

CONNECTICUT BAR ASSOCIATION ANNUAL REPORT
of Sections and Committees
2017-2018

Connecticut Bar Association

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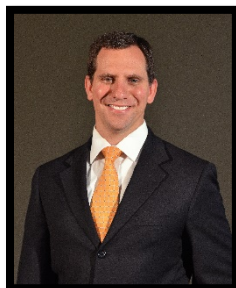
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CONNECTICUT BAR ASSOCIATION OFFICERS

2017-2018



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University of Connecticut
School of Law
Hartford



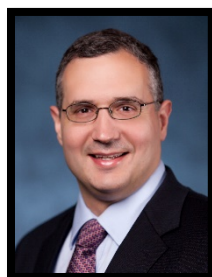
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District	Name	City
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16	Douglas J. Monaghan	Groton
17	Kimberley McGee	Mystic

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ANNUAL REPORT OF THE PRESIDENT

Karen DeMeola, 2017-2018 President



It is hard to believe this year is coming to a close. We started the year with the departure of one executive director and ended with a new one, Keith J. Soressi. In between, Carol DeJohn and Suzanne Hard stepped out of their roles as directors within the association, and into co-interim director roles.

Diversity and Inclusion (D&I) continues to be top priority for the CBA. Under the continued leadership of Cecil Thomas, the Diversity and Inclusion Committee continues to make significant progress. We developed D&I MCLEs and a D&I track at the Connecticut Legal Conference. Our annual Diversity and Inclusion Summit, led by Christine Jean-Louis, had a successful conference in October 2017. Dr. Arin Reeves showed us the importance of tailoring D&I programming toward our own institutions. Our signatories, remain hard at work in their organizations on year two Pledge and Plan goals and proudly, we have the first round of D&I lawyer assessments in the state. We have a long way to go to see our profession as diverse

as all of us, but we are on the way to making a sustained difference.

One year ago our pipeline program, Pathways to Legal Careers, kicked off. The program brought 300 middle and high school students to Hartford to talk about careers in law. The pipeline committee mentored high school kids, helped create mock trial teams, and in July 2018, our new partnership with Judge Angela Robinson's LAW Camp will take place in New Haven.

Access to justice continues to be an important conversation. Nationally, organizations including the ABA, are looking toward innovative ways to provide easily accessed pro bono representation. We became the site administrator for Free Legal Answers which allows our members to provide pro bono service at any time, and clients to log in and ask questions.

We have done a fine job restoring faith in lawyers to provide service to clients. We expanded the reach of our Find a Lawyer CT service and added brochures to courthouses and court libraries across the state.

Relationships and collaboration with the branch continue.

We have seen growth in our membership and finances continue to be stable, reaching sustainable levels. Though much of our growth is assumed to be due to the MCLE requirement, we are not resting on our laurels. Our education team continues to develop relevant programming that meets the needs of our members. We continue to provide information and educational opportunities that address technology and the practice, law practice management, making the business climate in our state better for lawyers, and communicating to potential clients the importance of having a lawyer.

As you will see in the annual reports appended herein, our sections, committees and task forces, including a new Lawyer Well-being Task Force, continue to explore changes within their areas, impact legislation, and generally make lawyers look great.

I look forward to continued growth in all ways in the years to come. I have confidence that Jonathan Shapiro will lead us another step forward as an association. It has truly been a privilege. Though I felt tokenized on the way in, I feel included on the way out. I may be the first, but knowing I will not be the last diverse person to lead the CBA is heartening. Both statements are a testament to how far we have come.

Thank you for this honor and for an amazing year.

SECTION REPORTS

ALTERNATIVE DISPUTE RESOLUTION SECTION

Alexandra Buenaventura Gillett and Gary Sheldon, Co-chairs

Purpose

This section aims to increase the awareness of alternative dispute resolution (ADR) within the bar and the general public; promote communication among lawyers and others involved in ADR, act as a resource to the courts and other entities, improve the quality of ADR services, and encourage members of the bar to serve as neutrals in various ADR settings.

Annual Report

Meetings

The section experienced some difficulty with meeting attendance and member involvement this year. While a core group continued to be actively involved in the 2017-2018 year, as the section continues to grow and evolve, new meeting venues and styles should be considered in order to best serve the needs of our members.

Section Activities

The executive committee of the ADR Section is actively engaged in multi-lateral diversity recruitment. By engaging with non-lawyer professionals interested in ADR, the Young Lawyers Section, and area law schools, the section continues to grow in membership.

The section also actively participated in the 2018 Legislative Session, with members committed to and involved with the passage of the Revised Uniform Arbitration Act. This has been many years in the making, and the section plans to host a CLE on the RUAA this fall. The section hopes that it can continue to serve as a guiding force for effective uses of dispute resolution tools in Connecticut.

The section has continued to revitalize the lawyer to client and lawyer to lawyer fee dispute programs administered by the CBA. The section is effectively and efficiently clearing the multi-year back log of pending cases, and has established an efficient system to mediate and/or arbitrate the disputes. A sub-committee established by the section has put forth recommendations to remediate the budgetary and logistical challenges uncovered.

Seminars/CLE's

The Arbitration Pre-Hearing Conference and the Obligations of the Arbitrator, Counsel and Parties

Wednesday September 27, 2017

1.0 CT CLE Credit, 1.0 NY CLE Credit

Presented by section members Roy De Barbieri, Eric Wiechmann, and Louis Pepe, the ADR Section held a well-attended CLE on the roles of various parties to an arbitration. The speakers provided very insightful and somewhat varying perspectives on the role of an arbitrator in steering the arbitration process and feedback was overwhelmingly positive. Members from the Construction and Labor Law Sections were invited to attend.

ANIMAL LAW SECTION

Colette S. Griffin and Suzan M. Porto, Co-chairs

Purpose

Formed in 2002, the purposes of the Animal Law Section are to provide a forum for members to exchange ideas, and to study and understand laws, regulations, and case law pertaining to all areas of animal law; to organize periodic CLE seminars on various issues relating to animals and the law in order to educate the members of the Connecticut bar, bench, and the public about animal law and about different ways in which the legal system can work to protect animals; to be a resource for people, organizations, and government agencies that wish to obtain information about the subject; to create and maintain a referral service for the public in order to be able to refer people with animal-related problems or concerns to attorneys who are prepared to handle such cases; and to create and maintain a brief and resources bank for use by attorneys practicing in the field of animal law.

Annual Report

Meetings

Quarterly section meetings have been held at a variety of locations and by phone.

Executive Committee Meetings

Executive meetings have been held quarterly. During conference organization, meetings occur weekly.

CLE

CT Legal Conference – Trends in Animal Law

Speakers included: Professor Jessica Rubin and Attorney Debora Bresch

Publications

N/A

Legislative Efforts

The section has followed pending legislation concerning animals and has forwarded information to the members accordingly. The section did not seek authority to support/oppose legislation this short session.

Volunteer Activities

We have continued to provide legal guidance regarding animal laws to a number of nonprofit organizations as well as to individuals who have contacted us with legal inquiries.

Other Programs and Events

We will be hosting an event with UConn School of Law in September on this topic as well.

On April 19, 2018, Colette Griffin spoke at a Law Review article presentation regarding pet trusts and the best interest standard.

This year we will have a presence at the June 11, 2018 CT Legal Conference. We will have a seminar on the use of habeus corpus in representing sentient beings.

APPELLATE ADVOCACY SECTION

Daniel J. Krisch and James P. Sexton, Co-chairs

Purpose

This section aims to improve appellate practice through meetings and CLE courses; determine the nature, scope, and interest in an appellate certification program; identify the resources and procedures required to maintain such a program; and identify other means to improve the appellate law practice in Connecticut.

Annual Report

The Appellate Advocacy Section had a productive and eventful 2017-2018! To begin, the section held four meetings and took a position opposing SB 505, which was an act that would have limited the jurisdiction of our appellate courts:

September 28, 2017

At our first meeting of the year, the section acquired a block of tickets to the Connecticut Forum event with United States Supreme Court Justice Stephen Breyer. In doing so, approximately 30 section members attended the event, hearing from Justice Breyer on a wide range of issues, including appellate advocacy.

November 20, 2017

In November, the section hosted Justice Eveleigh, who was retiring from the Connecticut Supreme Court, and Justice D'Auria, who was then the newest member of the Connecticut Supreme Court, for a roundtable discussion of various aspects of appellate advocacy.

March 26, 2018

At our March meeting, Connecticut Supreme Court Justice Maria Kahn joined us to discuss her views of appellate practice before the Supreme Court and challenges confronting the Judicial Branch. After her presentation, the section engaged in a substantive and lively discussion of SB 505, before voting as a section to formally oppose that legislation in written testimony.

May 16, 2018

The section hosted appellate court Judge Ingrid Moll to discuss the efforts by the Judicial Branches' Access to Justice Commission to increase Connecticut's pro-bono and low-bono representation on appeal. The section is forming an ad hoc committee to liaise with the commission in the development of recommendations that will ultimately be presented to the Judicial Branch to decrease the number of self-represented litigants trying to navigate the appellate process.

Through these events and its legislative efforts, the section has continued to promote the educational and professional objectives of the CBA within the area of appellate litigation. CLE credits were made available for the majority of our section meetings, and the section is actively working with the Judicial Branch to develop programs that will make appellate representation a reality for many who cannot presently afford such counsel. Our programming has been substantially enhanced by the close working relationship that the section shares with Connecticut's appellate bench, with section meetings being regularly attended by 30 or more members to hear from Supreme Court justices and appellate court judges. We look forward to continuing to build on these successes in the coming bar year.

Finally, at our meeting on May 16, 2018, the Section Executive Committee chose Attorney Thomas Donlon to replace Attorney Daniel Krisch as co-chair for the 2018-2019 bar year. James Sexton will continue to serve as co-

chair for another year. Additionally, Attorney Jessie Opinion was chosen to replace Attorney Rebecca Harris as our secretary-treasurer, and Attorney Danielle Edwards was chosen to serve as our legislative liaison.

COMMERCIAL FINANCE SECTION

Michael W. Kaufman, Chair

Purpose

The Commercial Finance Section is intended to promote the educational and professional objectives of the Connecticut Bar Association within the practice area of commercial finance, which includes the substantive topics of commercial law, finance law and transactions, real estate finance law and associated topics in the law of contracts, administrative law, enforcement and remedies in litigation and otherwise, and bankruptcy law.

Annual Report

Meetings

The current executive committee was installed for this section in the fall of 2015, and this leadership meets in person and telephonically to coordinate meetings with other section groups and arrange for speakers.

The Commercial Finance Section had another active year in 2017-2018. This section held a meeting where two attorneys from Day Pitney LLP delivered a presentation on fine art financing. This presentation focused on the terms and documentation applicable to lending against fine art. In particular, the speakers discussed issues surrounding perfection and the privacy concerns of borrowers. We plan to schedule additional speaking events to educate Connecticut Bar Association members as to perfection issues pertinent to other unusual or alternative types of collateral.

We continue to explore potential joint meeting opportunities with other sections of the Connecticut Bar Association, in particular with the Real Property Section.

Legislative Efforts

This year featured fewer legislative proposals directly applicable to the Commercial Finance Section, but as a group we nonetheless monitored certain legislation. Included in the matters we followed were the Revised Uniform Arbitration Act (PA 18-94)), the purpose of which was to revise and modernize arbitration procedures. This Act has been passed by the State House and State Senate.

We also followed a bill relating to choice of law (HB-5513), the purpose of which was to ensure the enforcement of choice of law provisions contained in certain contracts, agreements, or undertakings. This measure passed the State House, but the State Senate did not take action before the session ended. We will continue to focus our attention on this item going forward.

Finally, we followed several other matters (including the Uniform Protected Series Act and the Uniform Trust Code Act, Uniform Directed Trust Act and Qualified Dispositions in Trust Act for their impact on commercial finance transactions) which did not pass this year but which may be introduced in future sessions.

COMMERCIAL LAW AND BANKRUPTCY SECTION

Jessica Grossarth Kennedy, Chair

Purpose

The purpose of the Commercial Law and Bankruptcy Section is “to promote objectives of the State Bar Association of Connecticut within the field of commercial law and bankruptcy.” (Section 2, bylaws of Commercial Law and Bankruptcy Section of the Connecticut Bar Association). This section achieves this purpose by encouraging the free exchange of ideas and scholarship among its members and by providing a forum to educate and update its members in matters of interest in the area of creditor/debtor relations in commercial transactions. To further these goals, each monthly section meeting is open to the entire section, and attendance is encouraged.

Annual Report

Two primary global goals this year were: 1) to assist the Bench Bar Committee in communicating with the Bankruptcy Bench to advance the completion and dissemination of revised Local Bankruptcy Rules; and 2) to figure out a meaningful way to spend grant funds awarded to our section for pro bono training. We are happy to report that we achieved both goals.

Officers

The section’s officers for the 2017-2018 bar year have been:

Jessica Grossarth Kennedy, Chair; Pullman & Comley LLC

Thomas J. Sansone, Vice Chair; Carmody Torrance Sandak & Hennessey LLP

Roberta Napolitano, Treasurer/Secretary; Standing Chapter 13 Trustee for Connecticut

Executive Committee Meetings

We held Executive Committee meetings immediately before the dinner meetings described below on October 19, 2017, November 16, 2017, and on March 22, 2018. We also held four telephonic Executive Committee meetings on January 24, 2018, March 5, 2018, March 22, 2018, and April 23, 2018.

Dinner Meetings/Events

On September 13, 2017, the section held an informal meeting at the Milford Yacht Club, at which members discussed interesting cases on which they had worked during the summer.

On October 19, 2017, the section held a meeting at the Hartford Club to listen to a panel moderated by Judge Tancredi and composed of Charles A. Maglieri, Carl Gulliver, and Patrick Crook regarding the Means Test in Chapter 13. Participants received 1.5 hours of Connecticut CLE credit.

On November 16, 2017, Chief Judge Manning addressed the section at the Graduate Club in New Haven for a presentation entitled, “Latest Views From the Bench: Where We Are and Where We are Headed.”

On December 11, 2017 the section held a joint holiday party with the Turnaround Management Association at the Quinnipiac Club in New Haven.

On January 31, 2018, Judge Manning held a court lunch at the offices of Pullman & Comley offering the section the opportunity to voice thoughts, questions, and suggestions after a brief discussion about the amendments to the Federal Rules of Bankruptcy Procedure that became effective December 1, 2017.

On February 15, 2018, our section met at Updike Kelly & Spellacy PC's offices in Hartford to listen to a panel moderated by Sherwin Yoder of Carmody Torrance Sandak & Hennessey LLP related to understanding your duties of competence, confidentiality, supervision, and other professional and legal obligations with respect to safeguarding different types of personal and client information used in your law practice. Participants received 1.5 hours of CLE credit in the area of ethics and professionalism.

On March 22, 2018, the CBA's president and UConn School of Law assistant dean of students, Karen Demeola, spoke to the section at the the Hartford Club about implicit bias. Participants received 1.5 hours of CLE credit.

On April 11, 2018, section member John Cesaroni of Zeisler & Zeisler PC moderated a "Litigation Funding" panel which featured David Kerstein and Ken Epstein, investment managers and legal counsel with Bentham IMF, and James O. Moore, of counsel with Morgan Lewis & Bockius LLP. Participants received 1.5 hours of CLE credit, including 0.5 hours of CLE credit in the field of ethics and professionalism.

On May 1, 2018, we held a dinner meeting at Herd in Middletown where we held our Third Annual "CLABBY" Awards ceremony offering the following awards to the following section members: (1) Career Achievement Award given to Barbara Katz, (2) Service to the Profession Award given to Irve J. Goldman, and (3) Rising Star Award given to Erin Boatman. We also conducted the election for the section's new secretary/treasurer, which was won by Kristin Mayhew. Joshua Cohen of Day Pitney LLP also regaled attendees with a presentation about his participation in the "Seven Marathons in Seven Days on Seven Continents" event that he successfully completed this past February.

On May 7, 2018, Judge Manning held a court lunch in all seats of court where section members appeared by video-conference. Discussion topics included the new Bankruptcy Local Rules and generating a revamped pro bono program.

On June 1, 2018, section members will enjoy a Yard Goats game outing at Dunkin Donuts Park in Hartford.

On June 11, 2018, at the Annual Conference, Suzanne Sutton, Taruna Garg, and Jon Kaplan will present on behalf of the section the year in review related to consumer bankruptcy, business bankruptcy, and commercial law.

Miscellaneous Information

Committees

To facilitate reaching our goals, our section formed and received tremendous help from several sub-committees including diversity, bench-bar, legislative, programming, officer term and nominations, and a newly formed pro bono committee.

Pro Bono Mechanism

Section members, Tom Gugliotti, Bonnie Mangan, and Susan Williams, explored the possibility of utilizing the grant funds in connection with the Connecticut Community Law Center, which is an incubator initiative of the UConn Law School and the Hartford County Bar Association. The incubator opened in February 2017 in William F. Starr Hall on the UConn Law campus in Hartford, and aims to help people who have traditionally been underserved by the justice system: low- and moderate-income clients who don't qualify for legal aid, but can't afford standard legal fees. The law school provides office space and support for up to six new lawyers who receive training and experience to assist them in opening solo practices, and to encourage them to deliver pro bono legal services or services at an affordable cost.

Since bankruptcy services and training had not previously been offered at the incubator, the grant funds were utilized to purchase bankruptcy software essential to prepare and file a bankruptcy case properly. Additionally, the funds were used to purchase research tools including the Bankruptcy Code, Federal Rules of Bankruptcy Procedure, Federal Rules of Evidence, and materials from the National Consumer Law Center. Attorneys Mangan and Williams are actively volunteering their time to train the incubator attorneys on the software. The goal of the bankruptcy software training is twofold: to provide instruction to lawyers on the software, using pro bono cases

referred by legal aid, and to introduce the bankruptcy practice to new attorneys who wouldn't have otherwise been exposed to that area of law, thereby, increasing the number of volunteers who provide pro bono bankruptcy services in Connecticut.

The program was described in an article authored by Jessica Grossarth Kennedy in the 2018 March/April Issue, Volume 28/Number 4 of *Connecticut Lawyer*.

CONSTRUCTION LAW SECTION

Thomas G. Librizzi, Chair

Purpose

The purpose of the Construction Law Section is to bring together those CBA members practicing in the fields of construction and design law to discuss the current issues affecting this practice area, to educate that membership on the legal issues affecting those rapidly developing topics, and to foster collegial relationships between those practicing attorneys and the members of the construction industry.

Annual Report

Section Officers and Liaisons

Under the section's bylaws, each officer serves a two-year term. The current slate of officers was elected at the section's March 15, 2017 meeting, their terms to be effective as of July 1, 2017 and run to June 2019. The current section officers are:

Thomas G. Librizzi	Chair
Donald Doeg	Vice-chair
Michael J. Donnelly	Secretary
Laurann Asklof	Treasurer

Section Liaison Appointees

Legislation	Martin Onorato and Frederick E. Hedberg
Membership	V. Michael Simko
Publicity	Michael V. Pepe
Website	Steven Lapp
Education	Laurann Asklof

Meetings and Programming

In accordance with CBA directives, the section had four educational programs. We also held four Executive Committee meetings.

The first combination educational program, section meeting and Executive Committee meeting was held in September 2017. This was a program on the latest developments and trends in AAA Construction Arbitration and Mediation. The guest speaker was Jennifer Millender, director of ADR services for the AAA based in Boston, MA.

Next, on October 31, 2017, we had the section's annual construction law program at CCSU, where we had an educational program presented by Brian McCarthy, PE of CDM Smith as the program manager for the MDC's South Hartford Conveyance and Storage Tunnel project, which covered the detailed and lengthy process and complex technical and legal considerations involved in bringing this \$280 million project to completion.

On December 13, 2017, an Executive Committee meeting was held.

The next combination section meeting, educational program and Executive Committee, was held on April 18, 2018. The educational program was a review of the new AIA (American Institute of Architects) standard form construction and design documents. The presenters were section members Marty Onorato and Christine Chipman.

Another Executive Committee meeting was held on May 23, 2018 which addressed, among other things, additional members to the Executive Committee and program planning for the 2018-2019 bar year.

Finally, the last section meeting and educational program of the 2017–2018 term will be on June 11, 2018 at the CBA Legal Conference. As has become customary over the past few years, the section will present on new developments in construction law, including recent case holdings of note and legislative updates.

Publications

Carrying on a longstanding and valuable annual project, the section once again produced its annual *Construction Case Law Summary*, detailing important court decisions and legislative developments that affected the construction industry in Connecticut during 2017. This extensive analysis and compilation of materials—amassed and edited by about 20 section members—will be made available online as a resource for all section members. The section’s annual presentation of this material will be made on June 11, 2018 at the CBA Legal Conference.

Scholarships

Approximately 15 years ago, the section established a scholarship fund at CCSU to benefit undergraduate students in the Construction Management or Civil Engineering Programs. The section was pleased to once again enable the university to provide \$3,000 worth of scholarships sponsored by our section to two students in the current academic year and with plans to continue the scholarships in the future.

Executive Committee

At its meeting on May 23, 2018 the Executive Committee endorsed the addition of three new members of the Executive Committee. The chair will review potential candidates and make a recommendation to the new president of the CBA.

CRIMINAL JUSTICE SECTION

Moira L. Buckley, Chair

Purpose

The purpose of the Criminal Justice Section is to promote the objectives of the Connecticut Bar Association within the field of criminal justice. The section provides a forum for the discussion of issues of common interest to members of the Judiciary and both the criminal defense bar and those who serve with state prosecuting authorities.

Annual Report

In furtherance of the above stated purpose, the section conducts meetings throughout the year in order to explore and discuss issues and legislation relevant to the field of criminal justice. At section meetings, guest speakers address topics of current interest to members. The section also tracks Connecticut legislative developments relevant to criminal law.

The section served as a co-sponsors with the Health Law Section for a meeting where the False Claims Act was discussed, and with the Administrative Law Section for a meeting where the administrative process for handling DEA and DCP investigations in health care provider prescribing practices was discussed. The section was also invited to attend the Federal Practice Section meeting where a discussion was held regarding the Fourth Amendment and the cyberworld. The section had scheduled a dinner meeting to be jointly held with the Medical Marijuana Section, however it was canceled twice due to weather and poor attendance.

Purpose

The purpose of the Elder Law Section is to discuss and consider issues in elder law, promote the continuing education of CBA members and the general community, monitor and develop positions with respect to proposed legislation and regulatory action involving the elderly, and to foster relationships between attorneys and private, public, and governmental organizations dealing with the elderly.

Annual Report

1. We have held nine monthly open meetings (available to all section members, not only Executive Committee members as other sections do), held at the Graduate Club in New Haven. Our first section meeting was held on September 19, 2017. At each meeting, we have an educational program which qualifies for CLE credit. Our last meeting for this year was held on May 15, 2018.
2. We had three sponsors for our section monthly meetings at \$500.00/sponsorship. The sponsorship funds have enabled our section to do outreach to law students (see paragraph 3) by underwriting the cost of the students' dinner when they have attended our section meetings, and have supplemented our declining fund balance. I am happy to report that with the sponsorship funds raised for the year 2016-2017 (\$1,500.00) and the funds for this calendar year (\$1,500.00), as of April 2018, we have net income in the approximate amount of \$4,500.00. This is the first year in many where we don't have a net loss.
3. I formed an Outreach Committee to invite law students to participate in our Elder Law Section while they are still students. Law students are invited to be our guests at our section meetings (the dinner expense for the law students is underwritten by the fees we receive from sponsors of our meetings—see paragraph 2 above). On April 25, 2018, we held our regular monthly meeting at UConn Law School which was attended by approximately 28 law students. We have had several law students attend our monthly meetings.
4. Monthly section educational programs and full day and half-day seminars (see the end of this annual report for schedule).
5. Our legislative efforts and advocacy are unparalleled. We are barraged by proposed bills from every corner which require careful scrutiny and monitoring. Our legislative committee, chaired by the section's vice chair, meets weekly by teleconference when the legislature is in session to monitor legislative activity with the assistance of our paid outside lobbyist, Melissa Biggs. In this session, we successfully lobbied legislators to prevent a bill from being called for a vote and another from ever making it out of committee. We advocated for the restoration of benefits to seniors under the Medicare Savings Program which resulted in the reinstatement of those benefits. We wrote testimony in support of and opposing bills and our section members appeared to provide testimony at public hearings in Hartford. We sponsored legislation and actively pursued passage of that legislation. While I did not mention our legislative committee in my report for 2016-2017, this committee and our legislative advocacy has always been and will remain an integral part of the Elder Law Section and sets us apart from other sections. The following are specific advocacy efforts:

- a. I formed a work group to meet with the Department of Social Services to discuss (and reject) a proposal by D.S.S. to roll out a Medicaid certification program. We met with D.S.S. in January 2018 and have not heard anything more on the subject.
 - b. Two of our section members were members of a Probate Assembly committee that drafted Conservatorship Standards which are scheduled to become effective July 1, 2018.
 - c. Several of our members were members of a workgroup which met with D.S.S. over a period of months to address an initiative that D.S.S. wanted to implement which would have hurt our elderly.
 - d. I formed a committee and appointed a chair to oppose D.S.S.'s proposed changes to provisions in its Uniform Policy Manual. We presented written testimony in opposition of the proposed changes. D.S.S. abandoned its proposal.
6. Committees:
- a. As chair of the Elder Law Section, I was invited to serve on a committee to develop a symposium on Unsupervised Probate. The sponsors of the program were Quinnipiac Law School and the Connecticut Bar Foundation. The program was held in April, 2018 and was a great success.
 - b. As chair of the Elder Law Section, I was also invited to serve on the committee to develop the content for the bi-annual Probate Court Assembly and CBA program. The program was held on November 29, 2017 and was also a great success.

The unauthorized practice of law by organizations in Connecticut remains paramount as an issue for our members and it is our hope that our section will be invited to serve on the task force you will be forming to address this issue.

**Elder Law Section Program Schedule
2017-2018**

Meeting Date	Presentation Topic	Presenter(s)	Comments
CT Legal Conference June 12, 2017 4-5:30 time slot CT Convention Center, Hartford	Hot Topics in Elder Law - The Future of Healthcare for the Elderly in Connecticut and the U.S.	Judith Stein 860-456-7790 (Diane Simonsen) P.O. Box 350, Willimantic, CT 06226 Senator Chris Murphy (video) Amy E. Orlando	Jeannine & group are coordinating. Feb 17, 2017 – final program, speaker names, headshots, 3 paragraph style bios, brief description & learning outcomes due April 21, 2017 – final materials due (12 pages)
September 19, 2017	Recent Amendments to the UPOAA and the Use of POAs in Real Estate Transactions	Deborah Tedford DTedford@mysticlaw.com (860) 572-4707 Ellen Sostman, CATIC ESostman@catic.com	Amy Todisco is coordinating. CLE request due by August 29, 2017
September 28, 2017 9-3pm Hawthorne Inn, Berlin, CT	Identifying and Preventing Elder Abuse	See outline.	Jeannine and Kevin are coordinating with Sandra Sherlock-White and Mimi Peck-Llewellyn
November 09, 2017 9-3:30 pm Grassy Hill Country Club, Orange, CT	Advanced Topics in Elder Law	See outline.	Jeannine & group are coordinating.
October 17, 2017	Geriatric Psychiatric Perspective on the Relationship of Capacity and Function	Dr. Harry Morgan	Deb Hadaway is coordinating. CLE request due by Sept. 26, 2017
Meeting Date	Presentation Topic	Presenter(s)	Comments
November 14, 2017	MOLST Overview	Suzanne Blancaflor & Judge McGrath Suzanne.Blancaflor@ct.gov (860) 509-7457	Deb Hadaway is coordinating.

			CLE request due by October 24, 2017
November 29, 2017 Aqua Turf	Hot Topics in the Probate Courts	See outline.	Probate Admin in conjunction with Jeannine and Amy Todisco
December 5, 2017	Stretching Your Client's Dollars in an Assisted Living Facility	Amy Orlando	Jeannine is coordinating. CLE request due by Nov. 14, 2017
January 16, 2018	Eligibility for and Benefits of the Medicare Savings Program	Kevin Brophy (20 mins) Ed Lang Ashkon Roozbehani	Kevin is coordinating. CLE request due by Dec. 26, 2107
February 20, 2018	The Interplay of Assets, Income, and Employment with SSI Benefits	Diane Sauer dianemsauer@gmail.com 860-646-1119	Jeannine is coordinating. CLE request due by Jan. 30, 2018
March 20, 2018	A Review of Nursing Home Admission Agreements (language, legislation & litigation) / <u>Valliere</u> Decision PA16-209/CGS 19a-539(d)	Carmine Perri carmine@ctseniorlaw.com 860-952-9426 Bruce Fontanella	Amy Todisco and Jeannine are coordinating. CLE request due by Feb. 27, 2018
March 22, 2018 9-4 Grassy Hill Country Club, Orange	Essentials of Elder Law	Malcom Barlow Carmine Perri Lisa Davis George Bickford Deborah Hadaway Dr. Harry Morgan	Jeannine is coordinating
Meeting Date	Presentation Topic	Presenter(s)	Comments
April 25, 2018** 5:30-8:30 UCONN School of Law **Date has changed from 4/17/18	Fundamentals of Ethics in Elder Law: An attorney's ethical obligations in abuse cases, as court-appointed attorneys	Sandra Sherlock-White Kirk Lowry, CT Legal Rights Project Kathy Flaherty, CT Legal Rights Project	Amy Todisco is coordinating. CLE request due by March 27, 2018

	and in commitment matters		2 ethics credits
April 26, 2018 9:00 am – 1:00 pm CBA, New Britain	Medical Insurance Essentials for Advising the Elderly, Disabled, and Impoverished Medicare coverage plans, including Advantage plans, prescription coverage options, Access Health and HUSKY benefits.	Mike Leone (860) 621-7766 or mile@aibllc.com Paul Chase, DSS (860) 424-5994 or Paul.Chase@ct.gov DSS – Community Options Unit 55 Farmington Avenue Hartford, CT 06106	Amy Orlando, Amy Todisco, and Jeannine are coordinating.
May 15, 2018	Medicare Hot Topics – Help and Concerns	Judith Stein, Center for Medicare Advocacy	Sandra Sherlock-White and Jeannine are coordinating CLE request due by April 24, 2018
June 11, 2018 CT Legal Conference – CT Convention Center	How to Build an Elder Law Practice	Lisa Davis Deborah Tedford Amy Todisco moderating	Group is coordinating.

ENVIRONMENTAL LAW SECTION

M. Anne Peters, Chair

Purpose

The purpose of this section shall be to safeguard and enhance conservation and environmental quality; to promote the objectives of the CBA relative to environmental law; to promote the practice of environmental law, including compliance with the Rules of Professional Conduct; to foster relationships among attorneys with an interest in conservation and environmental law; to offer opportunities for discussion of an exchange of information about current issues; to aid in the drafting, review and interpretation of legislation and regulations; to assist with education of the general public, the news media and others about conservation and environmental law; and to undertake such other activities as the section or the CBA may deem appropriate.

Annual Report

This year, the section varied its customary meeting formats, times, pricing, and locations in order to expand and diversify our active membership and include more junior level attorneys, government attorneys, attorneys at non-profits, and small firm attorneys.

Full Section Meetings

September 26, 2017

Antea USA, Inc. v. Connecticut Department of Energy & Environmental Protection, HHB-CV17-6039206-S, at Eli's on Whitney, Hamden. The panel discussed the implications of DEEP's Declaratory Ruling in *Antea* for current and future environmental remediation projects in Connecticut. Speakers included: Eric Brown, Senior Counsel, Connecticut Business and Industry Association; Nancy K. Mendel, Winnick Ruben Hoffnung Peabody & Mendel LLC; and Alfred E. Smith, Jr., Murtha Cullina LLP. The program was approved for 1.0 hour of CT CLE credit.

October 26, 2017

"Connecticut DEEP's Priorities and Initiatives for 2017-2018," at the Quinnipiac Club, New Haven. The section met with attorneys from DEEP and the Attorney General's Environmental Section to review the agency's preliminary plans and priorities in the light of the state's October 25, 2017 budget. The commissioner, DEEP counsel, and section members also discussed the effect of Public Act 17-2, requiring ninety-day permit application final determinations on DEEP's permit processing. The speaker was Robert Klee, Commissioner, Department of Energy and Environmental Protection.

November 30, 2017

"Brownbag Lunch and Roundtable Discussion" with DEEP's in-house attorneys, hearing officers and the Connecticut Attorney General's environmental group, at DEEP's office, 79 Elm Street, Hartford. The section met with government attorneys to discuss opportunities to improve communications between private and public sector counsel, channels for providing feedback on DEEP applications and forms, and lead times for agency response to discovery requests, among other topics.

January 25, 2018

"Environmental Issues in Connecticut Real Estate Lending: There is Risk and There is Risk that Matters," City Steam Brewery, Hartford. The section met panelists Michelle Gamache, People's United Bank, N.A.; Robert F. Polito Jr., Webster Bank, NA; and Doug Brink, LEP, GEI Consultants, Inc. Moderators were Holly Winger, Brenner Saltzman & Wallman LLP; and Aaron D. Levy, Shipman & Goodwin LLP. The program was approved for 1.0 hour of CT CLE credit.

February 13, 2018

“Connecticut General Assembly Environment Committee Leadership: Remarks And Discussion On Current Environmental Issues And Initiatives For the 2018 Legislative Session,” joint meeting of Environmental Law Section and UConn Center for Energy and Environmental Law, Starr Reading Room, UConn Law School. The section met with UConn Law School students, faculty, DEEP attorneys, and legislators to discuss the Environment Committee’s legislative agenda for 2018. When two of the invited speakers cancelled because of unanticipated commitments, Lee Sawyer, CT DEEP Legislative Policy Director, presented a summary of the agency’s legislative priorities for the year. Speakers included: Senator Ted Kennedy, Jr., Representative Mike Demicco, and Lee Sawyer, CT DEEP Legislative Policy Director. The program was approved for 1.5 hours of CT CLE credit.

March 22, 2018

“An Evening with Gina McCarthy” at the Connecticut Science Center, presented jointly with the Environmental Professionals Organization of Connecticut, the Society for Women Environmental Professionals and the Connecticut Environmental Forum. Two hundred environmental professionals, including section members; attorneys from DEEP and the Connecticut Green Bank; and representatives from UConn, Eastern Connecticut State University, Yale, environmental consulting firms, laboratories, and manufacturing concerns, attended an evening of networking and socializing with former EPA Administrator, Gina McCarthy. During her lecture, McCarthy shared her views on the future state of environmental regulation at the local, state, regional, national, and international levels.

April 26, 2018

“Emerging Contaminants: A Lawyer’s Primer.” The topic included an overview of the regulations and policies governing the investigation and remediation of commonly used chemicals that are now known to pose a threat to public health and the environment. The program was held at GZA’s offices in Glastonbury and was broadcast live as the section’s first webcast to those who wished to participate remotely. It was also an early morning program and, like the section’s November lunch meeting with DEEP, there was no charge. Speakers included: Richard Desrosiers, LEP; and Gordon Brookman, PE, LEP, LSP. The program was approved for 1.5 hours of CT CLE credit.

Executive Committee Meetings

August 24, 2017

Programming for the year; bylaw amendments; possible section positions on legislation and regulations; diversifying section membership.

December 28, 2017

Amendment of bylaws to authorize electronic meetings of entire section and options for making membership more attractive for students, government attorneys, and attorneys for non-profits and small firms.

May 7, 2018

Approval of Westmoor Park, West Hartford, as recipient of the 2018 Clyde O. Fisher Award; amendment of bylaws to include CBA’s recommended diversity language; and a discussion of Executive Committee membership for 2018-2019.

May 18, 2018

Discussion whether the section wishes to comment on EPA’s proposed Transparency Rule. The meeting was followed by a Doodle Poll to solicit further feedback. There wasn’t a consensus within the Executive Committee and no further action was taken.

CLE

The section arranged for CT CLE credit for its September, January, February, and April meetings.

The section’s program planned for the June 11, 2018 Connecticut Legal Conference has been approved for 1.0 hours of CT and NY ethics credit. The program, entitled, “The Ethics and Environmental Practice,” will address ethical pitfalls in environmental matters, both in transactions and litigation, including conflicts of interest, confidentiality, special issues of competency, emergency response, and the role of the lawyer in working with consultants and the

media. Panelists include: Douglas S. Pelham, Cohn Birnbaum & Shea P.C.; and Lee D. Hoffman, Pullman & Comley LLC. The moderator is Elizabeth R. Fortino, Winnick Ruben Hoffnung Peabody & Mendel LLC. Attendees earned 1.0 hours of CT CLE credit.

Legislative Efforts

In late March, Graham Stevens and Dean Applefield of DEEP asked whether the section would support an amendment to the 2018 Brownfield Working Group's pending bill. The amendment would make technical changes to align grant and loan program requirements, revise the definition of an "environmental use restriction," and make minor changes to the enabling language for "activity and use restrictions" to make that program more usable. There wasn't enough for a formal section position on the amendment, but we were able to poll the Executive Committee and report, informally, on our members' responses. The amendment was raised, approved and the language is part of Public Act 18-85.

ESTATES AND PROBATE SECTION

Christopher S. Drew, Chair

Purpose

The mission of the Estates and Probate Section is to focus on all issues affecting wills, estates, trusts, guardianships, conservatorships, powers of attorney, living wills, health care documents and probate litigation, as well as estate, gift and income taxes. The section also promotes sound public policy and best professional practices.

Annual Report

Section Meetings

The section held regular monthly meetings from September through May. Five of the meetings were open meetings and four of the meetings were for the members of the section's Executive Committee. All of the meetings this year were held at the Quinnipiac Club. Every meeting included a CLE program. Following is a list of the speakers and topics for the 2017-2018 bar year:

September, 2017

Louis Bucari, General Counsel for the Connecticut Department of Revenue Services, "A Look at the Connecticut Estate Tax from the Perspective of the Connecticut Department of Revenue Services."

October, 2017

Michael J. Welch, CPA/ABV/PFS, J.D., LL.M, Partner, Pue Chick Leibowitz & Blezard LLC, "Tax and Employment Rules for Household Employees."

November, 2017

Byron Harmon, Partner, Shipman & Goodwin LLP; and Matthew D. Maclean, Founder and Managing Principal of Rossmore Private Capital LLC, "The Modern Prudent Investor Rule and Trustee Investing."

December, 2017

Bill Chapman, Government and Community Affairs Administrator, CBA; and Attorney Robert F. Shea, Jr., lobbyist for the Estates and Probate Section of the CBA, "Planning for the 2018 Legislative Session."

January, 2018

Jeffrey A. Cooper, Professor of Law, Quinnipiac University School of Law; and John R. Ivimey, Principal, Reid and Reige PC, "Recent Developments in Connecticut Estate and Probate Law."

February, 2018

Paul J. Knierim, Probate Court Administrator, "The Connecticut Conservator Standards of Practice."

March, 2018

Marc T. Finer, Partner, Murtha Cullina LLP; and Richard A. Marone, Partner, Murtha Cullina LLP, "An Overview of the Tax Cuts and Jobs Act of 2017," with particular emphasis on estate and gift taxes and planning; Individual, business and fiduciary income taxes; and business structuring.

April, 2018

Peter T. Mott, Principal, Brody Wilkinson; and K. Bradoc "Brad" Gallant, Partner, Day Pitney LLP, "Engagement Letters for Trust and Estate Attorneys."

May, 2018

Laird A. Lile, "Musings of a Florida Trust and Estate Lawyer. Florida Trust and Estate Law Issues for Connecticut Lawyers."

CLE Programs

The section was involved with the following CLE programs during the 2017-2018 bar year:

November 10, 2017

Co-sponsored with the Tax Section, the 2017 Federal Tax Institute of New England. This full day program brought in speakers from across the country and included nine different CLE programs.

November 29, 2017

Co-sponsored with the Elder Law Section and the Office of the Probate Court Administrator, the six-hour program, Hot Topics in Probate, that included six different CLE programs.

June 11, 2018

Connecticut Legal Conference presented by the Connecticut Bar Association. Sponsored the 1-hour program, "Estate and Trust Planning for Beneficiaries with Opioid Addictions." Co-sponsored with the Sports and Entertainment Law Section the 1-hour program, "Estate Planning for Actors and Athletes."

Legislative Efforts

At the end of October 2017, the Connecticut Budget Act included provisions to increase the Connecticut estate and gift tax basic exclusion amounts from \$2 million per person to \$2.6 million per person for 2018. The Act further increased the basic exclusion amounts to \$3.6 million in 2019, and the basic exclusion amounts were scheduled to match the federal estate and gift tax basic exclusion amounts in 2020. Since the federal estate and gift tax basic exclusion amounts were \$5.49 million at the time the legislature passed the Budget Act, and were increased by the federal government to \$11.18 million in late December 2017, it was expected that the Connecticut legislature would reconsider the decision to increase the Connecticut basic exclusion amounts to match the federal basic exclusion amounts in 2020. As expected, the Connecticut legislature did revisit the gift and estate tax issue but unfortunately two bills were passed during the 2018 legislative session that change the estate and gift tax threshold in Connecticut beginning in 2020. The first bill, PA 18-49, §§ 14-17, sets the basic exclusion amounts at \$5.49 million for 2020 and thereafter. The second bill, PA 18-81, §§ 66-68, sets the gift and estate tax basic exclusion amounts at \$5.1 million for 2020, \$7.1 million for 2021, \$9.1 million for 2022, and matches the federal basic exclusion amount for 2023 and thereafter. It is our understanding that the bill that passed second, P.A. 18-81, will control with regard to 2020 and beyond and we are hopeful that the legislature will resolve this conflict by October 1, 2018.

The Estates and Probate Section also proposed an omnibus trust bill to try to modernize Connecticut Trust law. The bill included the following provisions:

Uniform Trust Code

Connecticut has very few statutory rules governing trusts, and the case law on the topic is fractured and usually unclear. The Uniform Trust Code, modified to address Connecticut-specific law and concerns, provides a comprehensive model for codifying the law on trusts. It would answer many legal questions on trust for which there is currently no answer in Connecticut, and would facilitate development of a strong trust industry in Connecticut.

Rule Against Perpetuities Reform Act

A majority of states have eliminated or greatly modified the rule against perpetuities to allow trusts to stay in effect for longer periods of time. This antiquated rule was originally designed to keep real estate productive, has very little relevance today because most trusts now hold investment securities or closely held business interests. Elimination of the rule against perpetuities would protect beneficiaries in crisis, such as those suffering from addiction, by allowing for the continued management and protection of their assets.

Directed Trust Act

In a modern directed trust, a person other than a trustee has power over some aspect of the trust's administration. This act provides clean, functional rules that allow a settler to freely structure a directed trust preserving key fiduciary safeguards for beneficiaries, including sensible default rules regarding information sharing and division of responsibility. This legislation would enhance the ability to retain unique assets, such as family businesses, in Connecticut rather than having them sent to banks and trust companies in other jurisdictions that permit such direction provisions.

Qualified Dispositions in Trust Act

Currently 20 states have enacted some form of domestic asset protection trust laws. These laws are not designed to allow an individual to evade his or her current or known creditors, but to provide some level of protection against potential and future creditors after a prescribed statute of limitations has run. As a result of these statutes, many individuals have moved all or a portion of their significant investments to states with these favorable asset protection statutes. Connecticut residents are removing a substantial amount of their wealth out of Connecticut to states as nearby as Rhode Island and New Hampshire to protect those assets. The lack of comparable law in Connecticut provide a disadvantage to creditors in Connecticut by forcing Connecticut creditors to bring claims in foreign jurisdiction, adding appreciably to the cost of recovery.

Although our efforts to pass the omnibus trust bill were not successful in 2018, we feel that we made significant progress working with the interested parties and we are hopeful that we will be able to use this momentum to pass this legislation in 2019.

Volunteer Activities

Members of the Estates and Probate Section continued to volunteer to prepare wills and other estate planning documents for needy veterans. The section also hosted CBA Presidential Fellow Karolyn Ryan.

FAMILY LAW SECTION

Samuel V. Schoonmaker IV, Chair

Purpose

This section aims to enhance the practice of family law by providing education to members of the section, working with the judiciary and family relations division, and developing positions on issues facing the family lawyer.

Annual Report

The Family Law Section had a successful year. It held numerous CLE dinner meetings, including a joint meeting with the Young Lawyers Section. Members of the Executive Committee expressed concern that deficit spending has continued for several years. The section again engaged a lobbyist to supplement the efforts of the CBA lobbyist, which is the primary reason for the section's deficit budgets. As in the past several years, there were numerous legislative proposals relating to family law, and the volunteer efforts of section members would have been insufficient to address significant public policy issues as they arose.

FEDERAL PRACTICE SECTION

Jonathan B. Orleans and Shelley R. Sadin, Co-chairs

Purpose

The Federal Practice Section provides lawyers who practice in Connecticut's federal courts with opportunities for social interaction and education. Working with the district and magistrate judges, who are ex officio members of the Executive Committee, and with the invaluable assistance of Clerk of Court Robin Tabora and Chief Deputy Clerk Dinah Milton Kinney, the section seeks to create a forum for consultation and dialogue between members of the bar and the bench on issues of mutual interest, including rules and practice in the federal courts, relevant legislation, content for general meetings, presentations, and topics for the section's biennial bench-bar conference. As a whole or through its two main committees (civil practice and criminal practice), the section takes an active role in shaping and commenting on legal and procedural developments affecting federal practice in the District of Connecticut.

Annual Report

Early in the year, the section assisted the efforts of Judge Chatigny's former law clerks in raising funds to support the presentation of Judge Chatigny's portrait, which occurred on September 15, 2017. The section also co-sponsored a discussion with US Supreme Court Justice Steven Breyer, held at the Bushnell Auditorium in Hartford on September 28, 2017, as part of its Connecticut Forum series.

On October 11, 2017, the section's Executive Committee met at the Quinnipiack Club. The discussion included: proposed topics for upcoming section meetings; a report from Chief Judge Hall, on behalf of the court, regarding the re-appointment of Magistrate Judge Martinez; the appointment of new chief US Probation Officer Warren Maxwell; the search for a new magistrate judge; changes to the District's Local Rules; and initial planning for the 2018 bench-bar conference at St. Clement's Castle. The section also determined at this meeting to institute a no-questions-asked reduced admission charge option of \$25.00 for section programs, to encourage increased participation in section events by a more diverse group of lawyers.

On November 7, 2017, the section hosted a panel discussion entitled, "From Migrant Travel Bans to Wedding Cakes: The US Supreme Court, 2017-2018," featuring two distinguished speakers: Judith Resnik, the Arthur Liman Professor of Law at Yale Law School; and Beth Brinkmann of Covington & Burling LLP, who formerly served as deputy assistant attorney general, civil division, and assistant to the solicitor general at the Department of Justice. Professor Resnick and Ms. Brinkman discussed two major cases, *Trump v. Hawaii* and *Masterpiece Cake Shop v. Colorado Civil Rights Comm'n*, and their implications for separation of powers, federalism, and religious freedom.

On January 17, 2018, the section's Executive Committee met at the Quinnipiack Club for a presentation by Judge Bolden, who made a presentation and led a discussion focused on the recent changes to the District's Local Rules, including the Civil Pro Bono Panel (Local Rule 83.10).

On April 18, 2018, the section hosted a panel entitled, "Women in the Law: A Fireside Chat with Judge Shira Scheindlin (Ret.) and Journalist Linda Greenhouse." The very well-attended event was moderated by Chief Judge Hall, with distinguished panelists Hon. Shira Scheindlin, retired United States District Judge of the Southern District of New York, now Counsel at Stroock; and renowned journalist Linda Greenhouse, who currently serves as Joseph Goldstein Lecturer in Law, Senior Research Scholar in Law, and Knight Distinguished Journalist in Residence at Yale Law School. The panelists engaged in a lively discussion about their experiences and insights into challenges faced by women in the law, both in court and in practice.

Finally, on May 16, 2018, the section convened its annual criminal practice CLE, entitled, "The Fourth Amendment and the Cyberworld: Where will the Supreme Court and Second Circuit Draw the Line on the Government's Search and Seizure of Electronically Stored Evidence?" A panel, organized by Brian Spears and moderated by Judge Meyer, addressed several notable recent cases regarding the limitations on the government's ability to gather electronic evidence. Panelists were Sandra Glover, assistant US attorney and appellate chief; and John Cerretta of Day Pitney LLP, who discussed the Second Circuit's en banc decision *United States v. Ganius*; Edward Chang, 2VP of cyber risk management at Travelers, discussed the recent case *United States v. Microsoft* and related Congressional legislation; and Alexandra Shapiro of Shapiro Arato discussed the argument before the Supreme Court in *Carpenter v. United States* and the Court's forthcoming decision.

Although not official meetings of the section, many members have assisted with and attended panel discussions sponsored by other CBA sections. On April 4, 2018, at the Hartford Golf Club, the Labor and Employment Section hosted a panel, "Three Views from the Bench: Questions & Answers with Hartford's Federal Judges." In recognition of Judge Covello's 25th year on the court in 2017, Judges Shea and Martinez joined what was traditionally an annual panel with just one judge and offered their perspectives and anecdotes from federal employment cases. A Young Lawyers Section panel discussion on April 24 offered a panel consisting of Judge Underhill, James T. Shearin of Pullman & Comley LLC, and Kevin M. Smith of Wiggin and Dana LLP, and moderated by Kristen L. Zaehring of Murtha Cullina LLP. This panel discussed federal practice and procedure, including chambers practices, pleadings, discovery, dispositive motions, and preparing for trial. The panelists' insights as to the "ins and outs" of federal practice and procedure over the life of a case proved beneficial for all practitioners, from young attorneys to seasoned advocates.

On June 11, 2018, the section will sponsor a program at the Connecticut Legal Conference entitled, "Pro Bono Appointments in the Federal Court: Tips From the Trenches." Judges Michael Shea and Donna Martinez, and practitioners Sean Fisher and Antonio Ponvert will discuss the changes to Local Rule 83.10, the importance of pro bono assistance to the administration of justice in the District Court, and practical tips for lawyers representing prisoners in civil cases. Section co-chair Jon Orleans and member Kristen Zaehring will moderate.

The section's year will end with its traditional bench-bar social at the Pine Orchard Country Club in Branford, which will be held on June 20, 2018.

2017-2018 Officers

Jonathan B. Orleans, Section Co-chair, Pullman & Comley LLC, Bridgeport

Shelley R. Sadin, section Co-chair, Quinnipiac University School of Law, North Haven

Robert Frost, treasurer, Frost Bussert LLC, New Haven

James J. Healy, secretary, Cowdery & Murphy LLC, Hartford

Sherwin M. Yoder, Legislative Liaison, Carmody Torrance Sandak & Hennessey LLP, New Haven

Joseph Martini, Co-chair, Criminal Practice Committee, Wiggin and Dana LLP, New Haven

Brian Spears, Co-chair, Criminal Practice Committee, Spears Manning LLC, Southport

Adam S. Mocchiolo, Chair, Bench-Bar Retreat Planning Committee, Pullman & Comley LLC, Bridgeport

HUMAN RIGHTS AND RESPONSIBILITIES SECTION

Barbara J. Collins, Chair

Purpose

The purpose of the section is to promote the educational and professional objectives of the Connecticut Bar Association within the general field of civil and human rights and responsibilities, as well as the lawyer's role in the pursuit of such rights through the Rule of Law. The main forum for our efforts is the General Assembly.

Annual Report

Meetings

Meetings are always open to all section members. The section attempts to meet several times a year, but generally communicates with its members via e-mail.

CLE/Events

2017-2018 was a quiet year for the section. The section again monitored legislation being considered on the death penalty and offered testimony regarding the Aid in Dying bill. We also continue to monitor the budget battles to ensure that the Commission on Human Rights and Responsibility (CHRO) retains adequate funding especially to handle all the discrimination complaints that it faces and the new responsibilities the legislature imposes.

On July 27 we co-sponsored with the CBA and CHRO, and other CBA sections, the seminar, Transgender and Genderqueer in Public School Students School Safety in an Era of Uncertainty. It was very enlightening for attorneys trying to navigate the new world of bullying and sexual classification.

INSURANCE LAW SECTION

Marilyn B. Fagelson, Chair

Purpose

The Insurance Law Section (the “section” or “ILS”), includes approximately 210 members who represent the interests of insurance policyholders, insurance companies, and industry representatives in legal matters. The purpose of the section is to promote the educational and professional objectives of the Connecticut Bar Association within the general field of insurance law, regulation, and practice.

Annual Report

Much was accomplished this year by many members of the ILS working together. The chair communicated with all section members on a regular basis through e-mail and the CBA’s Sidebar, keeping them informed of ILS activities and encouraging members to be active participants in Section meetings and events.

Programs

We are pleased to report that by the conclusion of FY 2018, the ILS will have:

- Conducted and/or co-sponsored five CLE programs, including a presentation at the Connecticut Legal Conference;
- Hosted a dinner meeting with, and presentation by, the Insurance Commissioner;
- Hosted a reception for an historical presentation at the Knights of Columbus;
- Held five section meetings;
- Held four Executive Committee meetings;
- Drafted a section Diversity and Inclusion Plan; and
- Drafted amendments to the section bylaws to incorporate the section’s Diversity and Inclusion Plan and allow cost-free CLE programs for JD, LLM, and paralegal students, all of which are anticipated to be adopted by the vote of the section at our meeting on June 19, 2018.

Legislative Efforts

Legislative review and communication efforts were well-coordinated and timely. Our legislative liaisons provided detailed regular reports at meetings. In the future, should relevant proposed legislation require it, electronic updates and written materials regarding pending legislative matters will be provided, resulting in a better-informed membership.

YLS/UConn Law School Involvement

For a number of years now, we have had very direct involvement and participation in the section by the Young Lawyer’s Section (“YLS”) contingent. As a section, we are effectively utilizing the resources available to both sections and are bridging the relationship to younger constituents in order to solidify our base for the future. This year, YLS members are invited to attend our June social meeting free of charge. We also were pleased to have Peter Kochenburger, Associate Clinical Professor of Law and Executive Director of the Insurance LLM Program and Deputy Director of the Insurance Law Center, who has continued to serve on the Executive Committee (“EC”).

Membership

Our membership stayed at the same level (210 members) as in FY 2017.

Communication

Meeting minutes have periodically been posted to the CBA ILS website, and announcements and articles have been posted regularly to the section's LinkedIn site.

2017-2018 Meetings and Events

The meetings and events held to date are as follows:

September 18, 2017: Section Meeting and CLE on the History of Health Insurance

For the first meeting of the year, ILS sponsored the first in a series of presentations on the History of the Insurance Industry in Connecticut. The meeting was held at Aetna in Hartford. The evening began with a brief section meeting. Chair Marilyn Fagelson welcomed attendees and then Treasurer Bethany Barrese gave the treasurer's report. Next, education liaisons gave a report on the planned presentations through the fall. Legislation Liaison Theresa Guertin and Public Relations Liaison John Pitblado then each introduced themselves and explained their roles. Following these reports, the chair introduced speaker Charles H. Klippel, Vice President and Deputy General Counsel, Aetna and Adjunct Professor at UConn Law School. Mr. Klippel's presentation was, "Square Wheels and Solar-Powered Flashlights: The Curious History and Complex Regulations of Health Benefits."

October 3, 2017: Executive Committee Meeting

An initial meeting of Executive Committee members was held via telephone and video conference at the offices of Murtha Cullina LLP in Stamford, New Haven, and Hartford. Bethany Barrese gave the treasurer's report. Co-Education Liaison Melissa Federico provided a report on CLE/Program planning for the year, including the planned historical presentation at the Knights of Columbus and the annual presentation by Insurance Commissioner Katharine Wade. The committee discussed planning for the remainder of the year including ideas for the annual symposium, a joint presentation with the Real Property Section and proposals for the Connecticut Legal Conference. Diversity Liaison Tamar Bakhbava provided a report on her efforts to work with affinity bars and the YLS. Regan O'Malley reported on efforts to update the section's bylaws. A tentative agenda for the coming year was set.

October 12, 2017: Historical Presentation on the History of the Knights of Columbus

In the second in the series of presentations on the History of the Insurance Industry in Connecticut, the section sponsored a presentation at the world headquarters of the Knights of Columbus in New Haven. The Knights of Columbus is one of the largest insurers in the world. The presentation was given by John Marella, supreme advocate and general counsel of the Knights of Columbus. Mr. Marella spoke on, "Faith and Fraternalism: The Origins of Knights of Columbus Insurance in Nineteenth Century Connecticut."

November 14, 2017: Section Meeting with Insurance Commissioner

The section meeting was held at Carbone's Ristorante in Hartford. The meeting began with a presentation by Insurance Commissioner Katharine Wade, who addressed a wide range of topics concerning the Insurance Department, including department regulatory oversight initiatives and lean government initiatives. Commissioner Wade then took questions from ILS members. Thereafter, the Chair Marilyn Fagelson presented a report on the section's finances. Vice President and Co-education Liaison Elizabeth Ahlstrand reported on plans for upcoming CLEs. Publicity Liaison John Pitblado reported on publications on the ILS LinkedIn page.

December 15, 2017: Executive Committee Meeting

The meeting was via telephone and video conference at the offices of Murtha Cullina LLP in Stamford, New Haven, and Hartford. Chair Marilyn Fagelson presented the treasurer's report. Minutes of the October 4, 2017 EC meeting, prepared by Secretary Assaf Ben-Atar, were approved by a unanimous voice vote. Co-education Liaison Melissa Federico provided a report on CLE/program planning for the year and the committee held an extended conversation regarding topics for future presentations. Regan O'Malley and Tamar Bakhbava reported on efforts to update the section's bylaws and draft the section's diversity plan. Tamar Bakhbava also reported on efforts to reinvigorate the Disaster Hotline.

February 22, 2018: Joint Section Meeting with Real Property Section and CLE Program

The meeting was held at The Farms Country Club in Wallingford. The chair welcomed attendees and gave the treasurer's report. The chair then reported on plans for future meetings, including the annual symposium at UConn Law School and the Annual Review of Insurance Law cases. Co-legislative Liaison Theresa Guertin reported on bills they were tracking pertaining to property insurance. Thereafter the Real Property Section held a brief meeting followed a CLE entitled, "Property Insurance: What you need to know but were a bit too timid to ask—The Basics and Recent Developments," presented by Wystan M. Ackerman (Robinson & Cole LLP) and Celia B. Waters (Saxe Doernberger & Vita PC), and moderated by Ryan M. Suerth (Murtha Cullina LLP).

April 13, 2018: CLE Annual Symposium

The ILS and the Insurance Law Center at UConn Law School jointly sponsored a 3.0 credit-hour CLE, "Annual Insurance Law Symposium: Big Data Changes Everything: Why Insurance Lawyers Need to Catch Up Fast," at UConn Law School in Hartford. This symposium (which was postponed from March because of snow) began with a welcome by Chair Marilyn B. Fagelson (Murtha Cullina LLP) and moderator Peter Kochenburger (Insurance Law Center, UConn School of Law). Presenters were Deputy Commissioner Tim Curry (Connecticut Insurance Department), Jim Etkin, Robert D. Helfand (Pullman & Comley LLC), Christopher P. Makuc (Navigant), David T. Smith (The Hartford), and Matthew J. Smith (Coalition Against Insurance Fraud). The speakers discussed how "big data" and predictive analytics are transforming the way insurers underwrite insurance, adjust claims, investigate fraud, and work with regulators. The symposium is followed by a networking reception and was well attended by UConn Law students.

April 25, 2018: Section Meeting and CLE Program

The meeting was held at the Quinnipiack Club in New Haven. The chair welcomed the attendees, gave the treasurer's report, and encouraged attendees to become, or encourage others with the interest in becoming, Executive Committee members. Vice Chair and Co-education Liaison Elizabeth Ahlstrand gave a report on planned future programs and events and asked attendees to submit proposals for programs for next year. Theresa Guertin provided a comprehensive report on pending legislation relating to insurance. The meeting was followed by the CLE program, "The Annual Review of Connecticut Insurance-Related Decisions," presented by Regen O'Malley (Gordon & Rees LLP) and Michael Lemoult (Biller Sachs Raio & Zito).

May 18, 2018: Executive Committee Meeting

The meeting was via telephone and video conference at the offices of Murtha Cullina LLP in Stamford, New Haven, and Hartford. Chair Marilyn Fagelson presented the treasurer's report. Tamar Bakhbava presented the proposed amendments to the section's bylaws and the proposed Diversity and Inclusion Plan. The chair proposed a small modification to the draft and, after a brief discussion, with those changes, the committee voted unanimously to approve the amendments to the bylaws. The committee then voted unanimously on a voice vote to approve the section's Diversity and Inclusion Plan. Vice Chair and Co-education Liaison Elizabeth Ahlstrand led a discussion of the remaining planned events and planning for next year. The chair encouraged members to consider nominations of others to the Executive Committee.

Plans for the Rest of the Bar Year

June 11, 2018: Connecticut Legal Conference

At the Conference, the ILS will present a CLE program, "A Practical Look at Directors AND Officers Insurance." This presentation will explore an important part of any corporate insurance program, directors and officers insurance. The speakers will use a sample insurance claim to illustrate the many issues that can arise under a directors and officers policy. The program will be presented by Ryan M. Suerth (Murtha Cullina LLP), John C. Pitblado (Carlton Fields), and Douglas Worth (Willis Towers Watson).

June 19, 2018: Section Meeting and Summer Social Event

The section meeting will address: 1) approval of the proposed amendments to the section's bylaws; 2) approval of the section's diversity policy and initiatives; and 3) program planning for the coming year. The section meeting will be followed by a networking event to which all students and YLS members are invited to attend for free.

June 29, 2018: Executive Committee Meeting

The Executive Committee meeting will address: 1) appointment of officers for the coming year; (2) membership on the Executive Committee; and 3) program planning for the coming year.

Plans for the Coming Bar Year

- The ILS is in the process of planning CLEs for FY 2019. There have been many excellent suggestions for programs such as insurance for marijuana, cyber security, gaps in insurance, policy conditions, and mediation. These and other CLE programs will be discussed further at the June 29, 2017 Executive Committee meeting.
- The section will consider ways in which to encourage participation in the Disaster Relief Hotline. We will be working on developing the CBA website page to encourage volunteers, make training readily accessible to new volunteers and advertise the hotline's service after a weather event.
- The ILS will continue to look for ways to increase the diversity of its membership by planning programs and networking events with other sections, affinity bar groups, and the Insurance Law Center at UConn Law School.
- The ILS hopes to continue to increase interest and participation by more members in FY 2019. Consistent with the CBA's goals, ILS expects that its efforts to provide a wide array of educational and networking programs, to address issues of import to our members, and to coordinate these activities with other interested sections will encourage a more diverse membership to participate in ILS activities.

INTELLECTUAL PROPERTY SECTION

Jim Nault and Scott Lydon, Co-chairs

Purpose

The purpose of this section is to promote patent, trademark, copyright, trade secret, unfair competition, and other technology-related areas of the law.

Annual Report

In this term the Intellectual Property Law Section membership decreased slightly to 164 members.

The section has held the following events/programs during this term:

December 6, 2017

The section hosted a program entitled, "Ethic and IP: Traps, Pitfalls, and Adventures in IP Lawyering." The event offered 2.5 hours of CT CLE (2.0 Ethics/0.5 General). The program was held at Statehouse Square in Hartford.

March 14, 2018

The section hosted a program entitled, "IP Year in Review." The event offered 2.0 hours of CT CLE. The program was held at the CBA's office.

June 11, 2018

At the CT Legal Conference, the section will be presenting a program entitled, "Everything You Wanted to Know about Trade Secrets but Were Afraid to Ask." The program offers 2.0 hours of CT CLE (1.5 General/0.5 Ethics).

The section also planned a wine tasting networking event for April, but the event was canceled due to low registration.

The section has begun planning two CLE events to be held during the next bar year, one in early fall and one in mid-December.

The section held four Executive Committee meetings during this term.

LABOR AND EMPLOYMENT LAW SECTION

Joshua R. Goodbaum, Chair

Purpose

The functions of the section include the study, analysis, consideration, research, and investigation of legal principles having particular significance to labor or employment law; the promotion of the bar's leadership in matters of public importance affecting labor or employment law; the publication of works of legal scholarship; the preparation, evaluation, submission, advocacy, endorsement, and opposing of legislation pertaining to labor or employment law; the presentation of the highest quality legal education and other programs of interest to the bar and general public; the promotion of diversity within the Labor and Employment Bar; and the encouragement of cordial relations between members of the bar and members of other professions and disciplines concerning labor or employment law. See: Article I, Section 2 of the Labor and Employment Law Section Bylaws, approved May 10, 2010.

Annual Report

Officers

Joshua R. Goodbaum, Garrison Levin-Epstein Fitzgerald & Pirrotti PC, Chair

Rachel L. Ginsburg, Pullman & Comley LLC, Vice Chair

Jay Crowley, Jay Crowley Law LLC, Secretary

Paula Anthony, Berchem Moses PC, Treasurer

Section Meetings

The section held six general membership meetings during the bar year, as well as three planning or administrative meetings for the Executive Committee or the officers. To a greater extent than previous years, the general meetings represented a partnership with other sections of the CBA or with peer institutions in Connecticut.

The meetings were:

July 11, 2017

The Executive Committee met by conference call to discuss planning for the bar year.

September 7, 2017

Federal Magistrate Judges Sarah A. Merriam and Robert A. Richardson presented on mediation to a joint meeting of the section and the Connecticut Employment Lawyers Association (CELA).

October 25, 2017

Continuing the joint meeting from September, section members Holly L. Cini, Mary E. Kelly, and Patricia E. Reilly presented reactions to the September panel.

November 15, 2017

Rachel L. Ginsburg, Madiha Malik, and Mark Sommaruga presented on legislative developments in CT, MA, and NY. The meeting was held at three different locations, which were connected remotely. The format was an effort to test whether providing shorter travel distances would increase turnout. The consensus was that the night selected for the meeting included a number of conflicts and therefore was not a good test case.

December 12, 2017

The Executive Committee met by conference call to discuss planning the March Advanced Employment Law Symposium.

January 24, 2018

Section member Tom Meiklejohn and guest Walter Hunter (from Providence) discussed the unionization of university graduate students and/or employees. The Education Section was invited to attend.

February 28, 2018

Section member Virginia McGarrity and guest Sandra Cohen (from New York) discussed Section 409a and other issues concerning executive compensation. The Tax Section was invited to attend.

April 4, 2018

US District Judge Alfred Covello addressed a joint meeting of the section and the Connecticut Employment Lawyers Association. He was joined on the dais by District Judge Michael P. Shea and Magistrate Judge Donna F. Martinez. The event commemorated Judge Covello's 25th year on the federal bench in 2017.

May 2, 2018

The section's officers met to discuss planning for the 2018-2019 bar year.

The section continued an initiative, started during the previous bar year, to offer meetings at a reduced cost to any member for whom price was an obstacle to attendance. This year, the Executive Committee approved a reduction of the low-cost option from \$25 to \$20.

CLE Programs

The section organized two CLE programs:

March 15, 2018

For the seventh year, the section organized the Advanced Employment Law Symposium, a three-quarter day labor and employment law educational program. Over 100 people attended. The following programs were offered, the first six were three consecutive groups of two and the final as a plenary:

- Internal ADR Procedures: Judge Beverly Hodgson, Christine Newhall, Kyle McClain, JR Lederer
- Workplace Investigations: Paula Anthony, Christina Feeney, Gary Phelan
- In-House Counsel: Sarah Habegger, David Vegilante, Jennai Williams
- Millennials in the Workplace: Matthew Curtin, Rachel Ginsburg, Robin Imbrogno
- Hot Button Issues in Ethics: Desi Imetovski and Marcy Stovall
- Strategic Difference in Federal and State Statutes: Emily Gianquinto, Robin Kallor, Peg Sheahan, Eric Sussman
- Annual Update of Employment Law: Joshua Hawks-Ladd and Joshua Goodbaum

June 11, 2018

At the Connecticut Legal Conference the section will offer a two hour panel on workplace absence, including an introduction to the basics of and intersection between disability law, medical leave law, and workers' compensation. Presenters will be Courtney George, Robert Hinton, and Mary Kelly.

Legislation

Mark Sommaruga monitors relevant labor and employment law legislation in the Connecticut legislature. Due to the diverse views of the section member, including both employee- and employer-side counsel, the section is generally unable to take any positions on particular legislation.

Other Initiatives

The Executive Committee imposed an expectation that Executive Committee members will attend at least three section meetings during the year. As a result of lack of or limited attendance, 11 members of the Executive Committee were dropped from the committee. Six new members have been added to the Executive Committee for the 2018-2019 bar year.

The section continued the Kathy Eldergill Prize for Excellence in Employment Law, awarding a \$1,000 prize each to graduating law students from UConn and Quinnipiac. Along with the prize money, the section will pay the section fee for the Labor and Employment Law Section if the winners join the CBA, and will cover the cost of their attendance at the section's regular meetings. In the future, the section should submit these expenses to the CBA for preapproval during the first half of the bar year.

As the year ends, the section finds itself with more than \$37,000 in the bank. The two immediate past chairs of the section, David Rintoul and Joshua Goodbaum, have volunteered to lead a committee devoted to presenting ideas about how the section can spend this money in a way that advances the purposes of the section and the CBA.

Purpose

Article 1, Section 2 of the bylaws of the Litigation Section of the Connecticut Bar Association, amended by the Board of Governors on September 16, 1996, provides that the “purpose of this section shall be to promote the objectives of the Connecticut Bar Association within the field of civil justice and litigation.” The Litigation Section views that directive as requiring the Section to conduct regular section meetings designed to promote legal education, sponsor continuing legal education programs, monitor and present positions with respect to legislative matters that have the potential to affect the administration and process of an effective and efficient civil justice system, enhance relationships between the bar and the judiciary, and promote civility and professionalism in the practice of litigation.

Annual Report

New Initiatives to Encourage Involvement

The section established three new standing subcommittees, for: 1) programming of section dinner meetings; 2) continuing legal education programs; and 3) the section’s biannual retreat.

The section introduced a “lend-a-hand” price of \$15.00 for attendance at section dinner meetings, no questions asked, to allow attendance for section members for whom full price may present a financial hardship.

Section Meetings

The Litigation Section had eight full section meetings. They are summarized below.

On September 26, 2017, the section discussed plans for the program year, requests for section positions on two proposed rule changes, and proposed revisions to the Connecticut Code of Evidence. Ralph Monaco, the section’s legislative liaison, updated the section on new statutes about to take effect.

On October 25, 2017, the Hon. William H. Bright, Jr., outgoing chief administrative judge for the civil division, presented to the section on, “State of the Connecticut Judiciary: Challenges and Initiatives.”

On November 30, 2017, attorney David Atkins, who has substantial experience litigating attorney grievance and professional malpractice matters, presented to the section on, “Avoiding Claims for your Money or Your License: Risk Management for Litigators.” The program qualified for 2.0 ethics CLE hours.

On January 31, 2018, nationally acclaimed storyteller Matthew Dicks presented to the section on, “Storytelling for Trial Lawyers.” The program qualified for 1.0 CLE hour.

On February 22, 2018, attorneys Linda L. Morkan and Karen L. Dowd, who have substantial appellate practices, presented to the section on, “Issue Preservation for Trial Lawyers.” The program qualified for 1.0 CLE hour.

On March 27, 2018, three current and former court clerks—Tracy T. Bempong, law clerk for the US bankruptcy court in Hartford; Ronald J. Houde, Jr., former clerk for the Connecticut Superior Court; and Melissa Wyckoff, former clerk for the Connecticut Superior Court—presented to the section, “A View from the Trenches: Court Clerks on Tactics that Work.” The program qualified for 1.0 CLE hour.

On April 26, 2018, Attorneys Lisa Perkins of the UConn Tax Law Clinic, and Colleen Masse of the elder law firm Czepiga Daly Pope & Perri LLC presented to the section about, "Maximizing Recovery: A Litigator's Guide to Basic Tax Issues." The program also focused on representing clients who receive public assistance, and structuring litigation recoveries in a manner that does not jeopardize their benefits. The program qualified for 1.0 CLE hour.

On May 22, 2018, Attorneys Joseph E. Gasser of Wiggin & Dana LLP, and Scott T. Garosshen, of Horton Dowd Bartschi & Levesque PC, provided the section with an update on changes to the Rules of Practice and Connecticut Code of Evidence. The program qualified for 1.0 CLE hour.

CLE and Connecticut Legal Conference

On February 15, 2018, the Section presented a CLE program called, "Business Divorce: Litigating the Breakup of an LLC." The program was moderated by section chair William J. O'Sullivan, and the presenters were attorneys Jill O'Toole and Louis Schatz of Shipman & Goodwin LLP; Michael Kopsick of Kahan Kerensky & Capossela LLP; and Jeffrey M. Sklarz of Green & Sklarz LLC. The program qualified for 2.0 CLE hours.

The section is sponsoring a program at the Connecticut Legal Conference, scheduled for June 11, 2018, by nationally prominent litigator, lecturer, and author Patrick Malone, of Washington, DC, called, "The Fearless Cross-Examiner: Win the Witness, Win the Case." The program will qualify for 2.0 CLE hours.

The section began planning for a CLE, to be presented in October 2018, about litigating claims for attorneys' fees.

Legislative Initiatives

The section submitted an official section position opposing certain new official commentary to Article V- Privileges, Sec. 5-1 – General Rule of the Connecticut Code of Evidence. The proposed commentary pertained to the constitutional privilege against self-incrimination.

The section submitted an official section position opposing the automatic production in discovery, under Section 13-3 of the Practice Book, of motor vehicle "black boxes."

The section submitted an official section position opposing a proposed bill that would amend the minimum qualifications of a person serving as the state's attorney general.

The section submitted an official section position supporting a proposed bill regarding the licensure of court reporters.

The section submitted an official section position opposing a proposed bill that would limit the jurisdiction of the appellate court and Supreme Court.

PARALEGALS SECTION

James Budinetz and Joshua LaPorte, Co-chairs

Purpose

The purpose of the Paralegals Section is to disseminate information to attorneys regarding the paralegal profession, to publicize issues of importance regarding this profession, to encourage attorneys to practice with qualified paralegals in order to lower costs, and to improve the quality of service to clients.

Annual Report

The Paralegals Section's priority for this bar year was to continue and build upon our action plan from last year—continued provision of high-quality, cost-effective CLE programs for our members, continued development of a voluntary registration for qualified paralegals in this state, outreach to ABA-approved paralegal education programs, recruitment and development of a diverse group of leaders to represent the section, and improved access to our educational programs, business meetings, networking opportunities to paralegals throughout the state, and promoting pro bono initiatives.

We have achieved success on all fronts:

- We have continued to work with the education director at the CBA to accommodate educational programs designed for paralegals within the new MCLE rules for attorneys.
- We designed three excellent educational programs for paralegals and attorneys—two programs were delivered by attorneys, and one was a program presented by the IT director at UConn Law on cybersecurity issues that was tailored to all legal professionals.
- We have continued work on our voluntary paralegal registration proposal, including educating paralegals, attorneys and stakeholders on our proposal and related efforts nationwide, and strengthening our coordination efforts regarding the proposal with the other paralegal organizations in the state.
- We have continued our outreach efforts to Connecticut's ABA approved paralegal degree and certificate programs.
- We have continued to offer conference call-in for all meetings.
- Two of our Executive Committee members joined the Pro Bono Committee this year to offer our voice as to how paralegals can be utilized for pro bono activities, as well as to share how the CBA's paralegals have been involved and continue to seek out pro bono opportunities. The ABA and National Federation of Paralegal Associations, of which the Paralegal Section continues to be an affiliate member organization, has also promoted paralegals in pro bono this past year, and it is therefore a cause the section plans to continue to promote into the next bar year.
- We've continued to work to be inclusive of the full diversity of our section and to create opportunities for different members to contribute through activities ranging from introducing our speakers, to reaching out to educational programs in the state, working on the aforementioned voluntary registration proposal, and working on ad-hoc committees.

REAL PROPERTY SECTION

Brian S. Cantor, Chair

Purpose

The purpose of the Real Property Section is to promote the educational and professional objectives of the Connecticut Bar Association within the field of real property law. The section provides a forum at executive committee and section meetings throughout the year for the exchange of information and ideas relative to real property issues, concerns, and transactions, both residential and commercial. The section also welcomes consideration and discussions of issues related to conveyancing, mortgages, land use, title insurance, and other matters of interest to the real estate Bar.

Annual Report

Officers

Brian S. Cantor, Chair

Edward S. Shelton Vice-Chair

Carolyn J. Cavolo, Treasurer

Lisa J. Lugauskas, Secretary

Meetings and Education

The Real Property Section, one of the largest and most active sections in the Connecticut Bar Association, has presented the following programs at its monthly meetings commencing in September 2017 through May 2018 to provide professional development and enrichment to its members. The February meeting was a joint meeting with the insurance law section. A joint meeting with the Planning and Zoning Section in June is planned:

- "Judgment of Loss Mitigation"
- "Probate Matters," a discussion of probate issues of interest to real estate practitioners
- "Entity Transfers including the New LLC Act"
- Cyber fraud
- Property and casualty coverage and policy definitions
- Municipal searches

The section presented a seminar at the CBA Legal Center. Presenters were Matthew J. Cholewa, Bruce A. Zawodniak, Barbara C. Smith, and Joseph C. Sanfilippo.

The section also presented a seminar at the CBA Legal Center entitled, "Residential Real Estate Closings: Practice Essentials and An Overview of the New Rule." Presenters were Edward M. Rosenblatt and Lisa J. Lugauskas.

In addition to the other educational efforts of the section, the section will be presenting its Annual Survey of Case Law and Statutes as well as a joint presentation on Airbnb and short term rentals at the Connecticut Legal Conference in June, 2018.

The section will be presenting

We have prepared a handbook for officers of the section and a yearly calendar to aid incoming officers about their duties and responsibilities throughout the year.

Legislation

The section has an active legislative subcommittee that works closely with the CBA lobbyist to identify bills of interest to the real property practitioner. One of the problems that continues to hinder the section is the fact that many of these bills require immediate responses and the current method of securing CBA approval does not always allow us to be responsive enough to the legislative timetable. We are sometimes submitting testimony after the public hearing and the value of a bar association position on a particular issue is often lost. Despite these shortcomings, we have taken the following positions on legislative matters this year.

Summary of legislative activity 2016-2017, RPS:

Positions taken:

Quit Claim Deed. The Real Property Section *opposes* legislation to require both the grantor and the grantee, or their duly authorized legal representatives, to be present at the time a quitclaim deed is executed. Approved by the House of Delegates, March 20, 2017; expires end of 2019 legislative session.

Adverse Possession. The Real Property Section *opposes* legislation that would eliminate the possibility of acquiring property by adverse possession property when the owner pays the taxes on the land in question. Approved by the House of Delegates, March 23, 2015; expires end of 2017 legislative session.

Infinite Duration of the Succession, Estate, and Probate fee liens. The Real Property Section *supports* legislation to address the fact that: a) probate court fee liens and estate/successions tax liens are of infinite duration, and b) property is sometimes conveyed or mortgaged without such liens being cleared. Approved by the House of Delegates, December 12, 2016; expires end of 2019 legislative session.

Fixed Recording Fees. The Real Property Section *supports* legislation that would set fixed recording fees for documents to be filed on the land records in Connecticut for one-to-four family housing, without significantly increasing the average cost to record a document, in order to simplify the disclosures process in connection with residential closings occurring after new federal Consumer Financial Protection Bureau (CFPB) regulations go into effect on October 3, 2015. Approved by the House of Delegates, December 10, 2015; expires end of 2018 legislative session.

Internal Revenue Code 1031. The Real Property Section *opposes* federal legislative efforts to: (a) repeal section 1031 of the Internal Revenue Code, and (b) limit the amount of capital gains which can be deferred in a section 1031 tax deferred exchange. Approved by the House of Delegates, September 21, 2015; expires September 21, 2018.

Standardized Residential Contract Form. The Real Property Section *opposes* SB756 and legislation regarding "An Act Requiring a State-Wide Standardized Contract Form for the Sale of Residential Real Property." Approved by the House of Delegates, March 23, 2015; expires end of 2017 legislative session.

Good Funds. The Real Property Section *supports* legislation to require lenders to deliver 'good funds' for real estate closings no later than the day scheduled for such real estate closings, which would be a reinstatement of 36a-758a, which was repealed in 2007. Approved by the House of Delegates, June 20, 2016; expires end of 2019 legislative session.

Allowing Insurance Producers to Sell Title Insurance. The Real Property Section *opposes* any legislation which may be introduced which would have the effect of permitting non-attorneys to sell title insurance. Approved by the House of Delegates, September 21, 2015; expires end of 2018 legislative session.

Prior Title Holders. Together with the Elder Law and Real Property Section *support* legislation that prevents a previously recorded interest in property from losing its priority to an unrecorded or subsequently recorded claim or lien by the state against a person for repayment of state aid. Approved by the House of Delegates, June 20, 2016; expires end of 2018 legislative session.

Green Bank Bill. The Real Property Section *opposes* Raised Bill S.B. 973 concerning the Green Bank as long as it contains a provision that the lien created in the bill is a super-priority and secret lien. Together with the Environmental Law Section, the CBA has crafted this into a position supporting the Bill, provided the lien created by it is akin to a judgment lien, whereby it is created upon recording and take subject to the interest of previously recorded encumbrances.

Outreach

The section held two meetings in Fairfield County this past year in an attempt to make the section more visible in places other than Hartford and New Haven Counties. Both meetings were successful, and we anticipate the tradition to continue.

The section is currently trying to work with the Connecticut Department of Revenue Services regarding its online Real Estate Conveyance Tax form, in an effort to protect clients' non-public personal information, including social security numbers, and to improve the usability of the online form.

Social Committee

Diversity and Inclusion

Scholarship Fund

The section made its annual \$1,500 award each given to a law student at the University of Connecticut School of Law and the Quinnipiac University Law School who have demonstrated exceptional academic excellence in the area of real property law. The recipients of this year's awards were invited to attend our May meeting to be recognized by the section for their achievements.

The section increased its contribution to the Connecticut Bar Association Real Property Section Memorial Prize Endowment Fund which is administered by the UConn Law School Foundation and Quinnipiac University Law School by an additional \$1,000 to UConn, in an effort to get to a point where the fund generates sufficient income yearly to fund the award.

Model Contract

An on-going initiative has been the Model Residential Contract which was approved for use by the section on September 18, 2013. Despite the fact that the contract, as approved, was tabled by the CBA House of Delegates, the Model Contract Committee has continued and been reconstituted to involve lawyers from each county in Connecticut and the amended mission is to educate the local Bar and affinity groups about the benefits of a statewide contract. A current goal of the committee is to shorten the model contract, so as to increase its use. The contract committee is not receiving the support from the real estate community that we were promised and anticipated. They are reaching out to real estate agents directly and have found that real estate agents would like a uniform contract. Efforts are being made to work with real estate companies directly to develop a customized CBA contract for them. Gene Marconi has also been able to compile information illustrating how much companies save by using the contract. Through the use of the model contract, Gene Marconi has been able to save Berkshire Hathaway a good deal of money because of the document's thoroughness.

Residential Specialization

The Residential Real Estate Specialization Committee has had a busy and active year, developing and administering a practice exam to be used to qualify residential real estate professionals for the status of a Specialist in Residential Real Estate. The practice exam is then approved by a statistician prior to its submission to the bar association and the Judicial Specialization Committee. Active since 2004, the committee is composed of established real estate practitioners who will administer the examination to ensure the most qualified specialists.

Technology and Website

The committee's work focused on keeping the website current and useful to the members of the section. We corrected inconsistencies in the references to the "Group Pages," and we posted recent minutes and a current schedule of meetings. We have made available materials from presentations to members of the section when the presenters could not distribute hard copies at meetings and when the materials would have ongoing value for future reference. The Website Committee is working with the Social Committee to publish photographs of section events. The committee needs to review the website for currency and remove outdated materials, and we can improve the organization and accessibility of "Group Pages" and "Additional Links."

Unauthorized Practice of Law

The UPL Committee of the Real Property Section has met throughout the year to discuss strategies for addressing the unauthorized practice of law in the context of real estate transactions in the State of Connecticut. We met with the CBA UPL Committee to discuss (among other things) recent antitrust decisions relevant to enforcement action, strategies in addressing violations, and the role of the Judicial Branch in commencing enforcement action against violators. Throughout 2017, the Real Property Section UPL Committee has focused on several areas to advance the section's interests in assuring effective enforcement of UPL regulations. These include: (i) identifying areas of real estate practice where novel unauthorized practice issues are arising; (ii) identifying those actors and approaches that are best suited to addressing potential violations; (iii) evaluating potential legislative action that may enhance enforcement efforts; (iv) evaluating circumstances where direct legal action may be warranted by the Real Property Section, the CBA and third parties in order to protect the public interest; and (v) representing Real Property Section interests in any new state-level oversight that may be developed to address UPL issues in light of recent antitrust decisions. The UPL Committee looks forward to continuing in these efforts in the coming year, and to identify opportunities to improve UPL awareness and enforcement processes to better ensure the protection of the public.

The section is working to amend Connecticut General Statute section 51-88 subsection c as follows:

(c) Any person who violates any provision of this section shall be deemed in contempt of court, and the Superior Court shall have jurisdiction in equity upon the petition of (i) any member of the bar of this state in good standing, (ii) any regional or state-wide private association whose primary membership consists of members of the bar of this state, or (iii) upon its own motion to restrain such violation. The court may award the relief applied for or so much as it may deem proper including reasonable attorney's fees, and such other relief as may be granted in equity.

The intent is to allow any regional or state-wide private association to bring an action for UPL as individuals either do not have the resources or interest in bringing such action. UPL is an existential threat to the profession. Many sections such as estates and trust, and elder law sections are very interested in such a change to the statute.

SOLO AND SMALL FIRM SECTION

Jerome N. Goldstein, Chair

Purpose

The purpose of this section shall be to enhance the practice of lawyers engaged in the solo and small firm practice of law, through communication, study, collection, development, and dissemination of material on subjects of interest and concern to the solo and small firm practitioner, in cooperation with other sections of the Connecticut Bar Association, gearing its activities to basic principles and procedures and utilizing publications, meetings, seminars, committees, and other suitable media for this end, thereby promoting the objectives or goals of the Connecticut Bar Association.

Annual Report

We held section meetings on the following topics:

September

Executive Committee members met to plan section meetings and direction of the section for the year.

October

Roundtable discussion on How To Increase Efficiency, Reduce Costs, and Allow For Growth in Your Law Practice, presented by Attorneys Thea Martin and Ryan McKeen.

CBA LegalTech/Law Practice Management Conference CLE.

November

Presentation on voice over internet protocol for the law office by Covoda Communications.

Legal tech and ethical complications presentation by Tegan Blackburn.

December

Attorney Goldstein presented on Mailwasher, a malware e-mail prevention program.

Attorney Ryan McKeen presented on nourishing your practice with court appointments.

January - March

Executive Committee meeting.

February & March

Meetings postponed due to snow.

April

Networking and organization affiliations presentation by Rochford Business Coaching.

Art Laske presented on expanding your law practice with municipal appointments and marketing your trial practice to attorneys.

May

David Atkins special presentation on legal ethics.

June

Connecticut Legal Conference

(Two hour presentations)

David Shaiken to present on managing a solo and small firm practice

John Zaccaro to present on best tech for the law office

Tegan Blackburn to present on ethics rules regarding law firm technology

Roundtable Discussion on Perspectives on the Solo, Partnerships, and Small Firm Practice

Moderator: Colleen Joyce

Members: Jerome Goldstein, Ryan McKeen, Thea Martin, and Kristen Wolf join Shaiken, Zaccaro, and Blackburn

Roundtable topics to include: the virtual office, balancing your law practice and parenthood, best practices in running a law office for business and personal clientele, ethical risks and how to avoid them, technology for law practice, boutique law practice, and much more.

In addition, with the assistance of David Shaiken, Scott Schaffer, and Jerome Goldstein the section revised the it's bylaws to more clearly fit our members, which include both solo and small firm practitioners. The bylaws were also updated to meet CBA protocols on diversity and YLS participation. The section also has been investigating building a database of legal researchers and writers and virtual assistants for the solo and small firm law practice. Our Legislative Liaison David Robinson actively distributed relevant legislative updates to section members with discussions on appropriate topics held at section meetings.

SPORTS AND ENTERTAINMENT LAW SECTION

Donald P. Tutson, Jr., Chair

Purpose

The goals of the section are to: (1) provide a forum for attorneys to discuss and take action on issues important to the law and business of the sports and entertainment industries; (2) provide a networking system for attorneys in this area; (3) prepare and present seminars on sports and entertainment law for those attorneys and participants in the industry; and (4) promote such other legal and equitable programs as the section of Board of Governors of the association deems fit.

Annual Report

Cultivating relationships with law students and other sections whose areas of practice interact with sports and entertainment law remained a priority. UConn School of Law and Quinnipiac University School of Law have sports and entertainment law committees whose memberships total nearly 80 students, were key to this. The short term goal was to engage and invite those students to join the section and to take actions on campus that will promote these areas of practice. This was largely successful. Also, we were able to blend various topics related to sports and entertainment with other sections and co-hosted programs to that end.

Meetings

The section met April 25, 2018. The Executive Committee held discussion and vote to authorize appointments of current executive committee with new appointments of incoming chair, Michael Freeman; incoming chair ViceChair John Louizos; Legislative Liaison Carmina Tessitore; Education Liaison Melanie Dykas.

The section met on September 26, 2017. The session was a joint executive session and general session.

Programs and Presentations

Estate Planning for Entertainers and Athletes CLE at the Connecticut Legal Conference

The section has organized a CLE for the June 11 Conference in conjunction with the Estates and Probate Section that will provide practitioners with basic tools to manage the unique legal issues facing sports/entertainment clients and their attorneys when tasked with implementing a sound estate plan.

Sports Law in 2018: What's Hot & What's Not Symposium: Southern Connecticut State University

On April 25, 2018 the Sports and Entertainment Section provided experienced sports lawyers as presenters for SCSU's annual Sport Management Lecture for the Graduate Department of Recreation, Tourism, and Sport Management. Our panelists were Attorneys Felice Duffy, Don Tutson, and our invited guest-expert from New Jersey, Alan Goldberger. Attorney Goldberger is the author of, "Sport, Physical Activity and Law," which can be found at <http://www.reflaw.com/pracarea/index.htm>. SCSU graduate students were given insights into the cutting edge legal and business concerns facing sports teams, administrators, and athletes.

Sports Science Salon sponsored by the UConn Alumni Association

The Sports and Entertainment Section worked with the UConn Alumni Foundation and the UConn Arts Entertainment Sports Law Society (AESL) to co-promote and attend a panel discussion on the legal and medical issues associated with sports concussions. The event was held on February 8 at the new professional baseball stadium in Harford, the Dunkin Donuts Field. This event was successful as a substantive, well attended program that has set the stage for recurring cosponsored programs. The relationship established between the UConn Alumni Foundation, UConn Law AESL, and Sports and Entertainment Section is of great value going forward.

Matal v. Tam: The First Amendment and Football

On September 26, 2017, the Sports and Entertainment Section co-promoted this YLS CLE regarding a notable Supreme Court ruling concerning the concept of how “disparagement” affects entertainers artists and sports teams in copyright registration. Attorney Daniel Cooper acted in his capacity as the Sports and Entertainment Section’s new education liaison to connect us with YLS in this program.

Community Engagement

Throughout the year, the section provided access to our members to both Quinnipiac University School of Law students Sports and Entertainment Law Society and UConn’s ASEL to speak at their committee gatherings and to provide one-on-one academic and career advice.

Members also have participated and made donations to support the bike riding fundraiser for the Connecticut Veterans Legal Center (CVLC). Since the last report, section members have raised over \$2,500 for the CVLC and for the First Tee of Connecticut.

Legislative Efforts

The section is reviewing pending legislation and trends related to the regulation of fantasy sports, gaming, and concussion/injury related matters. These topics remain very much in flux and will be an ongoing source of study and assessment among members.

Old Business: 2016-2017 Bar Year

The 2016-2017 annual report was not filed. To that end, let this report reflect the section was active throughout the year.

On March 8, 2017, we hosted a substantive panel discussion on the business of baseball. Attorney George Springer and UConn baseball coach, Jim Penders, presented on the financial, compliance and regulatory aspects of NCAA baseball.

In May 2017 we co-promoted a YLS Women in the Law golf and networking event at Lyman Orchards. The Sports and Entertainment Section secured the keynote speaker, NCAA groundbreaking Athletic Director Pat Meiser. We also conducted a fundraiser for the special guests, First Tee of Connecticut, which raised \$250 for their girls golf program.

Purpose

Pursuant to Section 1.2 of the Tax Section's bylaws, "The purpose of the Tax Section is to promote the objectives of the [bar] association within the field of taxation; to further the continuing legal education of members of the section and the association; to serve as a resource concerning federal and state tax laws to section members, the General Assembly and the association; and to serve in a liaison capacity on behalf of the [bar] association with the Internal Revenue Service and Connecticut Department of Revenue Services."

Annual Report

Tax Section Meetings

During the 2017-2018 Connecticut Bar Association bar year, the Tax Section met eight times at the Quinnipiac Club in New Haven. Each meeting included a CLE presentation. The meetings were as follows:

On September 13, 2017, Andrew Mitchell was the presenter and he discussed foreign reporting requirements.

On October 11, 2017, the Tax Section held its annual career panel. The panelists were Keith Richey from Harmon Industries, Marilee Clark from the Connecticut Department of Revenue Services, and Lindsay LacCava from Baker McKenzie. Numerous tax practitioners and law students attended the event.

On November 8, 2017, Louis Bucari, chief counsel of the Connecticut Department of Revenue Services, discussed Connecticut Department of Revenue Services developments and initiatives.

On December 13, 2017, AUSA Peter Jongbloed presented on the US Department of Justice Criminal Tax Enforcement. This meeting also was used as a holiday celebration and a holiday dinner was served.

On January 10, 2018, Alan Lieberman, from Shipman & Goodwin LLP provided a Connecticut legislative update.

On February 13, 2018, Seth Hanlon, senior fellow at the Center for American Progress, discussed the Tax Cuts and Jobs Act of 2017. The attendance at this meeting was the largest of the year with 104 attendees.

On March 14, 2018, Debra Reale, Associate Area Counsel at Office of Chief Counsel, and Eric Green, from Green and Sklarz, discussed *Federal Tax Practice & Procedure*.

On May 9, 2018, an ethics panel was held. The panelists were Leslie C. Levin; Joel Barlow, Professor of Law, University of Connecticut School of Law; Brian B. Staines, Assistant Chief Disciplinary Counsel, State of Connecticut Judicial Branch; and James Brawley, Legal Malpractice Defense Attorney at Morrison Mahoney LLP in Hartford.

Tax Section Opposition to Legislation

The Tax Section continued to oppose the imposition of penalties on paid preparers in Connecticut and representatives of the Tax Section and the Connecticut Society of CPAs met with the Department of Revenue Services regarding penalties that were proposed by the Department of Revenue Services.

CLE Presentations

The Tax Section put on panels at the Federal Tax Institute of New England and at the Connecticut Legal Conference. The presentations at the Federal Tax Institute of New England included a presentation on the

purchase, sale, and redemption of LLC interests and an ethics panel moderated by Luke Tashjian and the panelists were Peter Jongbloed, AUSA; Lisa Perkins, Professor at UCONN Law; and Kevin Sullivan, Commissioner of the Department of Revenue Services. At the Connecticut Legal Conference Louis Schatz presented on the IRS's new partnership audit rules.

Tax Section and CT Society of CPAs Meetings

The CT DRS/ CBA/ CT CPAs joint meeting was held on November 8, 2017.

The CT CPAs/ CBA/ IRS working together conference was held on October 26, 2017.

National Meetings

Luke Tashjian attended the meeting in Washington DC on October 27-28, 2017 of the National Association of State Bar Tax Sections on behalf of the Connecticut Bar Association's Tax Section.

Tax Section Officers

Luke Tashjian, chair

Dan Smolnik, vice chair

Lindsay LaCava, secretary/treasurer

Dan Smolnik also serves as local IRS attorney liaison.

WORKERS' COMPENSATION SECTION

Francis X. Drapeau, Chair

Purpose

This section aims to organize the members of the CBA who are workers' compensation practitioners and to educate all members of the bar from all sides at all levels of expertise as to workers' compensation law. Furthermore, the section attempts to provide services to organizations other than the CBA when those organizations are involved in the Connecticut Workers' Compensation system. The section works with all levels of government in an effort to improve the system. The Executive Committee will take positions on pending legislation where appropriate. It will work through committees on various issues that arise in the practice such as amicus briefs, creating new and exciting continuing legal education, and producing our publication [Compensation Quarterly](#). The committee works with the commission giving feedback on issues affecting day-to-day practice of the parties that appear before the commission as they arise. The section consists of members who represent injured workers, employers and insurers as well as the State of Connecticut and the Second Injury Fund.

Annual Report

June 12, 2017

CT Legal Conference

2nd Annual Joint Seminar with YLS

New lawyer Nicole Gehen teamed up with WC Executive Committee member Tushar Shah to present the sometime complex law of average weekly wage calculations. We had an overflow crowd for this event.

Annual Section Meeting

We then conducted our annual meeting highlighted by a state of the commission address by Commission Chairman John Mastropietro, a case law update presentation by Jack Clarkson, and a legislative update by Lucas Strunk. Newly certified and recertified specialists were also honored as was outgoing section chair Joseph Passaretti.

September 14, 2017

Belkin-Verilli Charity Golf Tournament and Section Meeting Dinner, Shuttle Meadow Country Club, Kensington. Over 100 golfers participated in this event. Registration fees covered expenses, but hole sponsorship, contests, and raffles raised over \$11,000 for Food Share and Food Bank. Several current and former commissioners attended the section meeting dinner, which addressed current issues, mostly financial, impacting the commission.

October 20, 2017

"Workers' Comp on the Brain" seminar, CBA offices, New Britain. The rapidly increasing number of work-related brain injuries lead to creating this highly successful, all-day event, which drew about 120 workers' compensation practitioners who learned about all aspects of brain injuries from various perspectives: a forensic psychiatrist, a neurologist, a neuropsychologist, two psychotherapists, and a probate judge. The open panel Q & A at the end of the program generated lively discussion. One theme that arose out of this program is that the more science learns about the brain the more the line between mental and physical injury becomes blurred. This will be explored further by Dr. Tracy Cipriano at our June meeting.

November 9, 2017

Executive Committee Meeting, followed by a Section Meeting, Grassy Hill Country Club, Orange. At the section meeting, we presented representatives from Food Share and Food Bank with checks totaling over \$11,000 from

the charity golf event. Commissioner Chairman John Mastropietro then discussed the latest developments at the legislature and introduced the two newly appointed commissioners, Brenda Jannotta and Robert D'Andrea, who each gave a brief address. We then presented recently retired William Brown with our section's most prestigious award, the Pomeranz-O'Brien Award. Several lawyers, in turn, gave speeches honoring Mr. Brown. Both the presentment of the checks to Food Bank and Food Share and the awarding of the Pomeranz-O'Brien Award were featured in the News and Events section of the January/February Issue 2018, Volume 28/Number 3 of *Connecticut Lawyer*.

January 21-23, 2018

Workers' Compensation Retreat, JW Marriott, Marco Island, Florida. Forty-five Connecticut workers' compensation lawyers (a contingent of 81 including spouses) traveled to warmer weather for this three-day program. This event began with a cocktail reception the Sunday evening before the first day of CLE. This provided an opportunity for the lawyers and their spouses or traveling companions to meet two of our speakers, Dr. James Mazzara and Dr. David Tung.

On Monday, Dr. Mazzara presented on shoulder replacement surgery and its implications for the injured worker. Dr. Tung then provided us with a presentation on the latest in pain management research.

Tuesday's program began with Attorney Angelo Sevarino providing an update on the changes in Medicare requirements when settling a workers' compensation case. Then a panel of lawyers moderated by Commissioner Stephen Morelli brought the room into smaller groups to discuss fact patterns that addressed both the problems of a work from home workforce and ethical issues relevant to our practice. The seminar concluded with a presentation from Boston Attorney Daniel Shapiro, who spoke about handling federal workers' compensation cases.

February 21, 2018

Workers' Compensation Executive Committee Meeting at Casa Mia Restaurant, Berlin. This was rescheduled from February 7 due to the inclement weather forecasted for that day. In addition to our usual committee reports, CBA Lobbyist Bill Chapman spoke to the committee as part of an announcement about a new legislative initiative for the section. This announcement generated a lot of questions for both the chair and Mr. Chapman as to the process and the EC's role in that process.

April 20, 2018

"75 is the New 65: The Aging Workforce and Its Impact on Workers' Compensation Practice" Seminar, CBA offices, New Britain. This half-day program drew 91 registrants. The panel of speakers included Commissioner Peter Mlynarczyk who provided commission and labor department statistics as well as a jurist's perspective; Attorneys Diane Duhamel and David Morrissey who addressed the legal implications nuances from both the respondent and claimant points of view; Doctor Patrick Duffy who provided an orthopedic surgeon's view on addressing causation in an older worker; Attorney Gregory Lisowski who provided an update on dealing with Medicare issues, both in terms of conditional payments and Medicare Set-Aside Arrangements; and Porter Leslie from Ametros Financial, a company that professionally administers MSAs for a single flat-rate payment.

May 2, 2018

Executive Committee Meeting at the Inn at Middletown, Middletown. This meeting featured lively discussions on three topics: (1) How can we as a section help the commission transition with new Chairman Morelli and four new commissioners? The committee agreed to offer a mock formal hearing as part of the commissioner training process; (2) Do we affiliate our injured workers scholarship fund with a national charity, such as Kids Care? The committee agreed that we would need more information before essentially deciding to abandon our current charity for a national charity and that we should look into broadening our definition of eligibility for our current scholarship fund ; and (3) Do we move forward with drafting legislation recommended by the ad hoc legislative initiative committee? The committee voted overwhelmingly in favor of proceeding to the drafting stage.

May 24, 2018

Section Meeting to Honor Retiring Commissioner Christine Engel, Waterbury Country Club. As of May 14, we had 111 section members signed up for this section meeting and dinner to honor the retirement of Commissioner Engel.

Currently Scheduled Events, June 2018 – May 2019

June 11, 2018

CT Legal Conference at the Hartford Convention Center. In addition to the 2017 panel of speakers, Dr. Tracy Cipriano of Yale University, will be discussing the emerging new model of evidence-based pain management in the post-opioid era. The 3rd annual joint seminar with the YLS will discuss the canon of cases every workers' compensation practitioner should know.

July 19, 2018

Commissioner Ernie Walker Retirement Dinner at the Farmington Club, Farmington. (Not a CBA event, but organized and attended by section members.)

September 5, 2018

Executive Committee Meeting, TBD.

September 13, 2018

Verrilli-Belkin Charity Golf Event and Section Meeting Dinner, Shuttle Meadow Country Club, Kensington.

October 5, 2018

The physicians at Neurosurgery, Orthopedics and Spine Specialists will host a full-day CLE program at St. Mary's Hospital in Waterbury. The morning program will discuss the latest in treatment of upper extremity injuries, and after lunch, a panel of spine doctors will debate current controversies in spine treatment.

November 7, 2018

Executive Committee Meeting, TBD.

May 7 – 10, 2019

WC Retreat, Chatham Bars Inn, Cape Cod.

Subcommittee Activity

Charitable Committee

The section donated about \$11,000 to Food Share and the Food Bank from proceeds of the golf tournament. This committee also oversees the funding and awarding of scholarships from the Mathew Shafner Injured Worker Scholarship Fund. The committee has discussed expanding the definition of students who would qualify for this scholarship. Members of the EC recently raised whether we should become associated with a similar national charity, such as Kid's Care.

CLE Committee

This committee is chaired by Colette Griffin, the vice chair of the section. Under her direction, our CLE programs were hugely successful this year. (See EVENTS above.) Our section puts on five CLE programs per year: (1) our annual section meeting at the CT Legal Conference; (2) a joint program with the YLS immediately before or after the annual meeting; (3) a full day Fall program, usually with a medical-legal focus; (4) a 3-day Workers' Comp Retreat; and (5) a half-day Spring seminar, usually with a practice focus.

Upcoming programs

At the CT Legal Conference, Dr. Tracy Cipriano of Yale University, will be discussing the emerging new model of evidence-based pain management in the post-opioid era. Other speakers include newly appointed Chairman Stephen Morelli to address the state of the commission, Luke Strunk updating us on legislative news, and Jack Clarkson providing us with his annual CRB and appellate review. The 3rd annual joint seminar with the YLS will

present the canon of cases every workers' compensation practitioner should know. On October 5, 2018, the physicians at Neurosurgery, Orthopedics and Spine Specialists will host a full-day CLE program at St. Mary's Hospital in Waterbury. The morning program will discuss the latest in treatment of upper extremity injuries, and after lunch, a panel of spine doctors will debate current controversies in spine treatment. The WC Retreat is scheduled for May 7-10 at Chatham Bars Inn on Cape Cod.

Compensation Quarterly

Since December 1990, CQ has been the crown jewel of the WC Section. Frank Costello is its editor-in-chief. It is frequently at the center of conversation among lawyers at the district offices before and between hearings. Every issue contains legislative updates, case summaries, tech tips, interviews, point-counterpoint, as well as topical articles, such as those appearing in the four issues this year: "College Athletics and Workers' Compensation," "When the Claimant is a School Teacher," "Navigating the Recent Legislation Concerning Firefighters and Cancer," and "An Update on the Going and Coming Rule."

Legislative Liaison

Lucas Strunk continued as our legislative liaison. He monitors and reports on developments at the Capitol. This year he was kept busy with budget issues, including the rumored closing of the Stamford district office. More recently, three commissioners retired suddenly, and a third was nominated for a judicial judgeship. Three nominees are currently in the confirmation process at the Capitol.

Legislative Initiative

The chair created an ad hoc committee of pre-eminent WC attorneys to address necessary changes in the Act. The committee proposed six suggested changes, primarily to address obsolete provisions or provisions that are in conflict with judicial decisions. The EC has voted to proceed with the drafting of these bills.

Medical/Legal Cooperative

Colette Griffin and Mike Kerin co-chair this committee, which meets with doctor groups to educate them as to medical-legal issues in WC and to gain feedback from the doctors as issues that they have with the WC bar, the commission, or the system. For example, it was interesting to hear from an orthopedic group that many doctors were uncomfortable performing one-time (not RME or IME) evaluations, as it made the relationship with the patient poorly defined and awkward. Currently, the committee is seeking out mental health groups with whom to meet, as we anticipate that the need for these professionals will increase as the reliance on opioid therapy has dramatically decreased.

Membership Committee

The committee asked the CBA to identify attorneys who had attended our events in the past three years, but who were not section members. A letter under the Chair's signature was e-mailed to these attorneys during March when it was free to sign up for a section. This resulted in 11 new section members. Opportunities to reach out to WC attorneys who are not section members will be upcoming at two commissioner retirement events and the golf tournament in the Fall.

Examining Committee Standing Committee

Eleven attorneys applied to take the certification exam, but the committee did not have six candidates who qualified to sit for the exam, so the examining committee did not administer an exam this year. Under the standing committee rules, the exam will be administered next year so long as there is one qualified applicant.

Pomeranz-O'Brien Award Committee

This year, we presented the section's most prestigious award to recently retired William Brown of McGann Bartlett & Brown LLC, a founding member of the section and a driving force in the ten-year battle to establish a certification program.

Verrilli-Belkin Tournament Committee

Rick Aiken again organized this incredibly successful event, which saw over 100 golfers participate at Shuttle Meadow Country Club in Kensington. Registration fees covered expenses, but hole sponsorship, contests, and raffles raised about \$11,000 for Food Share and Food Bank. Several current and former commissioners attended the section meeting dinner afterward, which addressed current issues, mostly financial, impacting the commission. This year's tournament will also be held at Shuttle Meadow on September 13.

Website/Technology Committee

Scott Carta, Maribeth McGloin, and Tushar Shah completed a monumental project of collecting all issues of CQ, from December 1990 to the present, and working with the CBA to put them all on to the section web page in a searchable OCR format which only current section members can access.

Workers' Compensation Retreat (formerly known as the Exotic Seminar)

Jeremy Brown organizes an annual retreat alternating between remote locations in the even years and more local (driving distance) locations in the odd years. 2018's retreat was a huge success with 45 practitioners traveling to Marco Island, FL for a three-day event in January. The 2019 event is scheduled for May 7-10 at the Chatham Bars Inn on Cape Cod.

COMMITTEE REPORTS

AWARDS COMMITTEE

Moy N. Ogilvie and William H. Prout, Jr., Co-chairs

Purpose

The 2017-2018 Awards Committee (“Committee”) was initially constituted by the CBA in July, 2017. Consistent with CBA goals of inclusiveness and diversity, the committee roster included 18 members from throughout the state, each of whom actively participated in the work of the committee. A list of the committee members is attached.

Annual Report

All CBA members received calls for nominations advising them that nominations would remain open through October 20, 2017 and urging them to submit nominations for each of the awards within the committee’s jurisdiction:

- Citizen for the Law Award
- Citizen of the Law Award
- Charles J. Parker Legal Services Award
- Distinguished Public Service Award
- Henry J. Naruk Judiciary Award
- John Eldred Shields Distinguished Professional Service Award
- Tapping Reeve Legal Educator Award

During the nominations period, the committee met by conference call on various occasions to (1) review the criteria for each award; (2) review the lists of award recipients from prior years; (3) identify organizations and individuals to contact directly urging nominations; (4) appoint individual “precinct captains” to lead committee discussions as to each award; and (5) address other issues. All nominations and related documentation provided to the committee, from whatever source, during this period—and thereafter—was shared with each member of the committee. An impressive group of potential recipients was compiled for each award. This year, the committee received many nominations from the CBA membership at large. Consistent with past practices, the committee itself also recommended nominees for consideration.

Once the nominations period closed, the committee continued to meet by conference call, but ultimately met in person on two occasions to reach agreement on its final slate of proposed award recipients, which slate was submitted to the CBA Executive Committee on or about December 21, 2017. That slate was thereafter recommended by the Executive Committee to the Board of Governors, and approved by the Board on December 27, 2017. On April 12, 2018 the following distinguished recipients were presented their awards by President DeMeola and President-elect Jonathan M. Shapiro at the CBA’s “Celebrate with the Stars” reception at the Aqua Turf Club in Plantsville, Connecticut:

- Citizen for the Law Award – Dr. M. Saud Anwar
- Citizen of the Law Award – Theresa Hopkins-Staton
- Charles J. Parker Legal Services Award – Thomas A. Behrendt
- Distinguished Public Service Award – Hon. Denise L. Nappier
- Henry J. Naruk Judiciary Award – Chief Justice Chase T. Rogers
- John Eldred Shields Distinguished Professional Service Award – Chief Judge Janet C. Hall
- Tapping Reeve Legal Educator Award – Kate Stith

2017-18 CBA AWARDS COMMITTEE

- Nike V. Agman – Law Office of Nike V. Agman
- William J. Aseltyne – Yale New Haven Health System
- Maggie Castinado – Office of the Chief Public Defender/CHBA President
- Eric Daniels – Robinson & Cole LLP
- Karem Friedman – Boehringer Ingelheim/CHBA Past President
- Patricia R. Kaplan – retired formerly with New Haven Legal Assistance
- Najia S. Khalid – Wiggin and Dana LLP/SABAC Board Member
- John R. Logan – Logan & Mencuccini UC
- Kirk Lowry – Connecticut Legal Rights Project Inc.
- Ernest J. Mattei – Day Pitney LLP
- Moy N, Ogilvie – McCarter & English LLP
- Cherie G. Phoenix – City Of New Haven Office of Corporation Counsel
- William H. Prout, Jr. – Wiggin and Dana LLP
- Hon. Angela C. Robinson – Connecticut Superior Court Judge
- Ann H. Rubin – Carmody Torrance Sandak & Hennessey LLP
- Namita T. Shah – Day Pitney LLP
- Alix Simonetti – Connecticut Commission on Human Rights and Opportunities
- Elizabeth J. Stewart – Connecticut Superior Court Judge
- Cecil J. Thomas – Greater Hartford Legal Aid/SABAC Board Member

CONNECTICUT BAR JOURNAL BOARD OF EDITORS

Sarah E. Murray, Chair

Purpose

The board of editors is charged with the responsibility of producing, editing, and publishing the *Connecticut Bar Journal*, the official publication of the Connecticut Bar Association. The bylaws of the CBA mandate publication of Formal Opinions of the Committee on Professional Ethics and the Committee on Unauthorized Practice of Law in the *Connecticut Bar Journal*. The *Connecticut Bar Journal* also publishes scholarly articles of interest to the bar.

Annual Report

The *Connecticut Bar Journal* originated after a resolution passed on April 26, 1926, at the Connecticut Bar Association Annual Meeting. The resolution stated that "...the President of the State Bar Association appoint a Special Committee of five members to consider the advisability of publishing with power to publish if they deem it wise to do so, a quarterly bulletin or journal of the State Bar Association." President Terrence F. Carmody appointed the five-member panel in June 1926. The first issue of the *Connecticut Bar Journal* was published in January 1927 and has been published at least quarterly since that date.

The board is committed to serving the interests of CBA members and remaining relevant in the quickly changing legal landscape of the times. The following is a summary of the steps the journal has taken to further these goals:

In the 2012-2013 bar year—in an effort to provide the delivery of the *Connecticut Bar Journal* as fast, green, and convenient—the board decided to offer the membership the choice of receiving the *Connecticut Bar Journal* as a digital publication. The digital version has been sent as an e-mail attachment to the membership. The digital journal has much faster delivery, as members receive it in their inbox sooner without the delay of printing and mailing. In addition, the digital version has a positive effect on the environment because it saves in the use of paper to print and recycle. It is also more convenient because members can load it into their laptops, tablets, or smartphones and then read it anywhere and anytime. Starting with Volume 86, Numbers 1 and 2, all members of the Connecticut Bar Association received both the print and digital version of the publication. As members renewed their membership, they selected a box on their membership renewal form to opt-in for a print copy. Starting with Number 3, only members who opted-in for the print version received a printed copy; others received a digital version. The above choice has continued since the 2012-2013 bar year and is expected to continue into future years.

In the 2013-2014 bar year, building upon the success of the digital version of the publication, the board discussed and agreed to implement a new way of delivering the journal to members. As articles are completed, they are posted to the journal page and are published in the Connecticut Bar Association's *Weekly Docket* with a link to the article on the journal page. When enough articles are received and edited, a full traditional issue is assembled. The objective of the proposal was to deliver articles in the journal to members more quickly without sacrificing the scholarly quality for which the journal is known. The board implemented this new delivery in 2014 and it has continued into 2018. The articles have been edited as all other articles, so quality has not been negatively impacted. There has been no extra cost to the CBA.

This past year, 2017-2018, the board of editors published three issues of the *Connecticut Bar Journal* and another issue is to be published shortly. The board held one meeting in December 2017, and will have another meeting in June 2018. The board continues with the above initiatives and has as a goal adding members who contribute to the diversity of the board.

The board looks forward to continuing to serve the interests of CBA members.

DIVERSITY AND INCLUSION COMMITTEE

Karen DeMeola and Cecil J. Thomas., Co-chairs

Purpose

The Connecticut Bar Association is committed to diversity in its membership, officers, staff, House of Delegates, Board of Governors, executive committee, sections and committees, and their respective leaders. Diversity is an inclusive concept encompassing gender, gender identity, race, color, ethnic origin, national origin, religion, sexual orientation, age, and disability.

We are a richer and more effective association because of diversity, as it increases our association's strengths, capabilities, and adaptability. Through increased diversity, our organization can more effectively address member and societal needs with the varied perspectives, experiences, knowledge, information, and understanding inherent in a diverse relationship.

Annual Report

The Diversity and Inclusion Committee is charged with implementing the Diversity and Inclusion Policy of the Connecticut Bar Association (CBA). The committee's purpose is to adopt, monitor, and promote a diversity and inclusion plan to achieve a genuine, sustainable diverse and inclusive environment within the CBA and throughout its membership.

In addition to the CBA's internal diversity and inclusion focus, the Diversity and Inclusion Committee continues to work to foster and promote a more diverse and inclusive environment within the Connecticut legal community at large. Our externally focused diversity and inclusion efforts are represented within the Connecticut Legal Community's Diversity and Inclusion Pledge and Plan, the Annual Diversity and Inclusion Summit, and our education and pipeline initiatives. All are described in more detail below.

Assessment

Applying the adage of "what gets measured gets done," the Diversity and Inclusion Committee has adopted or continued several internal and external diversity and inclusion assessment tools, to obtain diversity and inclusion data from both within the CBA and the Connecticut legal community.

Looking internally, the committee launched its first internal assessment of diversity and inclusion during the 2016-2017 bar year. That assessment will be done again for the 2017-2018 bar year in the coming weeks. The committee has maintained a model diversity and inclusion plan that may be modified and adopted by CBA sections. Several CBA sections have used the model to adopt their own diversity and inclusion strategic plans.

Working with the signatories of the Diversity and Inclusion Pledge and Plan, we have created and implemented the first known assessment of diversity and inclusion within the Connecticut legal community. This was no small task. While we did not achieve 100% response rate from all of the signatories in the first year, we collected sufficient data to examine the state of diversity and inclusion, and are optimistic for greater participation rates with the next iteration of the survey.

The Connecticut Legal Community's Diversity and Inclusion Pledge and Plan

The CBA Diversity and Inclusion Committee facilitates the efforts of the signatories to the Diversity and Inclusion [Pledge and Plan](#). There are currently 32 organizational signatories which have pledged a commitment to strategic, ongoing and accountable diversity and inclusion efforts within their organizations over a multiyear process.

Each year of the multiyear process has a particular diversity and inclusion focus; year one on infrastructure and policy development, year two on education and training, year three on hiring and pipeline initiatives; year four on retention, year five on leadership and advancement. We are currently in year two of the Pledge and Plan. The signatories meet four times a year to discuss the year's goals and to share ideas, new programs and initiatives, and challenges.

Second Annual Diversity and Inclusion Summit

Our Second Annual Diversity and Inclusion Summit, led by Christine Jean-Louis, was a success. The event was sold-out. Dr. Arin Reeves of Nextions Inc. led a conversation about the design and implementation of effective diversity and inclusion training programs. Attendees were encouraged to work outside of traditional diversity and inclusion training so that we find engagement across all constituents, in order to build a more cohesive and inclusive environment.

Planning for the Third Annual Diversity and Inclusion, set for October of 2018, is underway.

Education

In addition to the annual summits, the committee maintains an active schedule of educational programming throughout the year. Neeta Vatti and Michelle Querijero have assumed leadership of the education initiative, and our educational programs for 2017-2018 have been well-attended, and well-received. Programs have included: "Promoting Diversity and Inclusion: A Look Back and a Way Forward," organized by John Letizia and Michael Roberts, and featuring New Haven Corporation Counsel John Rose as keynote speaker; "How to be an Inclusive Leader;" Implicit Bias; and, "Unfiltered Conversations on Race."

The 2018 Connecticut Legal Conference also features several committee-organized tracks: "Why 'One Size Fits All' Efforts Fail: Tackling the Biases That Still Frustrate Meaningful Racial and Ethnic Diversity and Inclusion;" "Access to Justice: Confessions, Ethics, and High Publicity in *Making a Murderer* with Aaron Keller;" and, "Getting to Well: The Professional Imperative for Lawyer Well-Being." Through these programs, we have sought to take a more expansive and in-depth view of diversity and inclusion.

Guest speakers at committee meetings have included Chief Justice Richard Robinson, Beth Griffin of Lawyers Concerned for Lawyers, and Troy Brown of the Connecticut Judicial Branch.

Pipeline

The Connecticut legal community cannot expect improved diversity and inclusion if it does not pay attention to the pipelines to our profession. This year, under the leadership of CBA President Karen DeMeola, the committee has focused on high school pipeline initiatives, so that students may gain an understanding of the profession from an early age.

The CBA launched a pipeline kick-off event in May 2017, which was attended by hundreds of Connecticut high school students, and featured notable members of the Connecticut legal community as speakers. The fall saw further engagement with Connecticut high school students, including visits to Connecticut high schools and coaching mock trial and debate teams. Emily Graner Sexton and Kean Zimmerman have assumed leadership of the pipeline initiative. In 2018, the pipeline initiative focused on transitioning Judge Angela Robinson's LAW (Love to Learn, Apply Yourself, Work for Justice) Camp to the CBA. LAW Camp will take place from July 9-13, 2018 in New Haven. We plan to run a Hartford iteration of LAW Camp this fall.

FAIR AND IMPARTIAL COURTS COMMITTEE

Nuala Droney and James T. Shearin, Co-chairs

Purpose

The Fair and Impartial Courts Committee was established by the Connecticut Bar Association to assist our state and federal judges when confronted by systemic attacks on their proper functions and from unfair and inappropriate criticism or assault, whether from individuals, organizations, the press or other sources, which are political and/or private in nature and which undermine the independence and fairness of the judicial system. We also investigate any issues that may arise concerning judges who may be questioned because of actions arising while performing their judicial role, particularly when these issues arise during re-appointment or the appointment process (for our sitting judges nominated to the appellate or Supreme Court).

Annual Report

The committee conferred this past year on a periodic basis, together, and with members of the Judiciary, to discuss the committee's business. We considered legislation and other political actions by the governor and General Assembly to determine whether action was necessary by the committee to support the Judicial Branch. We also investigated and addressed issues relating to the judicial re-appointment process.

FEDERAL JUDICIARY COMMITTEE

James T. Shearin and Robert Simpson, Co-chairs

Purpose

The Federal Judiciary Committee reviews and reports on nominations proposed by Connecticut's United States Senators for judicial appointments, primarily to the United States District Court for the District of Connecticut.

Annual Report

According to the Rules, our recommendations are reported to the president of the Connecticut Bar Association, where he/she forwards the findings to the proposed nominee; the Office of the President of the United States; the two US senators from Connecticut; the Attorney General of the United States; and the chair of the Committee of the Judiciary of the United States Senate.

This year we investigated and unanimously approved of Connecticut Superior Court Judge Kari Dooley as judge for her appointment as a Connecticut Supreme District Judge.

INSURANCE PROGRAMS FOR THE BAR COMMITTEE

Jennifer J. Cavalier-Mozzer and Anthony Nuzzo, Co-chairs

Purpose

The Insurance Programs for the Bar Committee is an advisory committee which is responsible for reviewing insurance products for the benefit of CBA Members. Included within these insurance products are professional liability, retirement, health, life, and disability.

Annual Report

Professional Liability

The CBA has a long-term relationship with our agent, John Kronholm, who is now affiliated with a national broker, Brown & Brown Insurance. John and his agents continue to do an excellent job for our membership. He is affiliated with CNA Insurance Company which is a premier insurer of lawyer professional liability insurance. Over the years, John has worked very hard to provide members with a good match for their professional needs. Unlike other carriers, CNA continues to have the broadest policy coverage for all areas of practice. Each policy also includes a 100 percent insured consent to settle clause.

Retirement Benefits

The CBA endorses the ABA Retirement Funds Program which offers retirement benefits for small firms. Presently there are 130 client firms under management for a total of approximately \$140,000,000. This includes 12 new plans written in 2017. These plans are specifically designed to give the small firm practitioner the benefits of a more robust retirement plan that would not otherwise be available to them. Additionally, program administration costs are minimal and the necessary documentation for tax filing is provided by the plan administration.

Medical, Disability, and Life

This is the maiden voyage for Tzedakah House LLC, a local insurance agency endorsed by the CBA in July 2017. Historically, the CBA endorsed national brokerage firms. However, once the Affordable Care Act became law, those agents showed no interest in our membership. This committee spent over a year trying to identify an agency who would advise the small firm practitioner even if no policy was written. That is exactly what happened. Since August 2017, the agency received 240 inquiries from members looking to purchase individual medical coverage. From those inquires, the agency helped 70 members evaluate their individual insurance options for 2018. The majority of those members bought individual policies recommended by the agency (with no commissions paid to the agency).

What Is Next

For 2018-2019, it is important that we help our endorsed programs increase market penetration. One ongoing need is the CBA website (which we understand is being revised) must separate insurance benefits from all other offered benefits. Both existing members and potentially new members should be permitted to shop effortlessly for these products, navigating through screens designed to help them make decisions.

We would also like to solicit membership feedback in the form of a short on line survey, to help the committee understand if we are addressing membership needs.

STANDING COMMITTEE ON WORKERS' COMPENSATION CERTIFICATION

Brian L. Smith, Chair

Purpose

The Connecticut Bar Association Standing Committee on Certification (SCWCC) certifies and re-certifies lawyers as specialists in the field of workers' compensation. In addition, the SCWCC promulgates Rules and Procedures to implement the Standards.

Annual Report

The SCWCC was chaired this year by Brian L. Smith and the following Board Certified Workers' Compensation Specialists served on the SCWCC: Diane D. Duhamel (chair of the examining committee), Michael R. Kerin, David J. Morrissey, Jeffrey J. Oliveira, Charlene M. Russo, Dominick C. Statile, and Elizabeth B. Zaccardi. The SCWCC was greatly assisted by Suzanne Hard, Elizabeth Ferguson, and Hysha Burgess of the Connecticut Bar Association.

This year was a busy year for our standing committee and examining committee. We are just about to recertify ten specialists. We continue to add approved courses to the list of those that qualify for inclusion in the certification and re-certification process. We reviewed and approved CLE credits from countless seminars, presentations, articles, etc. and updated our list of approved seminars.