



COMMUNITY ASSOCIATION
**Law
Seminar**

JANUARY 11-14, 2023 | NEW ORLEANS, LA

**Law Seminar
Distinguished
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.

Barry B. Ansbacher, Esq., is the founding partner of Ansbacher Law. He and his legal team serve Florida from offices in Orlando, Jacksonville, Fleming Island, and St. Augustine. Barry Ansbacher is recognized by his peers and clients as one of Florida's leading trial attorneys. He has achieved Board Certification and is recognized by the Florida Bar as a specialist in three practice areas, Real Estate, Construction, and Condominium & Planned Development. He is the only lawyer in Florida who holds all three certifications. For over thirty five years, Barry Ansbacher has specialized in real estate, construction, and community association law. He represents builders, developers, and associations in condominium and planned communities throughout Florida. In 2016, he obtained a landmark jury verdict against the nation's largest homebuilder on behalf of a condominium association and defended the verdict thorough appeal to the Florida Supreme Court.

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., 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.

Darren Bevan, Esq., is a partner with the law firm of Baydaline & Jacobsen LLP. The focus of Mr. Bevan's practice is representing and advising homeowners associations and commercial/industrial associations. Mr. Bevan provides general counsel and litigation services for common interest developments throughout Northern California. As well, he has extensive experience in advising boards and interpreting, enforcing, amending, and preparing governing documents. For many years he has lectured on common interest developments at various forums throughout the state. Mr. Bevan presently serves as a Delegate to the Community Associations Institute – California Legislative Action Committee (CAI-CLAC) and serves as its secretary, having previously served as its Chair, Vice Chair, Past Chair, and Legislative Chair. In addition, he is a past President, Secretary, and Director of the Board for the California North Chapter of Community Associations Institute (CAI-CNC). He also serves on the teaching faculty for the California Association of Community Managers (CACM). Mr. Bevan graduated from the University of the Pacific, McGeorge School of Law, where he received his Juris Doctor. Since graduating, Mr. Bevan has returned to McGeorge School of Law as a guest lecturer. Mr. Bevan also holds a Bachelor of Arts degree from the University of California at Davis. In addition to his admission to the California State Bar, he is also admitted to practice in the United States District Court for the Eastern, Northern, and Central Districts of California, the United States Court of Appeals for the Ninth Circuit, and the Supreme Court of the United States.

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.

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., is a Shareholder and the soon-to-be Manager of RMWBH'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 and 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 small community association law firm in Sarasota, Florida. Although small in size, the firm represented hundreds of communities in the area. As a result, Leah was able to have a hand in all aspects of the practice. Her experience with that small, yet mighty firm laid the foundation for her success in her current role with RMWBH.

Leah strives to develop meaningful relationships with her clients, as well as to provide prompt service and communication through active listening and with the goal of providing counsel to her clients in the most organic sense of the word.

Leah is most passionate about her continued work to improve diversity within 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 has presented on diversity in community associations to local CAI chapters across Texas and the CAI National Law Seminar, as well as the State Bar of Texas. She has testified before the Texas House of Representatives on bills aimed at striking discriminatory language from deed restrictions in Texas communities, and routinely presents to association boards and management companies on addressing diversity in their communities.

Leah currently serves as the President of the San Antonio Chapter of CAI, as well as Co-Chair of the Chapter's Legislative Committee. She is a graduate of the Bexar Country Women's Bar Foundation's esteemed LEAD Program. Leah received her Bachelor of Arts in English Literature and History from Bucknell University in 2000 and her law degree from Southwestern Law School in 2005.

M. Katherine Bushey, Esq., is a partner in the law firm of Kaman and Cusimano, LLC. Ms. Bushey earned her law degree from Wake Forest University School of Law in 2004, after graduating with Honors from Saint Mary's College in Notre Dame, Indiana in 2001. For 16 years, Ms. Bushey has focused her practice exclusively in community association law, representing numerous community associations throughout the state. She has spoken at local

and national seminars and conferences on community association law, including collections, foreclosure, bankruptcy, and covenant enforcement. Her practice includes counseling community associations and their boards of directors on a variety of legal issues such as rule and covenant enforcement, collections, bankruptcy and board governance. She is a member of the Community Associations Institute, Ohio State Bar Association, and several local bar associations. In addition, Katherine was named as an Ohio Rising Star by Super Lawyers Magazine for the years 2014, 2015, 2016, 2017 and 2018. Ms. Bushey is also on the Government and Public Affairs Committee for CAI and on the Complaint Committee of the CMCA Professional Conduct Enforcement Committee. In 2021, she was also appointed to a Stakeholder seat on the CAMICB Board of Commissioners and is the 2022 CAI Northern Ohio Board President.

Dr. Kolette Butler, is a native Arizonan and a licensed attorney and psychologist in the state of Arizona. She earned her JD at the Sandra Day O'Connor College of Law at ASU. After law school she clerked on the Arizona Court of Appeals, Division One. She then took a position with a national firm working on cases for Fortune 500 companies. During her legal career, a family circumstance prompted Dr. Butler to pursue a doctorate in psychology. She earned her PsyD from Midwestern University and has a private practice focusing on forensic psychology, trauma and complex mental health issues. Dr. Butler is with Verdant Hope Therapy & Evaluations, LLC.

Dr. Butler's practice focuses on aiding teens and adults in identifying and leveraging their strengths to get unstuck and create a life they are excited about living. She also consults with attorneys and their clients to assist with communication and managing difficult emotion. She is passionate about human behavior and helping people transition from enduring life to enjoying life. Dr. Butler is a long-time student/participant of mindfulness techniques and mindfulness is a cornerstone of her practice. She is a frequent presenter for groups such as the State Bar of Arizona and the Association of Family and Conciliation Courts and enjoys opportunities to share her discoveries with colleagues. Outside of work, Dr. Butler thrives on nature, being with her people, poetry, and quality time with her dog.

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.

Hope Darby Carmichael, Esq., CCAL fellow, is a Member of the firm. Since she started with the firm in 1991, her practice has largely involved civil litigation with a concentration on real property disputes and community association law. She has focused her practice on matters involving the interpretation of restrictive covenants, condominium and planned community associations for over twenty-five years, and exclusively practices in that area today.

Hope 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. She has argued a number of these cases in the North Carolina Court of Appeals and Supreme Court 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. In addition to her litigation practice, Hope devotes a good deal of her time to advising community associations on the interpretation and implementation of restrictive covenants and to the drafting and amendment of restrictive covenants and other legal documents governing community associations. Her clients include community associations, community managers and developers.

Hope was inducted into the National College of Community Association Lawyers in 2016. Professionally, she serves on the Board of Directors for the NC Chapter of the Community Associations Institute (CAI) and on the NC Bar Association's Community Associations Committee. She received her JD in 1991 from the University of North Carolina at Chapel Hill and a BA from Salem College in 1988.

In the community, Hope devotes much of her time volunteering and advocating on behalf of our public schools. She serves on the Board of the Raleigh chapter of National Charity League, Inc. and as an adult leader for youth in NCL. She volunteers her time with First Presbyterian Church, SafeChild, Marbles Kids Museum and various other community groups, largely focusing her energy with causes supporting families and children. Hope and her husband, Randy, live in Raleigh and are the proud parents of two teen-age daughters.

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.

Brian S. Cohen, is the Co-founder and CEO of Arden Insurance Services LLC based in Glendale, CA (www.ardeninsure.ai). He is also the founder and CEO of SmartRisk.ai, a pioneering tech company that develops unique solutions for the insurance industry using AI and machine learning. Prior to Arden, he was the CEO of Pacific Specialty Insurance Company. Brian also served as the CEO of Clear Technology and is a licensed attorney and member of the California Lawyers Association (California's State Bar Association). He started his insurance career at Farmers Insurance Group, where he held various senior executive positions, including as head of sales and distribution and Chief Marketing Officer.

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").

Karen O'Connor Corrigan, CIRMS is 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. She has designations as a Community Insurance and Risk Management Specialist (CIRMS) and an Educated Business Partner (EBP). 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. Karen joined O'Connor Insurance in 1985 after attending the University of Missouri-Kansas City.

Bruce Easmunt, Esq., is a shareholder with Chadwick, Washington, Moriarty, Elmore and Bunn, P.C. located in Virginia. For over 15 years, his practice has been entirely devoted to community association representation. Bruce is an active volunteer with the Washington Metropolitan Chapter of CAI and served six years on its Board of Directors, and as the Chapter's president in 2017. He has authored multiple articles for CAI and presented numerous local and national CAI educational seminars. Bruce was awarded the Washington Metropolitan Chapter's Educator of the Year award in 2015 and he has experience serving on boards of directors for both condominium and homeowners associations.

Richard S. Ekimoto, Esq., CCAL fellow, is a principal with the Hawaii law firm of Ekimoto & Morris and practices primarily in the area of general representation of community associations. Richard has served as the National Vice-President of CAI, Member of CAI's National Board of Trustees for two terms, president of the Hawaii Chapter of CAI, a member of the Board of Directors of the Hawaii Chapter of CAI, Chair of CAI's Public Affairs Council and the first chair of the Hawaii Legislative Action Committee for CAI. He has served on the CAI amicus team which prepares amicus briefs on cases throughout the country which raise issues important to community associations. Richard was a contributor to CAI's publication, *Satellite Dishes & Other Antennas: Model Rules and Guidelines for Planned Communities*. He is also the co-author of CAI's *Guide for Association Practitioners Design Review: How Community Associations Maintain Peace & Harmony* (originally GAP #2.). Richard was admitted to CAI's prestigious College of Community Association Lawyers in October, 1996 during his first year of eligibility. He is the second attorney from Hawaii to be so honored. He was the Chair of the Law Seminar Planning Committee for the 2004 Law Seminar, been a member of the Law Seminar Planning Committee for many years, and has served on the faculty for the Law Seminar on several occasions. He has served on CCAL's Board of Governors and is a member of the Professional Management Development Program faculty for managers seeking professional designations.

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.

Dea C. Franck, Esq., is the managing shareholder of Epsten, APC's Indian Wells, California office. After graduating law school as valedictorian, she clerked for Judge Alexa D. M. Fujise in the Intermediate Court of Appeals for the State of Hawaii. Since 2013 Ms. Franck has practiced transactional common interest development law with Epsten, APC. She has also served and chaired various committees and also served on the Board of Directors of the Coachella Valley Chapter of the Community Associations Institute.

Mitchell H. Frumkin, RS, is founder and president of Kipcon Inc., a full-service engineering firm which provides engineering consulting services specializing in community associations. Mr. Frumkin is a frequent speaker and writer on state and national levels for the Community Associations Institute (CAI). He is past national president of CAI as well as the Foundation for Community Association Research. On a local level he has served as president of both the New Jersey and the Keystone (Pennsylvania) chapters of CAI.

As past chair of CAI's National Reserve Professionals Committee, Mr. Frumkin is editor and contributing author of the Guide for Association Practitioners (GAP) report, *Reserve Funds: How and Why Community Associations Invest Assets*. During his time as chair, this committee developed the *National Reserve Study Standards of the Community Associations Institute* and the "Reserve Specialist" designation. In 1998, he was awarded the National President's Award for these efforts. In 2019, he co-chaired a national task force to update these standards and the *Best Practices* paper on Reserves. He was recently awarded the 2019 Award of Excellence in Designations by CAI for his efforts. He currently is cochairing a CAI task force which is reviewing the national standards for the inclusion of both maintenance as well as structural safety criteria. He also is a member of the national task force which is in the process of developing a best practices paper on maintenance.

In June of 2021 as the result of the tragic collapse of Champlain Towers South in Surfside, Florida, CAI created three task forces to develop public policies to help avoid this type of tragedy from happening again. The results of these task forces were published in October 2021 in the *Condominium Safety Public Policy Report: Reserve Studies and Funding, Maintenance, and Structural Integrity*. Mr. Frumkin cochaired the Building Maintenance and Structural Integrity Task Force and had a leadership role in the Reserve Study and Funding Plans Task Force. He was the only engineer who had a leadership role in these programs.

He served as chair of a joint task force between CAI and the National Association of Home Builders (NAHB) dealing with the transition of community associations from developer to homeowner control. This task force published a paper entitled *Best Practices: Transition*, which was recently updated under Mr. Frumkin's leadership. He also teaches senior level CAI classes such as M-370, "Managing Developing Communities" and M-320 "High Rise Maintenance and Management" on an ongoing basis.

Mr. Frumkin is approved as a court-appointed mediator in the civil division of the Superior Court of New Jersey and mediates construction cases on an ongoing basis. He is also an

approved Arbitrator under the New Jersey Homeowners Warranty program and has arbitrated numerous claims through this program.

With a Bachelor of Science in Civil Engineering from Tulane University and a Master's in Business Administration from Rutgers University, Mr. Frumkin is a licensed Professional Engineer in multiple states and holds the Community Associations Institute's Reserve Specialist designation.

Melissa M. Garcia, Esq., is a shareholder at Altitude Community Law P.C. and an HOA enthusiast! She provides advice and counsel to Colorado community associations in all areas of community association law. With over 20 years of experience under her belt, Melissa has represented a vast range of communities, including traditional, high-rise and mixed-use condominiums, townhome and single family home communities, and commercial-only communities.

Melissa's practice emphasizes transactional law, including issuing opinion letters, reviewing contracts, rewriting governing documents, and assisting with general counsel representation of homeowners' associations.

A frequent lecturer, Melissa speaks both locally and nationally on all issues facing associations. She presents an annual series of homeowners' association workshops for various cities in Colorado, and regularly teaches for both Altitude Community Education ("ACE") and the Community Association Institute ("CAI"). In 2021 Melissa received the Excellence in Education Award, CAI-Rocky Mountain Chapter; in 2018 and 2021 Melissa received the Committee Chair of the Year Award, for serving as Chair of the Technology Committee, CAI-Southern Colorado Chapter; and in 2012 Melissa received the Educator of the Year Award, CAI-Southern Colorado Chapter.

Education

Juris Doctorate, 1999 - California Western School of Law, San Diego, California

Bachelor of Arts, 1996 - University of Reno, Nevada

Matthew A. Gardner, Esq., is a partner of Richardson|Ober|DeNichilo who works with community associations, homeowners and boards of directors to amend governing documents, resolve homeowner/member disputes, manage assessment delinquency matters and provide leadership training to volunteers and community members. Matthew has given presentations, led discussions, and hosted panels throughout CAI Chapters in California on CAI basics and new laws, as well as editing FOCUS the GLAC Chapter Magazine. He enjoys helping his clients and business partners find creative solutions to emerging challenges.

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.

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.

Karna Gustafson, Esq.

Noelle Hicks, Esq., is an associate in the firm's Houston, Texas office and practices in the Real Estate Section as a member of the Community Association team. Noelle completed her undergraduate studies at Trinity University in San Antonio, Texas in 2005 where she earned a Bachelor of Science in Business Administration. After completing her undergraduate studies, she attended the Thurgood Marshall School of Law at Texas Southern University where she received her Juris Doctor in 2008.

While at TMSL, Noelle had the honor of clerking for the Honorable Judge Honorable Judge Vanessa Gilmore in the United States District Court for the Southern District of Texas. In addition, Noelle was a member of the Thurgood Marshall School of Law Criminal Law Clinic wherein she represented low-income and traditionally underrepresented persons accused of criminal offenses. She also served as a member of the Board of Advocates, the Black Law Students Association and the Student Bar Association.

Kevin Hirzel, Esq., CCAL fellow, is the managing member of Hirzel Law, PLC, which has offices in Chicago, IL; Farmington, MI; Grand Rapids, MI; and Traverse City, MI. Hirzel Law represents hundreds of community associations throughout Michigan and Illinois, as well as serving as panel counsel for insurance carriers and advising several local insurance brokers. He is the Co-Chairman of the State Bar of Michigan's Real Property Law Section Committee for Condominiums, PUDs & Cooperatives, and a Council Member of State Board of Michigan's Real Property Law Section. Mr. Hirzel is a fellow in the College of Community Association Lawyers, a prestigious designation given to less than 175 attorneys in the country. He is a former member of the CAI National Board of Trustees, CAI's Government and Public Affairs Committee, and the CCAL Board of Governors. Mr. Hirzel is a two-time winner of the best manuscript award at the CAI National Law Seminar. He has been recognized by Best Lawyers, Super Lawyers, Leading Lawyers, and as a "Go-To-Lawyer" in condominium and real estate law by Michigan Lawyer's Weekly. Mr. Hirzel has authored numerous articles on community association law for publications such as the Michigan Community Association News, Michigan Real Property Review, Macomb County Bar Briefs, and the Washington Post. He is also the author of "[Hirzel's Handbook: How to operate a Michigan Condo or HOA](#)". Mr. Hirzel has also been interviewed by various media outlets, such as CBS, CNBC, Crain's Detroit Business, Dan Abrams Live, the Detroit News, Dr. Drew Midday Live, Fox Business News, Fox News, the Law & Crime Network, MLive, Newsmax, NPR, the Wall Street Journal and WWJ on various community association issues.

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.

Phaedra Howard, Esq., 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, including:

- Collection of assessments and lien foreclosure
- Interpretation and enforcement of governing documents
- Drafting and amending governing documents and rules
- Homeowner and vendor disputes
- Preparing maintenance responsibility charts and preventative maintenance plans
- Cooperative membership issues and termination of membership/eviction

- Sale of cooperative shares and real estate
- Conversion/termination of community associations
- Board training on governance and related issues
- Fair housing concerns/complaints
- Review and negotiation of management agreements and other vendor contracts
- Litigation matters involving community associations

Phaedra also represents property owners and others in the real estate sector on issues involving:

- Mortgage and lien enforcement and foreclosure
- Mechanic's liens and foreclosure
- Contracts for deed and cancellations
- Purchase agreements, sales, and leases of residential and commercial real estate
- Easements
- Fair housing issues
- Landlord/tenant disputes, including evictions
- Title defects
- Adverse possession and boundary disputes
- Title exams and opinions
- Torrens registration and proceedings subsequent
- Real estate litigation and appeals
- Bankruptcy court/ creditor representation

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.

Michael L. Hyman, Esq., CCAL fellow, is Board Certified by the Florida Bar in the area of Condominium and Planned Development Law. He is the co-author of Florida Condominium Law & Practice, published in October, 1986, by Matthew Bender & Co., a comprehensive work in the area of condominium associations operations. A graduate of the University of Florida, Mr. Hyman received his Juris Doctor from the University of Miami School of Law. He is an "AV" rated attorney. He is also recognized as a "Super Lawyer" in the area of Construction Litigation. Since 1970, Mr. Hyman has been actively engaged in the representation of community associations (condominium and homeowners groups). In 1972, he was appointed by Governor

Reuben Askew (by recommendation of the Florida Bar) to the first Florida Condominium Commission.

He has served as a member of the Board of Directors of the Greater Miami Chapter of Community Associations Institute for seven (7) terms, he is the author of the Florida Bar Journal article "Alternatives to Recreation Lease Litigation - Structuring the Buy-Out." A frequent speaker at several of the University of Miami Condominium & Cluster Housing Seminars, he has lectured at various CAI National Conferences and has served as a member of the faculty of the Community Association Law Seminar in New Orleans, Newport Beach, San Francisco and Los Angeles, California, Washington, D.C., Philadelphia, Pennsylvania and Orlando, Florida. Mr. Hyman was a director of the Commercial Law Section of the Academy of Florida Trial Lawyers and was a member of The Florida Bar's Committee on Condominiums and Cooperatives. He is admitted to the Trial Bar of the Federal District Court. In 1994 Michael L. Hyman was inducted into the Community Association Law Institute College of Community Association Lawyers as a member of the Charter Class. This is an elite group of Community Association member attorneys who have distinguished themselves by exhibiting the highest standards of professional and ethical conduct. In 2002, Mr. Hyman was designated a facilitator for a series of educational programs provided by CAI and the State of Florida Department of Professional and Business Regulation, Division of Florida Land Sales, Condominium and Mobile Homes.

Cynthia A. Jones, Esq., 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.

Cynthia 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.

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.

Education

- Loyola University Chicago, B.A., Honors History and Political Science, cum laude, 2007
- Cleveland-Marshall College of Law, J.D., cum laude, 2010

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.

Timothy J Krupnik, Esq., graduated in 2017, summa cum laude and first in his class from the Sandra Day O'Connor College of Law. He also received the prestigious John S. Armstrong Award, the top honor bestowed by the Sandra Day O'Connor College of Law. During law school, Tim received numerous CALI Excellence for the Future Awards for academic excellence in multiple fields of study, including: Secured Transactions, Federal Income Tax, Decedents Estates, Professional Responsibility, and Arizona Constitutional Law. He also served as an extern for the honorable Judge David Gass Judge Davis Gass of the Maricopa County Superior Court and Special Master Susan Harris, who is working with the General Stream Adjudication in Arizona. Tim graduated cum laude with a Master of Arts in Theological Studies from Liberty University in 2011 and graduated summa cum laude from Arizona State University with a Bachelor's of Science in 2008. He is licensed to practice law in Arizona and New Mexico.

Joan Lewis-Heard, Esq., started practicing law in 1986 and has litigated all types of civil cases including employment law, real estate, personal injury, and business litigation matters. Having represented and defended everything from Fortune 500 corporations to start-up "mom & pop" businesses, Joan has gained a wealth of knowledge enabling her to assist any community Association of any size in litigation of nearly every type of matter that may arise in community associations. Evidence of Joan's expertise is ample in her writings, which can be found on SwedelsonGottlieb's HOA^lawblog.com.

Joan has litigated and obtained defense verdicts while defending large and small cases and has prosecuted both large and small cases, the largest having the distinction of one of the top 10

verdicts in California and one of the top 50 in the country in 2001.

Whether the Association is large or small and whether the monetary impact is large or small, Joan realizes every issue is important to those associations and their Boards involved in litigation and gives her utmost attention to every detail.

As a former professor of appellate advocacy as an Adjunct Law Professor at Loyola Law School, Joan uses her appellate skills in her litigation practice, having brought and responded to numerous matters in the Court of Appeal and California Supreme Court. Joan's standing as a superior attorney was confirmed in 2014, having been named in the February 2014 issue of the International Top 100 magazine as one of the top 100 lawyers throughout the country.

Joan was raised in Newton, Massachusetts, a suburb of Boston, and attended Tufts University in Medford, Massachusetts, where she graduated with honors, with a Bachelor of Science degree in 1983. Joan obtained her Juris Doctor from University of California, Los Angeles School of Law in 1986 and was admitted to the California Bar also in 1986. She is also admitted to practice before the federal United States District Courts for the Central, Northern, Southern, and Eastern districts of California. When not at the office, Joan enjoys a good episode of General Hospital and spending time with her family.

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.

Susan M. Hawks McClintic, Esq., CCAL fellow, is known for giving practical, commonsense advice without the legalese. Sue joined Epsten, APC, in October 1990 and became a shareholder in 1999. She has supervised the firm's transactional law department since 2008, has been a co-managing shareholder since August 2014, and was named managing shareholder of the firm in September 2021. Sue graduated from the University of Notre Dame Law School and grew up in Nebraska so she is a big football fan!

Sue is on the Board of Directors for the CAI Foundation for Community Association Research, a member of the CAI Case Law Review Committee and a member of the CAI Diversity & Inclusion Committee.

During her more than thirty year career in community association law, Sue has developed a special expertise in document interpretation, amendments, and restatements. Sue speaks regularly throughout the Community Association industry, and each fall is a featured speaker at the Epstein, APC Legal Symposium where she educates an audience of more than 600 clients and guests on newly passed laws that affect Common Interest Developments.

Claudia Lopez, Esq., is an Associate at Whiteford Taylor Present, LLP in the Community Associations group. Claudia represents condominium unit owner associations, homeowner associations, and housing cooperative entities. She also has commercial litigation experience, including breach of contract, trademark infringement, and misappropriation of trade secrets. In 2021, Claudia was selected as a "Rising Star" by Washington, D.C. Super Lawyers®. She previously clerked for the Honorable David Bernhard on the Fairfax County Circuit Court.

James R. McCormick, Jr., Esq., CCAL fellow, is a partner in Delphi Law Group, LLP. James attended the University of California, Los Angeles, where he received his undergraduate degree in Political Science. James then attended law school at the University of San Diego, where he was a teaching assistant for legal research, writing and oral advocacy and recognized as a Dean's Outstanding Scholar. James has been formally trained as a mediator and mediated disputes for the former San Diego Mediation Center, now known as the National Conflict Resolution Center.

James started in the industry in 1996, and since that time has served on various industry committees, has presented at numerous CAI and CACM events and has published many industry-related articles. James chaired the San Diego CAI Legislative Support Committee(LSC) of the California Legislative Action Committee (CLAC) for several years and currently serves on the CACM Legislative Affairs Committee, the CAI Coachella Valley LSC committee and the CAI Orange County PR Committee. James also co-founded and served for years on the CAI Coachella Valley PR Committee.

As a result of his work in the industry, James is one of approximately 150 attorneys nationwide to be granted a fellowship in the College of Community Association Lawyers (CCAL). James also serves on the prestigious Board of Visitors, an advisory board for the University of San Diego School of Law and occasionally serves as an adjunct professor at the USD School of Law.

James is passionate about teaching and has created training programs for managers and Board members in San Diego, Coachella Valley, Orange County, Los Angeles County and the Inland Empire. James also sat for over seven years as the board president of one homeowners association and is currently serving as a director on the board of two associations.

James **also trosschnology** advances that can be used by the common interest development industry and led his firm in implementing the firm's online collections program which allows managers 24/7 access to status reports for their association's collections accounts. In his spare time James also creates and manages several online communities. For his work James has received Most Valuable Professional awards from Microsoft for fifteen years in a row and has been featured in various print and online media stories.

Nick Meinert, Esq., has been an attorney with Kaman & Cusimano LLC since 2015, a law firm that is exclusively dedicated to counseling, informing, educating, and representing Ohio condominium and homeowner associations. Attorney Meinert focuses on association operations, including, presenting at annual meetings, drafting amendments, writing opinion letters for clients, employment issues, mortgage industry compliance, drafting contracts, and reviewing rulebooks. Nick also regularly performs webinar presentations to the firm's clients, discussing currently trending topics. In 2019, Attorney Meinert participated on the Young Lawyer Committee of CAI, working to develop the framework on how the Young Lawyer division would operate. That same year, Nick presented a CAI webinar on hostile working and living environments in community associations. At the 2020 Law Seminar, Attorney Meinert presented with Bob Diamond, Esq. on "Extraordinary Amendments." Nick was also recently published in the Cleveland Metro Bar Association Journal and named a Thomas Reuters Ohio Super Lawyers Rising Star for 2023.

Theresa Melson, AMS, PCAM, CIRMS, Senior Vice President, USI Insurance Services LLC
Theresa is licensed as a property and casualty insurance Broker, Consultant, and Life and Health agent in the Commonwealth of Virginia, State of Maryland, and District of Columbia for USI Insurance Services LLC, specializing in the common interest community association field. Prior to being licensed as a property and casualty insurance agent, Theresa worked in the common interest community industry for over 23 years. Theresa holds the Professional Community Associations Manager (PCAM[®]) and Certified Insurance and Risk Management Specialists (CIRMS) designations from CAI. She is also past President of the Washington Metropolitan Chapter of the Community Associations Institute (WMCCAI); and is a current member of the Washington Metro Chapter of CAI's Virginia Legislative Committee. She has been honored to be inducted into the WMCCAI Hall of Fame, and is a recipient of the Volunteer of the Year, Educator of the Year, and Committee Chair of the Year awards. Theresa has presented many educational programs on behalf of WMCCAI and CAI throughout her careers in both property management and insurance.

Winta Mengisteab, Esq., has been practicing community association law exclusively for about 15 years. She has an active practice representing community associations throughout the DC, Maryland, and Virginia tri-state area.

As a community association's attorney, Winta works with condominium and homeowners' associations for all their various legal needs, including to:

- Draft rules and regulations and amend governing documents/condominium instruments
- Enforce covenants and restrictions
- Negotiate service contracts
- Transfer storm water management/maintenance facility responsibilities
- Draft easement agreements
- Defend lawsuits/complaints against the association (ex. for disputed contracts or complaints submitted to various local agencies)
- Negotiate condemnation/ eminent domain matters
- Obtain FHA pre-approval
- Train board members on matters of association governance
- Customize effective procedures for the collection of unpaid condominium fees and association assessments

Winta is dedicated to the field of community association law, she frequently writes articles and presents on the topic. She is also a member of the local chapters of the Community Associations Institute.

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:

- College of Community Association Lawyers (CCAL), National Membership Committee, Chair, 2017-present; Board of Governors (CAI National), January 2020-present
- Community Association Institute (CAI), Wisconsin Chapter, Member of the Board of Directors, 2006-2012, 2019-2020; Former Legislative Action Committee Chair, 2013-2018; Former Chapter President, 2011-2012

- Milwaukee Bar Association, Courts Committee
- State Bar of Wisconsin

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.

Thomas O. Moriarty, Esq., CCAL fellow, is a founding member of the firm and chair of its Litigation Department and is widely regarded as one of the premier real estate litigators in the Commonwealth. Tom has vast experience in the areas of condominium construction defect and phasing litigation, both in the trial court and at the appellate court levels, and has litigated and argued several of the seminal appellate decisions in that arena. Tom appears in both state and federal court, representing clients in zoning and land use litigation, title disputes, prescriptive easement and adverse possession claims, beach rights and waterfront disputes, construction defect and transitional litigation, common area property disputes, condominium phasing and development matters.

Tom's commitment to the real estate and common interest ownership industries extends beyond his representation of clients in those sectors. He served as 2010 President of the Real Estate Bar Association, is a past co-chair of REBA's Litigation Section, the Residential Conveyancing Committee, the Unauthorized Practice of Law Committee, and the Condominium Law & Practice Section and is a member of the organization's Board of Directors and its Executive and Nominating Committees. He also served as REBA's designee to the Joint Bar Committee on Judicial Nominations. In the condominium arena, Tom is actively involved in the Community Associations Institute nationally and regionally. He served as chair of the Massachusetts Legislative Action Committee from 2006 until 2011 and was a member of the Board of CAI New England from 2019 through 2021 and served as its President in 2021. He is also a member of CAI's National Amicus Team. Recognized as an authority on condominium and real property litigation, Tom serves frequently as a faculty panelist for Massachusetts Continuing Legal Education seminars and chairs the MCLE's Annual Real Estate Conference. Recognized also as one of the Bay State's outstanding attorneys, Tom has been named to Law & Politics' list of Massachusetts Super Lawyers every year since 2005 and maintains an AV rating with Martindale Hubbell.

Kathryn Murphy, Esq., an Associate in the firm's Community Associations practice. Her practice is focused on representing community associations on such matters as corporate governance, contract law and covenant interpretation and drafting.

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.

George E. Nowack, Jr., Esq., CCAL fellow, is a Co-Founder of NowackHoward Community Association Attorneys.

George Nowack has dedicated his entire legal career to representing community associations. George began representing associations in 1981 at the law firm Hyatt & Rhoads, PC, which was one of the first firms in the United States to represent homeowner and condominium associations. In 1991, George founded the Community Association Practice at Weissman, Nowack, Curry & Wilco, P.C., where he practiced for 25 years. George and his law partner Julie Howard formed NowackHoward, LLC in October 2016 after working together for 20 years at WNCW.

In addition to George's extensive community association practice, he is a nationally recognized expert on community association insurance issues, especially Director's & Officer's claims and coverage for theft of community association funds. George has assisted three national insurance companies in drafting their D&O policies and has been appointed panel counsel for multiple insurance companies that specialize in writing for D&O policies.

George is also an expert on Fair Housing Law. He has already successfully defended 67 associations in Fair Housing Act claims, more than any other attorney in the country. As one of the members of a special task force, George also worked with the United States Department of Housing and Urban Development, which enforces the Fair Housing Act, to develop its condominium crime insurance provisions.

In September 2017 George met with Anna Maria Farias, Assistant Secretary for Fair Housing and Equal Opportunity at her office in Washington, D.C. to discuss the unintended consequences affecting community associations resulting from changes to the Fair Housing Act. In addition, throughout his career, George has been a stalwart in drafting amendments to the Georgia Condominium Act, the Georgia Property Owners' Association Act, and advising the Georgia Real Estate Commission in drafting its Community Association Managers' Licensing law.

An active member of the Community Associations Institute (CAI) since 1982, George was one of the earliest members of Georgia's CAI Chapter and served as Georgia Chapter President in 1990. George went on to serve two terms on CAI's National Board of Trustees and served as CAI National President from 1994-1995. Since 1984, George has been a featured presenter on numerous issues at more than 25 of CAI's National Conferences and 35 of CAI's Law Seminars and he has been a favorite speaker at local CAI chapters across the country from Massachusetts to Hawaii. George has volunteered countless hours for CAI over the years assisting with numerous committees, subcommittees and special projects.

In light of his dedication and commitment to CAI, George has earned many awards and special recognition over the years. In 2003, George received CAI-Georgia's Educator of the Year Award. In 2004 and 2005, George received CAI-National's President's Award for his extraordinary services to CAI's National Presidents. George received CAI-National's 2007-2008 Award of Excellence in Designations. In addition, in recognition of George's exceptional dedication to CAI, in May 2011, he received CAI-National's Distinguished Service Award.

In 1994, George's peers named him to the charter class of the College of Community Association Lawyers. George was elected to the College's Board of Governors in 2002. He served two terms as the Dean of the College from 2007-2009. Since 1985, George has served as a member of the faculty of the College's annual Community Association Law Seminar and, for 14 years, at the two general opening sessions of the Law Seminar, George co-presented a review of the 50 most significant cases affecting community associations and the resulting trends. In 2010, the College presented George with the first Gurdon Buck Award, the College's most prestigious recognition.

George is also a prolific writer on community association law. With more than 500 articles used in seminars and workshops, George has also written weekly columns on community association issues for the Atlanta Journal & Constitution and the Gainesville Times, as well as publishing articles in Common Ground, Real Property & Probate, the Atlanta Business Chronicle, The Newsletter of the Independent Insurance Agents of Georgia, and other publications. George has been quoted in the New York Times and the Wall Street Journal and has been the featured guest on local and nationally syndicated radio shows.

George and NowackHoward have both earned the AV Preeminent rating from Martindale-Hubbell, the legal profession's most prestigious rating service. This top rating is shared by an elite group of just eight percent of all attorneys. George has also been repeatedly designated a Super Lawyer by his peers since 2000.

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.

Norm Orban, Esq., is a partner with the law firm of Allcock & Marcus, whose sole focus is representing condominiums and homeowners' associations in Maine, Massachusetts, New Hampshire and Rhode Island. Norm provides condominiums and homeowners associations with general representation and in litigation matters in State and Federal Courts in Maine and Massachusetts including arguing condominium related issues before the Massachusetts' Appeals Court ranging from disputes concerning defective construction, defending associations in negligence claims, rules enforcement, among other matters. He has been an active member of the CAI New England for the past five years.

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.

Kieran Purcell, Esq., graduated from the University of Colorado at Boulder. After serving seven years in the United States Navy, Kieran attended California Western School of Law and joined Epsten, APC in 1995. Kieran's work on behalf of community associations includes providing advice on all types of corporate matters including litigation, interpretation and enforcement of governing documents and reconstruction issues. He has been a shareholder of Epsten, APC since 2002 and now serves as Vice President and CFO of the firm. Kieran spent three terms on the Board of Directors of the San Diego Chapter of the Community Associations Institute (CAI), where he served as its President, co-chaired the National Seminar Committee and co-chaired the Golf & Tennis Charity Classic. Kieran is a delegate for the San Diego Chapter's Legislative Support Committee (LSC), a former Legislative Co-Chair for the California Legislative Action Committee (CLAC), and now serves as Chair of CLAC. During his tenure with CAI, Kieran has earned the San Diego Chapter's President's Award four times, and in 2006 was recognized with the Samuel L. Dolnick Lifetime Achievement Award.

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.

J. David Ramsey, Esq., CCAL fellow, serves as Chair of Becker's New Jersey Community Association Practice Group. He concentrates his practice in community association law, having represented community associations in New Jersey for over 35 years. His experience also includes significant representation of clients in commercial real estate, zoning and planning law. David routinely lectures to, and writes for publication, to other attorneys on a national and

state basis as well as presenting programs to board members, managers and other professionals in the community association field. He has and continues to serve in various leadership positions detailed in the “Experience” section. In each of his leadership roles David has been a motivating force in connection with the drafting of legislation critical to the community association world.

David’s representation of community association clients includes long-term representation of some of New Jersey’s largest community associations, such as Rossmoor (3,200 units) and Clearbrook (2,700 units), as well as numerous high-rise communities along New Jersey’s “Gold Coast.” David is considered a “go-to” person by managers, governing boards and other attorneys and professionals involved with community associations. David finds practical solutions to difficult issues to resolve matters that would otherwise embroil association clients in lengthy and expensive litigation. But when litigation is unavoidable his clients seek his common-sense perspective and advice to work through serious disputes.

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.

Ed Ronsman, Esq., is a shareholder of McCabe & Ronsman and practices in the area of community association law. Mr. Ronsman is a Florida Bar Board Certified Specialist in the area of Condominium & Planned Development Law – the first year that such certification was offered. Mr. Ronsman received his Bachelor of Arts in History from St. Norbert College in De Pere, Wisconsin and earned his Juris Doctor degree from Florida Coastal School of Law in 2008. Mr. Ronsman has extensive experience representing community associations. Mr. Ronsman is experienced in litigating matters involving community associations, while also handling statutory mediation proceedings and arbitration before the Florida Department of Business and Professional Regulation (“DBPR”). Mr. Ronsman is an approved instructor of educational courses for Community Association Managers (CAM) by the DBPR, including legislative updates, homeowner association and condominium association certification courses, as well as other substantive courses on day to day issues affecting community association managers. Mr. Ronsman is actively involved in Community Associations Institute (CAI), serving as President of the Northeast Florida Chapter from 2016-2017 and as immediate past president in 2018. Mr. Ronsman served as a Chapter delegate for the Florida Legislative Alliance Committee (FLAC) of CAI. Mr. Ronsman also provides pro bono legal services for St. Johns County Legal Aid.

Sara J. Ross, Esq., is a principal/attorney with the firm of Chadwick, Washington, Moriarty, Elmore & Bunn, P.C., and has practiced in the firm’s Fairfax, Virginia office since 2003. Her practice is devoted to community association law in Virginia. Sara provides counsel and advice to the firm’s clients regarding a wide range of community association issues, including, corporate governance, covenant enforcement, developer transition, drafting of rules and regulations, review and negotiation of client contracts, drafting amendments to governing documents, and collections and bankruptcy matters. Sara is an active CAI member and is on the Board of Directors of the Washington Metropolitan Chapter of the Community Associations Institute (“WMCCAI”). She is a current member of National CAI’s Board of Trustees and Business Partners Council and frequently presents at industry conferences and educational.

Mark Sahl, Esq., is a Shareholder at Carpenter, Hazlewood, Delgado & Bolen, LLP, and focuses his practice on representing community associations - including planned communities, condominiums, and cooperatives. Mark is also responsible for overseeing the Insurance Defense practice group at the firm. In relation to his HOA insurance defense practice, he published the “Arizona HOA Insurance Claims Handling Manual – HOA and Condo Claims” for HOA insurance professionals. He has also written numerous other articles on community association issues. Mark has successfully tried numerous civil cases in Superior Court, Justice Court, and in the Office of Administrative Hearings in Arizona. He has handled many different types of cases ranging from board/annual meeting irregularities, Board removal actions, and slip and falls to complex receivership matters. Mark is also a Certified Public Accountant and provides tax guidance to his community association clients. Mark prides himself in educating the community association industry – both in Arizona and nationwide. In fact, he has presented Board trainings and other educational offerings for over 100 clients and management companies during the course of his nearly 15 year career. Mark has presented on topics ranging from short term rentals, alcohol consumption on common areas, the Fair Housing Act, board member fiduciary duties, drone use on common areas, insurance issues relating to HOAs, and Arizona HOA laws. Mark has spoken multiple times at CAI National and CAI Arizona events. He also serves on the CAI Arizona Legislative Action Committee and has drafted proposed legislation relating to community associations. He is also a current member of the Arizona CAI Membership Committee and a former member of CAI’s National Government Affairs and Public Policy Committee.

Jim Ruebsam, CIRMS, Senior Vice President, The Daniel & Henry Company. For more than 15 years, Jim has led the community association team at Daniel & Henry, a US Top 100 independent brokerage with locations across the Midwest. Jim currently serves as President of CAI’s Heartland Chapter, his second tenure as President in the past decade. The Daniel & Henry Company is an annual Diamond Sponsor of the Heartland Chapter and was recognized as the Business Partner of the Year in 2018. In addition to serving in various position on the Heartland Chapter Board, he also serves on two committees and is a frequent speaker at CAI and other industry events across the Midwest. Jim graduated *magna cum laude* from the School of Journalism at the University of Missouri and enjoyed a career in advertising before “seeing the light” and entering the commercial insurance industry. Jim earned his CIRMS designation in 2015 and EBP in 2018.

Mark Sahl, Esq., is a Shareholder at Carpenter, Hazlewood, Delgado & Bolen and is responsible for overseeing the Insurance Defense practice group at the firm. Mark has successfully tried numerous civil cases in Superior Court, Justice Court, and in the Office of Administrative Hearings. He has handled many different types of cases ranging from board meeting irregularities and slip and falls to complex receivership matters. While Mark has significant trial experience and is an aggressive litigator, he also looks for creative ways to resolve cases and lives by the motto, “it is never too early or too late to settle a case.”

Mark also provides general counsel guidance and routinely provides practical advice to minimize risks for his clients. Mark is also a Certified Public Accountant and provides tax guidance on a variety of issues presented by his clients.

Mark enjoys spending time with his wife and two daughters and is active in his church, where he serves on the Executive Council. When Mark is not working or spending time with his family, you can find him cooking a wide variety of meats on his smoker or grill.

A.J. Scott, CPCU, CIRMS, Associate Vice President at Cline Agency Insurance Brokers in 2006, AJ has worked in our certificate department, managed a book of renewals, and spearheaded our lessor's risk and workers' comp departments before assuming her current role in 2011 as a production team leader overseeing new business and focusing primarily on community associations. She completed her CPCU® designation (Chartered Property Casualty Underwriter) in November 2014 and was recognized as the Distinguished Graduate at the 2015 conferment ceremony in Indianapolis. In June 2019, she earned her CIRMS designation (Community Insurance Risk Management Specialist) from CAI (Community Associations Institute).

From 2012-2019, AJ was actively involved in the Independent Insurance Agents & Brokers Association (the Big "I") at the local, state, and national levels. In 2016, she served both as Chair of the Greater Los Angeles I-Day Convention and as President of the Los Angeles chapter (IIABA-LA) and presented as a panelist at the 2016 IIABCal Blue Ribbon Conference. She has also participated in the Big "I" Legislative Conference in Washington, D.C. five times (2013-2016, 2019).

AJ currently co-chairs the Education Committee for CAI-OCRC (Orange County Regional Chapter) and has served on the CAI Law Seminar CIRMS Planning Group since March 2018. She lives in the City of Orange (Santiago Hills/ Peters Canyon area) with her husband Nic and their two dogs.

Augustus H. Shaw, IV, Esq., CCAL fellow, is the founding member of Shaw & Lines, LLC. For over 20 years, Augustus has advised community associations, timeshare associations, non-profit corporations, real estate developers and general businesses. Augustus, a fellow of the College of Community Association Lawyers, has served CAI as a past Member of CAI's College of Community Association Lawyers Board of Governors and as a past Board Member and past Vice President of CAI's Central Arizona Chapter. Augustus has been a speaker at CAI 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. Augustus received his Bachelor of Arts from the University of Arizona and his Juris Doctor from the University of Arizona James E. Rogers College of Law. 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.

Seminars, including the CAI National Conference, the WMCCAI Conference & Expo and the 2015 and 2017 CAI Law Conference. In addition, she has been published in several national trade publications, as well as numerous CAI chapter and other community association industry publications.

Rebecca Drube Shiland, Esq., is an attorney with Jensen Baird Gardner & Henry located in Portland, Maine. Since 2007, she has practiced community association law in Florida, Georgia and Maine. Rebecca served as a pundit on the “Panel of Pundits” at the 2021 National Community Association Law Seminar and was a member of the 2016-2018 Case Law Review Team for the Law Seminar’s Case Law Update. In addition, she has presented many manager and board member educational seminars to her local CAI chapter and firm events, as well as authored articles for CAI chapter and firm publications. Prior to relocating to Maine, Rebecca served as Chair of the Education Committee for the CAI Georgia Chapter and was an active member and volunteer for the Education Committee and the CAI Georgia Chapter generally.

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.

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.

Harmony Taylor, Esq., focuses her practice on representation of community associations on litigated and non-litigated matters. Harmony regularly advises on association governance, assists with director and member meetings, represents communities in district and superior courts, and represents associations in complaints brought before local human relations commissions on Fair Housing and other discrimination claims. Harmony regularly speaks to boards, managers and owners on community association related topics, including North Carolina's Community Association Institute Law Day. Harmony is an active member of the Community Association Institute and serves on the Legislative Action Committee for the North Carolina Chapter and the College of Community Association Lawyers Governing Documents Task Force.

Harmony also represents individuals and entities in negotiating and drafting leases and contracts and litigating disputes arising from these agreements. Harmony has participated in hundreds of mediations and over twenty jury trials, and has litigated cases in district and superior courts across North Carolina through the appellate level.

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.

Gregory Vinogradsky

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.

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.

Heather Wentworth, As Chief Data Officer of [Accelerant Holdings](#), Heather leads the company's [#data](#) strategy. Her critical role drives Accelerant's business intelligence, artificial intelligence, and data protection across the platform. Heather's 15+ years of experience span the global value chain including leading business and technology solutions at Liberty Mutual, Crum & Forster, Willis Towers Watson and Brown & Brown. Most recently, she led platform designs and builds for [Innovisk Capital Partners](#), a global [#insurtech](#) [#startup](#), and was also honored with the 2022 Insurance Innovators Top 100 for her work in data intelligence. In her free time, Heather is a volunteer facilitator for [Girls Who Code](#) and a candidate for the MIT ACE.

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.