

2024 COMMUNITY ASSOCIATION Law Seminar

FEB. 14-17 | LAS VEGAS, NEVADA

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2024 Annual Community Association Law Seminar Speaker Biographies

Edmund A. Allcock, Esq., CCAL fellow, is a managing partner in the firm and is the head of the Firm's Litigation Department. He is widely regarded as one of the premier condominium and real estate litigators in Massachusetts, New Hampshire and Rhode Island. In addition to being an active trial lawyer, Ed has the unique distinction of having argued condominium cases in the Massachusetts, New Hampshire and Rhode Island Supreme Courts. That dedication has resulted in Ed being named a Massachusetts and New England Super Lawyer by Boston Magazine for eight (8) consecutive years. Ed has also recently been named one of the 2018 Lawyers of the Year by Massachusetts Lawyers Weekly Newspaper for his advocacy in the 2018 Massachusetts Supreme Court Decision in the case of Cambridge Point Condominium Trust v. Cambridge Point, LLC, 478 Mass. 697 (2018) where the Court held that a developer inserted anti-litigation provision in the condominium by-laws was void as against public policy. As demonstrated by the Cambridge Point case, in which he convinced Massachusetts' highest Court that provisions of the condominium documents were unfair, Ed routinely takes on the toughest and most challenging cases and never backs down. Ed's multistate condominium litigation practice ranges from condominium development rights and phasing cases, enforcement of condominium covenants and rules, construction defects, land use and zoning issues, contract disputes, matters of statutory interpretation, easement and real property rights claims (including view easements), fiduciary claims, and insurance defense of condominium boards. As part of his multistate litigation practice, Ed offers general operational and day to day advice designed to avoid litigation. Ed preaches that he is a condominium lawyer first and a litigator second. He prides himself on being available to clients 24/7.

Ed's dedication to the field of condominium law goes beyond his representation of condominium and homeowner associations. In 2011 Ed was inducted in the prestigious national Community Association College of Community Association Lawyers (CCAL). In 2017, Ed was elected to the CCAL Board of Governors and has recently been named President-Elect of CCAL. Ed's Presidency will begin on January 1, 2020. Additionally, Ed serves on the CCAL Law Seminar Planning and is its former Chair and is currently the co-chair of CCAL's amicus committee, which files friend of court briefs in significant condominium and homeowner association cases across the country. Ed has also recently been elected to a second term on the Board of Directors for the Community Association Institute's New England Chapter, which is a non-profit organization established to represent the interests of condominiums and homeowners associations through advocacy and education. Ed is also Co-Chair of the Rhode Island CAI's Legislative Action Committee, through which he has played an instrumental role in drafting and securing the passage of two pieces of legislation benefitting condominiums in Rhode Island. Ed has also been selected by CAI to draft amicus curiae (friend of the Court) briefs before the Massachusetts and Rhode Island Supreme Courts on condominium specific matters.

Ed is a regular panelist and lecturer for CAI-New England and CCAL National Programs and is a contributor to CAI-NE's monthly magazine, Condo Media. Ed is also the creator of the firm's monthly

newsletter, "Condominium Insider". When he is not working, Ed can be found playing golf at Pawtucket Country Club or sitting in Section 335 at Patriots games.

Charlotte Allen, CIRMS, Charlotte Allen walked through the doors of Socher Insurance Agency in 2005 and since then has successfully aided in the acquiring and retention of insuring over 1,000 common interest developments. As Director of Marketing, Charlotte works collaboratively with our agents to highlight our service, knowledge and dedication. Her commitment remains focused on educating common interest developments and their managers in some of the most prevalent issues faced today. Charlotte is an active participant of CAI, ECHO and CACM and has circuited over two dozen seminars, tradeshows and speaking engagements. Her dedication certainly does not end at Socher Insurance. She is also a devoted wife and mother of two and spends countless hours volunteering in and around her community. She has served on her children's Parent Teacher Organization board over seven years and has tackled the role of President, School Liaison, and Chair of many fundraising events. Her hobbies include cooking, hot yoga, and her commitment to excellence in public education.

Michelle Baldry is Reserve Advisors' Northeast Regional Executive Director. Michelle is responsible for the overall management and administration of the firm's Northeast region. Michelle is a professional engineer and holds CAI's Reserve Specialist and Educated Business Partner designations, and APRA's Professional Reserve Analyst designation. She is President of CAI's Foundation for Community Association Research Board. She serves on various CAI committees, including chairing the Chesapeake Chapter's magazine committee. She served on Virginia's CIC Structural Integrity and Reserves Work Group and CAI's national reserve study task force; both were created to consider revising reserve studies due to the tragedy in Surfside, Florida. She has fourteen years of experience in serving community associations and has personally prepared hundreds of reserves studies.

Nicholas Bartzen, Esq., is a founding member of Bartzen Rosenlund Kasten LLC. He currently serves as the co-chair of the Chicago Bar Association's Condominium Subcommittee, and is an active member of CAI-IL, the Illinois chapter of the Community Association Institute, the Illinois State Bar Association, and the American Bar Association.

Nicholas is both frequently published and interviewed on condo and HOA legal issues in a range of local and national industry publications, including *Condo Lifestyles Magazine*, *Common Interest Magazine*, the CAI-Illinois publication, *The New York Cooperator: The Co-op and Condo Monthly*, and *The Chicago and Cooperator: The Condo, HOA and Co-op Monthly*. Nicholas is also the co-author of the Illinois Institute for Continuing Legal Education (IICLE®) 2021 Edition of "Condominium Law: Governance, Authority, and Controlling Documents. linked [here](#). He is a frequent lecturer and host of legal seminars for industry organizations and area property management companies (list of presentations available via the "Presentations" tab above). You may also see his extensive list of community association publications by clicking the "Publications" tab above.

Prior to law school, Nicholas worked for two premiere Chicago condominium management firms managing associations as a licensed Illinois CAM (Certified Association Manager), overseeing staff, and administering large-scale capital improvement projects. During his time as a property manager, Nicholas trained with the Institute of Real Estate Management (IREM®) to earn his CPM® credentials.

Finally, in addition to association law, Nicholas is a frequent speaker at forums and contributes to articles related to legal technology, including the *Evolve the Law* 2018 seminar, Giant City Media's *Artificial Intelligence: Moving Legal Innovation Forward* seminar and multiple publications regarding legal tech. A sample of those articles and interviews can be found below:

- *Attorney At Work – "Will AI Change the Way Attorneys Work?"*
- *Globe St. – Real Estate Media – "How AI is Used to Read Real Estate Leases"*
- Panelist for the *Evolve the Law Summit – Innovators and Influencers*

Andrew J Bateman, CIC, CMCA, CIRMS,

Client Executive, TriSure Insurance Agency Andrew is a nationally licensed independent Commercial Insurance Agent whose focus is on protecting Homeowners Associations with all lines of insurance. He works with Single Family, Townhome and Condominium Associations. TriSure is part of the ALERA Group, which is one of the largest national independent insurance agencies. Andrew is a Certified Insurance Counselor-CIC, Community Insurance and Risk Management Specialist-CIRMS and Certified Manager of Community Associations-CMCA. Andrew serves as Treasurer on the CAI-NC Board of Directors, and as Vice-Chair of the CAI-NC Legislative Action Committee.

Adam M. Beaudoin, Esq., CCAL fellow, Ward and Smith, P.A., Wilmington, NC

As leader of Ward and Smith, P.A.'s Community Associations practice, Adam Beaudoin advises community association and country club/yacht club boards and members regarding corporate governance, procedural requirements, governing document amendments, fiduciary duties, inspection right, collection issues, and rule adoption and enforcement. He also has experience preparing all components of community association, country club, and yacht club entity formation, including articles of incorporation, bylaws, committee charters, organizational minutes, confidentiality policy, communication policy, and documentation retention policy.

In addition to his community association practice, Adam's general business practice encompasses a broad range of business law and transactional matters, including negotiating and drafting all components of contracts and purchase agreements, including stock, limited liability interest, partnership, and asset purchase agreements and in conducting business and non-profit director, shareholder, and member meetings. He regularly advises business clients regarding corporate governance, procedural requirements, governing document amendments, and fiduciary duties.

Adam is active with Community Association Institute and is currently serving on the North Carolina Chapter's Board of Directors.

Dawn M. Becker-Durnin, CIRMS, in June of 2020, Dawn obtained the prestigious designation of Community Insurance and Risk Management Specialist (CIRMS). This designation is a recognition of Dawn's demonstration of a high level of competency with the risk management profession in connection with Community Associations.

In early 2014, Dawn obtained the prestigious designation of Certified School Risk Manager (CSRSM) (personnel responsible for the risk management function involving schools).

Former member of AIHA (American Industrial Hygiene Association) and the National Alliance for Insurance Education & Research. Dawn also is an active member with Community Associations Institute in states such as New Jersey, South and North Carolina.

Former New Jersey Co-Director ASEP (American Society of Environmental Professionals). Member "The Community Associations Institute" (CAI) is a national, nonprofit organization offering resources to condominium associations, serving as a committee member of the Business Partners Council since 2020.

In Dawn's personal life she is a New Jersey State Certified Firefighter since 1995. She was an active member of Washington Valley Volunteer Fire Company, Warren, NJ since 2004; having served as President in 2009 and 2008, and Secretary in 2007, 2006, 2005, and as Interior Fire Fighter. Dawn was also a previous member and served as First Lieutenant on the Liberty Corner First Aid Squad, Liberty Corner, NJ from 1998-2001, previous member of Basking Ridge Fire & Rescue as interior Firefighter and EMT from 1993-2002. Incident Command certified, with specialty certificates of training in flashover, pump operations, fire sciences and emergency response. Former certified CPR and First Aid Instructor - Professional and Community Level for American Red Cross.

Specialties: Dawn is a multi-state licensed insurance agent - Property & Casualty, Personal Lines and Life

& Health. Her niche specialty being Construction, Environmental and Real Estate insurance programs including Bonding. Her office located in Easton, PA has a speciality writing insurance programs for Community Associations including coastal properties.

Tiago Bezerra, Esq., is a senior associate with Chadwick, Washington, Moriarty, Elmore and Bunn, P.C. located in Virginia. Tiago has devoted over 8 years of practice to the representation of community associations in Virginia and the District of Columbia. Tiago is an active member of the Washington Metropolitan Chapter of CAI, having served on the Virginia Legislative Committee and the Chapter's Board of Directors. He has authored several articles for local CAI chapters and presented numerous educational seminars for WMCCAI, CAI, and local governments. Tiago was awarded the Washington Metropolitan Chapter's Virginia Advocate of the Year award in 2020 and was named an Up and Coming Lawyer by Virginia Lawyers' Weekly in 2021.

Todd Billy, Esq., Todd is Missouri's second Fellow of the College of Community Association Lawyers representing community associations throughout Missouri and Southern Illinois. As head of Sandberg Phoenix Homeowners' and Condominium Associations Group, the team also represents community associations in California and Kansas.

In addition to numerous presentations for the Heartland Chapter, Todd has served as past board member and President of the Heartland Chapter and served over a decade on Missouri's Legislation Action Committee contributing to several adopted statutes.

Brendan P. Bunn, Esq., CCAL fellow, is a shareholder in Chadwick, Washington, Moriarty, Elmore & Bunn, P.C. and has practiced community association law since 1993. He served on the Washington Metro Chapter's Board of Directors and was its President in 2005. Brendan was selected to the Chapter's Hall of Fame in 2007 and to the College of Community Association Lawyers in 2011. He currently serves on the CCAL Board of Governors. He has also served on the Board of Trustees for National's CAI Board of Governors. Brendan has given numerous seminars to local AI Chapters, at national and CCCAL Conferences on a wide range of community association topics including Coronavirus and Community Associations, Curing Dysfunctional Boards, Understanding Association Insurance, Covenant Enforcement Strategies, Sex, Drugs and Drones, Fair Housing Law, Conducting Successful Meetings, Hoarding, loitering and Other Abnormal Behaviors, Voting, Non-Judicial Foreclosures, Case Updates and many more.

Daniela Burg, in 2011, left NY, where she practiced insurance defense litigation, to join Community Association Underwriters of America, Inc. ("CAU") in Bucks County, Pennsylvania. As a Senior Claims Specialist with CAU, Ms. Burg focuses on general commercial liability claims including bodily injury, property damage and Directors & Officers liability. Ms. Burg is a graduate of Brandeis University and New York Law School. She is admitted to the New York Bar.

Ursula K. Burgess, Esq., CCAL fellow, represents community associations in Virginia and Maryland. She works with community associations to:

Amend governing documents, including Declarations, Bylaws and Architectural Guidelines
Collect delinquent assessments through liens, lawsuits, and foreclosure actions
Compel compliance with the association's governing documents by filing lawsuits in General District (VA) and Circuit Court
File and defend complaints with the Montgomery County Commission on Common Ownership Communities (CCOC)
Negotiate million dollar contracts for capital improvements and renovations
Defend associations in Fair Housing Complaints

Ursula has been very successful in bringing delinquency rates under control for associations. In one case a condominium client avoided filing bankruptcy as a result of her successful collection efforts. For that client, and others, she negotiated a payment plan with the utility company to pay the overdue bills and

avoid having the electricity shut off. Her aggressive approach to collection of assessments is appreciated by her association clients.

Leah K. Burton, Esq. CCAL fellow, is a Member of Steptoe & Johnson, PLLC's Dallas Office. She serves as general counsel to property owners' associations, including but not limited to single-family communities, master-planned developments, condominium regimes and cooperatives in all aspects of corporate governance, including governing document creation, amendment and interpretation, contract review, collection of delinquent assessments, restrictive covenant enforcement, alternative dispute resolution and federal and state law compliance.

Leah developed a passion for property owners' association law when, upon relocating to Florida following five years of practice in California, fate led her to a community association law firm in Sarasota, Florida. Although small in size (but mighty!), the firm represents hundreds of communities in the Sarasota-Bradenton area. As a result, Leah was able to gain valuable ground level experience in all aspects of the practice. Leah is also licensed to practice law in Tennessee.

Leah strives to develop meaningful relationships with her clients, as well as to provide prompt service, healthy communication, competent and effective counsel and ongoing education on topics of concern to community associations.

Leah is most passionate about her continued work to improve diversity within community associations. Her work on the topic has been featured by CAI on an international scale and formed the basis of CAI's renowned Diversity and Inclusion Guide. Leah is frequently called upon by boards, managers and attorneys across the country to advocate for and provide education on the topic. Leah's 2021 and 2022 Law Seminar manuscripts entitled "Overcoming Racism: Attorneys as Agents of Change" and "Tackling Mental Health in Community Associations" were both awarded the esteemed CCAL Best Manuscript Award and have been subsequently published by CAI and other national publications.

Leah currently serves on the Board of Directors of the CAI Dallas Chapter. She also serves as a member of the CAI National Diversity, Equity and Inclusion Task Force and the Texas Bar College. Leah is a graduate of the Bexar Country Women's Bar Foundation's LEAD Program, which serves to encourage the retention of women attorneys in the legal profession and to assist them in attaining the highest levels of success in their firms, organizations, and communities. Leah received her Bachelor of Arts in English Literature and History from Bucknell University and her law degree from Southwestern Law School. Leah grew up in Alaska, where her family still resides on an island in the middle of a lake that is only accessible by boat in the summer and by car (via a frozen ice road) in the winter.

Hope Derby Carmichael, Esq., CCAL fellow, is shareholder and principal with the Raleigh, NC firm of Jordan Price Wall Gray Jones & Carlton, PLLC. She has focused her practice on matters involving the interpretation of restrictive covenants, condominium and planned community associations for the last thirty years. She is a leading authority on legal issues affecting condominiums and homeowners associations in North Carolina, and has litigated hundreds of cases in her career involving architectural and general covenant enforcement, collection of assessments (including foreclosure), corporate and development issues. Hope has more recently been involved in the litigation of complex cases across the state involving the applicability and interpretation of restrictions in older, established condominiums and planned communities and has consulted on the drafting of nearly every piece of legislation affecting planned communities and condominiums in North Carolina in the last two decades.

Hope was inducted into the College of Community Association Lawyers in 2016. Professionally, she serves on the Board of Directors and is immediate past president of the North Carolina Chapter of CAI NC Chapter of the Community Associations Institute (CAI) and on the NC Bar Association's Community Associations Committee. She received her JD from the University of North Carolina at Chapel Hill and a BA from Salem College, the oldest institution of high learning for women in the United States.

Scott B. Carpenter, Esq., CCAL fellow, focuses primarily on general counsel, corporate and transactional matters, complex litigation, business advice, transactions, employment issues, and conflict resolution and avoidance for condominiums, homeowners associations, planned community associations, cooperatives, churches, and other nonprofit clients. As the author of Community Association Law in

Arizona, published by the State Bar of Arizona, Scott is highly regarded on community association matters. He is a frequent contributor to continuing legal education courses on the topic of mandatory-membership community associations. Scott is a member of the Community Associations Institute where he has served as the President of the Central Arizona Chapter and the Co-Chair of the Arizona Legislative Action Committee. He is also a member of the Community Associations Institute's National Faculty and has the distinguished honor of membership in the Community Associations Institute's College of Community Association Lawyers where he served as the President in 2013.

Lydia J. Chartre, Esq., CCAL fellow, Lydia has extensive experience advising Wisconsin condominium association boards of directors on the myriad issues facing them, including declaration and bylaw amendments; assessment collection and foreclosure; rule-making, voting and governance issues; and HUD and fair housing issues.

Condominium residents typically live in close quarters, and that proximity can add a personal edge to legal issues. Lydia listens carefully and tactfully to clients and to opposing parties, keeping an open mind and anticipating counterarguments. No two cases are alike, nor are issues black and white. Questions typically have more than one answer, and Lydia is skilled at helping clients find the right answer for their needs.

Adam Clarkson, Esq., CCAL fellow, was born and raised in Spartanburg, South Carolina, graduated with a degree in business from the College of Charleston, and earned his juris doctorate at the University of South Carolina School of Law.

Mr. Clarkson is among the preeminent few attorneys who are Fellows of Community Association Institute's College of Community Association Lawyers (CCAL). CCAL Fellows are a prestigious group of attorneys who have distinguished themselves through contributions to community association law, and who have committed themselves to high standards of ethical conduct. Of the thousands of attorneys practicing community association law in the United States, fewer than 170 have been granted membership in the College.

Mr. Clarkson is the founder of Clarkson McAlonis & O'Connor, P.C., formerly The Clarkson Law Group, P.C. He is currently licensed and admitted to practice law in Nevada, Florida, California, South Carolina, Utah, the United States District Court of Nevada, the United States Bankruptcy Court of Nevada, and the United States Court of Appeals for the Ninth Circuit.

Mr. Clarkson is a member of the South Carolina Community Associations (CAI) Institute Legislative Action Committee (LAC), Blue Ribbon Committee, and his firm is a super sponsor of the South Carolina CAI Chapter.

Having started his firm in Las Vegas, Nevada nearly a decade ago, he is a past president, past vice president, and past secretary of the Nevada CAI Chapter board of directors, chair of the NV CAI Legislative Action Committee (LAC), former chair and current member of the NV CAI Political Action Committee (PAC), Nevada's industry representative on the Nevada Department of Business & Industry's Common Interest Communities Task Force, and a co-author the Community Association Law portion of the Nevada State Bar Real Property Practice Manual.

Gabriella Comstock, Esq., CCAL fellow, a principal with Keough & Moody, P.C., joined the firm in 1996 and began her representation of community associations. Gabriella is primarily responsible for litigation related to community associations, which varies from breach of contract to seeking declaratory and/or injunctive relief. Gabriella's practice also concentrates on representing community associations in non-litigation related matters, which includes providing Board of Directors' with opinion letters, drafting amendments to the Association's governing documents and drafting rules and regulations. She provides all areas of legal counsel to community associations within the Chicagoland area.

Gabriella received her J.D. from Loyola University of Chicago School of Law after graduating Cum Laude from Loyola University of Chicago. Gabriella is admitted to practice law in all state courts in the State of Illinois and in Wisconsin. She is also admitted to the United States Court of Appeals for the Seventh District. Gabriella is a member of the Federal Trial Bar, the Illinois State Bar Association, Chicago Bar Association, and DuPage County Bar Association. She is the co-chair of the Chicago Bar Association's Real Property Law, Condominium Subcommittee.

Gabriella was admitted to the College of Community Association Lawyers (CCAL). CCAL is a prestigious group of attorneys practicing community association law in the United States. Fewer than 150 attorneys have been granted membership in the College.

Gabriella has been involved in CAI-Illinois' Chapter. Most recently, she was the co-chair of the Education Committee for the annual conference and tradeshow. In the past, she co-chaired the Program Committee. Gabriella also contributes written articles for CAI's Common Interest Magazine.

Gabriella also speaks at various CAI Chapter Programs, including her presentations at various Legal Forums and trade shows. Since 2015, she has been a member of the Planning Committee for the CAI National Law Seminar. She has also presented at the CAI National Law Seminar, as recently as at the 2018 Seminar. Finally, Gabriella has contributed to IICLE's ("Illinois Institute of Continuing Legal Education") book related to Condominium Law. She has also presented for IICLE and the National Business Institute ("NBI") on issues related to community associations, as part of the continuing education they offer for Illinois attorneys.

Gabriella is currently the co-chair for the Chicago Bar Association's Condominium Subcommittee. Gabriella also presents and writes for other industry groups including MCD Media, Condo Lifestyles, and Association of Condominium Townhome, and Homeowners Association ("ACTHA").

Lauren DeVoe, Esq., Lauren graduated in the top of her class from the S.J. Quinney College of Law at the University of Utah, graduating with Honors. In law school she served on the *Utah Law Review* and was selected to be an Executive Editor. She was a Leadership scholarship recipient and the National Lawyers' Guild chapter president. Lauren earned the Outstanding Achievement Award in Civil Procedure, Constitutional Law II, and Advanced Legal Research. During law school, Lauren also interned at the Utah Supreme Court for the Honorable Justice Christine Durham assisting with writing opinions and legal research.

After graduation, Lauren worked as a law clerk for Second District Court judges assisting in drafting rulings and researching and reviewing pleadings and memoranda filed with the Court. In this capacity she observed trials and oral arguments and frequently had an opportunity to discuss these observations with the judges involved in the cases. Lauren has also worked for the Utah Department of Insurance researching and drafting new insurance regulations.

Lauren's practice includes all aspects of community association law, including governing document drafting and rewrites, governance issues, litigation, governing document enforcement, and disputes between owners and associations. Lauren recently performed an instrumental role in a hard-fought effort on behalf of a group of owners to obtain the appointment of a receiver over a Park City Condominium Hotel. Lauren also has a distinct focus on Fair Housing Act issues, including the defense and prosecution of Fair Housing Act claims, participating as a member of Utah's Fair Housing Forum with representatives from a variety of diverse organizations and municipalities, and presenting at educational events in Utah and Idaho.

Lauren was selected for the Rising Stars category of Super Lawyers for 2018 through 2023, which recognizes attorneys for excellence in legal practice. Lauren has also been recognized by *Utah Business* magazine's Utah Legal Elite™ for 2022.

Robert M. Diamond, Esq., CCAL fellow, concentrates on real property law, with special emphasis on the planning and development of condominiums, mixed-use projects and planned unit developments, preparing community association documents for developers and builders. His practice includes risk management for developers/builders, ensuring compliance with secondary mortgage market requirements (FNMA, FHLMC, VA, FHA, VHDA), negotiation of warranty and construction defect claims, and general representation of community associations. More recently, Bob has worked on a number of commercial, hotel and continuing care retirement condominiums as well as litigating association-related issues in state and federal court. His clients include condominium and homeowners associations; developers of new and conversion residential, office and mixed-use condominium and PUD projects; lenders providing construction and permanent financing and assessment-based loans for condominiums and planned communities; and management companies and insurance companies working with community associations.

Bob has been active in the development of legislation concerning condominiums and planned communities, for over 35 years. In that time, he has significant and notable accomplishments, among which include:

- Serving as one of four drafters of the Uniform Condominium Act for the National Conference of Commissioners on Uniform State Laws (which is now the Uniform Laws Commission).
- Member of the group that prepared the 1975 amendments to the Virginia Condominium Act.
- Served as Secretary of the D.C. Bar Real Estate Committee and Chairman of the D.C. Bar Subcommittee on Condominiums, which drafted and participated in the enactment of the District of Columbia Condominium Act of 1976 over a period of two years and then drafted amendments in 1983, which were enacted in 1991.

Melissa Doolan, Esq., is an attorney with The Travis Law Firm, solely focusing on the representation of associations and non-profit corporations. She practices in all aspects of community association law including general counsel, covenant enforcement, litigation and collections. Melissa has been practicing law since 2008 and with the Firm since 2009. She was admitted to the State Bar of Arizona in 2008 and is licensed to practice in all Arizona State Courts, the United States District Court of Arizona and United States Bankruptcy Court: District of Arizona.

Melissa is a member of the Central Arizona Chapter of the Community Association Institute and an affiliate partner with the Arizona Association of Community Managers. She graduated from Washburn University Law School in December 2007 with Deans Honors. In law school, Melissa participated in the Washburn Law Clinic and served as an editor of the Family Law Journal. Melissa received her Bachelor of Science from Brockport University of New York, graduating Magna Cum Laude. She has written articles regarding community association law and taught classes on various association issues.

Prior to law school, Melissa started her career in community association law as a paralegal focusing on collections.

Education: Brockport University of New York, B.S., Washburn University Law School, J.D

Valerie Farris Oman, Esq., is a partner at Condominium Law Group, PLLC. Valerie is proud to mentor, train, work with, and support a growing team of smart, engaged, versatile professionals who are experts in community association law.

Valerie graduated cum laude from Seattle University School of Law. She is an active volunteer with the Washington State Community Associations Institute, a trade group that serves and advocates for community associations in Washington State. Valerie is a speaker at industry events and homeowner associations, and contributes regularly to industry periodicals. In 2022, Valerie was honored to present at the Community Associations Institute's National Law Seminar.

Born in Detroit, Valerie moved to and grew up on Lopez Island in the Pacific Northwest. She speaks four languages with varying degrees of fluency and loves to spend time with her daughter, family, friends,

and her beloved dog, Dot. She is an avid PNW sports fan and attends games (Seahawks, Mariners, and Sounders) whenever possible. She looks forward to the day when our SuperSonics return to Seattle.

Valerie and her partner Ken conduct weekly Zoom Q&A sessions, which began as a response to COVID-19 and have expanded to include a wide variety of topics relevant to condominium and homeowner associations in Washington State. (E-mail info@condolaw.net if you want an invitation to these Wednesday morning Zoom Q&As!)

Alexis Firehawk, Esq., practices in the areas of community association law, business law, and litigation. She counsels community associations and other nonprofit and for-profit organizations, regarding statutory and regulatory compliance, contracts, employment and consulting agreements, intellectual property, conflict resolution, business transactions, and strategy. Alexis also represents companies on both sides of civil litigation, bringing affirmative claims and providing litigation defense.

Alexis manages the firm's summer associate, intern/externships, and mentor programs. Alexis believes mindfulness is not only the way to be a happy, resilient lawyer, but it is also the key to civility in the legal community. Success in this profession is inspired by building relationships and mindfulness builds our relationship with self.

Tim Flanagan, Esq., Tim Flanagan supervises the corporate counsel and litigation matters for the firm. Tim began his career as a plaintiff-side litigation attorney and has taken that experience to successfully prosecute claims on behalf of community associations.

In 2019, Tim successfully argued the *Orchard Estate Homes v. Orchard Homeowners Alliance* case in the Fourth District Court of Appeal of California. The *Orchard* case was certified for publication and will be used as beneficial case precedence for HOAs in California.

Tim has represented community associations in numerous alternative dispute resolution proceedings and CC&Rs Court Petitions.

Tim's practice includes corporate counseling where he advises boards of directors on the interpretation and enforcement of governing documents, negotiating and drafting of contracts, leases, easements and other agreements, providing guidance on compliance with the Davis-Stirling Common Interest Development Act, FEHA, ADA, and other statutory regulations, and drafting amendments and restatements of governing documents. Tim's straightforward explanation of the legal issues aides Boards in making appropriate decisions.

Tim is an active member of the San Diego County Bar Association, Community Associations Institute ("CAI"), the California Association of Community Managers ("CACM") and Educational Community for Homeowners ("ECHO"). Tim has served on the Board of Directors of the San Diego Chapter of CAI since 2019 and is currently the President. Tim previously served as Co-Chair of the Education Committee for the San Diego Chapter of CAI from 2015-2017.

Tim has presented several community association law classes for the Coachella Valley, Greater Inland Empire, Orange County and San Diego Chapters of CAI. He is a panelist for CACM where he has been able to teach hundreds of California community managers the basic principles of HOA law and other practice tips needed to become proficient community managers.

In 2011, he was nominated as Speaker of the Year by the Orange County Chapter of CAI. Tim has written several articles on community association law publications throughout Southern California, and in 2016 he authored an article that was nominated as Article of the Year by the Orange County Chapter of CAI. Tim was a featured speaker at the 2019 CAI National Law Seminar in New Orleans where is presented before hundreds of HOA attorneys from across the country.

Christopher Flythe, PE, RS, Principal Engineer

Chris joined Giles Flythe Engineers, Inc. as a Principal in 2012. He has over 15 years of infrastructure design and inspection for residential, commercial, and institutional projects. Chris has performed numerous reserve studies and transition studies for townhomes, condominium complexes, high-rise residential units, single-family homes, and mixed-use developments. His due diligence experience includes property condition assessments, Phase 1 Environmental Site Assessments, and site/civil engineering services. Chris also has experience performing drainage, asphalt and concrete paving evaluations, design and specifications development, bidding, and construction monitoring projects for a wide range of properties. His land development experience is invaluable for helping owners with complex drainage and/or erosion concerns. He has helped hundreds of property owners by providing forensic engineering, structural evaluations, and design services. During his early career, Chris designed prestressed concrete and steel girder bridges and provided inspections and evaluations of timber, concrete, and steel bridges. In addition to his extensive engineering experience, he also provides expert witness and support services for capital reserve and site/civil engineering-related litigation.

Chris is a North Carolina native, husband, and father of two daughters and one son. He and his family are involved with their church and desire to live a life of service in response to the Gospel. Chris enjoys CrossFit workouts with his wife, coaching soccer for his daughters, and riding dirt bikes with his son. He has served on the Cary Christian School Board for the last decade. Chris is passionate about learning and researching. He enjoys mentoring the incredible team he works with while gaining just as much knowledge from the talented engineers around him.

Elina B. Gilbert, Esq., CCAL fellow, has practiced community association law for over 20 years with Altitude Community Law, PC., with an emphasis on transactional issues such as insurance, document amendments, and real estate matters. Elina is currently the Shareholder in Charge of Practice at the firm and oversees the Altitude Community Education (“ACE”) program, which she has done for over 10 years, a critical part of the firm’s mission statement and overall brand. Overseeing ACE involves creation, preparation, and presentation of 25+ programs per year, including lunch forums, webinars, and full-day classes that provide managers with CMCA and Real Estate credits. She also heads up the firm’s monthly E-Newsletter, which is nationally circulated. Elina is a frequent speaker on both a local and national level, which includes CAI Law Seminars, attorney courses through the National Business Institute, national webinars through HOALeader.com, and state classes and webinars through ACE and local CAI Chapters. Elina was inducted into the College of Community Association Lawyers (“CCAL”) in 2010, and is also a co-chair, of the CCAL Law Seminar Planning Committee.

Kevin R. Giles, RS, Director of Operations, joined Giles Flythe Engineers, Inc. in 2010. Kevin has more than ten years of experience in commercial and residential construction management, building material manufacturing, and safety and environmental oversight. Over the last decade, he has utilized his business management background and technical experience to work with several hundred community associations on reserve studies, transition studies, and construction management. Kevin has also assisted with numerous commercial real estate evaluations, including cost segregation studies, property condition assessments, and phase 1 environmental site assessments. These studies address a range of contaminants, including petroleum products, hazardous materials in construction materials, and compliance with building codes, ADA regulations, and mechanical, electrical, and structural integrity issues. Kevin has a broad range of experience, including building material manufacturing, commercial building renovation and construction, commercial building maintenance, and residential construction and renovation.

Kevin currently serves as a Board Member of the North Carolina Chapter of Community Associations Institute (CAI-NC).

Kevin was born and raised in North Carolina. He is a husband and father to two daughters. His family is all very involved with their church. He is a runner and enjoys his workouts with F3 South Cary. Kevin trusts the Giles Flythe team with autonomy to perform their job duties and achieve their goals.

John Gill, Esq., Construction defect specialist with deep HOA general representation roots.

In virtually every case, John can speak meaningfully about any HOA-related legal predicament and determine how to best resolve it. But more importantly, he has the ability to take the most complex legal concept and explain what his client needs to know, what they need to consider, and the decisions they need to make and why. Even the most overwhelmed board member or community association manager is comfortable with John and appreciative of his approach.

John began representing homeowner associations more than 25 years ago, prior to the current-day specialization within HOA law firms. As a result, John can do it all and has done it all – from corporate governance representation to multimillion dollar construction defect claims.

Bill Gourley, Esq., is a Partner with NowackHoward, LLC, and has over a decade of experience in community association law. His wide-ranging practice focuses on both general servicing and litigation. Bill counsels board of directors on corporate governance matters, interprets and drafts governing documents, assists with zoning and land use issues and provide guidance on day-to-day legal issues. Bill also defends associations, board of directors and property managers against a wide range of lawsuits, including breach of fiduciary duty actions, breach of contract actions and tort claims, and represents associations in covenant enforcement actions against property owners. Bill also enjoys developing and instructing educational courses for board of directors and property managers on corporate governance, fair housing and covenant enforcement.

David Graf, Esq., CCAL fellow, has practiced community association law exclusively since 2001. In this time, he has represented a wide range of communities throughout the State of Colorado. Much of his practice involves interpreting and amending governing documents, advising associations on the corporate aspects of running a common interest community, and enforcing the terms of governing documents through court action. He has attended several thousand difficult and contentious board and member meetings on behalf of associations.

David is one of the most sought-after community association industry trainers and speakers in the United States. He is a national faculty member of the Community Associations Institute's Professional Management Development Program ("PMDP") and travels throughout the United States to facilitate multi-day corporate trainings for professional community managers. In 2015, he was named CAI's National Educator of the Year.

David has been admitted to the College of Community Association Lawyers ("CCAL" or the "College"). Of the thousands of lawyers practicing community association law throughout the United States, fewer than 200 have been admitted to the College. David, together with Steven Weil, Esq. of Berding & Weil, LLP of Walnut Creek, California, was awarded the first ever Best Manuscript Award from the College for the materials accompanying their presentation on national community association voting trends at the 2014 CAI National Law Seminar. David served on the Colorado Legislative Action Committee of CAI for many years, including as the co-chair of the committee. David served on the Executive Board of the Rocky Mountain Chapter of CAI for four years, with one year as President. In 2018 and 2020, David was elected by his CCAL peers to the College's Board of Governors and is the current President of the College.

David is a Connecticut native. He received a Bachelor of Science in Business Administration from Boston University and a Juris Doctor, with honors, from the University of Connecticut School of Law. Coming to Colorado in 1995, David began work at a collection company and then moved to a law firm specializing in collections. After that, he was a commercial litigator for two years and spent over one hundred days per year in courts during this period. He then became associated with a corporate law firm, where his practice focused on the representation of developers, owners of commercial properties, and corporations of all types. He left that practice in 2001 as a partner in the firm to practice community association law.

David is a stroke survivor. In 2013, he suffered a stroke after tearing his vertebral artery in a freak accident. David had always been an outdoor enthusiast and endurance athlete. After re-learning to walk, dress, and feed himself, he commuted to work and to client meetings on a folding bicycle until he was able to drive again, nearly a year after his stroke. David speaks on mental toughness during long-term rehabilitation, living with chronic pain, and human resilience. David is also a life and mindset coach who works with attorneys and with stroke survivors and their families to help them live their best lives during difficult circumstances. He is a Certified Professional Coach and holds the Energy Leadership Index-Master Practitioner designation.

Marshal Granor, Esq., CCAL fellow, in addition to being a CCAL fellow, Marshal Granor was a principal author of Pennsylvania's Uniform Planned Community Act. Marshal's real estate practice focuses on drafting community association documents and creative problem-solving. In May of 2020, Mr. Granor completed his term as Chair of the Pennsylvania Bar Association's Section on Real Property, Probate and Trust Law. Marshal is a member of CAI's Pennsylvania Legal Action Committee. He serves as an expert witness in community association and real property cases, and has testified before committees of the Pennsylvania state legislature. Marshal holds Pennsylvania and New Jersey licenses as a real estate broker and title insurance agent, as well as being a licensed Pennsylvania real estate instructor. He frequently teaches continuing education courses for attorneys, real estate licensees and title insurance agents, as well as for community association professionals and residents. For six years, Mr. Granor owned and operated a community association management company serving approximately 11,000 homes. He was a partner in a residential builder-developer for 40 years, where he served as declarant member of the boards of 26 community associations in Pennsylvania and New Jersey.

Daniel Heaton, Esq., brings over a decade of experience to the team at Nordberg | DeNichilo, LLP. While an undergraduate at the University of Utah, Daniel completed an internship with the Supreme Court of the United States that left a lasting impression:

“I became fascinated by the process by which the Supreme Court decides which cases will be heard each year (a little over 1%, or about 80 of 7,000). What is it about certain issues or even how briefs are written that makes the Court more inclined to accept them?”

This led Daniel to return to Washington, DC to attend The George Washington University Law School where he received his Juris Doctor degree with honors. In reflecting on some of the high points so far in his career, Daniel acknowledges that his SCOTUS internship and subsequent focus while at GW provided him valuable insight when he was later asked to advise a client on how best to respond to petitions to both the Supreme Court of California and then the Supreme Court of the United States. After preparing the necessary briefs, the result returned exactly as predicted — in favor of the client.

It's that drive to research and explore the best options for a client that makes Daniel an excellent litigator and an even better corporate counsel. His belief is, to be successful, one should always strive to be the best possible version of oneself. His clients and colleagues agree. Daniel endeavors to bring a quiet dignity to his interactions with his clients, who are volunteer leaders that are often forced to grapple with a wide variety of complex issues. He understands that emotions can run high in these types of situations and, to mitigate this stress, Daniel patiently explains processes and options available and then acts swiftly to resolve the matter as soon as possible. Daniel works closely with fellow colleagues at Nordberg | DeNichilo, LLP to ensure the best results for clients.

At his former firms, Daniel handled critical law and motion matters, including appellate advocacy, in general and commercial liability, personal injury, and products liability disputes. Having initiated his legal career at one of the top employment defense firms in the nation, Daniel also has substantial experience defending discrimination, wrongful termination, and wage/hour disputes on both a class-action and individual basis.

Edward Hoffman, Jr. Esq., CCAL fellow, is a graduate of Temple University (B.A.), California State University (M.S.) and Temple University School of Law (J.D.), and is licensed to practice law in Pennsylvania and New Jersey. Ed regularly represents and counsels homeowners associations, condominiums and planned communities on a full range of issues.

Ed counsels associations on the proper use of social media, websites, technology and other cutting edge issues. Ed also practices insurance defense litigation exclusively on behalf of community associations where he defends associations against general liability and director and officer liability claims. He is a member of CAI's Pennsylvania Legislative Action Committee and the CAI PA/Del-Val Poconos Regional Council.

Julie McGhee Howard, Esq., CCAL fellow, is the co-founder and managing partner of the community association law firm NowackHoward, LLC in Atlanta, Georgia. Ms. Howard has served as general counsel to condominium and homeowner associations across Georgia since 1996.

Ms. Howard was elected to membership in the College of Community Association Lawyers in 2008 and served as Co-Chair of the Law Seminar from 2015-2017. Ms. Howard was elected to the College's Board of Governors in 2015 and served as the College's 2018 President.

Ms. Howard served six years on CAI's National Board of Trustees and was CAI President in 2014. As President, Ms. Howard initiated a yearlong national project to explore the future of community associations—Community Next: 2020 and Beyond, bringing together over 50 members and external stakeholders on four distinguished panels, culminating in a CAI special report on what's to come for community associations. In May 2016, Ms. Howard received CAI National's Outstanding Volunteer Service Award for her contributions to CAI and for her work on Community Next.

Ms. Howard also served six years on the Board of Directors of the Georgia Chapter of the Community Associations Institute and was Chapter president in 2003. Ms. Howard is an active and long-time lobbyist for community associations, and chaired CAI-Georgia's Legislative Action Committee from 2011-2013 and continues to actively serve on the Georgia LAC. Since 1998, Ms. Howard has been a licensed instructor for the Georgia Real Estate Commission, teaching the Community Association Managers' Pre-License Course.

Phaedra Howard, Esq., CCAL fellow, brings her creative and strategic acumen to individuals and a broad range of entities, including condominium, townhouse, cooperative, and other community associations. She provides legal advice and representation on a wide variety of issues affecting associations. Whether working with individuals or commercial entities in real estate, community association law, or collections, creditor's rights and remedies, Phaedra tailors her legal services to the unique needs of each client.

"I individualize my approach to each case so that my clients have a clear understanding of their options and how best to proceed within the constraints of a particular situation," says Phaedra. "By getting to know my clients and understanding the unique nature of their situation, together we can achieve the best possible outcome."

She is licensed to practice law in the state courts of Minnesota and Wisconsin and the federal court in Minnesota.

Troy Isaacson, Esq. has nearly twenty-five years of experience working with homeowners, board members, managers and homeowners' associations. Throughout his career, Mr. Isaacson has worked to help his clients make knowledgeable decisions when confronted with otherwise overwhelming legal issues.

In his career, Troy has handled numerous cases through the Real Estate Division, mediation, trial and into appeal involving homeowners' associations, construction law, contract disputes, and personal injury matters. Mr. Isaacson serves as general counsel for numerous homeowners' associations throughout the Las Vegas Valley who rely upon his incisive advice. In furtherance of educating individuals and board

members on issues surrounding common-interest communities, he has lectured extensively including classes taught on behalf of the Community Association's Institute and the Nevada Ombudsman for Common-Interest Communities. Troy has worked to assist homeowners and homeowners' associations with resolving their legal questions in a cost effective and expeditious manner.

Troy is licensed to practice in Nevada and California and numerous Federal Courts throughout the United States. He obtained his Bachelor of Science Degree in Economics from the University of California, Riverside and his Juris Doctor from the Whittier College School of Law.

Cynthia A. Jones, Esq., CCAL fellow, is licensed in both North Carolina and South Carolina and concentrates her practice on representing community associations and real estate developers. She frequently works on the development, creation and organization of condominium and homeowner's associations. In addition, Cynthia guides clients with the interpretation, enforcement and amendments of governing documents and routinely assists clients with the collection of unpaid assessments, including liens, foreclosures and bankruptcies.

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Jeffrey E. Kaman, Esq., CCAL fellow, earned his law degree from the Cleveland Marshall College of Law, after graduating with honors from Loyola University Chicago with degrees in Honors History and Political Science. Since joining Kaman & Cusimano, Jeff has worked intensively, focusing on association operations, answering many general operational telephone calls, and spends significant time drafting governing document amendments, reviewing contracts, and writing opinion letters for the firm's condominium and homeowner association clients.

In addition, Jeff is an active member of the Community Association Institute, serving as a board member for the Central Ohio Chapter, and the Programs Committee Chair for the Ohio Valley Chapter. Further, Jeff serves as the national co-chair for CAI's case law update summary team, which reviews and summarizes all major community association court opinions from around the country, to advise CAI's community association attorney members on trends and updates in the condominium and homeowner association legal field.

As a member of his condominium association's board for six years, Jeff is able to empathize with today's challenges that face all community association board members by being both a board member and a unit owner. Using that experience, Jeff is constantly attending community association meetings with the goal to develop further relationships with our clients and their professional property managers, and to educate board members and owners on Ohio community association laws on topics such as reserves, collections, enforcement, insurance, pending legislation, and developer transition issues, as well as to moderate elections, explain governing document amendments, and elaborate on owner and association responsibilities.

Further, Jeff enjoys confronting the challenges and opportunities for condominium and homeowner associations presented by technological advancement. He has been influential in deploying ATLAS: the Association Total Legal Assistance System, Kaman & Cusimano's state-of-the-art online resource for board members and property managers. Jeff also routinely writes for the Ohio Condo & HOA law blog and numerous other online articles.

For 2021, Jeff was named as an Ohio SuperLawyers Rising Star, an honor conferred upon less than 2.5%

of the attorneys in Ohio.

Maria Kao, Esq., is a Common interest development attorney specializing in corporate governance and litigation. Currently representing: common interest developments, residential, commercial and mixed use developers, apartment owners/holding groups. Specialized areas of litigation include CC&R enforcement, CID vendor disputes, and disputes with local municipalities. Rare ability to take litigation from Complaint to Post-Judgment Collection.

Gayle A. Kern, Esq., CCAL fellow, is a shareholder with Leach Kern Gruchow Anderson Song. Ms. Kern is one of just over 150 attorneys in the United States to be inducted into the College of Community Association Lawyers (CCAL) and one of only three—including John Leach of LKG—in the state of Nevada.

In practice for more than 34 years, she focuses on a general civil practice with an emphasis on all types of common-interest communities including condominiums; townhomes; landscape maintenance; single family; master and sub associations; and mobile home parks, as well as litigation, bankruptcy, and real property law. Ms. Kern began representing associations approximately twenty-eight years ago and currently serves as counsel to over two hundred fifty associations throughout Northern Nevada.

Ms. Kern lectures regularly and teaches seminars on common-interest community law. She serves on the Community Associations Institute's Legislative Action Committee, which participates in review and comment on legislation affecting common-interest communities and regulations promulgated by the Ombudsman and Nevada Real Estate Division. Ms. Kern worked with the Real Estate Division in the development of the first community manager exam and is approved by the Real Estate Division to teach classes to community managers. She regularly attends CAI's National Law Seminars to keep apprised of new developments in the industry— not only in Nevada, but throughout the country. As a member of CAMEO, she is an approved instructor for many of their classes.

Ms. Kern is proud to have served as the president of her own homeowners' association and knows first-hand the challenges her clients face.

Jeffrey Kerrane, Esq., CCAL fellow, Shareholder Jeff Kerrane has more than 25 years of experience representing property owners and community associations in construction defect cases.

In addition to his extensive experience in the courtroom, Jeff has been published in journals such as the Santa Clara Law Review, Nevada Lawyer, California Regulatory Law Reporter, Condo Management Magazine, Recharger Magazine, and local publications of the Community Associations Institute (CAI). He is a frequent speaker on construction defects and community association law topics, and has lectured for CAI, the Nevada Ombudsman's Office for Community Associations, the Nevada Real Estate Division, the Greater Las Vegas Association of Realtors, and California Association of Community Managers.

Jeff is a member of CAI's Legislative Action Committee which furthers legislation in support of homeowners and community associations. Jeff has testified before state legislative committees regarding homeowner issues. In 2012, Jeff joined a state bar delegation to visit Cuba for the purpose of researching Cuba's legal system.

Jeff is a high school mock trial coach and enjoys spending time with his wife and their four kids.

Jessica Knutsen, CIC, CIRMS, has been practicing insurance for 18 years. She holds a Property & Casualty insurance license and Surplus Lines insurance license for multiple states in the US including VA, MD, DC, DE, NC and CA. She has developed expertise pre-underwriting, negotiating and placing insurance programs for Common Interest Communities.

She joined USI in 2011, she leads the Community Associations Division at USI as a Partner and Vice President. Her role is to assist Community Managers and board members in understanding their

insurance risk profile, provide insurance market updates and facilitate the placement of insurance programs to be in compliance with governing documents and lender requirements.

Cyrus Koochek, Esq., is a senior associate attorney at SwedelsonGottlieb and is primarily involved with providing assistance to associations in all areas of corporate counsel and transactional work. Cyrus oversees SwedelsonGottlieb's Amend! program, which covers the amendment and restatement of governing documents for associations. Cyrus participates in and volunteers for CACM as well as several chapters of CAI, and is a past CAI Rising Star Award winner. Cyrus is also a frequent speaker and regular educator for CACM and for several CAI chapters throughout Northern and Southern California, and has authored several articles on a variety of community association topics in Common Ground and several other community association publications. In 2021, Cyrus was recognized as a Southern California Super Lawyers Rising Star, a distinction reserved for only the top 2.5% of attorneys.

Lynn Krupnik, Esq., CCAL fellow, graduated first in her class from Arizona State University College of Law in 1996, where she was named the ASU Alumni Association Outstanding Graduate. Lynn also received the International Academy of Trial Lawyers Award (for exceptional trial advocacy skills in Law School Clinic), John J. Ross Award (for outstanding performance in Business Association courses), CALI Excellence for the Future Award (for excellent achievement in Law School Clinic), and Order of the Coif. While at ASU, Lynn served as a managing editor for the Arizona State Law Journal, and as a writing instructor for first year law students. After graduation, Lynn accepted a judicial clerkship with Vice Chief Justice James Moeller of the Arizona Supreme Court. Lynn served on the Board of Directors for the Central Arizona Chapter of the Community Associations Institute ("CAI") for six years, and is a fellow in the CAI College of Community Association Lawyers. Lynn served as the co-chair for the CAI Arizona Legislative Action Committee for four years and continued to serve on that Committee. She frequently writes and lectures on association issues. Lynn's law practice focuses on representing community associations. She has represented community associations in Arizona since 1997 and in New Mexico since 2006. Lynn is licensed to practice law in Arizona and New Mexico and with the United States District Court, District of Arizona and District of New Mexico.

Lydia Pierce Linsmeier, Esq., CCAL fellow, is a Partner in the Tempe office. Lydia began her legal career as a sole practitioner concentrating on animal and equine law. In 2011, Lydia joined a Valley firm and developed a unique practice area that is sensitive to the role of animals in a community association setting.

As part of the insurance defense practice group, Lydia successfully defends claims in both state and federal court, and the Office of Administrative Hearings. Lydia's general counsel foundation and in-depth understanding of Arizona community association law makes her ideal for representing the interests of associations at every stage, from pre-litigation to trial.

Lydia is passionate about fair housing and disability access issues, and teaches fair housing seminars to managers, associations, and the public. Assistance and service animals are always a contentious issue, and Lydia enjoys educating associations locally and nationally on how to best implement both the spirit and law of the Fair Housing Act.

Currently serving on the Executive Committee of the State Bar of Arizona Animal Law Section, Lydia routinely teaches and writes on animal law topics, including her 'Community Animal' column. She spends her spare time hanging out with a variety of mutts and attempting to grow antique roses.

Kayleigh Long, Esq., is a senior attorney with Hirzel Law, PLC and focuses her practice in the areas of community association law, including bylaw enforcement, appellate litigation, and document amendments. Ms. Long obtained her Juris Doctor degree from Indiana University Robert H. McKinney School of Law, where she graduated in the top 5 of her class and served as the Senior Executive Editor on the Indiana Law Review.

Ms. Long has been recognized as a Michigan Rising Star in Real Estate Law by Super Lawyers since 2020, an award given to no more than 2.5% of the attorneys in the State of Michigan. She also was recognized as a 2022 Up & Coming Lawyer by Michigan Lawyer's Weekly, an award given to no more than 30 attorneys in the state each year. Ms. Long has also made numerous presentations on community association law, along with having articles published in the Michigan Real Property Review.

Adam Maldonado, is the vice president of Texas region of Reconstruction Experts. For Reconstruction Experts' Vice President of Texas Region, Adam Maldonado, there are two key elements to every project that are non-negotiable: Safety and Quality. For 8 of his over 16 years of experience, Adam has been a valued member of the Reconstruction Experts team –having held numerous, important roles within the organization, giving him a deep insight into every facet of our business and sharing his wisdom to further develop our expertise.

As an Expert Witness in multiple states, he is an integral part of our litigation support team, while his time on-site managing construction projects gives him an edge in being able to see all sides of execution and meeting needs with a level of unparalleled detail and analysis. Adam's passion for the industry is unmatched and shows in the work he does managing the success of Reconstruction Experts' Texas branch.

Stephen Marcus, Esq., CCAL fellow, has over 40 years of experience specializing in condominium law. Stephen is regarded as one of the “original” or “first generation” of condominium lawyers.

Stephen entered the condominium arena, while attending law school (when condominiums were in their infancy in the 1980's) and began working as a condominium manager with Joe and Mary Ann Saurino at Condominium Management Enterprises while attending law school. Because of his work as a condominium manager while attending law school, he was the only law student that knew he wanted to be a condominium lawyer when he graduated. That experience was unique and opened Stephen's eyes to the complexities of condominium living and governance, which were all relatively new in Massachusetts. It was his experience as a condominium manager that directed him towards law school, making him the only person known to have attended law school with the intent of becoming a condominium lawyer. Known for his photographic memory of condominium cases, sharp wit and outside the box problem solving strategies, Stephen is a mentor to all in the condominium industry. He has served as a mentor to and partnered with most of the condominium lawyers and leaders practicing in Massachusetts today. His “coaching” or “mentor” tree is unparalleled in the field of condominium law. Stephen has a unique ability to bring parties, including competitors and sworn enemies, together on matters of common concern in the condominium industry. His approach and tenacity has proven successful time and time again, whether it was helping secure priority lien legislation for condominiums in the early 1990's, securing important federal bankruptcy and telecommunications legislation for condominiums in the early 2000's, taking on Fannie Mae and Freddie Mac condominium secondary market requirements in the second decade of the 2000's, being the driving force behind numerous state and national Amicus briefs and most recently spearheading a task force of lawyers and engineers from all over the Country to address the tragic Champlain Towers collapse in Surfside, Florida. Stephen's influence clearly extends well beyond Massachusetts. His experience and exposure to condominium lawyers across the country has always served his condominium clients locally. Stephen is a fellow in the national College of Community Association Lawyers and served as its President in 2015. In 2017, he was honored by the College as only its 5th ever recipient of the Don Buck Lifetime Contribution Award. Currently, Stephen serves on the CAI National Federal Legislative Action Committee and was tri-chair of the CAI National Building Inspection task force that was created in 2022 after the collapse of the condominium in Surfside, Florida which took the lives of 98 people.

At Allcock & Marcus, Stephen focuses on representing community associations, developers and lenders in various capacities, including reviewing, drafting and amending condominium documents; negotiating the terms of condominium association loans; and advising boards on rules enforcement, association insurance and other day to day governance issues. Stephen uses a unique “value” billing system

depending on the needs and means of the client. Much to the chagrin of his partners, he also will take on pro bono work for certain cases that are of special interest to him or where the need for the free services is demonstrated.

Stephen is a popular local and national lecturer on condominium law and a frequent contributor to various industry publications. Other industry experts frequently seek Stephen's consultation and is quoted often in industry and general interest publications.

Marc Markel, Esq., CCAL fellow, is one of Roberts Markel Weinberg Butler Hailey's founding shareholders. Marc has been practicing law for over forty years. He is experienced in handling all aspects of real estate transactions, litigation and community association representation. Marc has been listed on Thomson Reuters *Super Lawyers* from 2005-2012 and 2014-2022. He has been recognized as a Best Lawyer by Best Lawyers in America 2018-2022. Marc is Board Certified in Residential Real Estate, Commercial Real Estate and Property Owners Association Law by the Texas Board of Legal Specialization. He is a charter fellow of the Community Association Institute's College of Community Association Lawyers (CCAL), and a fellow of the American College of Real Estate Lawyers (ACREL). He is AV-rated Preeminent by *Martindale-Hubbell*, the highest possible peer rating for both competence and ethics.

Mr. Markel has authored master deed restrictions for numerous large residential, commercial and mixed-use projects. He represents and defends community associations and their volunteers in litigation and frequently assists developers through their due diligence process and acquisition of title. His representation of developers, builders and associations involves litigation avoidance techniques in which he conducts a thorough risk analysis program. Mr. Markel is also a frequent speaker on real estate topics for various bar organizations and the Community Associations Institute.

Ruhi Mirza, Esq., represents community association clients, including condominiums and homeowners associations located in the District of Columbia, Maryland, and Virginia. Ruhi has assisted her community association clients by representing them in collections efforts against delinquent owners in multiple jurisdictions. She has coordinated, monitored, and prepared recommendations and documentation related to covenant enforcement actions. She has provided counsel regarding interpretations of legal documents, in accordance with applicable state, local and federal law, as well as, preparing and amending legal documents, including Articles of Incorporation, Declarations, Bylaws and Policy Resolutions. Ruhi has also assisted in preparing for and conducting membership and Board of Director meetings. She has provided valuable counsel for her clients by reviewing, negotiating and revising contracts, easement agreements and settlement agreements.

Daniel J. Miske, Esq., CCAL fellow, is one of only two Wisconsin attorneys admitted to the national College of Community Association Lawyers, which recognizes excellence in the practice. He represents condominium and homeowners associations (HOAs) throughout the state.

He handles the many issues facing the boards of directors and managers of condominium associations, homeowner associations, cooperatives and timeshares, including document amendments, collections, contracts, rules and governance.

Daniel's interest in condominium law started when he became a condo owner and, eventually, president of his condominium association. He relates well to his clients because he can identify with the complexities of condo ownership and the diversity of the legal challenges that boards and managers confront.

Daniel serves on the firm's Executive Board and is actively involved in the following professional associations.

Brian D. Moreno, Esq., CCAL fellow, is an experienced litigator and community association attorney, having practiced common interest development law since 2003. Brian has represented and provided legal counsel to the boards and managing agents for California condominium and planned developments, as well as stock cooperatives, qualified vacation ownership resorts, and mobile home communities in connection with matters pertaining to common interest development, real estate, collection and corporate law.

Brian has experience with the many real estate and community association issues and disputes that impact community associations relating to CC&R interpretation and enforcement, corporate governance and compliance with the Davis-Stirling Act, assessment collection, foreclosure and wrongful foreclosure defense. Brian routinely handles matters related to the assignment of rents enforcement, receiverships, view obstructions, conveyance deeds, easements, encroachment and boundary disputes, deeds of trust interpretation and enforcement, lien priority, title insurance, eviction, wrongful eviction and community association governance.

Licensed to practice law in both California and Arizona, Brian is an active member of the Community Associations Institute (CAI) in several Southern California chapters and has authored a number of articles pertaining to common interest development law and its application to community associations in California. Additionally, he has been a featured speaker at CAI events (including the 2015 and 2018 National CAI Law Conferences), as well as an approved instructor for various chapters in Southern California.

In 2013, Brian was the 20th California attorney to be admitted to CAI's College of Community Association Lawyers. He serves on the Programs Committee for the Greater Los Angeles Chapter, as well as on the Legislative Action Committee for the Channel Islands Chapter. He also serves on CAI's National Law Seminar Planning Committee.

Brian earned his Juris Doctor degree from California Western School of Law and his Bachelor of Arts degree in Communication from the University of California, Santa Barbara. While attending law school, Mr. Moreno served as a legal intern for the Superior Court of California, County of San Diego, where he researched and analyzed various juvenile delinquency issues for several judges and judicial referees. After completing his legal internship, he helped represent creditors while employed as a paralegal for a San Diego law firm specializing in bankruptcy law.

Brian W. Morgan, Esq., CCAL fellow, has been practicing community association law for over 20 years. He is actively involved in his CAI chapters in Arizona and Utah and has served as co-chair of the Legislative Action Committee in Arizona for nearly a decade. He has also served as a Board Member for CAI, Central Arizona Chapter.

Mr. Morgan is in the unique position of being a principal and the managing partner of Maxwell & Morgan, P.C., while at the same time serving as CEO of Anva, a software company providing practice management software to HOA lawyers. Mr. Morgan has seen first hand this past year those firms that were prepared to work remotely compared to those that were not, and he has seen what differences the level of preparedness has made in HOA firms throughout the country. He has had to pivot his own firm to allow staff members to work remotely and has had to ensure both his firm as well as the software company were fully prepared to deal with the numerous ethical issues involved with running law firms remotely.

P. Thomas Murray, Jr., Esq., CCAL fellow, started representing condominium and homeowners associations in 1988. Over the years, his law practice evolved into the exclusive representation of community associations. Tom offers clients valuable perspective and practical counsel on day-to-day issues, as well as and complex legal questions including:

- Additions and changes to covenants and other governing documents Bylaws, rules, regulations, and important policies Covenant enforcement Federal and state laws.

- Tom is the first attorney in Indiana inducted as a Fellow into the College of Community Association Lawyers (CCAL). Fewer than 150 attorneys in the country are part of this prestigious group.

W. Alexander Noland, Esq., CCAL fellow, is the founding shareholder of Noland Law PC and manages the firm. He has been practicing California community association law since 2008.

Alex has built a strong reputation for providing creative solutions and clear opinions to his clients. His practice includes counseling associations on corporate governance, fiduciary duties, and compliance with statutory requirements; negotiating and drafting contracts; amending and restating governing documents; preparing opinions on corporate business and legal issues; and representing associations in mediation and other dispute resolution proceedings. Alex provides legal services to associations managing residential, mixed-use, and commercial and industrial common interest developments throughout California.

Alex has been active in industry organizations in southern and northern California for many years, garnering numerous accolades. From 2014 to 2019, Alex served on the Board of Directors of the Bay Area and Central California Chapter of the Community Associations Institute (CAI), and was that Chapter's President in 2018. On a national level, he is a fellow of CAI's College of Community Association Lawyers, a select honor conferred in recognition of his long history of commitment as an educator and advocate for community associations. Alex regularly speaks statewide at educational programs hosted by and authors articles for publications of CAI, the California Association of Community Managers (CACM), and the Educational Community for HOA Homeowners (ECHO).

In 2019 and 2020, Alex was selected to the Northern California Super Lawyers list, an honor reserved for those lawyers who exhibit excellence in practice. Only five percent of attorneys in California receive this distinction.

Matt D. Ober, Esq., CCAL fellow, is a partner of Richardson|Ober|DeNichilo where his practice is dedicated to the exclusive representation of community associations throughout California. Matt has served as counsel to community associations for over two decades and has made significant contributions to the community association industry through both the Community Associations Institute (CAI) and the California Association of Community Managers (CACM).

Matt is a member of CAI's National Faculty and a CACM faculty member. He is a Fellow of CAI's College of Community Association Lawyers (CCAL) and is the President of the CCAL Board of Governors. Matt is also a delegate to CAI's California Legislative Action Committee (CLAC) and serves as Legislative Co-Chair of CLAC's Executive Committee. He also serves on CAI National's Government and Public Affairs Committee. At its recent 2018 national conference, Matt received the "Outstanding Volunteer of the Year" award from CAI for his 25 years of service to the community association industry. In June, Matt was awarded the 2018 Manuscript Award from the College of Community Association Lawyers (CCAL) along with colleague, Amy Tinette, Esq. Their presentation, "Bucking the Trends: Impact of Legislative Trends on Community Association Governance" was selected from more than 50 other entries.

Matt is a co-author of CAI's California Law Course for Community Association Managers and CAI's Board Education Course as well as CAI National's L-100 course "Essentials of Community Association Law." In addition, Matt has earned the Martindale-Hubbell® AV Peer Review Rating™ signifying the highest rating in legal ability and ethical standards.

Kimberly M. O'Halloran-Perez, Esq., CCAL fellow, is a Principal in the firm's Community Association department. Kim has more than sixteen years' experience exclusively representing community associations in Maryland, Virginia and West Virginia. Her key clients are luxury condominiums and large property owners associations in Maryland and Virginia. Kim also prides herself on offering advice and counsel to several associations that are managed solely by their owner volunteer members.

Kim has a unique expertise in counseling community associations to resolve complaints that are subject to review by the Common Interest Community Board (“CICB”) Ombudsman in Virginia. In addition, Kim has appeared several times before Commission on Common Ownership Communities (“CCOC”) in Montgomery County on behalf of her Maryland community association clients.

In addition to Kim’s experience in Ombudsman and CCOC matters, Kim has also defended dozens of fair housing related actions during her time at Rees Broome. These actions have included disability claims involving autism spectrum disorders, multiple chemical sensitivity, psychiatric disorders as well as claims of familial status and racial discrimination. Prior to joining Rees Broome, Kim received extensive crisis intervention training, and she has used these skills to the benefit of her many clients to address and resolve challenging community situations.

Kim is also an example of Rees Broome’s policies of promoting from within as she originally began her career at Rees Broome as the legal assistant to the firm’s co-founder, Jonathan Broome. Soon thereafter Kim was promoted to serve as a paralegal in the Community Association department where she routinely worked on unresolved covenant violations matters, collection of delinquent assessments and assisted with trial preparation for community association litigation. Later Kim rejoined the firm as an attorney after serving as a law clerk for the firm while attending law school.

From 2012-2013 Kim served as the President of the Washington Metro Chapter of the Community Associations Institute where she worked with her fellow officers and directors on the Board to retain a new Executive Director for the Chapter after conducting a nationwide search. During her tenure as Chapter President, Kim also championed the unsung heroes in our industry who volunteer their time to their communities as well as the professionals who serve the many community associations in our region.

Howard J. Perl, Esq., AMS, PCAM, CCAL fellow, has been involved in all aspects of community association law, including transactional, collections, mediation, arbitration, construction defects and litigation. He is Florida Bar Board Certified in Condominium & Planned Development Law and is certified by the State of Florida as a facilitator for continuing education credit courses for Community Association Managers. He has prepared and conducted informational seminars for continuing education credits for community association managers and Board members. Howard handles community association arbitration and mediation cases, as well as community association-related litigation.

Mr. Perl holds the AV Preeminent rating, Martindale-Hubbell’s highest possible rating for an attorney, for both ethical and standards and legal ability. In 2019, he was named as a fellow to the College of Community Association Lawyers. The CCAL has fewer than 175 members who distinguish themselves through contributions to the development of community association law.

Mr. Perl retired as a Major in the Army Reserves after 33 years of service and was deployed to Iraq in support of Operation Iraqi Freedom from July 2005 to July 2006.

Laurie S. Poole, Esq., CCAL fellow, is a partner with Adams|Stirling, PLC, in San Diego, California. Laurie has extensive experience representing common interest developments, including master-planned communities, large condominium projects, mixed-use, and highrise developments. Her practice involves interpreting and amending governing documents, advising boards on compliance matters, addressing governance and insurance issues, and enforcing governing documents.

Laurie devotes time to shaping the laws governing California’s community associations. Laurie was appellate counsel in *Quail Lakes v. Kozina* (2012), trial and appellate counsel in *Mission Shores v. Phiel* (2008), and trial counsel in *Fourth La Costa v. Seith* (2008). Through her efforts, eleven appellate decisions have become published case law in California.

Laurie is an active volunteer for Community Associations Institute (CAI). She is currently a CCAL Board of Governors member and served as President in 2022. Laurie is a frequent speaker at industry events and has received multiple awards, including 2021 CAI National's Co-Author of the Year.

Patrick G Prendiville, CIRMS, started Prendiville Insurance Agency in 1988 after graduating from the University of California, Santa Barbara. Patrick has earned the "Community Insurance and Risk Management Specialist (CIRMS)" designation from Community Associations Institute (CAI).

Over the years, Patrick has been actively involved in multiple chapters of CAI. Highlights of Patrick's involvement with Community Association Institute's local Chapters.

Anthony (Tony) Rafel, Esq., CCAL fellow, is the Managing Partner of Rafel Law Group PLLC, with offices in Seattle, Washington and Portland, Oregon. He is a Fellow in the College of Community Association Lawyers, serves on CAI's Amicus Curiae Brief Committee, and is the immediate past President of the Washington State Chapter of CAI. Tony has been selected as a Washington SuperLawyer™ every year since 2003, is listed in Best Lawyers in America, and holds an AV peer-review rating from Martindale-Hubbell. He previously served as president of the Federal Bar Association of the Western District of Washington and as a judicially selected lawyer representative to the Ninth Circuit Judicial Conference. Tony represents community associations both as litigation counsel on construction defect, insurance coverage, and covenant enforcement actions, and as general counselor and advisor.

Kelly G. Richardson, Esq., CCAL fellow, is co-founder and Partner of Richardson | Ober | DeNichilo. In practice since 1983, Kelly is known as a devoted and successful trial attorney and advisor to real estate professionals, property and business owners, and common interest developments.

Kelly is heavily committed to the real estate profession. He serves as legal counsel for Six Southern California Associations of Realtors® ("CAR"), and is a member of the CAR Legal Affairs Forum and Housing Committees. For more than 20 years, Kelly was a GRI faculty member teaching GRI coursework on risk management, construction and development issues to hundreds of Realtors® annually. Kelly is a popular lecturer to Associations of Realtors®, professional real estate organizations and major brokerages and has authored numerous articles on real estate law in local and national business and trade publications. He is a licensed real estate broker, and is periodically consulted as an expert witness on the standard of care of real estate professionals.

Kelly is a leading advocate for California community associations, serving common interest developments for over 32 years. In 2006 he was the 16th California attorney admitted into the College of Community Association Lawyers (CCAL), an elite group of attorneys serving the common interest community housing sector. In 2016, he was the international President of the Community Associations Institute (CAI), an organization with 45,000 members in four countries, and served on its Board of Trustees for seven years. For 16 years he has authored a weekly syndicated column on homeowner association legal issues, currently appearing in approximately 16 publications.

While he uses his experience and expertise to help clients steer clear of litigation, when litigation proves to be necessary and unavoidable, Richardson is an accomplished trial attorney and fierce courtroom advocate. He was in 2010 admitted to the American Board Of Trial Advocates, an elite jury trial attorney organization, skipping its entry-level membership and receiving admission as an "Associate" ABOTA member. He has prosecuted and defended major claims in construction, corporate and real estate law, as well as claims of breach of contract, franchise fraud, personal injury, unfair competition, professional negligence, wrongful death, breach of fiduciary duty, construction defect, and banking negligence.

Mr. Richardson is licensed to practice before all California state and local federal jurisdictions, and is a member of the Real Estate and Litigation Sections of the State Bar, Los Angeles County and Pasadena Bar Associations. He holds an "AV" rating with the prestigious Martindale Hubbell attorney listing organization – the highest available rating for competence and ethics, based upon peer review input.

Prior to founding the firm now known as Richardson | Ober | DeNichilo in 1994, Kelly was a partner in the Pasadena law firm of Barker & Richardson.

Loura Sanchez, Esq., is the prior Managing Partner of HindmanSanchez, P.C. (kna Altitude Law) in Denver Colorado and prior Director of Market Expansion and Director of Business Development at Burg Simpson Eldredge Hersh & Jardine, P.C. She is now a retired attorney and focuses on doing what she loves via her company, Inspired Interaction, LLC which helps companies and leaders achieve their corporate goals through development of culture of processes as well as a few other 'inspiring' things. During her career Loura served on numerous leadership positions at CAI-RMC and CAI National. She was the President/Dean of the College of Community Association Lawyers and contributed significantly to the industry as both a lecturer, educator and author.

Scott Sandler, Esq., CCAL fellow, is the managing partner of Sandler & Hansen, LLC. From 2001 to the present, Scott has focused on representing condominium and homeowner associations.

Scott is a fellow of the Community Associations Institute's College of Community Association Lawyers. He also has an AV Preeminent® rating, the highest peer rating standard awarded by Martindale-Hubbell®, signifying that Scott's peers rank him at the highest level of professional excellence for his legal knowledge, communication skills, and ethical standards.

Scott is also a designated Super Lawyer. Super Lawyers is a rating service of outstanding attorneys throughout the country. The Super Lawyer designation is an honor reserved for those lawyers who exhibit excellence in practice, and who have attained certain honors, results or credentials, which indicate a high degree of peer recognition or professional competence. Only 5% of attorneys in Connecticut receive this distinction.

For 10 years, Scott served as the chairman of the Legislative Action Committee of the Connecticut Chapter of the Community Associations Institute. He also serves as a member of the Institute's Government & Public Affairs Committee. In 2013, the Institute presented Scott with the Award of Excellence in Government & Public Affairs. Scott served as president of the Institute's Connecticut Chapter from 2008 through 2009. He also represented the Chapter when he served on the Connecticut Law Revision Commission Study Committee, which adapted the 2008 revisions of the Uniform Common Interest Ownership Act for use in Connecticut.

Scott is a co-author the *Connecticut Common Interest Ownership Manual (2nd Ed.)*, published by the Connecticut Bar Association.

Scott is a member of the American Bar Association and the Connecticut Bar Association, where he serves as a member of the Executive Committee of the Real Property Section. From 2011 through 2016, Scott was listed in the Connecticut Super Lawyers list of Rising Stars in the area of Real Estate. He also received the 2012 New Leaders in the Law Award, presented by the Connecticut Law Tribune. Scott is a graduate of the State University of New York at Albany (B.A., Economics, 1997) and Quinnipiac College School of Law (J.D., 2000). While in law school, he was an associate editor of the *Quinnipiac Law Review*.

Augustus H. Shaw, IV, Esq., CCAL fellow, is the founding member of Shaw & Lines, LLC. For over 23 years, Augustus has advised community associations, non-profit corporations, real estate developers and general businesses.

Augustus, a fellow of the College of Community Association Lawyers, serves as a Member of the College of Community Association Lawyers Board of Governors and is a past Board Member and past Vice President of CAI's Central Arizona Chapter. Augustus has been a speaker at CCAL Law Seminars, CAI National Conferences as well as local seminars for the State Bar of Arizona and the City of Scottsdale, AZ

Neighborhood Academy. Starting in the 2024 Spring Semester, Augustus will teach a course on Homeowner Association Law at the Arizona State University Sandra Day O'Connor College of Law.

Augustus received his Bachelor of Arts from the University of Arizona (1996) and his Juris Doctor from the University of Arizona James E. Rogers College of Law (2000). He is licensed to practice law before the State Supreme Court of the State of Arizona, the State Supreme Court of the State of Nebraska, the United States District Courts of Arizona and Nebraska and the United States Tax Court.

Augustus is a veteran of the U.S. Navy and an avid golfer. When not practicing law or engaged in community service, Augustus can be found with his sons on the golf course.

Todd A. Sinkins, Esq., CCAL fellow, is a shareholder of Rees Broome, PC, where he is the Chair of its Community Association Department. Todd is a 1993 law school graduate of George Washington University, has his undergraduate degree from the American University. Todd's practice focuses exclusively on the representation of community associations in Virginia and the District of Columbia. Todd is an active member of the Community Association Institute, having completed six years serving on the Washington Metropolitan Chapter's Board of Directors, chaired the DC Legislative Action Committee from 2007 to 2014, for whom he again has served as co-chair for 2021-22, and has served on the CAI Government and Public Affairs Committee since 2017. Todd has won numerous industry awards, including Educator of the Year and Public Advocate of the Year on several occasions, and was inducted into the Washington Metropolitan Chapter's Hall of Fame in 2019 and into the College of Community Association Lawyers in 2020.

Mr. Sinkins has been very active on legislative issues, having testified for CAI before the DC Council on numerous occasions, and having drafted amendments to various sections of the Condominium Act for the District of Columbia and both the Condominium Act and Property Owners' Association Act in Virginia.

Mr. Sinkins' represents community associations on a wide range of issues, some of which include drafting governing documents, drafting and reviewing contracts, assisting clients on the enforcement of covenants and rules, fair housing disputes, obtaining financing, advising clients on rights and responsibilities under the applicable statutes, conducting meetings and interpreting governing documents.

James H. Slaughter, Esq., CCAL fellow, joined Law Firm Carolinas in 2001 and serves as firm President. He is a regular speaker on issues of real estate and community association law and has authored numerous HOA and condo articles. Jim was the first North Carolina attorney inducted as a Fellow into CAI's College of Community Association Lawyers (CCAL) and served as CCAL's 2014 national President. He was also the first North Carolina attorney recognized by Best Lawyers in the category of "Community Association Law." Since its inception Jim has served on the NC Bar Association's Community Associations Committee and was 2016 President of the NC Chapter of the Community Associations Institute.

Jim is also a Certified Professional Parliamentarian-Teacher, Professional Registered Parliamentarian, and past President of the American College of Parliamentary Lawyers (ACPL). He has served as Parliamentarian to many of the largest associations in the country, including the AFL-CIO, NEA, AFT, ANA, LIUNA, SEIU, AFSCME, UFCW, NATCA, and others. Jim is author of two books on association meeting procedure, *The Complete Idiot's Guide to Parliamentary Procedure Fast-Track* (a quick go-to guide that provides details on the most used motions, appropriate informal procedures for association boards, and general advice for shortening meetings) and *Notes and Comments on Robert's Rules, Fourth Edition* (a user's guide to Robert's Rules that uses a question-and-answer format to cover the most misused and asked-about provisions). *Notes and Comments* received the 2013 Phifer Award from the National Communication Association. Many charts and articles on Robert's Rules of Order and meeting procedure can be found at the firm's parliamentary Website at www.jimslaughter.com.

In addition to his professional work, Jim has been involved in many civic and charitable organizations. He has been recognized by the Bar Association most every year for his pro bono activities and by NC Lawyers Weekly as a 2016 Leaders in the Law Honoree. The Governor of North Carolina has also awarded Jim the Order of the Long Leaf Pine, one of the state's highest civilian honors.

Amy Smith, Esq., a Partner with Makower Abbate Guerra Wegner Vollmer PLLC, has been licensed to practice law in Michigan since 2011, and since that time has concentrated her practice in civil litigation. She has been practicing community association law since 2016. Amy is a member of the State Bar of Michigan, including the Real Property Section, and is also licensed to practice in the Eastern District of Michigan. She is an active participant and member of the Michigan Chapter of the Community Associations Institute, where she contributes and shares her knowledge as a committee member, speaker, and author. Amy was named a "Go To Lawyer" for real estate by Michigan Lawyers Weekly in 2022. She was named on the list of "Ones to Watch" in the 2021, 2022 and 2023 Editions of the Best Lawyers in America. She previously served on the Social Committee for the Michigan Chapter of CAI, and currently serves on the Chapter's Awards Committee. Amy is also a current member of the Michigan State Bar's Real Property Law Section Legislation & Decisions Committee.

Jason Smith, Esq., Jason began practicing law in 2001 as a real estate and construction attorney but joined a large community association law firm in 2006 as a defense attorney, handling primarily insurance defense litigation, administrative hearings, and Fair Housing matters. Subsequently, he managed the Tucson office for the larger firm, overseeing all aspects of the community association practice prior to opening Smith & Wamsley in 2021. Smith & Wamsley continues to provide a full range of legal services to more than 300 community association clients in the southern Arizona market. Jason has substantial experience representing community associations and residential landlords with a penchant for Fair Housing matters. Jason frequently teaches about community association law on a wide array of topics but has taught Fair Housing at the CAI National Law Conference as well as at the Texas State Bar Advanced Property Owners Association Law certification course. He received the Instructor of the Year recognition from the Arizona Association of Community Managers in 2016 for his outstanding teaching of numerous credentialing classes for community managers.

Steven L. Sugarman, Esq., CCAL fellow, is the founding principal of the law firm of Steven L. Sugarman & Associates, with offices located in Berwyn, Philadelphia, Lancaster and Allentown, Pennsylvania. He concentrates his practice in the field of community association law, real estate and construction litigation. Mr. Sugarman is a member of the College of Community Association Lawyers and a past president of the Community Associations Institute (CAI), Pennsylvania/Delaware Valley Chapter. A past and current chairman of CAI's Legislative Action

Committee in Pennsylvania, Mr. Sugarman actively participates in the drafting of key legislation governing common interest communities in Pennsylvania and serves as an expert in community association matters brought before Pennsylvania's Courts and Legislature.

Mr. Sugarman is also an adjunct professor at Villanova Law School where he developed and teaches the course, "Condominium and Homeowner Association Law." He has been awarded Martindale Hubbell's highest AV Preeminent peer review rating and has been featured as a Pennsylvania "Super Lawyer" in Philadelphia magazine every year since 2007. Mr. Sugarman earned a B.A. degree from Cornell University and a J.D. degree from Temple University School of Law.

Susan B. Tarley, Esq., CCAL fellow, a partner with the firm, received her law degree from the George Mason School of Law and concentrates her practice in the areas of community associations, real estate acquisition, financing and development, commercial and residential real estate transactions, business matters and creditors' rights.

A leading attorney in the representation of common interest communities throughout the Peninsula and Tidewater Areas, Susan represents some of the largest communities, but has extensive experience

representing associations of all sizes, both commercial and residential.

In 2013, Susan was admitted to the College of Community Association Lawyers (CCAL) – one of fewer than 150 attorneys nationwide to be admitted to the prestigious organization. CCAL was established in 1993 by the Community Associations Institute (CAI), with membership consisting of attorneys who have distinguished themselves through contributions to the evolution or practice of community association law. CCAL members are also recognized for committing themselves to high standards of professional and ethical conduct in the practice of community association law.

Susan has served since 2010 on the Virginia Legislative Action Committee, a not-for-profit subcommittee of the CAI dedicated to monitoring and influencing legislation that affects community associations in Virginia. Susan is currently chair of the committee.

Susan seeks to use a common sense approach in her representation, recognizing that these common interest communities are neighborhoods. Therefore, Susan emphasizes that executive boards must abide by the law, but should always strive to treat neighbors with respect.

During her more than 20 year law career, Susan has worked extensively on all phases of association representation, including transition representation, document amendments, review and advice relative to governance of the community, and covenant violation litigation. She provides each of her communities with board training seminars focused on the individual community.

Susan's expertise in developing communities includes mixed use communities, single family communities and multi family communities. She has enjoyed success working with developers to convert shopping centers into commercial condominiums.

Additionally, Susan has considerable experience in residential and commercial real estate matters. Representing both lenders and developers in commercial financial transactions, they rely on her legal expertise and ability to get the deal closed.

Susan is a popular speaker at educational forums on real estate and common interest community topics. As an adjunct professor at the William and Mary Law School, she designed a comprehensive course for 2nd and 3rd year students with subjects ranging from the nuts and bolts of a real estate practice, to the development of a mixed use community and an introduction to common interest communities.

A leader in our community, Susan has served as President of the Williamsburg Bar Association, the Greater Peninsula Women's Bar Association, the Central Virginia Chapter of Community Associations Institute and Avalon. She has served on numerous boards and currently serves on the board of Child Development Resources and the Central Virginia Chapter of Community Associations Institute.

Susan received the Outstanding Service Award from James City County recognizing her presentations for community associations and was selected to the inaugural class of honorees as a Virginia Leader in the Law, recognizing Virginia attorneys who change the practice, advance the law or improve the justice system in Virginia. Her leadership in the local legal community was acknowledged by the Williamsburg Bar Association with the Award of Merit.

Lisa Tashjian, Esq., CCAL fellow, a partner with Beaumont Tashjian, has devoted her career to representing community associations. While she provides the firm's clients with legal advice on all areas of community association law, she focuses her practice on litigation including dispute resolution, arbitration and trial work and supervises the firm's attorney-managed assessment collections department. In addition to her practice, Ms. Tashjian is active in various community association organizations, such as Community Associations Institute (CAI) and California Association of Community Managers (CACM). She is past President of the CAI-Channel Islands Chapter where she also served as the

liaison for the group's California Legislative Action Committee as well as past President of the CAI-Greater Los Angeles Chapter (CAI-GLAC). She is a distinguished and frequent speaker for both CAI and CACM, and has authored several articles published in each of the organization's magazines. She is also a member of the College of Community Association Lawyers, and is among a select number of attorneys that have been granted membership in the College.

Amy K. Tinetti, Esq., CCAL fellow, joined Hughes Gill Cochrane in 2007, and became a Principal in 2012. She has been representing homeowners associations since 2004 in all aspects of their corporate operations, including governing document analysis, interpretation, revision and enforcement, elections, real property and title issues, planning and collection of large special assessments, analyzing and drafting agreements with vendors, and member disputes and litigation.

Prior to 2004, Ms. Tinetti practiced for more than five years as a litigation attorney handling medical malpractice defense, insurance defense, business and commercial real estate matters. Ms. Tinetti's practice also included insurance coverage matters.

Ms. Tinetti received her Juris Doctor in 1998 from Emory University School of Law in Atlanta, Georgia, where she served as a Notes and Comments Editor of the Emory Law Journal. Ms. Tinetti received her Bachelor of Arts in Communication from the University of California at San Diego.

Ms. Tinetti became a member of the State Bar of California in 1998 and is admitted to practice before the U.S. District Court for the Northern District of California.

Ms. Tinetti is the Past President of the Bay Area and Central California Chapter of the Community Associations Institute (CAI) and is on the faculty of the California Association of Community Managers (CACM). Ms. Tinetti is a frequent speaker, writer and contributor for trade organizations and community associations on a variety of topics pertinent to Board members, community managers, and members of common interest developments.

Chad J. Toms, Esq., is a Partner with Whiteford Taylor & Preston practicing in the areas of complex business litigation, community associations and business reorganization. He frequently handles litigation matters involving common interest communities, corporate governance, fiduciary duty and bankruptcy issues. Mr. Toms is licensed to practice law in Delaware, New Jersey and Maryland and is also a Certified Public Accountant, currently inactive. He heads up the firm's Community Association practice in Delaware and the Eastern Shore and manages the firm's Bethany Beach, Delaware and Ocean City, Maryland offices. In that capacity, Mr. Toms advises common-interest community association boards on day-to-day business operations including compliance with governing documents, operating procedures, meetings (including quorum, voting and proxy issues), insurance matters, director issues and disputes, member issues and disputes, financial and real property matters. He also serves on the Advisory Council to the Delaware Common Interest Community Ombudsman.

Theresa M. Torgesen, Esq., CCAL fellow, is the principal attorney at Sage Community Law, PLLC. She has been representing condominium and homeowner associations as general counsel since 2007. Theresa is passionate about education and advocacy and enjoys collaborating with other industry professionals about community association issues. One of her best experiences was the eight years she spent as a member of the Washington State Uniform Common Interest Ownership Act Drafting Committee, a small, but distinguished group of attorneys representing community associations, individual owners, developers, title companies, and lenders who were tasked with drafting new, comprehensive legislation for condominium, homeowner, and cooperative communities in our state. Theresa is a frequent presenter of educational seminars and former Co-Chair of the CAI Washington State Legislative Action Committee (LAC).

Danielle Wang, Esq., is an experienced real estate lawyer who handles all aspects of commercial real estate acquisition and disposition, development, and investment. Working with lenders, businesses, builders, and international investors, she tailors her guidance to her clients' specific goals and lifestyle.

While Danielle's experience spans the entire real estate process, she has particular experience negotiating and drafting contracts, loan documents, and leases for commercial real estate matters. Adept at issue spotting, clients appreciate Danielle's ability to assist them on everything, from scoping a project to handling small procedural details. Her experience extends to resolving complex title and zoning issues.

Real estate investment is also one of Danielle's strengths, and she enjoys helping both new and experienced investors attain the financing and terms that best align with their investment strategies. She often works with busy individuals, many of whom invest in or develop real estate as part of their wealth-planning. They trust Danielle to see their projects to completion within their schedule and prescribed limitations.

In addition, Danielle is active member of Sands Anderson's Community Associations team, and she works with associations, developers, builders, management companies, and lenders for common interest communities. She provides counsel, drafts and negotiates contracts and loan documents, drafts and interprets covenants and restrictions, and resolves disputes.

While in law school, Danielle focused extensively on international and trade matters. In addition, she interned in Wuhan, China, where she worked in international trade dispute resolution.

When not in the office, Danielle enjoys yoga, traveling, and devouring books. She also speaks conversational Mandarin Chinese.

Melissa B. Ward, Esq., CCAL fellow, is a Principal at Hughes Gill Cochrane Tinetti, PC and practices in the firm's Transactional/General Counsel department. She has been representing homeowners associations since 2010 in all aspects of their corporate operations, including governing document analysis, interpretation, revision and enforcement; elections and governance, real property and title issues; special assessments; analyzing and drafting agreements with vendors; and resolution of member disputes. Prior to 2010, Melissa practiced as a corporate and real estate attorney handling transactional business and real estate matters, as well as real estate litigation involving mortgage lending and foreclosures, ADA/disability access, partition claims, environmental and land use matters, construction defects, title insurance, and lease disputes.

Melissa received her Juris Doctor from the University of California, Hastings College of the Law, where she served as Editor in Chief of the Hastings International and Comparative Law Review. She received her Bachelor of Arts in History from Yale University. When not practicing law, Melissa serves on the Planning Commission for the City of Walnut Creek and is a cellist with the Diablo Symphony Orchestra.

Thomas Ware, II, Esq., CCAL fellow, is a partner in the law firm of Kulik Gottesman Siegel & Ware LLP. Since 1989, Tom's practice has focused on the representation of non-profit homeowners associations, their volunteer directors and officers, and their property managers. Tom was one of the attorneys of record for the prevailing parties in the landmark California Supreme Court case *Nahrstedt v. Lakeside Village Condominium Association*, 8 Cal.4th 361 (1994). This case established the legal framework and deferential standard for enforcing CC&R provisions. He also was appellate counsel in *Martin v. Bridgeport Community Assn.*, 173 Cal.App.4th 1024 (2009), which holds, *inter alia*, that CC&Rs can be enforced against tenants but tenants lack standing to enforce the CC&Rs against the Homeowners Association. He has been awarded Martindale-Hubbell's highest peer review rating, "AV (Pre-Eminent)." For each of the past twelve years, he has been selected for inclusion in Southern California Super Lawyers® (2009 – 2020). For the past two years, Tom has served as Legislative Co-Chair for CAI's California Legislative Action Committee.

Steven Weil, Esq., CCAL fellow, is one of the founding partners of the firm and serves on its Executive Committee. He has practiced community association law since 1984 and has helped clients address virtually all types of challenges arising out of the operation of community associations. Early in his career his practice included construction defect claims. More recently he has been the “architect” of numerous votes helping Boards obtain membership approval to initiate arbitration and litigation (and loans, amendments and special assessments). Other areas of practice include advising clients on compliance with association, board and member duties under the Davis-Stirling Common Interest Development Act and other state and federal laws; analyzing fiduciary duty, free speech, discrimination, parking and insurance issues; assisting communities address construction needs; and handling CC&R and architectural enforcement matters. Steve is especially effective in helping communities facing political challenges and financing large capital improvements or other projects requiring membership or judicial approval.

Scott Weiss, Esq., CCAL fellow, is an attorney at Ortale Kelley Law Firm in Nashville, TN. Scott is Tennessee’s first and only attorney inducted as a Fellow in the College of Community Association Lawyers. Scott’s practice almost exclusively involves community association law and real estate law. Scott represents Associations in matters involving delinquent account collections, restrictions enforcement, HOA rights in bankruptcy, State and Federal Fair Housing laws; governing document interpretation, composition, amendments, and legal opinions; parliamentary procedure; and association general counsel matters.

Jennifer L. Wojciechowski, JD, CIRMS, CCAL fellow, is the Vice President of Operations at Community Association Underwriters of America, Inc., a division of Alliant Specialty Insurance Services. At CAU, Jennifer drives the company’s initiatives and policies. Previously, Jennifer was the casualty claim manager at CAU and managed a team of adjusters handling casualty claims under both Directors & Officers Liability and General Liability insurance coverage. She is a member of the Community Associations Institute and frequently presents at the CAI Law Seminar. She is an active member of the CLM. Since its inception in 2013, Jennifer has taught at CLM’s Claim College – School of Casualty Claims. She now holds a position on the Executive Council for the School of Casualty Claims. In 2013, she attended the Litigation Management Institute and attained the CLMP designation. At the 2014 Annual Conference, she was recognized as one of four finalists for the Litigation Management Professional of the Year award. In 2015, she earned the Certified Claims Professional in Casualty Claims (“CCP”) designation. She was awarded her CIRMS designation in 2018. Jennifer is a member of the Pennsylvania and New Jersey bars.

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2024 CIRMS Insurance Masters Program Speaker Biographies

Michelle Baldry is Reserve Advisors' Northeast Regional Executive Director. Michelle is responsible for the overall management and administration of the firm's Northeast region. Michelle is a professional engineer and holds CAI's Reserve Specialist and Educated Business Partner designations, and APRA's Professional Reserve Analyst designation. She is President of CAI's Foundation for Community Association Research Board. She serves on various CAI committees, including chairing the Chesapeake Chapter's magazine committee. She served on Virginia's CIC Structural Integrity and Reserves Work Group and CAI's national reserve study task force; both were created to consider revising reserve studies due to the tragedy in Surfside, Florida. She has fourteen years of experience in serving community associations and has personally prepared hundreds of reserves studies.

Dawn Becker-Durnin is the Community Association Practice Leader for Acrisure Inc.'s NJ Platform. Dawn is a multi-state licensed Property & Casualty insurance agent. Dawn has been intimately involved with brokering specialized insurance products, risk consulting, and reviewing insurance programs on behalf of Common Interest Communities (Condominiums & HOA), Co-Ops and Apartments. Dawn leads with an emphasis on contractual risk transfer and risk management. Dawn has written several published articles relating to community associations and is often a guest lecturer and educator.

Tressa Bishop is a Senior Vice President with Alliant Insurance Services, specializing in community association insurance. She is passionate about educating clients on potential exposures and providing guidance and advocacy throughout the claims process. Ms. Bishop obtained her B.A. in social sciences from Colorado State University in Fort Collins, CO and her M.B.A., concentration in finance, from Fairleigh Dickinson University in Madison, NJ. She holds the Certified Insurance Counselor (CIC) designation through The National Alliance for Insurance Education & Research, as well as the Community Insurance Risk Management Specialist (CIRMS) designation through CAI. Ms. Bishop is actively involved with CAI, having served as Treasurer and Board President for the Southern Colorado Chapter (SOCO) and currently serving as Chair of the Editorial committee (SOCO) as well as Chair of the Activities committee for the Rocky Mountain Chapter (RMC) and contributing member of RMC's Programs & Education committee.

Christa Brady has 18 years of experience in the Community Association industry. She has been the Vice President for the Community Association Practice of USI Insurance Services since December 2019. Prior to joining USI, she spent 14 years as an Executive Manager within the community association industry. With an extensive background in working with Boards of Directors of condominiums and cooperatives, Christa possesses a very select skill set and expertise in developing comprehensive insurance and risk management programs designed to meet the unique needs of community associations. She holds a Property & Casualty insurance license for DC, Virginia, Maryland, and Delaware.

Adam Clarkson is a Fellow of Community Association Institute's College of Community Association Lawyers (CCAL) and the founding shareholder of Clarkson McAlonis & O'Connor, P.C., which is multi-state community association law firm with offices in Nevada and South Carolina. Mr. Clarkson's practice of law is dedicated to representing community associations. Currently, Mr. Clarkson is licensed and admitted to practice law in SC, NV, FL, CA, UT, the related federal courts, and the United States Court of Appeals for the Ninth Circuit. Mr. Clarkson is a member of the South Carolina CAI Legislative Action Committee (LAC), Blue Ribbon Committee, and his firm is a Super Sponsor of the SC CAI Chapter. Mr. Clarkson is the current chair of the Nevada CAI Legislative Action Committee (LAC), former chair and current member of the CAI Nevada Political Action Committee (PAC), past president and current president-elect of the CAI Nevada Chapter board of directors, the community association industry representative on the Nevada Department of Business & Industry's Common Interest Community Task Force, a member of the Nevada State Bar Real Property Committee, and a co-author of the Common Interest Community Section of the Nevada State Bar Real Property Practice Manual. His firm is the Diamond Elite sponsor of the NV CAI Chapter.

Adam Collins is Business Development Leader for Ian H. Graham Insurance (IHG), a Managing General Underwriter specializing in insurance products for community associations. IHG's D&O insurance program is endorsed by the Community Association Institute (CAI). Mr. Collins has over 20 years of experience in the Insurance Industry, having earned the Certified Insurance Counselor (CIC) and Community Insurance Risk Management Specialist (CIRMS) designations along the way. Mr. Collins previously managed the IHG underwriting unit prior to moving to his current position of new business development through agent and broker relationships. In his free time, Mr. Collins enjoys spending time at the river with his family and golfing.

Kevin Davis is the President of Kevin Davis Insurance Services; Inc and he currently insures over 40,000 community association and is the largest providers of specialty insurance coverage for community associations in the country. Mr. Davis served as president of the Greater Los Angeles Chapter of the Community Association Institute (CAI) and has served two terms on the National CAI Board of Trustees. He is one of a small group of individuals nationally to hold a Community Insurance and Risk Management Specialist (CIRMS) designation since April of 2003. Kevin has focused on insurance and risk management for community associations for over 35 years. Kevin is a Member of the Foundation for Community Association Research Think Tank.

Karen O'Connor Corrigan is the President and Owner of O'Connor Insurance. She and her team specialize at insuring over 500 community associations. Karen is dedicated to the CAI Heartland Chapter including serving as Past President, currently serving on three committees, and frequently presents risk management Board Development sessions. Karen was appointed as the Chair of Independent Insurance Agents and Brokers of America's (IIABA) Technical Affairs Committee. This group of insurance representatives work to analyze, broaden and revise many of the insurance policy forms used nationwide today. The group works with the industry's leading source for writing policy language, Insurance Services Office (ISO). In addition, Missouri Association of Insurance Agents (MAIA), appointed Karen to the MAIA Coverage Advisory Committee to answer and research coverage questions posed by other insurance industry colleagues. MAIA is Missouri's leading education source for agents. She is also a contributing author to the Association's bi-monthly publication "Missouri Agent" addressing subjects relating to community association insurance as well as other topics of insurance expertise.

Patrick Prendiville started Prendiville Insurance Agency in 1988 after graduating from the University of California, Santa Barbara. Over the years, Patrick has been actively involved in multiple chapters of CAI; some highlights of his involvement include:

- Awarded "May Russell Lifetime Achievement Award" in 2017 and "Committee Member of the Year" in 2016 and "Outstanding Service Award" in 2013 (OC)

- Chapter President in 2012 (OC)
- Chapter Board Member for six years (OC)
- Chapter President in 2018 (San Diego)
- Committee Chair of the “Legislative Support Committee” 2009-2010 (OC)
- Committee Chair of the “Education Committee” 2013-2014 (OC)
- Awarded “Speaker of The Year” in 2011(OC)
- Nominated for Educator of the Year 2017 (SD)

With offices in Dana Point and Rancho Mirage, Prendiville Insurance Agency services over 700 associations throughout Southern California.

Robert Sides is currently the General Manager for the Regatta Seaside HOA in Marina del Rey, CA, a post he has held for fifteen years. The Regatta Seaside is a luxury high-rise community comprised of 224 unit and with a full set of amenities, including valet, front desk, gym, pool, spa, conference room, screening room, and library. Regatta was constructed in YR2000. Regatta is known for its innovative adoption of technology and was the first residential high-rise in the nation with Earthquake Early Warning capability, as well as one of the first residential properties with integrated water sensing technology wrapped into every unit. Prior to joining Regatta Seaside in 2009, Robert was the first Executive Director for the Kapalua Resort Association, a high-end, luxury resort on the island of Maui. Before that, he managed both HOAs and Hotels in Hawaii. Robert achieved his AMS designation in 1997 and his PCAM in 2000. As a leader in the industry for over thirty years, Robert has spoken at multiple local, statewide, as well as national conferences.

Clifford Treese is a nationally recognized practitioner in community association (condominium, cooperative and planned community) underwriting, risk management and insurance, Mr. Treese, also, has a substantial background in all phases of community association operations. He is president of Association Consulting, Inc., providing services concerning association operations, risk management and insurance as well as litigation support for a range of associations including condominium associations with several thousand units. Mr. Treese has been involved with CAI almost since its inception. He is a past president of CAI and the CAI Foundation for Community Association Research and he is a recipient of CAI’s Distinguished Service Award. Mr. Treese is author of several CAI Publications on various topics including community association risk management and insurance as well as the Community Association Fact Book. He also is president of Association Consulting, Inc. a community association risk management consulting firm. He is a graduate of Stanford University and attended graduate school at the University of Chicago.

Jennifer L. Wojciechowski, JD, CIRMS, CCAL fellow, is the Vice President of Operations at Community Association Underwriters of America, Inc., a division of Alliant Specialty Insurance Services. At CAU, Jennifer drives the company’s initiatives and policies. Previously, Jennifer was the casualty claim manager at CAU and managed a team of adjusters handling casualty claims under both Directors & Officers Liability and General Liability insurance coverage. She is a member of the Community Associations Institute and frequently presents at the CAI Law Seminar. She is an active member of the CLM. Since its inception in 2013, Jennifer has taught at CLM's Claim College – School of Casualty Claims. She now holds a position on the Executive Council for the School of Casualty Claims. In 2013, she attended the Litigation Management Institute and attained the CLMP designation. At the 2014 Annual Conference, she was recognized as one of four finalists for the Litigation Management Professional of the Year award. In 2015, she earned the Certified Claims Professional in Casualty Claims (“CCP”) designation. She was awarded her CIRMS designation in 2018. Jennifer is a member of the Pennsylvania and New Jersey bars.