



NCLDB

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# THE NATIONAL COUNCIL OF LAWYER DISCIPLINARY BOARDS ANNUAL CONFERENCE

February 4-6, 2025  
Glendale, AZ

WITH VIRTUAL ACCESS OPTION

## SCHEDULE OF EVENTS





# Conference Overview

## CONFERENCE ACCESS OPTIONS

- \$495 In-person conference attendance
- \$325 Virtual access to all speaker sessions

## CONFERENCE REGISTRATION

Register online for in-person or virtual access to the 2025 conference at [bit.ly/NCLDB25Registration](https://bit.ly/NCLDB25Registration).

## HOTEL ACCOMODATIONS

Block rates are available until January 13, 2025 at the Renaissance Glendale Hotel & Spa via [bit.ly/3Y5RXVg](https://bit.ly/3Y5RXVg).

## CONFERENCE SESSIONS

### Tuesday, February 4, 2025

*Outdoor Courtyard*

Welcome Reception, 6:30pm MST

### Wednesday, February 5, 2025

*Cira Ballroom A*

- Roundtable of Jurisdictions
- Attorney Well-Being and Accountability
- Presentation from Lexum
- Artificial Intelligence and Legal Ethics
- Recruiting, Training, Supporting, and Appreciating Hearing Committee Members

### Thursday, February 6, 2025

*Cira Ballroom A*

- Unusual Defenses in Lawyer Discipline
- How Jurisdictions Strive for Uniformity
- Transparency, Publicly-Available Information, Media Requests, and Helping the Public Understand Discipline



Wednesday, February 5, 2025

Cira  
Ballroom A

**7:30 - 8:30am MST      BREAKFAST**

**8:30am                      WELCOME REMARKS**

**Karen M. Daley**, *President-Elect, NCLDB*  
Associate Counsel, Michigan Attorney Discipline Board

**8:30 - 10:00am              ROUND TABLE: WHAT'S NEW AROUND THE COUNTRY IN DISCIPLINE**

**Jordan D. Huck**, *Past President, NCLDB*  
Hearing Committee Counsel, Louisiana Attorney Discipline Board

*A discussion of what's new in the world of attorney discipline. Representatives from each jurisdiction will have the opportunity to advise what is new in their jurisdiction. A fan favorite!*

**10:00 - 10:15am              BREAK**

**10:15 - 11:45am              ATTORNEY WELL-BEING AND ACCOUNTABILITY: EVOLVING DISCIPLINARY APPROACHES TO SUPPORT ATTORNEYS WITH SUBSTANCE USE AND OTHER MENTAL HEALTH DISORDERS**

**Tom Gilbertsen**  
Board Member, District of Columbia Board on Professional Responsibility

**Tracy L. Kepler**  
Risk Control Consulting Director, Lawyers Professional Liability Division, CNA Insurance

*This program provides a comprehensive update on how attorney disciplinary systems nationwide have responded to the 2017 Report from the National Task Force on Lawyer Well-Being and addresses additional substantive issues that intersect with disciplinary and Lawyers Assistance Program (LAP) systems. The presentation will focus particularly on how various disciplinary jurisdictions approach diversion, probation and mitigation strategies for attorneys experiencing mental health and substance use disorders. Attendees will gain insight into evolving practices and policies that aim to support attorney well-being while maintaining the integrity of disciplinary procedures.*

**11:45 - 12:45am              LUNCH**

**12:45 - 1:00pm              PRESENTATION FROM LEXUM**

1:00 - 2:30pm

## ARTIFICIAL INTELLIGENCE AND LEGAL ETHICS

### **Gary Marchant**

Regents and Foundation Professor of Law; Faculty Director, Center for Law, Science, and Innovation, Sandra Day O'Connor College of Law

### **Judge Yvette D. Roland**

Hearing Judge, State Bar Court of California

*Artificial Intelligence (AI) is revolutionizing the legal profession, but its rapid development poses significant ethical challenges for legal practitioners. As AI transforms tasks like legal research, document drafting, and client communications, it introduces risks such as biased outputs, data privacy concerns, and the potential for overreliance on AI-generated work. Legal ethics frameworks, including the ABA Model Rules, must evolve to address these issues while ensuring technological competence, proper supervision of AI tools, and adherence to confidentiality obligations. Bar associations and courts are critical in providing guidance, as demonstrated by initiatives such as California's "Practical Guidance" for attorneys using generative AI. This session explores how lawyers can navigate these complexities to ethically integrate AI into their practices, balancing innovation with professional responsibility.*

2:30 - 2:45pm

## BREAK

2:45 - 3:45pm

## RECRUITING, TRAINING, SUPPORTING, AND APPRECIATING HEARING COMMITTEE MEMBERS

### **Gretchen A. Mundorff**

Vice-Chair, Disciplinary Board of the Supreme Court of Pennsylvania

### **Marcee D. Sloan, Secretary, NCLDB**

Prothonotary, Disciplinary Board of the Supreme Court of Pennsylvania

### **Jeffrey D. Woolf, Past President, NCLDB**

Assistant General Counsel, Massachusetts Board of Overseers

*This session will focus on elevating the invaluable contributions provided by voluntary hearing officers in Pennsylvania. This session will cover these areas which we view as essential to proper engagement: (1) recruitment, appointment, and training; (2) assignment and evaluation of the work; and (3) support and appreciation for the weighty responsibility these volunteers undertake.*



**7:30 - 8:30am MST    BREAKFAST**

**8:30 - 8:45am        NCLDB BUSINESS MEETING**

**8:45 - 9:45am        UNUSUAL DEFENSES IN LAWYER DISCIPLINE**

**Jeffrey D. Woolf**, *Past President, NCLDB*  
Assistant General Counsel, Massachusetts Board of Overseers

**Marianne J. Lee**, *Past President, NCLDB*  
Executive Counsel and Director, Attorney Grievance Commission of Maryland

**Aisha L. Cassis**, *President, NCLDB*  
Deputy Executive Attorney, District of Columbia Board on Professional Responsibility

*Disciplinary counsel and adjudicators are sometimes confronted with defenses to bar discipline that are out of the ordinary and do not fall within the parameters of what have previously been addressed by their jurisdictions. This program will address some of those defenses that several jurisdictions have seen and how they have been handled. Attendees will gain insights and strategies to assist in addressing novel and unusual defenses.*

**9:45 - 10:45am      HOW JURISDICTIONS STRIVE FOR UNIFORMITY**

**Judge Bryon M. Large**, *Board Member, NCLDB*  
Presiding Disciplinary Judge, Colorado Supreme Court

**Tara McPhail**  
Chief Legal Officer, Law Society of British Columbia

**Judge Richard A. Honn**  
Presiding Judge, State Bar Court of California

*This program will provide information from various jurisdictions on how they seek uniformity in lawyer discipline sanctions. It will feature perspectives from jurisdictions that follow the ABA Standards for Imposing Lawyer Sanctions, as well as jurisdictions that follow other methods. Speakers will also discuss their jurisdictions' perspectives on progressive discipline and the handling of reciprocal discipline.*

**10:45 - 11:00am    BREAK**

**11:00am - 12:00pm**    **TRANSPARENCY, PUBLICLY-AVAILABLE INFORMATION, MEDIA REQUESTS, AND HELPING THE PUBLIC UNDERSTAND DISCIPLINE**

**Marcee D. Sloan**, *Secretary, NCLDB*

Prothonotary, Disciplinary Board of the Supreme Court of Pennsylvania

**Teri A. Stoltenburg**

IT Systems Support Specialist, Disciplinary Board of the Supreme Court of Pennsylvania

*This session will explore the ways in which the Pennsylvania Disciplinary Board interacts and communicates with the public. The session will provide examples of information available on the Pennsylvania Disciplinary Board's website that describes the disciplinary and reinstatement process, dockets on all public pending matters, recent cases, upcoming proceedings, news articles, Court and Board Opinions, rules that Pennsylvania attorneys must follow, conservatorships, and many other features. It will also include an interactive component to uncover other best practices from jurisdictions around the country.*

**12:00pm**                    **CLOSING REMARKS**



# Speaker Biographies

**Aisha L. Cassis** is the Deputy Executive Attorney of the District of Columbia Board on Professional Responsibility. Ms. Cassis advises Hearing Committee and Board Members in matters pending before them concerning substantive and procedural issues as they arise. She participates in the Hearing Committee recruitment process and facilitates the training of newly appointed members. Prior to her tenure with the Board, Ms. Cassis was engaged in private practice at Gilbert LLP, Covington & Burling LLP, and Simpson, Thacher, & Bartlett LLP. Ms. Cassis currently serves as President on the Board of Directors of the National Council of Lawyer Disciplinary Boards.

**Tom Gilbertsen** is a Washington, D.C.-based trial and appellate attorney and member of the D.C. Court of Appeals Board on Professional Responsibility (BPR). He practiced antitrust and commercial litigation at Washington-based national firms for thirty years before launching Dueffert Gilbertsen PLLC with Williams & Connolly LLP alumnus Paul Dueffert in 2020. During his career in biglaw, Mr. Gilbertsen chaired antitrust and litigation practice groups and served as human resources and hiring partner. He served on a BPR hearing committee from 2015 to 2021, on the D.C. Bar Lawyer Assistance Committee for several years (chair, 2021-2022), and on the American Bar Association's Commission on Lawyer Assistance Programs. Mr. Gilbertsen also serves as a board member of D.C. Council for Court Excellence and co-chairs the Federal Communications Bar's ethics and professionalism committee.

**Judge Richard A. Honn** was appointed Presiding Judge of the State Bar Court of California by the Supreme Court of California in 2020. Judge Honn graduated *Magna Cum Laude* from the University of California at Santa Barbara in 1974, majoring in Political Science. Thereafter, he received his Master's Degree in Public Administration and Urban Planning and Development from UCLA in 1975 and his Juris Doctor degree from Loyola Law School in December 1978. Judge Honn has been active in various committees of the Los Angeles County Bar Association and the State Bar of California, often serving as committee chair. From 1980 to his appointment to the bench, Judge Honn was a member of the faculty of the Marshall School of Business at the University of Southern California, teaching both graduate and undergraduate courses. Recently, he taught Ethics at his alma mater, Loyola Law School. From 1992 to 1994, he was President of California Special Olympics. In November 2002, Judge Honn was appointed by the Supreme Court of California to the State Bar Court, to be one of five trial judges in the State handling attorney disciplinary matters. In 2014, the Supreme Court elevated him to the Review Department, the appellate court within the State Bar Court. In 2020, the Supreme Court appointed him Presiding Judge of the State Bar Court, a position that he currently holds. Judge Honn and his wife, Ann Snow, a professor at California State University, Los Angeles, have been married for over forty-eight years and have traveled extensively throughout the world for both business and pleasure. They lived in Hong Kong over a six-month period while Dr. Snow taught at Chinese University under a grant from the Fulbright Foundation. In addition, their travels have taken them to China, Japan, Singapore, Australia, New Zealand, the former Soviet Union, Hungary, the former Yugoslavia, Morocco, all of Western Europe, Scandinavia, Pakistan, India, Peru, Ecuador, Argentina, Chile, Brazil, Egypt, Mexico, and Iceland. In 2009, Dr. Snow and Judge Honn lived in Cyprus during an assignment on a second grant from the Fulbright Foundation. They have two daughters.

**Jordan D. Huck** is the Hearing Committee Counsel for the Louisiana Attorney Disciplinary Board. Mr. Huck provides legal counsel to the Board's Hearing Committees in adjudicative matters. He is also responsible for the training and development of the Hearing Committee members. Prior to working for the Disciplinary Board, Mr. Huck served as the law clerk for the Honorable Emile St. Pierre in the 29th Judicial District Court of Louisiana (St. Charles Parish). He is a graduate of Loyola University New Orleans College of Law. Mr. Huck is a former President of the National Council of Lawyer Disciplinary Boards.

**Tracey L. Kepler** is Risk Control Consulting Director for CNA's Lawyers Insurance Program where she designs/develops content and distribution of risk control initiatives relevant to the practice of law. Prior to her role at CNA, she served as the Director of the American Bar Association's Center for Professional Responsibility, providing leadership in developing and interpreting standards and scholarly resources in legal and judicial ethics, professional regulation, professionalism, client protection, professional liability, and attorney well-being. Ms. Kepler also has nearly twenty years of experience as a regulatory/disciplinary litigator with the United States Patent and Trademark Office and the Illinois Attorney Registration and Disciplinary Commission. She currently serves as an Adjunct Professor of Legal Ethics and Professional Responsibility at Georgetown University Law Center, American University – Washington College of Law, and Loyola School of Law Chicago.

**Judge Bryon M. Large** is Colorado's Presiding Disciplinary Judge. He earned his Juris Doctor degree from the University of Denver and his undergraduate degree from the University of New Mexico. Before the Colorado Supreme Court appointed him as PDJ, Judge Large served as a magistrate in Adams County, Colorado, primarily assigned to civil and domestic dockets. Judge Large's prior experience includes work as a trial attorney at the Office of Attorney Regulation Counsel, as well as nearly ten years in private practice as an immigration attorney.

**Marianne J. Lee** is the Executive Counsel and Director for the Attorney Grievance Commission of Maryland (AGC). Prior to her appointment in 2016, she served as Assistant Bar Counsel and Senior Assistant Bar Counsel for over fourteen years investigating and prosecuting hundreds of cases of attorney misconduct and has argued multiple disciplinary cases before the Supreme Court of Maryland. Before joining the AGC, Ms. Lee served as Litigation Counsel of the Illinois Attorney Registration & Disciplinary Commission in Chicago. Prior to that, she worked as a civil litigator in federal and state courts in Chicago, focusing on class action and consumer protection litigation and clerked for the chief judge of the Circuit Court for Baltimore City. Ms. Lee received both her B.A., *magna cum laude*, and J.D. from the University of Maryland. She served as President on the Board of Directors of the National Council of Lawyer Disciplinary Boards from 2020-2021.

**Gary Marchant**, Ph.D., J.D., M.P.P., is Regents' Professor and Faculty Director of the Center for Law, Science & Innovation at the Sandra Day O'Connor College of Law, Arizona State University (ASU). Professor Marchant's research interests include the governance of emerging technologies such as genomics, biotechnology, nanotechnology, artificial intelligence, neuroscience, quantum technology, and blockchain. Prior to joining ASU in 1999, Professor Marchant was a partner at the Washington, D.C., office of Kirkland & Ellis. During law school, he was Editor-in-Chief of the Harvard Journal of Law & Technology and editor of the Harvard Environmental Law Review and was awarded the Fay Diploma (awarded to top graduating student at Harvard Law School). He has authored more than two hundred articles, books, and book chapters on various issues relating to emerging technologies. He has served on seven National Academies of Science, Engineering, and Medicine (NASEM) consensus committees (chairing two) and has been elected as a lifetime member of the American Law Institute and a Fellow of the American Association for the Advancement of Science. He also chairs the IEEE Working Group (P2863) to create a governance standard for entities that develop or use artificial intelligence.

**Gretchen A. Mundorff** is a founding partner of Watson Mundorff, LLP and currently serves as the Vice-Chair of the Disciplinary Board of the Supreme Court of Pennsylvania. Ms. Mundorff is also a past Disciplinary Board Hearing Committee Member and served as President of the Pennsylvania Bar Association and Chair of the Pennsylvania Continuing Legal Education Board. A life fellow of both the American and Pennsylvania Bar Foundations, Ms. Mundorff served as a Director of the Pennsylvania Bar Institute and as a member of the American Bar Association House of Delegates. She has sat on the boards of directors of several local organizations devoted to community development, poverty alleviation, and the arts. Throughout her distinguished career, Ms. Mundorff has received many recognitions for her dedication to the legal profession and volunteer service. In addition to being named a Pennsylvania Super Lawyer for many consecutive years, she was named a Distinguished Citizen by the U. S. House of Representatives. She graduated *summa cum laude* with



a Bachelor of Arts degree in Psychology from Chatham College in Pittsburgh and earned her Juris Doctorate from the Marshall-Wythe School of Law at The College of William and Mary in Virginia.

**Tara McPhail** is the Chief Legal Officer at the Law Society of British Columbia. In this role, she is responsible for the Law Society's professional regulation programs, including Intake & Early Resolution, Investigations, Discipline, Monitoring and Enforcement, Unauthorized Practice, and Practice Standards. Ms. McPhail also oversees the Society's litigation management and the Alternative Processes and Administrative Penalties programs. She has a combined ten years of regulatory experience at the Law Society. She began her career as a management-side labor and employment lawyer with a national law firm before going in-house with a local police force. Ms. McPhail is a frequent volunteer and has past international and legal volunteer experience. She is the past President and current board member of a federal not-for-profit organization, and a past board member of the BC College of Dental Hygienists and the Canadian Women Voters Congress. Ms. McPhail is a frequent speaker on the Law Society's various activities and related legal topics. She obtained her Bachelor's of Civil and Common Law from McGill University, and her undergraduate degree from Queen's University.

**Judge Yvette D. Roland** was appointed to the California State Bar Court's Hearing Department in Los Angeles on August 25, 2014 by California Assembly Speaker Emeritus, Toni G. Atkins. On November 1, 2018, Judge Roland started her second term with the State Bar Court of California when she was appointed by Governor Edmund Brown, Jr. and sworn in by California Supreme Court Chief Justice Tani Cantil-Sakauye. Before joining the bench, she was a partner at Duane Morris LLP and Hancock, Rothert and Bunshoft LLP, practicing in the areas of complex civil and commercial litigation, insurance coverage, and employment law. While practicing law, she served as lead trial counsel on an array of cases including copyright infringement, trademark infringement, defamation, employment, environmental coverage, and products liability. Judge Roland has served on various boards, including the National Council of Lawyer Disciplinary Boards (NCLDB, 2022-present), Black Women Lawyers Association of Los Angeles, Inc. (President 2008-2009), the California Association of Black Lawyers (Chair-Legislative Day Committee, Co-chair of the Judicial Evaluations Committee), Southern California Education Fund (Chair), ONE LA, and the Black Women Lawyers Association of Los Angeles Foundation (Treasurer). Her extensive pro bono and community service activities have included presenting at and conducting workshops on legal ethics, foreclosure prevention, sentence reduction clinics, the Affordable Care Act, and healthcare enrollment programs. Judge Roland is a graduate of the University of California, Los Angeles, School of Law. After graduating from law school, she clerked for Hon. Terry J. Hatter, Jr. in the United States District Court, Central District of California. Judge Roland currently serves on the Board of Directors of the National Council of Lawyer Disciplinary Boards.

**Marcee D. Sloan** is the Prothonotary of the Disciplinary Board of the Supreme Court of Pennsylvania. She has more than thirty years of case management experience. Before joining the Disciplinary Board in 2006, Ms. Sloan worked as a legal clerk for Magisterial District 12-02-01 in Dauphin County. She graduated from Harrisburg Area Community College with an associate degree in criminal justice. Ms. Sloan currently serves as Secretary of the Board of Directors of the National Council of Lawyer Disciplinary Boards.

**Teri A. Stoltenburg** is the Systems Support Specialist with the Disciplinary Board of the Supreme Court of Pennsylvania. In her nineteen years with the board, she worked in various departments, including Attorney Registration and the Office of Chief Disciplinary Counsel. With her experience and accumulated knowledge of the processes and systems used by each department, she was instrumental in the development of projects to transform and modernize the Board's Case Management Systems, the recovery of attorney fees resulting from the discipline or reinstatement process, and the redesign of the Board's website. Ms. Stoltenburg was also a key resource in implementing the virtual return to hearings three short months into the COVID-19 lockdown.

**Jeffrey D. Woolf** is an Assistant General Counsel to the Massachusetts Board of Bar Overseers, and from 2006-2012, he was an Assistant Bar Counsel at the Office of the Bar Counsel. Before that, he spent many years in private practice where he concentrated in personal injury, products liability, medical malpractice, toxic torts, and corporate litigation. He is a member of the Massachusetts and District of Columbia bars and is active in numerous bar associations. From 2012-2016, he was an adjunct professor at Boston University Law School. He is currently an adjunct professor at New England School of Law. He also previously taught at Northeastern University. He has taught numerous continuing legal education programs in legal ethics, civil litigation, discovery, and related topics. He is the author of numerous articles, seminar materials, and book chapters. Mr. Woolf has also served as a mediator for the federal court mediation program, as a conciliator for the Boston Bar Association's volunteer project. From 2000-2006, he was a hearing officer for the Board of Bar Overseers. From 1995-2000, he was a special assistant attorney general, representing the Commonwealth of Massachusetts in tobacco litigation (*Commonwealth v. Philip Morris*). He received his undergraduate degree from Yale University, where he was on the Dean's List, and received his M.A. and law degree from Boston University. Mr. Woolf is a past president of National Council of Lawyer Disciplinary Boards.

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