer practicing in California. With live and pre-recorded options connecting lawyers to today’s hot topics and evergreen information, featuring presentations from national experts and our local judiciary, the SDCBA CLE Center provides a broad array of program topics spanning the gamut of practice areas and special credits, that cater to the needs, budget, and busy schedule of our diverse membership and the local legal community at large.

» Live webinars
» Pre-recorded “On-Demand” programing
» 25-hour CLE Bundle fulfilling all mandatory CA State Bar CLE requirements, including six hours of required specialty credits
» Special Credit CLE Bundle fulfilling mandatory CA State Bar CLE requirements for specialty credits, including four hours of legal ethics, one hour of elimination of bias, and one hour of competency.
The Lawyer Referral and Information Service (LRIS) is a public service of the San Diego County Bar Association that has been referring individuals in our local community to qualified attorneys for decades. LRIS operations and revenues are regulated by Rules and Regulations of the State Bar of California, which pertain to Lawyer Referral Services and CA B&P Code § 6155, and the Rules of Operation of the Lawyer Referral Service of the San Diego County Bar Association.

LRIS Panels

The LRIS has 315 panel attorneys covering a wide array of practice areas. All attorneys on the panels are qualified through a rigorous review process. All attorneys who participate in LRIS go through an application process and Committee review in order to participate in the service and receive referrals.

- Each attorney must complete a panel application in the area of practice they wish to apply. The panel application asks for trial, education and legal experience in the area of law. In 2018-19, the LRIS Committee reviewed and updated all panel applications to make it more welcoming for 3-5-year attorneys to join the program.
- All attorneys must have current malpractice insurance.
- All attorneys must be in good standing with the State Bar of California.
- Two letters of recommendation from business colleagues or judges must be submitted.

Once the application packet is received, the LRIS Committee will then review the prospective attorney’s application for approval.

LRIS Counselors

LRIS currently has 4 fully trained referral counselors who screen clients to decide the best course of action. Many times, callers do not need an attorney or do not have the means to pay for one; so, over the years, LRIS has compiled an extensive list of free or low-cost community resources that help members of the San Diego community in specific legal areas. If the counselor decides the caller needs an attorney, they will be directed to an attorney who is best suited to help them in a specific area of law. This eliminates unwanted calls to attorneys’ offices that do not fit with the attorneys’ specialty.

LRIS Committee

The Service is managed by a Standing Committee of nine SDCBA members. The primary function of the Committee is oversight of the service at the highest levels and adherence to both the State Bar Rules and the San Diego County Bar Association Rules for the LRIS.

The program has expanded its services to Imperial County. The committee saw a need to expand and assist the Imperial County population. LRIS informational brochures were placed at Imperial County courthouses and chamber of commerce. LRIS also advertises on local radio to promote the program. As a result, the program saw an increase in referrals and retained cases in Imperial County.
LRIS
INFO

Total Contacts and Referrals
Summary of Public Contacts in 2021

In 2021, LRIS achieved:
Total attorney referrals in 2021: 37,911
Total clients referred to agencies: 12,075
Total clients referred to pro bono programs: 145

From these contacts:
LRIS average number of referrals per month: 3,159
2021 year-end cases retained: 1,423
Total fees generated for attorneys from referrals: $6 Million
Forwarding fees from attorneys: $884,450

Total Referrals by year:

<table>
<thead>
<tr>
<th>Year</th>
<th>Referrals</th>
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<tbody>
<tr>
<td>2015</td>
<td>24,659</td>
</tr>
<tr>
<td>2017</td>
<td>30,017</td>
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<tr>
<td>2018</td>
<td>32,013</td>
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<tr>
<td>2019</td>
<td>40,269</td>
</tr>
<tr>
<td>2020</td>
<td>36,901</td>
</tr>
<tr>
<td>2021</td>
<td>50,131</td>
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Top panels from which forwarding fees were received in 2021:
Family
Employment
Personal Injury
Civil & Commercial
Litigation
Consumer Fraud

Top Sources for referrals:
Attorneys
Prior Clients
SDCBA Web/Internet
Live Chat/Email form
24/7 Platform

Financial Stability
LRIS makes its money through forwarding fees from the attorney. The attorney pays the LRIS a flat 15% of the attorney fee at the close of the case. Sometimes this occurs several years from the time of the original referral. In addition to forwarding fees, the LRIS has a reserve fund totaling over $500,000.

LRIS collects a 15% forwarding fee on all cases retained. The fee to join the service is a non-refundable registration fee of $125.00 for SDCBA members or $350.00 for non-SDCBA members. There is also a $50.00 fee per panel application to cover the cost of assembling all the paperwork for review.

LRIS Forwarding Fees — 10-year Historical Summary

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<td>$950,388</td>
<td>$769,059</td>
<td>$1,049,319</td>
<td>$884,478</td>
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Modest Means

LRIS has a Modest Means program for family law cases only. This program is set up to provide persons of “modest means” who do not qualify for indigent legal aid, pro bono or other no cost legal services, and who cannot afford to pay market rate attorneys' fees, and who may otherwise be denied access to needed legal services. The Modest Means program has a panel of qualified family law attorneys who have agreed to provide legal services at reduced fee rates once financial eligibility requirements are meet. Once qualified, the attorney’s agreement with the client is an initial $1,500 retainer and once the retainer has been exhausted the attorney would charge the client $150 per hour for any additional services (revised September 2020). In 2021, the program prescreened 334 cases of which 181 meet the qualifications and 76 were retained. There are 33 Modest Means attorneys.

Committee Chair: Jason Sheinberg
Vice Chair: Wendi Santino

Fee Arbitration

This program provides a mechanism to arbitrate disputes between attorneys and clients concerning costs and/or fees charged for professional services by attorneys in San Diego County. The Fee Arbitration Committee offers an alternative to the use of the Superior Court for resolution of fee disputes between attorneys and clients. Sections 6200 through 6206 of the California Business and Professions Code establishes a system and procedure for the arbitration of disputes concerning costs and/or fees charged for professional services by attorneys. In the State of California, fee arbitration is mandatory for the attorney if the client initiates the fee arbitration.

LRIS staff administer the program and work with both clients and attorneys to set up arbitration hearings. In 2021, the program received 75 new cases and closed 90 arbitration cases. The program currently has 59 volunteer attorney arbitrators and 9 lay arbitrators.

Committee Chair: Gary Powell
Vice Chairs: Ezekiel Cortez, Carla Nassof, and Mary Pendleton
Wills for Heroes

The SDCBA hosts this program in affiliation with the Wills for Heroes Foundation, enabling local attorneys and legal professionals to provide free preparation of wills, durable powers of attorney for property management, and advance health care directives to first-responders who risk their lives every day protecting and serving our community. In 2021, 70 volunteer attorneys assisted 77 heroes with estate plans.

Servicemember Civil Relief Act (SCRA) Pro Bono Program

The SCRA program was set up to provide limited pro bono legal assistance to active duty military servicemembers who are named in a civil lawsuit or family court matter. Through this program, volunteer attorneys on the SCRA panel will apply a stay in the proceeding pursuant to the Servicemembers Civil Relief Act, thus protecting active duty servicemembers from default judgments at a time when they are serving their country. Representatives from the SDCBA, BANSDC, San Diego Superior Court, the Navy, and the Marine Corps have worked together for over a year to develop this program in response to this growing need.

How it works: A Superior Court judge appoints a volunteer attorney to represent the servicemember on a limited scope basis, solely for the purpose of getting in contact with the servicemember and determining whether or not they qualify for the stay and then obtaining the stay if appropriate. LRIS specialists send the order and correspondence to both the Navy and Marines legal offices. They verify if the servicemember is active duty and once located they send the correspondence to the servicemember. The servicemember in turn will contact the attorney for assistance. In 2021, volunteer attorneys assisted 54 servicemembers. The program currently has 28 volunteer attorneys.

Committee Chair: Ian Topf
Vice Chair: Jenna Hackett

Guardian ad Litem (GAL)

The Guardian Ad Litem (GAL) Program is managed by the San Diego County Bar Association’s Lawyer Referral and Information Service (LRIS). Attorney volunteers in the program are eligible for appointment by the juvenile court to serve as Guardian Ad Litem to advance the best interests of a dependent child, to make decisions that will protect the child’s legal interests, and to oversee the civil litigation and the work of the civil attorney representing the child. This pro bono program was launched in November 2020. In 2021, the program assisted 12 foster youth. The program has 7 attorney volunteers.
Law Week Poster & Video Contest

This annual Law Week event is centered around the American Bar Association’s (ABA) annual Law Day. This special national day, held annually on May 1, is set aside to celebrate the rule of law. Law Day provides an opportunity to understand how law and the legal process protect our liberty, strive to achieve justice, and contribute to the freedoms that all Americans share.

The first Law Day was established back in 1958 by President Dwight Eisenhower to mark the nation’s commitment to the rule of law. In 1961, Congress passed a resolution designating May 1 as the official date of Law Day, which was then codified.

Every year, LRIS sponsors a poster and video contest for K-12 students focused on that year’s Law Day theme provided by the ABA. The 2021 Law Week Poster & Video theme was “Advancing the Rule of Law NOW.”

Due to the continuing pandemic, the contest was conducted similarly to how it was done in 2020, with contestants submitting digital copies of their artwork and videos online. Judging also occurred online, and the winners were presented in a video presentation at SDCBA’s Annual Awards Ceremony & Celebration of Community Service in May.

2021 Poster Winners

First Place - Grades K-5
Marianna Czajka - St. Therese Academy

First Place - Grades 6-8
Ava Hanna - St. James Academy

First Place - Grades 9-12
Alejandra Rojas - San Diego High School

2021 Video Winners

First Place - Grades 6-8
Patsy Hellmann - St. James Academy

First Place - Grades 9-12
Bill Chen - Monte Vista High School
2021 was a year of transition in all aspects for the SDCBA, and marketing was no exception. While the majority of the year’s event and programs carried over from 2020 as mainly virtual, there were periods of time when the pandemic receded, allowing temporary resumption of in-person events — Summer Social, Holidays Around the World, and Stepping up to the Bar among them — and the ability to gather at the Bar Center once again. But whether virtual or in person, the SDCBA continued to produce and promote a full slate of exciting networking and social events, educational programming, and community initiatives throughout the year — and that kept the marketing busy continuously producing comprehensive creative promotional campaigns, driving strong member engagement. Following are highlights from 2021:

- **Released Statement**: in response to the January 6 Capitol riots
- Announced [LRIS 24/7 Online Referral System](#)
- Produced and conducted 2021 Member Survey
- Created [State Bar Provisional Licensure Program](#) webpage and promotional campaign — to help eligible law school graduates and lawyer supervisors connect
- **Released statement**: condemning hate crimes against the Asian American and Pacific Islander communities
- Launched a stand-alone website promoting public resources for help with appeals — [Access to Appellate Justice Program (ATAJ)](#) and [Civil Appellate Self-Help Workshops (CASHW)](#) — at AppealHelp.org
- Promoted several high-profile events and initiatives, including [Dialogue on Diversity](#), [Service Awards](#), and the new [Diversity Pledge](#)
- Produced [Service Awards](#) celebration and awards ceremony video, including the [Law Week Poster & Video contest](#) winner announcements.
- **Released Statement**: “The San Diego County Bar Association Denounces Personal Criticism of Federal Judge”
- Launched monthly CLE promotional email campaign
- [Produced](#) and submitted video for [San Diego Pride 2021](#)
- Produced Summer Social 2021 - “Here Comes The Sun” promotional campaign and various supporting collateral for the event
- Launched [Leadership Academy](#) promotional campaign and website.
- Created [Bar reopening welcome campaign](#) “Belly Up to the Bar”
- Launched “100% Gazette” monthly email to 100% Club members
- Completed [Rebrand and reopening of Suite 120](#) “The Center At Columbia” with a new web page and ad in the San Diego Business Journal Book of Lists
- Recorded Stepping Up 2021 swearing in ceremony video and made available on the SDCBA website.
2021 Summer Social: “Here Comes the Sun” promotional campaign materials

Leadership Academy promotional materials

Example event promotional emails

2021 Summer Social: “Here Comes the Sun”

DJ hosted by NLD
step and repeat, and more! Cash bar.
photo booth, glitter glam face & hair artist,
SDCBA Members: $15  Non-Members: $25

San Diego County Administration Center at Columbia rebrand. Ad created for SD Business Journal Book of Lists

Imagine your next meeting here...

The Center at Columbia
401 W. A St. Suite 120  San Diego, CA 92101

www.sdcba.org/center-columbia

HERE ...

The bar Center re-opening “Belly up to the Bar” webpage and branding.

San Diego County Bar Association and New Lawyer Division (NLD) Summer Social 2021

IT MIGHT SEEM LIKE YEARS SINCE IT’S BEEN...

HERE, BUT THE SDCBA SUMMER SOCIAL IS BACK!

It’s time to reunite. Here Comes the Sun!
while basking in the glorious late afternoon sunshine.
friends and colleagues from the local legal community, all
and of course, sensational socializing with hundreds of your

Learn more & reserve:
www.sdcba.org/center-columbia

THE CENTER AT COLUMBIA
HOSPITALITY SPACE
401 W. A St. Suite 120  San Diego, CA 92101

Get connected doesn’t get any easier!

Leadership Academy

Make valuable connections as you start your legal career!

Wednesday, January 27
5:30 – 7:00 p.m.

Learn More...
Once again, we were deeply inspired by the selfless acts of service of outstanding community members.

### 2021 SDCBA Service Awards

- **Outstanding Attorney Award**
  - Andrea St. Julian
  - Law Office of Andrea St. Julian

- **Outstanding Jurist Award**
  - Hon. Randa Trapp (Ret.)
  - San Diego Superior Court

- **Community Service Award**
  - Commissioner Nadia Keilani
  - San Diego Superior Court

- **Community Service Award**
  - Robert Gleason
  - President and Chief Executive Officer, Evans Hotels

- **Service to Diversity Award**
  - Carolina Bravo-Karimi
  - Wilson Turner Kosmo LLP

- **Service By a Public Attorney Award**
  - Alex Calero
  - Senior Counsel, California Department of Financial Protection & Innovation

- **Service to the Legal Community Award**
  - David Grapilon
  - San Diego County District Attorney’s Office

- **Service to the Legal Community Award**
  - Matthew Wechter
  - San Diego County Office of the Public Defender

- **Outstanding Service By a New Lawyer Award**
  - Maresa Martin Talbert
  - Talbert Law Office

- **Distinguished Citizen Award**
  - John Adkins
  - San Diego Law Library

- **Distinguished Citizen Award**
  - Elaine Lawrence
  - Lawyers Club of San Diego

- **Distinguished Citizen Award**
  - Mary Silva
  - North County Bar Association
After experiencing one of the best years on record for student and volunteer participation in pre-COVID 2020, it was expected that the San Diego County High School Mock Trial Competition would repeat that success in 2021. Unfortunately, COVID-19 seemed to have other plans, keeping the world on lockdown for much of 2021. There was talk of having the event take a year off. But teachers, students, and the Mock Trial committee felt otherwise. Encouragingly, the Constitutional Rights Foundation (CRF), sponsor of the statewide competition, was moving forward with the program virtually. So was Los Angeles County, which puts on the largest competition in the state. The decision became a fait accompli: the San Diego County competition must go on! And so, the Competition took a massive pivot to become an all-virtual event.

Thank goodness for Zoom, which became the primary platform for the competition. Deciding to use Zoom was easy; figuring out how to coordinate hundreds of participants in multiple Zoom breakout rooms was not ... Fortuitously, members of the Mock Trial Committee were able to volunteer at the Los Angeles competition in late 2020, gaining valuable insight into how it could be done. This, plus countless hours of planning and administration work, resulted in a process that worked remarkably well – from the advance remote training sessions for teachers, students, judges, coaches, scorers, and monitors, to the competition and closing award ceremonies.

Despite missing out on being in physical courtrooms and working together in person, the students got largely the same benefits as students had in the past – gaining confidence, sharpening speaking skills, forging new friendships, learning the justice system, and, for many, becoming inspired to pursue a future career in the law. Many students considered it one of the most rewarding experiences of their lives. Teachers did too.

In the end, 28 teams and 548 students competed in 6 rounds of competition. 54 state and federal judges/commissioners presided over 60 trials. 80 attorneys volunteered to coach teams; 148 helped score the competition. These would be great numbers in any year, made all the more remarkable by the unprecedented challenges that were overcome during the pandemic.

### BY THE NUMBERS:
- 60 trials over 4 days
- 548 high school students from 28 teams
- 6 rounds of competition
- 54 state, federal, appellate judges, and commissioners presided
- 80 attorneys volunteered as a coach
- 148 attorneys volunteered to score the competition
The SDCBA’s flagship publication, the bimonthly San Diego Lawyer magazine, continued to literally set the bar for what a legal community magazine can be, with timely, highly informative and thought-provoking articles that met the moment and served the needs of our diverse membership. Content was presented with a fetching, modern design in both glossy print and digital formats. Never dry, sometimes humorous and sometimes lyrical, but always poignant, the pages of San Diego Lawyer magazine continued to highlight the human side of our profession and its practitioners while honoring the very important and uplifting work we do in the service of justice and society.
2021
SDCBA PROFESSIONAL TEAM

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JILL EPSTEIN

DEPUTY EXECUTIVE DIRECTOR
KEITH FISHER

EXECUTIVE ASSISTANT /
LEADERSHIP COORDINATOR
OLGA BLANKSON

DIRECTOR OF PROGRAMS & EVENTS
SARAH HARRIS

PROGRAM SPECIALIST
MARIBEL SANCHEZ

CONFERENCE CENTER & EVENTS MANAGER
NIC HAGAN

PROGRAM & EVENT SPECIALIST
PAOLA VALENCIA

PROGRAM & EVENT SPECIALIST
NANCY MILAZZO

DIRECTOR OF MARKETING & OUTREACH
RON MARCUS

SENIOR DESIGNER
ATTIBA ROYSTER

MARKETING MANAGER
SASHA FEREDONI

CONTENT & PUBLICATIONS EDITOR
HAILEY JOHNSON
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Moxtra
McCabe Ali
National Conflict Resolution Center - West Coast Resolution Group Div.
Panish Shea & Boyle LLP
Shustak Reynolds & Partners
Signature Resolution
Stanford and Associates
Todd Bulich
Veritas Tax Law
FINANCIAL STATEMENT

FROM CONSOLIDATED STATEMENT OF ACTIVITIES:

Revenue $3,584,927
Operating expenses $3,526,076

FROM CONSOLIDATED STATEMENT OF FINANCIAL POSITIONS

ASSETS
- Cash, cash equivalents and investments: $5,907,014
- Prepaid expenses, receivables and other $192,715
- Property and equipment $1,903,224
Total Assets: $8,002,953

LIABILITIES
- Deferred revenues $526,717
- Indigent criminal defense grant fund $593,056
- Accrued expenses and other liabilities $1,348,169
Total Liabilities $2,467,942

NET ASSETS
- Unrestricted $5,433,980
- Temporary restricted $101,031
Total Net Assets $5,535,011

Total Liabilities & Net Assets $8,002,953

1. Includes interest & dividend income, excludes unrealized investment gains
2. Includes Union & B LLC and 1241 State Street LLC expenses. Excludes deferred lease expense, depreciation, PCC expenses, and CARE expenses.
INDEPENDENT AUDITOR’S REPORT

Board of Directors
San Diego County Bar Association
San Diego, California

Opinion
We have audited the accompanying consolidated financial statements of San Diego County Bar Association (the Association), which comprise of the consolidated financial statement of position as of December 31, 2021, and the related consolidated statements of activities, functional expenses and cash flows for the year then ended, and the related notes to the consolidated financial statements.

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of San Diego Country Bar Association as of December 31, 2021, and the changes in net assets and its cash flows for the year then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion
We conducted our audit in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor’s Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Association and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audit. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Consolidated Financial Statements
Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Association’s ability to continue as a going concern within one year after the date that the consolidated financial statements are available to be issued.

Auditor’s Responsibilities for the Audit of the Financial Statements
Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor’s report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements, including omissions, are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.
In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Association’s internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Association’s ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

**Report on Summarized Comparative Information**

We have previously audited the Association’s 2020 consolidated financial statements, and we expressed an unmodified audit opinion on those audited financial statements in our report dated May 11, 2021. In our opinion, the summarized comparative information presented herein as of and for the year ended December 31, 2020, is consistent, in all material respects, with the audited financial statements from which it has been derived.

WEST RHODE & ROBERTS

San Diego, California
April 12, 2022