


ALSO INSIDE: Taxation Law Section Note • Law Day 2021  
Access to Justice Summit • Use of a Revocable Living Trust

# THE OKLAHOMA BAR Journal

Volume 92 — No. 7 — September 2021



**OKLAHOMA BAR ASSOCIATION**  
**2021 ANNUAL MEETING**  
**EVERY LAWYER**  
**NOVEMBER 10-12 | OKLAHOMA CITY**



FRIDAY,  
OCTOBER 1, 2021  
9 A.M. - 3:50 P.M.

Embassy Suites by Hilton  
3233 Northwest Expressway  
Oklahoma City, OK 73112

MCLE 6/2



Mona Salyer Lambird  
Spotlight Awards Luncheon  
Keynote Speaker:

**Kelli M. Masters,**  
Founder, CEO, & Chief Player Agent,  
KMM Sports

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# 2021 WOMEN IN LAW CONFERENCE

## CLE PROGRAM AND AWARDS LUNCHEON

Bevan Stockdell and Shannon Panach, *Women in Law Committee Co-Chairs*  
Melissa East, *Vice-Chair*

### PROGRAM AGENDA:

9:00 a.m.

#### Judicial Leadership: A Panel of Female State Court Judges

Moderator: The Honorable Barbara Swinton, Chief Judge, Oklahoma Court of Civil Appeals  
The Honorable Noma Gurich, Justice, Supreme Court of Oklahoma  
The Honorable Dana Kuehn, Justice, Supreme Court of Oklahoma  
The Honorable Jane Wiseman, Judge, Oklahoma Court of Civil Appeals  
The Honorable Sheila Stinson, District Court Judge, Oklahoma County

10:00 a.m.

#### Missing and Murdered Indigenous Women/People

Brenda S. Golden, Golden Legal Services, Okmulgee

10:50 a.m.

#### You're Allowed to be More than a Lawyer: Navigating Life and a Career

Paula Williams, GableGotwals, Oklahoma City

11:45 p.m.

#### Mona Salyer Lambird Spotlight Awards Luncheon

Keynote Address: *Pushover to Pioneer*

Kelli M. Masters, Founder, CEO, & Chief Player Agent, KMM Sports

1:10 p.m.

#### Civility in the Courtroom (Ethics)

Chief Judge Janice Loyd, U.S. Bankruptcy Court, Western District of Oklahoma  
Judge Sarah Hall, U.S. Bankruptcy Court, Western District of Oklahoma  
Magistrate Judge Suzanne Mitchell, U.S. District Court, Western District of Oklahoma

2:10 p.m.

#### Agent for Change: The Power of Diversity in Leadership

Kelli M. Masters, Founder, CEO, & Chief Player Agent, KMM Sport

3:00 p.m.

#### The Right to Bare Arms: What Your Style Says About You (Ethics)

Katherine Mazaheri and Mary Rahimi, Mazaheri Law Firm, Oklahoma City

3:50 p.m.

Adjourn

4:00 - 5:30 p.m.

Closing Reception

*\*For public health, location and delivery type may be subject to change.*

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# The G. William Rice Memorial Scholarship

Sponsored by the Oklahoma Bar Association  
Indian Law Section

**THREE** \$2,000.00 scholarships will be awarded to deserving 2<sup>nd</sup> or 3<sup>rd</sup> year law school students who intend to practice Indian Law in Oklahoma.

Applications must include:

1. Cover Letter describing commitment to practice Indian Law in Oklahoma;
2. Resume describing Indian Law related activities;
3. Law school transcript; and
4. Academic or professional reference letter of support for your application.

G. William "Bill" Rice was an attorney, University of Tulsa Law School professor, widely hailed expert on American Indian legal matters, and beloved mentor, colleague, and friend to many. A citizen of the United Keetoowah Band of Cherokee Indians, Bill dedicated his life to furthering the rights of Indigenous peoples worldwide. This scholarship is granted in his name and is intended to help law students with the costs of the bar exam.

Submit applications to:

Debra Gee  
PO Box 1548  
Ada, Oklahoma 74821

Or by email to:  
[debra.gee@chickasaw.net](mailto:debra.gee@chickasaw.net)

**Application Period: September 6 – October 31, 2021**

Awards will be announced in November during the  
OBA Annual Meeting- Indian Law Section



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Editor: Lori Rasmussen

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# Every Lawyer Can Enjoy Camaraderie During Annual Meeting

By Mike Mordy

**I**N MAY, I ATTENDED THE SEMINOLE COUNTY Law Day festivities in Wewoka and it was fabulous. Judge Deborah Barnes of the Court of Civil Appeals spoke in the morning, and OBA Executive Director John Morris Williams gave a short presentation after the luncheon. The luncheon was on the front lawn of the courthouse, which started with the Pledge of Allegiance to our flag followed by all of us singing “God Bless America.” However, I thought the best part of the celebration was the camaraderie shared amongst the members of the Seminole County Bar Association and the other attorneys who were present.

I have previously handled cases in Seminole County and have always noticed the camaraderie amongst the local lawyers. I believe camaraderie is an important aspect

of life – especially in our vocation. It is the spirit of friendly good-fellowship shared amongst each other. I have noted this camaraderie to be exhibited in other counties, especially when I have appeared at motion dockets.

I ran in marathons at one time in my life and always enjoyed the great camaraderie amongst the runners and the bystanders. The camaraderie was exhibited by the encouraging bystanders standing in bad weather, cheering on the runners. The marathons were competitive; however, there was always a mutual desire amongst the runners to enjoy themselves, or at least attempt to enjoy themselves, which is similar to those in the legal profession.

There was probably more camaraderie amongst us as attorneys when we were first out of law school, because we were less sure of what we were doing. We still had a survival instinct from law school, which left us more tribal. We were more inclined to share court-

room disasters and ask each other practical questions. We become more self-reliant as we progress in our individual pursuits; however, we as attorneys evolve better from camaraderie because we can borrow from each other and expand upon ideas. Camaraderie also promotes civility and professionalism.

---

We will have flexible attendance options to best protect the health of our members ...

We lost some camaraderie amongst ourselves during the pandemic because of court closures, restrictions and isolation. Solo practitioners may have suffered even more due to the lack of fellow attorneys in their office. However, we can build back our camaraderie. This is important because it helps us perform better through greater energy and enthusiasm.

The annual mid-year Solo and Small Firm Conference has helped instill and promote camaraderie amongst bar members, but it has been canceled for the last two years due to COVID-19. The Annual Meeting, however, is scheduled for the second week of November. While we will have flexible attendance options to best protect the health of our members, I hope if you are healthy and able, you will join us in person to once again enjoy the camaraderie of your fellow legal practitioners.



A handwritten signature in dark ink, appearing to read "Mike Mordy".

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in Ardmore.  
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# THE OKLAHOMA BAR Journal

Volume 92 — No. 7 — September 2021

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# EVENTS & HIGHLIGHTS

## What Every Lawyer Needs to Know About Living and Practicing in Indian Country (6-Hour CLE) | Wednesday Morning & Afternoon

The *McGirt v. Oklahoma* case related to tribal sovereignty is generating numerous questions for lawyers across a broad spectrum of practice areas. This program features a slate of experts who will cover several topics, including Indian law basics, tribal jurisdictions, related tax issues, state and tribal compacts, ownership and property rights in Indian country and tips for practicing in tribal courts. Attend online or in-person. Sponsored by OAMIC.

## President's Reception | Wednesday Evening

Join President Mike Mordy on Wednesday evening to network and socialize with colleagues from across the state at the President's Reception. The event is free with Annual Meeting registration, and complimentary heavy hors d'oeuvres and drink tickets will be provided. Sponsored by OAMIC.

## Speed Round: Hot Topics for Every Lawyer (3-Hour CLE) | Thursday Morning

Our Thursday morning plenary session will feature quick yet informative discussions on a variety of legal topics including immigration and criminal law, guardianship and power of attorney, issues in state and federal courts, and hot topics in the Oklahoma Legislature. Attend online or in-person. The cost of this program is included with your Annual Meeting registration fee.

## Annual Luncheon | Thursday at Noon

Keynote speaker Judge Robert Bacharach, U.S. Court of Appeals for the 10th Circuit, will speak during the Annual Luncheon on Thursday at noon as part of the OBA Annual Meeting. OBA award winners will also be honored at this event. Sponsored by the OBA Family Law Section.

All events will be held Nov. 10-12 at the Sheraton Oklahoma City Downtown Hotel unless otherwise specified.

## Wellness Matters: Lawyers Helping Lawyers CLE Program | Thursday Afternoon

Lawyers who take care of their own physical and emotional needs are best equipped to take care of their clients. The focus will be wellness, mental health and substance abuse during this afternoon session. Every lawyer who attends will discover best practices for self-care while earning three hours of Ethics MCLE credit. The cost of this program is included with your Annual Meeting registration fee. Attend online or in-person. Sponsored by the OBA Lawyers Helping Lawyers Assistance Program.

## Diversity Awards Dinner | Thursday Evening

OBA Diversity Awards are presented to Oklahoma businesses, groups or organizations promoting or developing diversity initiatives that advance justice, fairness and inclusivity. Awards are also presented to Oklahoma lawyers and members of the judiciary. Join us during this Thursday evening banquet to celebrate as the 2021 winners are announced and hear from Oklahoma lawyer and author Hannibal B. Johnson who will speak about the Tulsa Race Massacre. Sponsored by LawPay.

## Delegates Breakfast | Friday Morning

Kick off the last day of the Annual Meeting with a generous breakfast and a presentation by Oklahoma lawyer Jim Priest, CEO of Goodwill Industries of Central Oklahoma. The breakfast will be a ticketed event, free for delegates or only \$30 for nondelegates.

## General Assembly and House of Delegates | Friday Morning

The most important association business of the year takes place Friday morning – OBA award presentations, updates from judicial and OBA leaders, elections and consideration of resolutions. For resolutions to be published in the official General Assembly and House of Delegates publication, proposed resolutions in bill format must be submitted to Executive Director John Morris Williams by **Oct. 1**. The deadline to publish proposed resolutions in the November *Oklahoma Bar Journal* is **Oct. 14**.

Submit meeting room and hospitality suite requests to Craig Combs, [craigc@okbar.org](mailto:craigc@okbar.org), by Sept. 30 for inclusion in the official Annual Meeting program.



# ANNUAL LUNCHEON

## Luncheon Speaker to Focus on Effective Writing for Every Lawyer

**AS WE CELEBRATE EVERY** Lawyer during the OBA Annual Meeting, keynote speaker Judge Robert Bacharach, U.S. Court of Appeals for the 10th Circuit, will share tips every lawyer can use for effective legal writing and communication. Judge Bacharach will present his remarks during the Annual Luncheon on Thursday, Nov. 11 at noon.

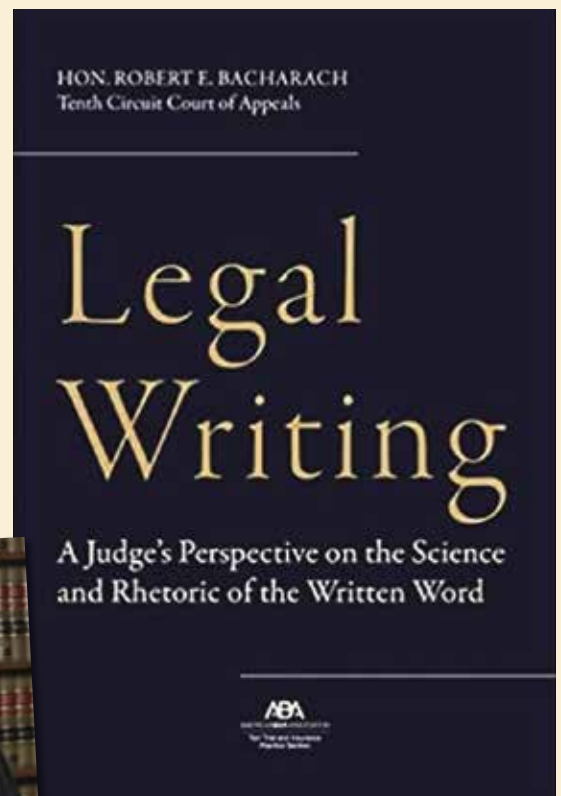
Judge Bacharach recently authored the book *Legal Writing: A Judge's Perspective on the Science and Rhetoric of the Written Word*. In the book, he discusses how effective legal writing serves primarily to explain and persuade, and why considering the intended audience should be an important part of the writing process. In the book, he dives into the science of psycholinguistics, the study of the relationships between the ways we speak and psychological processes. He draws upon the examples of several well-known rhetoricians in helping his readers understand the value of clear and concise communication.

Judge Bacharach will discuss the book during the luncheon while highlighting specific methods lawyers can use to improve their writing output.

Judge Bacharach was confirmed as a judge for the 10th Circuit in 2013. Prior to that he served for 14 years as a magistrate judge on the U.S. District Court for the Western District of Oklahoma. He earned his J.D. at Washington University School of Law in 1985. He was the recipient of the 2020 OBA Award of Judicial Excellence.

This year's OBA award winners will also be honored during the Annual

Luncheon, which is sponsored by the OBA Family Law Section. Annual Meeting registrants may purchase a luncheon ticket for \$40, or a luncheon-only ticket is \$50. Luncheon tickets are refundable until Nov. 4.







WEDNESDAY - FRIDAY,  
NOVEMBER 10-12, 2021

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**WEDNESDAY, NOVEMBER 10, 9 a.m. - 4:50 p.m.**

## **What Every Lawyer Needs to Know About Living and Practicing in Indian Country**

The *McGirt v. Oklahoma* case related to tribal sovereignty is generating numerous questions for lawyers across a broad spectrum of practice areas. This program features a slate of experts who will cover several topics, including Indian law basics, tribal jurisdictions, related tax issues, state and tribal compacts, ownership and property rights in Indian country and tips for practicing in tribal courts.

**Sponsored by OAMIC.**

### **MCLE 6/1**

#### **The Basics of Indian Law**

Greg Buzzard, Crowe & Dunlevy

#### **Tribal Courts and Jurisdiction from the Tribal Point of View**

Sara Hill, Attorney General, Cherokee Nation

#### **McGirt and Tax Issues**

Mike McBride, Crowe & Dunlevy

#### **State and Tribal Compacts**

Mithun Mansinghani, Solicitor General, State of Oklahoma

#### **Title, Ownership, and Property Rights in Indian Country**

Conor Cleary, Senior Indian Law Attorney, U.S. Department of the Interior

#### **Tribal Courts: Tips for Best Practices (Ethics)**

Stacy Leeds, Foundation Professor of Law & Leadership, Arizona State University;  
Dean Emeritus, University of Arkansas School of Law; Judge, Muscogee (Creek) Nation District Court

**THURSDAY, NOVEMBER 11, 9 - 11:50 a.m.**

## **Speed Round: Hot Topics for Every Lawyer**

Our Thursday morning plenary session will feature quick yet informative discussions on a variety of legal topics including immigration and criminal law, guardianship and power of attorney, issues in state and federal courts, and hot topics in the Oklahoma Legislature.

**The cost of this program is included with your Annual Meeting registration fee.**

### **MCLE 3/0**

#### **PLENARY:**

**Immigration Law:** T. Douglas Stump, American Immigration Lawyers Associations

**Criminal Law:** Ed Blau, Blau Law Firm, PLLC

**United States Supreme Court:** Kieran D. Maye, Founding Partner, Maye Law Firm

**Oklahoma Supreme Court and Court of Civil Appeals:** Jana L. Knott, Bass Law

**Guardianship and Durable Power of Attorney:** Shannon D. Taylor, Attorney

**Oklahoma Legislature:** Senator Kay Floyd (Dist. 46) and Senator Brent Howard (Dist. 38)

**THURSDAY, NOVEMBER 11, 2 - 5 p.m.**

## **Wellness Matters: Lawyers Helping Lawyers**

Lawyers who take care of their own physical and emotional needs are best equipped to take care of their clients. The focus will be wellness, mental health and substance abuse during this afternoon session. Every lawyer who attends will discover best practices for self-care while earning three hours of Ethics MCLE credit.

**The cost of this program is included with your Annual Meeting registration fee.**

**Sponsored by the OBA Lawyers Helping Lawyers Assistance Program.**

### **MCLE 3/3**

#### **Understanding Addiction**

The Honorable Kenneth M. Stoner, District Judge, Oklahoma County

#### **Substance Abuse in the Legal Profession**

Rhiannon Baker, Partner, Holden Litigation, Tulsa

#### **Perception, Pills and Practicing**

Scott Bearskin Goode, Co-Owner/Managing Partner, Military Law Group, PLLC, Tulsa



# DIVERSITY AWARDS DINNER

## THE OBA DIVERSITY

Committee is set to host its 2021 Diversity Awards Dinner and Ceremony. During the event, individuals and organizations will be honored with Ada Lois Sipuel Fisher Diversity Awards in recognition of their efforts in promoting diversity and inclusion in Oklahoma. The event will also feature a presentation by Hannibal B. Johnson, who will speak about the Tulsa Race Massacre.

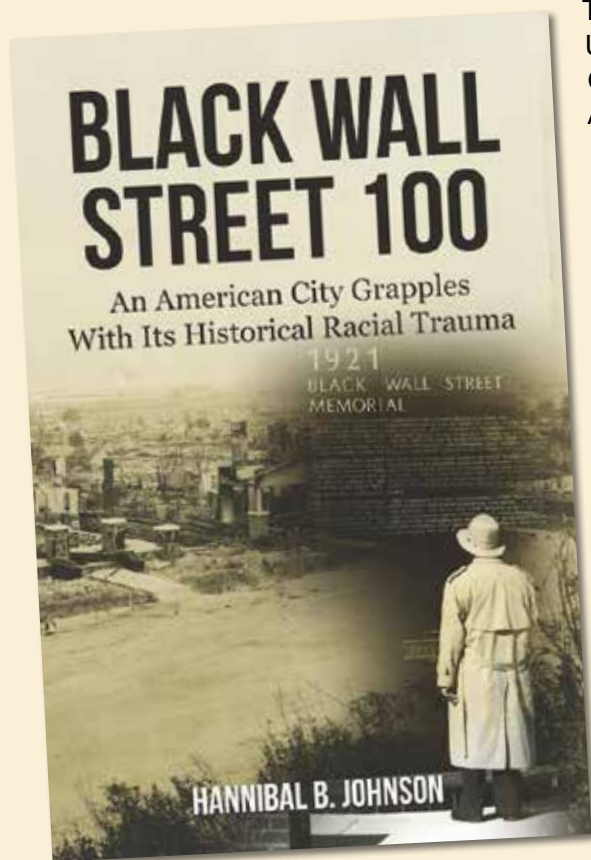
Mr. Johnson, a graduate of Harvard Law School, is an attorney, author and independent consultant specializing in diversity, inclusion and cultural competence issues and nonprofit governance. He is a member of the federal 400 Years of African American History Commission and the Oklahoma Advisory Committee for the United States Commission on Civil Rights. He served as past president of Leadership Tulsa, the Metropolitan Tulsa Urban League, the Northeast Oklahoma Black Lawyers Association and chairs the Education Committee for the 1921 Tulsa Race Massacre Centennial Commission.

His books, including the most recent, *Black Wall Street 100: An American City Grapples with its Historical Racial Trauma*, chronicle the Black experience in Oklahoma and its unforgettable impact on American history. Mr. Johnson's play, *Big Mama Speaks – A Tulsa Race Riot Survivor's Story*, was selected for the 2011 National Black Theatre Festival and was performed during the Just Governance for Human Security Conference in Caux, Switzerland.



Hannibal B. Johnson

The Diversity Awards Dinner and Ceremony, which is sponsored by LawPay, is set for Thursday, Nov. 11, at 7 p.m. Meeting registrants may purchase a ticket for \$40 or a dinner and ceremony-only ticket for \$50. Tickets are refundable until Nov. 4. Before the dinner and ceremony, every lawyer is invited to the Oklahoma Bar Foundation reception to be held adjacent to the dinner location. It begins at 5:30 p.m. and is free for Annual Meeting attendees.





# HOUSE OF DELEGATES

## Dear County Bar Presidents:

Thank you to the county bar presidents of:

Beaver, Blaine, Caddo, Cherokee, Choctaw, Cimarron, \*Cleveland, Custer, Ellis, Grady, Grant, Kay, Mayes, McIntosh, Oklahoma, \*Tulsa, Washington and Washita counties for submitting your delegate and alternate selections for the upcoming OBA Annual Meeting. (\*Reported, awaiting election)

Listed below are the counties that have not sent their delegate and alternate selections to the offices of the OBA as of Aug. 23, 2021. Please help us by sending the names of your delegates and alternates now. *In order to have your delegates/alternates certified, email, mail or fax delegate certifications to OBA Executive Director John Morris Williams, c/o Debbie Brink, P. O. Box 53036, Oklahoma City, OK 73152-3036, fax: 405-416-7001, or email to [debbieb@okbar.org](mailto:debbieb@okbar.org).*

Adair	Garvin	Major	Pottawatomie
Alfalfa	Greer	Marshall	Pushmataha
Atoka	Harmon	McClain	Roger Mills
Beckham	Harper	McCurtain	Rogers
Bryan	Haskell	Murray	Seminole
Canadian	Hughes	Muskogee	Sequoyah
Carter	Jackson	Noble	Stephens
*Cleveland	Jefferson	Nowata	Texas
Coal	Johnston	Okfuskee	Tillman
Comanche	Kingfisher	Okmulgee	*Tulsa
Cotton	Kiowa	Osage	Wagoner
Craig	Latimer	Ottawa	Woods
Creek	LeFlore	Pawnee	Woodward
Delaware	Lincoln	Payne	
Dewey	Logan	Pittsburg	
Garfield	Love	Pontotoc	

In accordance with the bylaws of the OBA (5 OS, Ch. 1, App. 2), "The House of Delegates shall be composed of one delegate or alternate from each County of the State, who shall be an active or senior member of the Bar of such County, as certified by the Executive Director at the opening of the annual meeting; providing that each County where the active or senior resident members of the Bar exceed fifty shall be entitled to one additional delegate or alternate for each additional fifty active or senior members or major fraction thereof. In the absence of the elected delegate(s), the alternate(s) shall be certified to vote in the stead of the delegate. In no event shall any County elect more than thirty (30) members to the House of Delegates."

"A member shall be deemed to be a resident, ... of the County in which is located his or her mailing address for the Journal of the Association."





# 2022 OBA BOARD OF GOVERNORS VACANCIES

## Nominating Petition Deadline: 5 p.m. Friday, Sept. 10, 2021

*One representative is elected from each of the nine Supreme Court judicial districts, as such districts existed prior to Jan. 1, 2020, pursuant to Order No. SCBD 4483 (2020 OK 17).*

### OFFICERS

#### President-Elect

Current: James R. Hicks, Tulsa  
Mr. Hicks automatically becomes  
OBA president Jan. 1, 2022  
(One-year term: 2022)  
Nominee: **Brian T. Hermanson,**  
**Ponca City**

#### Vice President

Current: Charles E. Geister III,  
Oklahoma City  
(One-year term: 2022)  
Nominee: **Miles T. Pringle,**  
**Oklahoma City**

### BOARD OF GOVERNORS

#### Supreme Court Judicial District Three

Current: David T. McKenzie,  
Oklahoma City  
Oklahoma County  
(Three-year term: 2022-2024)  
Nominee: **Vacant**

#### Supreme Court Judicial District Four

Current: Tim E. DeClerck, Enid  
Alfalfa, Beaver, Beckham, Blaine,  
Cimarron, Custer, Dewey, Ellis,  
Garfield, Harper, Kingfisher, Major,  
Roger Mills, Texas, Washita,  
Woods, Woodward counties  
(Three-year term: 2022-2024)  
Nominee: **Vacant**

#### Supreme Court Judicial District Five

Current: Andrew E. Hutter, Norman  
Carter, Cleveland, Garvin, Grady,  
Jefferson, Love, McClain, Murray,  
Stephens counties  
(Three-year term: 2022-2024)  
Nominee: **Vacant**

#### Member At-Large

Current: Miles T. Pringle,  
Oklahoma City  
Statewide  
(Three-year term: 2022-2024)  
Nominee: **Vacant**

### SUMMARY OF NOMINATIONS RULES

Not less than 60 days prior to the annual meeting, 25 or more voting members of the OBA within the Supreme Court Judicial District from which the member of the Board of Governors is to be elected that year, shall file with the executive director, a signed petition (which may be in parts) nominating a candidate for the **office of member of the Board of Governors** for and from such judicial district, or one or more county bar associations within the judicial district may file a nominating resolution nominating such a candidate.

Not less than 60 days prior to the annual meeting, 50 or more voting members of the OBA from any or all judicial districts shall file with the executive director a signed petition nominating a candidate to the **office of member at-large** on the Board of Governors, or three or more county bars may file appropriate resolutions nominating a candidate for this office.

Not less than 60 days before the opening of the annual meeting, 50 or more voting members of

the association may file with the executive director a signed petition nominating a candidate for the **office of president-elect or vice president**, or three or more county bar associations may file appropriate resolutions nominating a candidate for the office.

If no one has filed for one of the vacancies, nominations to any of the above offices shall be received from the House of Delegates on a petition signed by not less than 30 delegates certified to and in attendance at the session at which the election is held.

See Article II and Article III of OBA Bylaws for complete information regarding offices, positions, nominations and election procedure.

Elections for contested positions will be held at the House of Delegates meeting Nov. 12, during the Nov. 10-12 OBA Annual Meeting. Terms of the present OBA officers and governors will terminate Dec. 31, 2021.

Nomination and resolution forms can be found at [www.okbar.org/governance/bog/vacancies](http://www.okbar.org/governance/bog/vacancies).

## OKLAHOMA BAR ASSOCIATION NOMINATING PETITIONS

(See Article II and Article III of the OBA Bylaws)

### OFFICERS

#### President-Elect

##### Brian T. Hermanson, Ponca City

Nominating Petitions have been filed nominating Brian T. Hermanson, Ponca City for President Elect of the Oklahoma Bar Association Board of Governors for a one-year term beginning Jan. 1, 2022.

**A total of 492 signatures appear on the petitions.**

#### Vice President

##### Miles T. Pringle, Oklahoma City

Nominating Petitions have been filed nominating Miles T. Pringle, Nichols Hills for Vice President of the Oklahoma Bar Association Board of Governors for a one-year term beginning Jan. 1, 2022.

**A total of 88 signatures appear on the petitions.**



# REGISTRATION

Join your colleagues Nov. 10-12 for great CLE, camaraderie, networking and fun in a safe and convenient way. The 2021 OBA Annual Meeting brings together great guest speakers and events with **flexible in-person or virtual attendance options**. Your Annual Meeting registration includes:

- Wednesday evening President's Reception
- Thursday's "Hot Topics for Every Lawyer" plenary session (3-hour CLE credit)
- Thursday's "Wellness Matters" Lawyers Helping Lawyers program (3-hours Ethics CLE credit)
- Discounted Annual Luncheon tickets

## HOW TO REGISTER



### Online

Register online at [www.okbar.org/AnnualMeeting](http://www.okbar.org/AnnualMeeting).



### Mail

Download registration form at [www.okbar.org/AnnualMeeting](http://www.okbar.org/AnnualMeeting) and mail to OBA Annual Meeting  
P.O. Box 53036  
OKC, OK 73152



### Phone

Need help with registration? Call Mark Schneidewent at 405-416-7026 or 800-522-8065 or email [marks@okbar.org](mailto:marks@okbar.org) with any questions or concerns.



### Fax/Email

Download registration form at [www.okbar.org/AnnualMeeting](http://www.okbar.org/AnnualMeeting) and email to [marks@okbar.org](mailto:marks@okbar.org) or fax to 405-416-7092.

## DETAILS

### Location

Most activities will take place at the Sheraton Oklahoma City Downtown Hotel, One N. Broadway Ave. in Oklahoma City.

### Parking

Parking is available in several lots and garages at or near Annual Meeting activities.

### Hotel

Fees do not include hotel accommodations, which must be booked separately. To reserve a room by phone, call the Sheraton at (405) 235-2780 and provide Group Code UU2 to the reservation agent, or visit [www.tinyurl.com/OBA2021AM](http://www.tinyurl.com/OBA2021AM). The deadline to reserve a room under the room block is Oct. 26.

### Cancellation Policy

Full refunds will be given through Nov. 4. Partial refunds for in-person events will also be available.

### Special Needs and Requests

Please notify the OBA at least one week in advance if you have a special need and require accommodation.





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**FAMILY LAW SECTION**

**THURSDAY,  
SEPTEMBER 30, 2021**  
9 A.M. - 3:20 P.M.

**FRIDAY,  
OCTOBER 1, 2021**  
9 A.M. - 3:45 P.M.

**WORKSHOP LEADERS:**

Chad Kelliher,  
Andrea Rust, Jacob Rowe  
and Matt Wade



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**THURSDAY PROGRAM:**

**MOTOR VEHICLE ACCIDENTS: A BACK-TO-BASICS COURSE**

**MCLE 6/1**

**Learning Objectives:**

- Sample contract
- Sample intake questionnaire
- Letter of representation
- Spoliation letter
- Medical auth; HITECH auth; Medicare forms; Health insurance subrogation requests
- Provider list
- Sample demands
- Reduction requests



**FRIDAY PROGRAM:**

**ADVANCED LITIGATION WITH MOTOR VEHICLE ACCIDENT CASES: SO YOU DIDN'T SETTLE, NOW WHAT?**

**MCLE 6/1**

**Learning Objectives:**

- Experts
- Pre-existing conditions
- UIM/UM
- Bad faith
- Ethics

*\*For public health, location and delivery type may be subject to change.*



The background of the top half of the image is a close-up, slightly blurred view of the stars and stripes of the United States flag. The stars are a light blue/white color against a dark blue field, and the stripes are a mix of white and light blue. A white rectangular border with a thick line frames the text.

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# Use of a Revocable Living Trust as a Preferable Alternative to Probate

## General Observations and Pitfalls to Avoid, Part 2<sup>1</sup>

By Maria Tully Erbar and Andra Erbar Peterson

**P**REVIOUSLY, OUR SURVEY of the uses and attendant possible pitfalls of a trust-centered estate plan has focused on issues relating generally to hypothetical “happily ever after” marital unions and resulting family units. But what happens when the happiness ceases to exist forever, and the family unit becomes dysfunctional? What issues are presented when the management of and forward planning for the marital estate that began on a jointly agreed, harmonious track is no longer joint and harmonious, and the marital union is dissolving? Are there any drafting precautions that – if made before the happy union goes southward – could help steer the preexisting, trust-based estate plan through such turbulent waters?

Yes. The first observation is that an antenuptial agreement may be helpful in such a situation. Note, in *Dean v. Jelsma*,<sup>2</sup> the Supreme Court determined a prenuptial agreement that bestowed third-party beneficiary rights on a child of a former marriage could not be abrogated by a subsequent non-conforming will. Although

it is unclear whether this same rationale would apply to a trust-centered estate plan followed by marital dissolution, such a result seems arguably reasonable. This is especially true considering the close relationship between judicial rulings with similar facts based in different contexts of wills and trusts.<sup>3</sup> Absent a successful prenup, division of the marital estate and status of the family trust will be adjudicated in the divorce court. There, the various applicable statutes<sup>4</sup> appear to be quite straightforward, especially in light of the statutory admonition to “make such division between the parties as may appear just and reasonable.”<sup>5</sup> This division is to apply to the marital estate – something that is sometimes referred to as that estate that is “acquired by joint industry during coverture.” Courts have struggled to define exactly what is meant by the phrase “acquired by joint industry during coverture.” If a spouse gifts the other spouse property previously owned by the gifting spouse prior to marriage, is that property transmuted into property acquired by

joint industry during coverture? Does acquisition of property by gift from one spouse to the other then become the separate property of the receiving spouse – or is it property acquired by joint industry?

### PRESUMPTION OF A GIFT

Complications occur in probate proceedings when a spouse dies having transferred their separately acquired property to the other spouse in joint tenancy, raising a presumption of an intramarital gift of the asset into the marital estate.<sup>6</sup> Thus, there has arisen from probate the “presumption of a gift” doctrine, which can only be rebutted by clear and convincing evidence.<sup>7</sup>

With that as the probate background, in divorce actions, the interplay of marital estate and contrary contractual trust provisions has a winding and convoluted history. In a case involving the transfer of the husband’s house and other properties into joint tenancy with the subsequent conveyance of an undivided one-half of said properties into the wife’s separate trust, it was held that the properties became marital when the joint tenancy transfers were





made. The case was remanded for a determination whether the properties became separate property upon the conveyances of one-half interests into the trust.<sup>8</sup> In the case of *Courts v. Aldridge*,<sup>9</sup> where a husband deeded farming property to his daughter but during his lifetime kept complete control of it and acted as if he still owned it, the transfer was deemed to create a resulting trust. A married man cannot make gifts of jointly acquired property during his lifetime without the consent or knowledge of his wife where the transfer is in fraud of the wife's marital rights.

In a non-divorce proceeding, the wife's allegation that her husband's various gifts to other defendants during the marriage (in a sum exceeding \$8 million) stated a

claim for relief.<sup>10</sup> *Sanditen v. Sanditen* changed the 50-year reign of *York v. Trigg*,<sup>11</sup> wherein the court had previously determined a husband was not restricted from transferring non-homestead property to a trust *inter vivos* in the absence of a statute proscribing same. Twelve years after *Sanditen*, *Thomas v. Bank of Oklahoma*<sup>12</sup> expanded the spousal election such that it controlled over opposing trust provisions (as a sidebar, reading these three cases in chronological succession provides a brief survey of evolving 20th-century attitudes about the role and rights of married women). Thereafter, the cases depend on the attitudes and analyses of the reviewing courts on a case-by-case basis. One thing certainly that can

be gleaned from these cases is the contractual arrangements and apparent intentions of the parties hold significant sway in determining the rulings that result.

Title 60 O.S. §175A states that provisions in an express trust in favor of a spouse are revoked in the event of subsequent divorce. This statute and the indefiniteness and complexity of property division within a divorce case could spell disaster for the family trust, but there is a way to avoid this result by careful drafting of the original trust provisions. This course would be to clearly spell out what the parties intend to be applied to their trust – contractually and to state initially with clarity and specificity exactly what status and condition the parties intend

to be applicable to their trust. The settlors must be specific about the status of property transferred to it so the contractual terms of the interim and ultimate disposition of their estate leave little room to litigate the issues. When such clear and definite provisions are employed, there is a safe harbor that exists within the statute at Subsection (B)(5) thereof that excludes the application of the automatic revocation in cases where, and to the extent that, “The trust contains a provision expressing an intention contrary to [automatic revocation] ...” If your clients are aware of the possible havoc a future divorce could inflict upon the administration and distribution of their trust and estate plan intentions, they may wish to bind themselves in the future to a distribution plan presently delineated and in such event the trust instrument should specifically bar application of the automatic revocation rules in Section 175(A).

## RIGHTS OF OTHER HEIRS

Having addressed instances of post-funding divorces, we should look at how the “rights” of other heirs may come into conflict with trust terms as set out by its settlors. Most of us have probably been guilty of applying “forced heir” nomenclature to cases of pretermitted heirs in probate matters involving such situations. But as our courts have pointed out in *Estate of James*, “Oklahoma’s pretermitted heir statute ... is not a limitation on a testator’s power to dispose of his or her property ... [but] is an assurance that a child is not unintentionally omitted from a will.”<sup>13</sup> *James* also distinguishes pretermitted rights as to wills from other vehicles whereby a beneficiary receives her “bequest,” such as insurance policies, certain

bank accounts and trusts. As to all the others, this case clearly indicates no pretermitted heir savings clause applies to trusts. There is an interesting proposition to be found in *James* that bears on the different applications and interpretations of trust provisions from will provisions: “Disposing of property is an inalienable natural right throughout a person’s lifetime. However, the method of disposition of property after death and the right of inheritance are statutory.” The clear result of this language is the drafter of a trust-centered estate plan should reflect her clients’ wishes as to all heirs and, as a precautionary measure, make suitable mention (in the words of the statute) of “any omitted children or for the issue of any deceased child.” Because of the clear language of the statute (note the limiting language of “given by the will”), our



courts have explicitly and consistently denied claims of alleged pretermitted heirs as not applicable to a trust-centered distributive scheme found where the benefit – if any – is not derived through testamentary “oversight.”<sup>14</sup>

The best practice, however, would be to ascertain all possible

statutory or other (*i.e.*, “contractual”) claimants and then specifically mention them in the trust along with any specific distributions or lack thereof. This would successfully cut off such pretermitted or other expectancy or contractual claims to a distributive share. The reader may remember the example in the preceding portion of this article of Mrs. Smith’s written promise of the million-dollar graduation gift to Mary Jane. That example highlights what is meant by “all possible contractual claimants,” and that’s why “contractual” is included among those matters whose existence and status require clear ascertainment prior to drafting the trust. Statements should be included in the trust indenture that either 1) no promises were ever made and no expectancies ever created thereby or 2) specifically

renouncing any known claims. Alternatively, if and in the event the promise was made, your client should be instructed to revisit the matter with the future beneficiary in order to reach the best possible disentanglement now rather than to endure costly litigation *in futuro*.

The preceding part of this article discussed the pretermitted heir situation. There is also another matter that bears some similarity to the pretermitted issue: lapse caused by the death of the beneficiary prior to the death of the settlor or termination of the trust. Application of 60 O.S. §175.56 offers a partial solution to this lapse problem in that the statute provides that in such event, distribution is to be made to the “lineal descendants” of such deceased beneficiary “by right of representation, in the same manner as the beneficiary would have done had he been living at the time for distribution of the trust.” However, this possibly leaves open the question as to how the substitution is to occur.

Twenty-three years after the passage of Section 175.56, in the case of *O’Donoghue v. Dooley*,<sup>15</sup> the Oklahoma Supreme Court made some clarification by holding that distribution of a deceased’s beneficiary’s share to that beneficiary’s lineal heirs must be done by means of a *per stirpes* or “lineal by blood” categorization. In *O’Donoghue*, the subject distributive provision of the trust expressly called for such a *per stirpes* distributive scheme, but the dead beneficiary had left no children. The question was whether distribution could be made to a widow of a deceased beneficiary, and the court said no. The drafter should pay careful attention to her client’s wishes as to how her estate is to be distributed in the event the initial beneficiaries predecease the grantor. Being selective in the use of terms such as “by representation” and “*per stirpes*” – and situations where only the widow or widower of a deceased beneficiary is left alive – will help to effect a distribution compatible with the client’s desires.<sup>16</sup>

Concerning contested matters of trust distribution after the settlor’s death, the inclusion of a no-contest provision will go a long way in the abatement of later fights over trust construction and/or distribution of its assets. *In terrorem* clauses are useful devices that likely may already be somewhat familiar to your client, and their inclusion in the trust and pour-over will should be discussed. They are generally enforceable in most jurisdictions and have specifically been recognized as valid by Oklahoma courts.<sup>17</sup> *Wallace Revocable Trust* follows the ruling in *Matter of Estate of Westfahl*,<sup>18</sup> that such “no contest” clauses are not only acceptable in wills and trusts but “are favored by public policy.” Note, though, that *Westfahl* puts forward the rule that, “A forfeiture clause should not be invoked if the contestant has probable cause to challenge a will based on forgery or subsequent revocation ...” Presumably, this same caveat applies to trusts, as discussed in *Wallace*, and this should be especially so considering the specific statutory sections that reference construction and interpretation of trust provisions<sup>19</sup> and concerning matters addressing breach of trust or removal of a trustee.<sup>20</sup>

#### THE LAW OF ADEPTION

Ademptions and resulting trust concepts involve situations, respectively, where the object of a bequest no longer exists (or has been previously transferred to the beneficiary by other means) and where the trust appears to have no end game. The law of ademption deals with property that once was – but is no longer – part of the estate; the same conceptual framework would apply to trust circumstances, and the instrument should be drafted accordingly to obviate such circumstances. What about providing for after-acquired or overlooked

property – that is, property that was not included initially through oversight or that was acquired later but not titled in the trust? Probate law provides for such situations.<sup>21</sup> Trust law does not.<sup>22</sup>

At this point, the circle has brought us back to the beginning of the preceding installment of this article, where the authors advised that the pour-over will “acts as a very useful guard against possible subsequent trouble from omissions to the trust or after-acquired property, but the will is a prophylactic rather than a driving force for the estate plan.” This is nowhere more evident and exceedingly useful than in cases of properties that were omitted – for whatever reason – from inclusion into the trust. Thus, every trust-centered estate plan must include, as part and parcel thereof, a pour-over will. It will fill in this gap, providing a conduit by which after-acquired or after-discovered property can be channeled for distribution – under the terms and in the manner your client wanted. It can direct distribution of such property to the intended ultimate beneficiary of the now-defunct trust by means of a clause that provides for distribution upon terms identical to those of the former trust as same existed at the time of death of the settlor.

Finally, when the trust by its own terms has no ultimate beneficiary, the law provides for a resulting trust. By inserting language to assure there is never a dearth of beneficial interests and referencing distribution of trust proceeds to a pour-over will (with the two instruments having essentially mirrored provisions), the need to rely on the potential result of curative statutes that may – or may not – achieve the final result envisioned by Mrs. Smith can be obviated.



## CONCLUSION

All the vignettes outlined above and in the earlier installment present potential scenarios that could affect the quality of your client's lifetime relationship to her trust – as well as her beneficiaries' experience in concluding it. No degree of investigation, due diligence nor finesse in drafting the trust will guarantee a conflict-free trust administration. Unfortunately, this is true in a trust-free estate plan as well. Thoughtful trust preparation may uncover a problem that can be corrected concerning that ill-considered earlier deed that placed Blackacre into joint tenancy. By uncovering such title issues and making necessary corrective adjustments, the attorney can avoid an unpleasant surprise that would be a disservice to the client and would fail to meet the hopes and expectations of the intended and disappointed beneficiary. Careful attention to the client's factual, situational history as well as to her dispositive wishes, together with drafting that considers foreseeable circumstances will create a trust that serves your client well.

## ABOUT THE AUTHORS



Maria Tully Erbar is a solo practitioner at Maria Tully Erbar, Attorney at Law

PC in Oklahoma City. Her practice is focused primarily on probate, trusts, guardianships and family law matters. She is a member of the OBA Estate Planning, Probate and Trust Law Section, as well as the Family Law Section.

After attaining her M.A. in vocal performance from OU, Andra Erbar Peterson spent several years singing professionally. She is a recent graduate of the OCU School of Law

with practice interests in wills and estates, family law, real estate law, health law and immigration law. She is also a licensed realtor.

## ENDNOTES

1. Part 1 of this article was published in the April 2021 issue of the *OBJ*, page 32.
2. 1957 OK 163, 316 P.2d 599.
3. Wills and related probate (wills and intestate succession) have a much longer and more varied history; it is often upon these cases that current conflicts are decided, and it is often useful to attempt to analogize from probate to trust law. The effort is commendable – and probably the best path through unexplored territory – but results are not always the same. "... [T]he trend in both statutory and case law is to subject trusts, and persons interested in them, to the same law that would apply if the settlor had instead used a will to provide for the disposition of her property at her death. ... while there are many revocable trust issues that are being, and should be, resolved by reference to the law of wills, there are many others for which that is not the case." Newman, Alan, "Revocable Trusts and the Law of Wills: An Imperfect Fit" (2008). Akron Law Publications. 169. <http://ideaexchange.uakron.edu/ua-law-publications/169>.
4. 43 O.S. §§204, 205.
5. 43 O.S. §121 (B).
6. See *Shackelton v. Sharrard*, 1963 OK 193, 385 P.2d 898.
7. See *Smith v. Villareal*, 2012 OK 114, 298 P.3d 533 and *Jackson v. Jackson*, 1999 OK 99, 995 P.2d 1109.
8. *Bartlett v. Bartlett*, 2006 OK CIV APP 112, 144 P.3d 173.
9. 1941 OK 405, 120 P.2d 362.
10. *Sanditen v. Sanditen*, 1972 OK 39, 496 P.2d 365.
11. 1922 OK 257, 209 P. 417.
12. 1984 OK 41, 684 P.2d 553.
13. *In re Estate of James*, 2020 OK 7, 472 P.3d 205, at ¶17.
14. See *Estate of Jackson*, 2008 OK 83, 194 P.3d 1269 and *Welch v. Crow*, 2009 OK 20, 206 P.3d 599.
15. 2016 OK 110, 383 P.3d 773.
16. Probate law seems subject to similar confusion. See 84 O.S. §§142, 177 and 178 and *Matter of Estate of Worsham*, 1993 OK CIV APP 122, 859 P.2d 1134 and *In re Estate of Prather*, 1974 OK CIV APP 24, 527 P.2d 211.
17. Generally, see *Newman*, op cit, Section VI(F) and specifically as to Oklahoma law, see *In re: Wallace Revocable Trust*, 2009 OK 34, 219 P.3d 536.
18. 1983 OK 119, 674 P.2d 21.
19. 60 O.S. §175.23.
20. 60 O.S. §§175.57 and 175.39.
21. 84 O.S. §146.
22. To the contrary, 60 O.S. §175.44 specifically provides that any property "not embraced in the trust and not otherwise disposed of" is "left in the trustor of the trust or his successors." This illustrates the necessity for a pour-over will with terms that are compatible for such an unexpected contingency.



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# 2021 Oklahoma Tax Legislation

By Sheppard F. Miers Jr.

**THE FOLLOWING IS A** summary of some of the changes in Oklahoma law on state taxation enacted by the Oklahoma Legislature in its 2021 session.

### INCOME TAX

#### *Oklahoma Individual Income Tax Rate Reduction*

The Oklahoma individual income tax rates imposed on Oklahoma taxable income of resident and nonresident individuals were reduced. The maximum individual income tax rate was reduced from 5% to 4.75%. The reduced rate shall apply for all taxable years beginning on or after Jan. 1, 2022.<sup>1</sup>

#### *Oklahoma Corporation Income Tax Rate Reduction*

The Oklahoma corporation income tax rate imposed on Oklahoma taxable income of every corporation was reduced. The corporation income tax rate was reduced from 6% to 4% for all taxable years beginning after Dec. 31, 2021.<sup>2</sup>

#### *Oklahoma Bank and Credit Union Privilege Tax Rate Reduction*

The Oklahoma privilege tax on the amount of taxable income of every state banking association, national banking association and credit union organized under laws of the state, located or doing business in the state, was reduced from 6% to 4% for taxable years beginning after Dec. 31, 2021.<sup>3</sup>

#### *Electing Pass-Through Entity Tax Rates Modified*

The pass-through entity tax imposed on electing pass-through entities was amended to conform rates to the reduced individual and corporation Oklahoma income tax rates. The amended rates were changed to correspond with the electing pass-through entity's member status. The rates shall be the highest individual rate of 4.75% if the member is an individual, trust or estate, 4% if the member is classified as a corporation pursuant to the Internal Revenue Code, 4% if the member is a pass-through entity, 4% if the member is a financial institution and the highest Oklahoma marginal income tax rate that would be applicable to any item of the electing pass-through entity's income or gain without the election made if the member is a person or organization exempt from federal income taxation under the provisions of the Internal Revenue Code as described in 68 O. S. §2359.<sup>4</sup>

#### *Oklahoma Refundable Earned Income Credit*

A refundable earned income credit shall be allowed for tax years beginning on or after Jan. 1, 2022, for individuals. The credit shall be 5% of the earned income tax credit allowed under Section 32 of the Internal Revenue Code, which for the taxable years beginning on and after Jan. 1, 2022, shall be computed

using the same requirements, other than the 5% amount to compute the credit, which shall remain constant, as in effect for computation of the earned income tax credit for federal income tax purposes for the 2020 taxable year. For tax years that begin on or after Jan. 1, 2022, if the credit exceeds that Oklahoma income tax imposed, the excess amount shall be refunded to the individual.<sup>5</sup>

#### *Oklahoma Equal Opportunity Education Scholarship Act*

The provisions related to Oklahoma income tax credits for contributions to certain education improvement grants or scholarship-granting organizations were amended. The amendments provide for an income tax credit based upon contributions on and after Jan. 1, 2022, to eligible public school foundations or to benefit school districts, subject to limits on credits allowed and reporting requirements. An annual cap on total credits allowed is applicable, and a separate credit limit is applied per public school district annually.<sup>6</sup>

#### *Deduction for Contributions to ABLE Accounts*

An Oklahoma income tax deduction shall be allowed for taxable years beginning after Dec. 31, 2020, for contributions to accounts established pursuant to the Achieving a Better Life Experience (ABLE) Program as established in 56 O. S. Supp. 2020, §§4001.1. *et seq.*<sup>7</sup>



#### *Income Tax Credit for Aerospace Sector*

The definitions of terms applicable to the Oklahoma income tax credit allowed for businesses and public organizations engaged in business and activities in the aerospace sector were amended. The definitions of “qualified employee” and “qualified program,” as used in the provisions allowing the credit, were amended.<sup>8</sup>

#### *Income Tax Deduction for Equity Investment*

An Oklahoma income tax deduction was added for an equity investment by an accredited investor in an eligible venture capital company in an amount not in excess of \$25 million during a taxable year. The deduction is subject to specified record keeping, investment retention and disposition standards under rules to be promulgated by the Oklahoma Department of Commerce.<sup>9</sup>

#### *Income Tax Credit for Blood Donations*

An Oklahoma income tax credit was added to allow a credit to an employer for verified blood donations by employees as a part of a blood drive by an Oklahoma nonprofit blood donation organization. The credit authorized shall be equal to \$20 for each verified donation. The credits allowed are to be limited to a total annual amount.<sup>10</sup>



*Income Tax Refund Donation  
to the YMCA Youth and  
Government Program*

A state income tax donation from a tax refund to the Oklahoma chapter of the YMCA Youth and Government Program was extended to apply to 2021 and subsequent tax years.<sup>11</sup>

*Income Tax Refund Donation  
to Court Appointed Special  
Advocates Programs*

A state income tax deduction for donations from a tax refund for the benefit of programs to recruit, train and supervise volunteers as court-appointed advocates was amended to reauthorize the donation, effective Jan. 1, 2022.<sup>12</sup>

*Income Tax Return Due Date  
Extension for State of Emergency*

The Oklahoma statute providing for the filing of Oklahoma income tax returns was amended to provide the Oklahoma Tax Commission may provide a later due date for returns if a state of emergency is declared by the governor or upon declaration by the Internal Revenue Service to postpone certain tax filing and tax payment deadlines in disaster areas.<sup>13</sup>

*Interest on Income Tax Refunds*

The Oklahoma statute providing for interest to be paid whenever an income tax refund is not paid to the taxpayer within specified periods was amended. The amendment provides for interest to be paid if a refund is not paid within the specified number of days after the income tax return is filed or due, whichever is later.<sup>14</sup>

*Interest on Underpayment  
of Estimated Payment*

The Oklahoma statute providing for adding interest to an underpayment of an estimated payment of tax was amended to

modify the computation of the period of underpayment.<sup>15</sup>

*Apportionment of Income  
Tax Collections*

The Oklahoma statute that relates to the apportionment of income tax collections was amended by increasing certain apportionments for certain fiscal years and decreasing certain apportionments for certain fiscal years.<sup>16</sup>

## **SALES AND USE TAX**

*Sales Tax Exemption of Sales  
Between Related Companies*

An exemption from Oklahoma sales tax was enacted that specifically exempts the transfer of tangible personal property between wholly owned subsidiaries of a parent company and between a parent company and its wholly owned subsidiary.<sup>17</sup>

*Sales Tax Exemption for  
Broadband Access Equipment*

An Oklahoma sales tax exemption was enacted for sale, lease, rental, storage, use or other consumption of qualifying broadband

equipment by providers of internet service or subsidiaries if the property is directly used or consumed by the provider or subsidiary in or during the distribution of broadband internet service. The exemption shall be administered as a rebate for which claims must be filed with the Oklahoma Tax Commission to establish that as a result of the equipment purchase, there has been net growth in the number of potential customers served in underserved or unserved areas. Claims for rebate must satisfy specified requirements, including a filing date requirement. The total amount of rebates that may be paid is limited, subject to apportionment to eligible projects serving counties with specified population density.<sup>18</sup>

*Sales Tax Agricultural Exemption*

The sales tax exemption for sales of agricultural products and items to be used in agricultural production was amended to specify the forms of proof of eligibility for the exemption the Oklahoma Tax Commission shall accept.<sup>19</sup>

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An Oklahoma sales tax exemption was enacted for sale, lease, rental, storage, use or other consumption of qualifying broadband equipment by providers of internet service or subsidiaries if the property is directly used or consumed by the provider or subsidiary in or during the distribution of broadband internet service.



### *Sales Tax Exemption of Forestry Equipment*

A sales tax exemption was enacted, providing for a specific exemption from Oklahoma sales tax until January 2027, of sales of commercial forestry service equipment, limited to certain specifically described types of equipment sold to businesses engaged in logging, timber and tree farming.<sup>20</sup>

### *Sales Tax Exemption for Sales to Disabled Veterans*

The sales tax exemption allowed for sales of tangible personal property or services to disabled veterans and surviving spouses of such veterans was amended with respect to verification of eligibility for the exemption of veterans registered with the registry created by the Oklahoma Department of Veterans Affairs.<sup>21</sup>

### *Sales Tax Exemption for Sales to City-County Library Systems*

The sales tax exemption for sales to governmental and nonprofit entities was amended to provide an exemption for sales of tangible personal property or services to any city-county library system.<sup>22</sup>

### *Sales Tax Exemption for Sales to Museums*

The sales tax exemption for sales to governmental and nonprofit entities was amended to provide an exemption for a museum that operates as a part of an organization exempt from taxation under Section 501(c)(3) of the Internal Revenue Code, is not accredited by the American Alliance of Museums and operates on an annual budget of less than \$1 million.<sup>23</sup>

### *Sales Tax Exemption for Tax Exempt Organization Providing Affordable Housing*

A sales tax exemption was enacted to exempt sales of

tangible personal property or services used solely for construction and remodeling projects to an organization that is exempt from taxation pursuant to Section 501(c)(3) of the Internal Revenue Code and that meets certain specified requirements with respect to the organization's primary purpose of constructing or remodeling and selling affordable housing, providing homeownership education to residents of Oklahoma with limited income, serving public or charitable purposes rather than commercial purposes, receiving of funding and revenue, and charging of fees and compensating its employees in the best interest of clients.<sup>24</sup>

### *Sales Tax Exemption for Tax-Exempt Organizations Providing Disaster Assistance*

A sales tax exemption was enacted to exempt sales of tangible personal property or services to an Oklahoma organization that is exempt from taxation pursuant to Section 501(c)(3) of the Internal Revenue Code – the principal functions of which are to provide assistance to natural persons following a disaster with program emphasis on repair or restoration to single-family residential dwellings or construction or replacement of such a dwelling.<sup>25</sup>

### *Sales Tax Exemption for Tax-Exempt Organization Use in a Clinical Practice or Medical Facility*

A sales tax exemption was enacted to exempt sales of tangible personal property or services until July 1, 2022, to an organization that is exempt from taxation pursuant to Section 501(c)(3) of the Internal Revenue Code that has entered into a joint operating agreement with the University Hospitals Trust created pursuant to Section 3224 of Title 63 of the Oklahoma Statutes. The exemption shall be

limited to the purchase of tangible personal property and services for use in clinical practices or medical facilities acquired or leased by the organization from the University Hospitals Authority, University Hospitals Trust or the University of Oklahoma on or after June 1, 2021.<sup>26</sup>

### *Disbursement of Sales Tax on Aquarium Admission*

The state sales tax generated on the sale of tickets for admission by an aquarium exempt from taxation under Section 501(c)(3) of the Internal Revenue Code or owned or operated by a public trust or political subdivision of the state shall be collected and disbursed to the nonprofit organization, public trust or political subdivision responsible for the aquarium's operations for use by that entity for promoting visitation primarily to out-of-state residents.<sup>27</sup>

### *Apportionment of Sales and Use Tax Collections*

The Oklahoma statutes that relate to apportionment of sales and use tax collections were amended to change certain apportionments for certain fiscal years.<sup>28</sup>

## **AD VALOREM TAX**

### *Payment of Ad Valorem Taxes in Installments*

The provision for required payment of *ad valorem* tax in installments was amended to provide that unless one-half or more of the tax is paid before the first day of January, the entire tax levy for the fiscal year shall become delinquent on that date. If the first half or more of the taxes for the fiscal year has been so paid by the first day of January, the remainder shall be paid before the first day of April thereafter and if not paid, shall become delinquent on that date.<sup>29</sup>

### *Five-Year, New Manufacturing Facility Exemption*

The statutory provisions implementing the five-year *ad valorem* tax new manufacturing facility exemption allowed by Article 10, Section 6B of the Oklahoma Constitution and defining qualifying “manufacturing facilities” for purposes of the exemption were amended. The definition of “manufacturing facilities” was amended to mean facilities of which the investment cost of construction, acquisition or expansion is \$500,000 or more with respect to assets placed in service during calendar year 2022. For subsequent years, such required amount of investment shall be increased annually based on increases in the Consumer Price Index-All Urban Consumers. The statutory requirements for qualification for the exemption were also amended as to average wage requirements for specified establishments and entities, the definition of the term “facilities” for purposes of the exemption, elimination of certain provisions authorizing waivers of not meeting payroll requirements, a limit on allowance of the exemption for certain computer data processing and preparation and information processing service providers, a waiver of payroll requirements for 2021 for a specified type of manufacturing facility and the valuation and assessment of manufacturing facility property for which an exemption is recognized and granted by the tax commission.<sup>30</sup>

### *Assessment of Fixed Wireless Broadband Internet Service Providers*

The *ad valorem* tax definitions applicable to businesses defined as a “public service corporation” and a “transmission company” and related provisions, were amended to provide a defined term of “fixed wireless broadband internet

service provider” and to provide that as used in the *Ad Valorem* Tax Code, the terms “transmission company” and “public service company” shall not be construed to include fixed wireless broadband internet service providers.<sup>31</sup>

### *Cost Approach Definition*

The definition of the term “cost approach” as used in the *Ad Valorem* Tax Code for purposes of valuation was amended to provide for subtracting accrued depreciation, including a loss in value that may be caused by physical deterioration, functional obsolescence or economic obsolescence and adding the value of the land.<sup>32</sup>

### *Tax Commission Schedules of Values of Personal Property*

The duties of the *Ad Valorem* Division of the Oklahoma Tax Commission were amended with respect to its duty to provide from year-to-year schedules of values of personal property to aid county assessors in the assessment of personal property and to state it shall be in accordance with Uniform Standards of Professional Appraisal Practice (USPAP) and International Association of Assessing Officers (IAAO) requirements.<sup>33</sup>

### *Additional Homestead Exemption for Lower-Income Households*

The provisions allowing an additional homestead exemption for low-income homeowners were amended to allow the additional homestead exemption for homesteads of heads of households whose gross household income does not exceed \$25,000 and to provide that gross household income shall not include the amount of any federal stimulus or relief payments related to the COVID-19 virus.<sup>34</sup>

### *Homestead Exemption for Disabled Veterans*

The *ad valorem* tax provisions for a homestead exemption were amended to provide that the homestead exemption shall be allowed if a disabled veteran or surviving spouse of a deceased service person who died in the line of duty occupies improvements affixed to real property owned by a city or town or entity formed under ordinances thereof, the property will be considered a homestead.<sup>35</sup>

### *Personal Information of Officials Not Published on the Internet*

The provisions allowing personal information of public officials related to the assessment of *ad valorem* tax to not be published on the internet were amended to apply to information about elected county officials and peace officers.<sup>36</sup>

### *Tax Resale Transfers to County*

The provisions for resale of property were amended to limit the scope of certain claims on property sold to boards of county commissioners, where the property was bid off in the name of the county.<sup>37</sup>

### *Abandoned Property*

The provisions for resale of property were amended with respect to common area nuisance property. The county treasurer is allowed to take specified action with respect to common area nuisance property, including allowing it to remain in current ownership and in specified circumstances, bid off such property to a city or town.<sup>38</sup>

### *Manufactured Homes*

A clarifying amendment was made to the *ad valorem* tax provisions applicable to a manufactured home located on land owned by the owner of the manufactured home.<sup>39</sup>

### *Livestock Employed in Support of a Family*

The statute implementing the exemption from *ad valorem* tax of livestock employed in support of a family was amended to modify language and describe an exemption for livestock owned by entities owned by residents of the state and to provide that animals are ineligible for exempt treatment if owned wholly or in part by a publicly traded corporation or a corporation incorporated in a state other than Oklahoma.<sup>40</sup>

### *County Boards of Equalization and County Excise Boards*

The requirements for completion of courses of training and instruction and the compensation and required attendance of members of county boards of equalization were modified. The requirements for completion of courses of training and instruction of members of county excise boards were modified.<sup>41</sup>

### *Ad Valorem Reimbursement Fund Reimbursement for Veterans and Spouses Exemptions*

The provision for creation and expenditure of the *Ad Valorem* Reimbursement Fund was amended to provide that for calendar year 2022 and all subsequent years, the fund will be used to reimburse qualified counties for loss of revenue due to *ad valorem* tax exemption granted to veterans and their surviving spouses, subject to specified requirements for the number and amount of exemptions and a limit on the amount of loss of revenue reimbursed.<sup>42</sup>

### **PETROLEUM OIL EXCISE TAX**

#### *Extension of Petroleum Excise Tax*

The provisions of Article 11 of Title 68 of the Oklahoma Statutes imposing an excise tax of 0.095 of 1% of the gross value of oil and



natural gas, in addition to the Oklahoma gross production tax was extended to apply to production prior to July 1, 2026.<sup>43</sup>

### **ELECTRIC VEHICLE CHARGING TAX AND RELATED TAX PROVISIONS**

#### *Excise Tax on Electric Current Used for Electric Vehicle Charging*

A “Driving on Road Infrastructure with Vehicles of Electricity (DRIVE) Act of 2021” was enacted. The act imposes a tax levy on certain transfers of electric power to electric vehicles. The act imposes a tax of \$0.03 per kilowatt-hour or its equivalent on electric current used to charge or recharge the battery or batteries of an electric vehicle, subject to limited exemptions. The tax shall be levied beginning Jan. 1, 2024. The tax shall be remitted monthly by each charging station owner or operator. Charging stations will generally be required to register with the Oklahoma Tax Commission and use a metering system that is capable of imposing the cost for the charging service using a unit per kilowatt-hour or a comparable measurement as

determined by the Tax Commission. The bill enacting the act contained related provisions applicable to electric vehicles as described below.<sup>44</sup>

#### *Additional Registration Fee for Electric Vehicles*

In addition to regular motor vehicle registration fees required pursuant to 47 O. S. §1132, at the time of initial or renewal registration for any electric vehicle, there shall be an additional fee based upon the weight of the electric vehicle registered.<sup>45</sup>

#### *Income Tax Credit for Electric Vehicle Charging Taxes Paid*

For taxable years beginning after Dec. 31, 2023, there shall be allowed a credit against the Oklahoma income tax in the amount of electric vehicle charging taxes paid by an individual or lawfully recognized entity subject to specified limits based on registration fees for electric vehicles paid during the taxable year with a five-year carryover to the extent the credit is not used.<sup>46</sup>

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The Oklahoma Vehicle License and Registration Act was amended to provide that the Oklahoma Tax Commission, on or before July 1, 2022, shall implement a program that will permit the electronic filing, storage and delivery of motor vehicle certificates of title and allow a lienholder to perfect, assign and release a lien on a motor vehicle in lieu of submission and maintenance of paper documents as otherwise provided in the act.

*Sales Tax Exemption for Sales of Electricity at Charging Stations*

A sales tax exemption shall be allowed for sales of electricity at charging stations when electricity is sold by a charging station owner or operator for purposes of charging an electric vehicle, and the tax imposed on the transmission of electricity in charging the electric vehicle is collected and remitted to the tax commission.<sup>47</sup>

**MOTOR FUEL TAX**

*Extension Pre-Collection and Remittance by Suppliers and Importers*

The Motor Fuel Tax Code was amended to extend the requirement of pre-collection and remittance of the motor fuel tax by each supplier and bonded importer who sells motor fuel until July 1, 2024.<sup>48</sup>

**VEHICLE TRANSFER TAX**

*Vehicle Tax In Lieu of Sales and Use Tax Provision Amendment*

The excise tax levied and assessed on the transfer and use of any vehicle registered in the state was amended to provide that trailers and semitrailers registered to transport cargo over state highways shall be in lieu of all sales and use taxes levied pursuant to the Sales Tax Code or the Use Tax Code.<sup>49</sup>

**VEHICLE REGISTRATION**

*Electronic Filing and Delivery of Certificates of Title and Associated Liens*

The Oklahoma Vehicle License and Registration Act was amended to provide that the Oklahoma Tax Commission, on or before July 1, 2022, shall implement a program that will permit the electronic filing, storage and delivery of motor vehicle certificates of title and allow a lienholder to perfect,

assign and release a lien on a motor vehicle in lieu of submission and maintenance of paper documents as otherwise provided in the act.<sup>50</sup>

*Registration of Persons Preparing Notices of Liens*

A statutory provision was added requiring a person or persons charging a fee for the preparation or assistance in the preparation of notices of liens to register with and submit an annual fee to the Oklahoma Tax Commission, subject to specified exceptions.<sup>51</sup>

**MOTOR VEHICLE RENTAL TAX**

*Peer-to-Peer Car Sharing Program Act*

An act to be known as the “Peer-to-Peer Car Sharing Program Act” was enacted providing rules for a peer-to-peer car sharing program that is a business platform connecting vehicle owners with drivers to enable sharing



of vehicles for financial consideration. The provisions of the motor vehicle rental tax were amended to provide for circumstances under which the tax shall be levied or applied to shared vehicles as defined in the Peer-to-Peer Car Sharing Program Act.<sup>52</sup>

## MUNICIPAL TAXES

### *Redirection of Dedicated Taxes*

The statute authorizing cities and towns to assess, levy and collect municipal taxes was amended to provide that any municipality that levies a dedicated tax pursuant to a vote of the people for the purpose of funding public safety or any other governmental purpose shall not redirect all or a portion of the dedicated tax revenue to another purpose without a vote of the people authorizing such action.<sup>53</sup>

## OKLAHOMA ROAD USER CHARGE PROGRAM AND TASK FORCE

### *Oklahoma Tax Commission Collection of Road Use Fees and Charges*

An act providing for the creation of the Oklahoma Road User Charge Program and the Road User Charge Task Force was enacted to consider the potential for a road user charge to replace traditional motor fuel taxes. The act provides for representation of the Oklahoma Tax Commission on the task force. The Oklahoma Tax Commission shall administer the collection of any charges and fees associated with the Oklahoma Road User Charge Program.<sup>54</sup>

## TOBACCO PRODUCTS TAX

### *Tobacco Products Tax Enforcement Act*

A "Tobacco Products Tax Enforcement Act" was enacted, authorizing the establishment of a Tobacco Products Enforcement Unit by the Oklahoma Tax Commission. The act provides that

the unit shall enforce the tobacco tax laws of the state and ensure all taxes are paid on tobacco products by taking specified actions concerning licensing, purchasing of tobacco products, auditing of wholesalers and retailers, issuing fines for violations, conducting inspections and other actions and providing for staffing of the unit by the Oklahoma Tax Commission.<sup>55</sup>

### *Tobacco Products Tax Amendment*

The legislation providing for the establishment of a Tobacco Products Enforcement Unit also amended statutes imposing the tobacco products tax and the administration of the tax. The statutes added and amended provide the excise tax shall be paid by the wholesaler liable for payment of the tax, with stated intent to require all wholesalers to pay applicable tobacco products tax upon the sale, use, exchange or possession of taxable commodities. The definitions of "wholesaler," "retailer" and "consumer" were amended, defined term "distributing agent" deleted and related provisions of the statutes amended and conformed. The statutory provisions related to stamps by use of which the tax is paid and related provisions were deleted, and other provisions of the statutes were amended and conformed to the change.<sup>56</sup>

### *Defined Terms Modified, Conforming Amendments*

The Oklahoma tobacco products tax statutes were further amended to modify definitions. Provisions were also amended relating to rates, amount and apportionment of tax, penalties and untaxed products, trucks and vehicles carrying untaxed merchandise and transportation or possession of untaxed products.<sup>57</sup>

## TAX PROCEDURE AND ADMINISTRATION

### *Medical Marijuana Tax and Oklahoma Tax Commission Assessment, Collection and Enforcement*

The provisions governing the levy of a tax on retail medical marijuana sales were amended. The Oklahoma Tax Commission shall have the authority to assess, collect and enforce the tax, including interest and penalty.<sup>58</sup>

### *Tax Administration Amendments*

Legislation was enacted relating to various tax administration provisions, including claims for refunds, liability for mixed beverage gross receipts tax, collection contracts with respect to certain excise tax, hearings before the Oklahoma Tax Commission, garnishment, debt collection for unpaid taxes, sales tax exemption for certain disabled veterans, documentary stamp tax, conforming language, the Oklahoma Film Enhancement Rebate and other administrative provisions.<sup>59</sup>

### *Court Fines and Costs Intercept of Income Tax Refunds*

The statute providing for court fines and costs to be deducted from individual income tax refunds was amended.<sup>60</sup>

## ECONOMIC DEVELOPMENT

### *Oklahoma Quality Events Incentive Act*

The Oklahoma Quality Events Incentive Act was amended. The period the act will be in effect is extended through June 30, 2026. Amendments to the act include amendments of definitions with respect to the administration of the act.<sup>61</sup>

*Oklahoma Remote Quality  
Jobs Incentive Act*

An “Oklahoma Remote Quality Jobs Incentive Act” was enacted that defines applicable terms, provides procedures for applications for incentive payments from the state based upon the creation of jobs and payment of wages, computation and payment of incentive payments and reporting of results. The act provides for incentives to be paid to qualifying proxy establishments that facilitate the attraction of remote workers to Oklahoma and to attract growth industries and sectors that employ remote workers to Oklahoma through a policy of rewarding businesses with a highly skilled, knowledge-based workforce.<sup>62</sup>

*Filmed in Oklahoma Act of 2021*

The Legislature enacted the “Filmed in Oklahoma Act of 2021,” creating an incentive rebate program relating to film production incentives and requiring the Oklahoma Department of Commerce and the Oklahoma Tax Commission to administer the program.<sup>63</sup>

*Oklahoma Tourism and  
Development Act*

The Legislature enacted provisions related to the sales tax credit inducements under the Oklahoma Tourism Development Act.<sup>64</sup>

## ABOUT THE AUTHOR

Sheppard F. Miers Jr. is a shareholder at the Tulsa office of GableGotwals and practices in the areas of federal, state and local taxation.

## ENDNOTES

1. HB 2962, amending 68 O. S. Supp. 2020, §2355; effective Jan. 1, 2022.
2. HB 2960, amending 68 O. S. Supp. 2020, §2355; effective Jan. 1, 2022.
3. HB 2961, amending 68 O. S. Supp. 2020, §2370; effective Jan. 1, 2022.
4. HB 2963, amending 68 O. S. Supp. 2020, §2355.1P-4; effective Jan. 1, 2022.
5. HB 2962, amending 68 O. S. Supp. 2020, §2357.43; effective Jan. 1, 2022.
6. SB 1080, amending 68 O. S. Supp. 2020, §2357.206; effective Nov. 1, 2021.
7. HB 2178, amending 68 O. S. Supp. 2020, §2358; effective Nov. 1, 2021.
8. SB 893, amending 68 O. S. Supp. 2020, §2357.301; effective Nov. 1, 2021.
9. SB 915, adding 68 O. S. 2021, §2358.110; effective Nov. 1, 2021.
10. SB 905, adding 68 O. S. 2021, §2357.406; effective Nov. 1, 2021.
11. SB 436, amending 68 O. S. Supp. 2020, §2368.17; effective Nov. 1, 2021.
12. SB 379, amending 68 O. S. Supp. 2020, §2368.12; effective Jan. 1, 2022.
13. SB 601, amending 68 O. S. Supp. 2020, §2368; effective May 7, 2021.
14. SB 601, amending 68 O. S. Supp. 2020, §217; effective May 7, 2021.
15. SB 601, amending 68 O. S. 2011, §2385.13; effective Nov. 1, 2021.
16. HB 2894, amending 68 O. S. Supp. 2020, §2352; effective July 1, 2021.
17. HB 1060, amending 68 O. S. 2011, §1360; effective Nov. 1, 2021.
18. HB 2946, amending 68 O. S. Supp. 2020, §1357, and adding 68 O. S. 2021, §1357.21; effective July 1, 2021.
19. SB 422, amending 68 O. S. 2011, §1358.1; effective July 1, 2021.
20. HB 1588, amending 68 O. S. Supp. 2020, §1357; effective Jan. 1, 2022.
21. SB 415, amending 68 O. S. Supp. 2020, §1357, 68 O. S. Supp. 2020, §205 and 72 O. S. Supp. 2020, §421; effective April 28, 2021.
22. SB 265, amending 68 O. S. Supp. 2020, §1356; effective Nov. 1, 2021.
23. SB 909, amending 68 O. S. Supp. 2020, §1356; effective Nov. 1, 2021.
24. HB 1935, amending 68 O. S. Supp. 2019, §1356; effective Nov. 1, 2021.
25. HB 1935, amending 68 O. S. Supp. 2020, §1356; effective Nov. 1, 2021.
26. HB 2949, amending 68 O. S. Supp. 2020, §1356; effective July 1, 2021.
27. HB1566, amending 68 O. S. Supp. 2020, §1354; effective Nov. 1, 2021.
28. HB 2894, amending 68 O. S. Supp. 2020, §§1353, 1403; effective July 1, 2021.
29. SB 181, amending 68 O. S. 2011, §2913; effective Nov. 1, 2021.
30. SB 609, amending 68 O. S. Supp. 2020, §2902; effective Nov. 1, 2021.
31. HB 2297, amending 68 O. S. 2011, §2808, effective Nov. 1, 2021.
32. HB 2775, amending 68 O. S. Supp. 2020, §2802; effective Nov. 1, 2021.
33. HB 2775, amending 68 O. S. Supp. 2020, §2875; effective Nov. 1, 2021.
34. HB 1009, amending 68 O. S. Supp. 2020, §2890; effective Jan. 1, 2022.
35. HB 1062, amending 68 O. S. Supp. 2020, §2888; effective Jan. 1, 2022.
36. HB 1643, amending 68 O. S. Supp. 2020, §2899.1; effective Nov. 1, 2021.

37. HB 2362, amending 68 O. S. Supp. 2020, §3131, effective Nov. 1, 2021.
38. HB 1749, amending 68 O. S. Supp. 2020, §3129; effective Nov. 1, 2021.
39. HB 1153, amending 68 O. S. 2011, §2812; effective Nov. 1, 2021.
40. HB 2805, amending 68 O. S. Supp. 2020, §2807.1; effective Jan. 1, 2022.
41. SB 483, amending 68 O. S. Supp. 2020, §2862, and 68 O. S. Supp. 2020, §3006; effective Nov. 1, 2021.
42. HB 1990, amending 62 O. S. Supp. 2020, §193; effective Nov. 1, 2021.
43. SB 1059, amending 68 O. S. Supp. 2020, §§1101, 1102 and 1103; effective July 1, 2021.
44. HB 2234, adding 68 O. S. 2021, §§6501-6512; amending 47 O. S. Supp. 2020, §1141.1; amending 68 O. S. Supp. 2020, §1355; effective Nov. 1, 2021; SB 600, amending Enrolled HB 2234; effective Nov. 1, 2021.
45. HB 2234, adding 68 O. S. 2021, §6511; effective Nov. 1, 2021.
46. HB 2234, adding 68 O. S. 2021, §6510; effective Nov. 1, 2021.
47. HB 2234, amending 68 O. S. Supp. 2020, §1355; effective Nov. 1, 2021.
48. SB 298, amending 68 O. S. Supp. 2020, §500.22; effective Nov. 1, 2021.
49. HB 2964, amending 68 O. S. Supp. 2020, §2103; effective Nov. 1, 2021.
50. SB 998, adding 68 O. S. 2021, §1105A; effective Nov. 1, 2021.
51. SB 273; adding 42 O. S. 2021, §90; effective Jan. 1, 2022.
52. SB 355, amending 68 O. S. Supp. 2020, §2110; effective Nov. 1, 2021.
53. SB 825, amending 68 O. S. 2011, §2701; effective Nov. 1, 2021.
54. HB 1712; enacting uncodified findings and declaration of the Legislature, adding 69 O. S. 2021, §§1931, and 1932; effective Nov. 1, 2021.
55. HB 2292, adding 68 O. S. 2021, §§400-400.6; effective July 1, 2021.
56. HB 2292, amending 68 O. S. 2011, §§401, 68 O. S. Supp. 2020, §402-1, 68 O. S. 2011, §403, 403.1, 403.2, 407, 68 O. S. Supp. 2020, §§412, 413, 68 O. S. 2011, §§414, 415, 68 O. S. Supp. 2020, §§417, 418, 68 O. S. 2011, 420.1, 421, 422, 426; repealing 68 O. S. 2011, §§406, 408, 409 and 411; effective July 1, 2021.
57. SB 1078, amending 68 O. S. 2011, §§401, 402-1, 402-3, 412, 413, 414, 418, as last amended by HB 2292 (2021); amending 68 O. S. Supp. 2020, §§402, 402-3; effective July 1, 2021.
58. SB 1033, amending Section 7, State Question No. 788, Initiative Petition No. 412 (63 O. S. Supp. 2020, §426 and adding 68 O. S. 2021, §255.2; effective May 28, 2021).
59. HB 2780, amending 68 O. S. Supp. 2020, §§227 and 253; 68 O. S. 2011, §§254, 1361.2 and 1501; and 68 O. S. Supp. 2020, §§2947.1-2947.3; 68 O. S. 2011, §§3204, 3624; effective Nov. 1, 2021.
60. SB 343, amending 68 O. S. Supp. 2020, §205.2; effective Nov. 1, 2021.
61. HB 1121, amending 68 O. S. Supp. 2020, §§4301, 4303, 4304 and 4305; effective April 21, 2021.
62. HB 2860, adding 68 O. S. 2021, §§4501-4510; effective July 1, 2021.
63. SB 608, adding 68 O. S. 2021, §§3631-3641 and amending 68 O. S. 2011, §2352; effective July 1, 2021.
64. SB 739, amending 68 O. S. Supp. 2020, §§2393-2397; effective Nov. 1, 2021.

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# The OBA Celebrates Law Day Sept. 30

*By Ed Wunch*



*Professor Rebekah Taylor discusses the OU Legal Clinic during Ask A Lawyer filming.*



**A S WE WERE PREPARING** for Law Day earlier this spring, it was clear we would not be able to hold many traditional Law Day events around May 1. As a result, we made the decision to postpone Oklahoma's statewide Law Day celebrations to the fall, and fall is here!

Before discussing our statewide events, it is important to recognize the tremendous work by county bar associations across the state. Although the OBA postponed our Law Day celebrations, the ABA still celebrated Law Day on May 1. As a result, this gives multiple opportunities to celebrate Law Day this year. It was wonderful to hear about the virtual and in-person celebrations held across the state, as well as those events still planned for later this month. I encourage you to reach out to your county Law Day chair or county bar president to find out about local events near you. County Law Day chairs are listed on the OBA website at [www.okbar.org/lawday/countychairpersons](http://www.okbar.org/lawday/countychairpersons).

As we have done for many years, the OBA is producing *Ask a Lawyer*. Pandemic permitting, we intend to hold phone banks where lawyers can provide pro bono service by giving free legal advice from 9 a.m. to 9 p.m. In 2019, lawyers donated 400 hours of their time to assist more than 1,700 individuals

for our last in-person phone bank. Even in 2020, when we were not able to hold in-person events, over 100 lawyers volunteered their time to answer questions by email. I hope you will be able to volunteer

this year through the phone banks in Oklahoma City and Tulsa or through a possible outreach opportunity with your county bar.

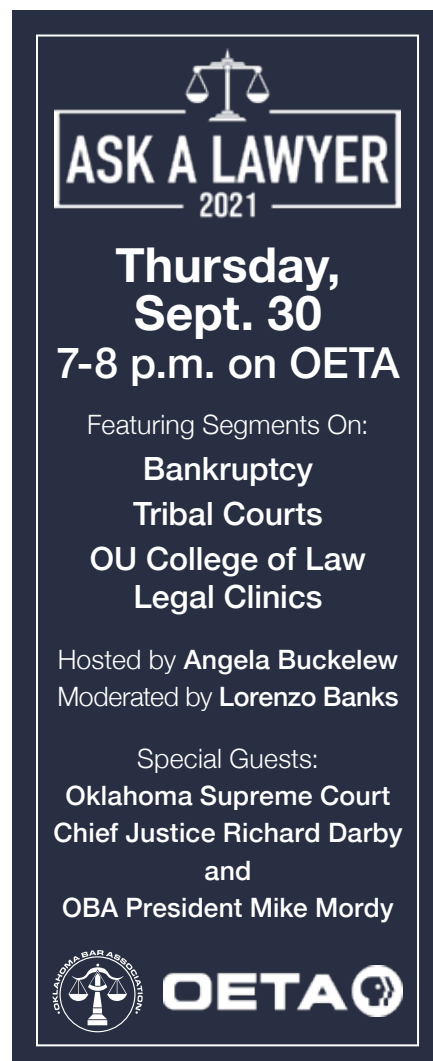
#### **ASK A LAWYER TV SHOW**

This year's *Ask A Lawyer* program will air Thursday, Sept. 30, at 7 p.m. on OETA, Oklahoma's public television station across the state. This year's topics include bankruptcy and a spotlight on the legal clinics at OU, as well as additional segments. Angela Buckelew will host, and we welcome a new panel moderator, OBA member Lorenzo Banks.

The bankruptcy segment will feature Oklahoma City attorney Luke Homen of Luke Homen Law PLLC, who assists clients across the state with Chapter 7 and Chapter 13 needs. Mr. Homan's client will share his story about how bankruptcy protection helped his family during a difficult time.

The OU Legal Clinic segment will feature Amy Pepper and Rebekah Taylor, who are both professors at the OU College of Law. Ms. Pepper and Ms. Taylor will share how the clinic assists low-income individuals in both civil and criminal cases.

OBA President Mike Mordy will share information about [OklahomaFreeLegalAnswers.com](http://OklahomaFreeLegalAnswers.com), where income-eligible individuals can get free answers from volunteer



The graphic is a dark blue rectangular box with white text and logos. At the top is a white scales of justice icon. Below it, the text "ASK A LAWYER" is in a large, bold, sans-serif font, with "2021" centered underneath. The date and time "Thursday, Sept. 30 7-8 p.m. on OETA" are prominently displayed in a large, bold font. Below this, the text "Featuring Segments On:" is followed by a list of topics: "Bankruptcy", "Tribal Courts", "OU College of Law", and "Legal Clinics". The hosts are listed as "Hosted by Angela Buckelew" and "Moderated by Lorenzo Banks". Special guests are listed as "Special Guests: Oklahoma Supreme Court Chief Justice Richard Darby and OBA President Mike Mordy". At the bottom left is the Oklahoma Bar Association logo, and at the bottom right is the OETA logo.

**ASK A LAWYER**  
2021

**Thursday,  
Sept. 30  
7-8 p.m. on OETA**



Featuring Segments On:

**Bankruptcy  
Tribal Courts  
OU College of Law  
Legal Clinics**

Hosted by **Angela Buckelew**  
Moderated by **Lorenzo Banks**

Special Guests:

**Oklahoma Supreme Court  
Chief Justice Richard Darby  
and  
OBA President Mike Mordy**

 **OETA** 

attorneys. Oklahoma Supreme Court Chief Justice Richard Darby will share his thoughts on this year's theme and will recognize the Law Day contest winners.

### CONTESTS AND ACTIVITIES

As I mentioned in April, we received Law Day contest entries from 1,288 students across the state focused on this year's theme, "Advancing the Rule of Law Now." Despite the pandemic, this is an increase in the number of entries received in 2020. We recognized the first place and grand prize winners in a virtual ceremony this spring that was attended by President Mordy and Chief Justice Darby.

Because we postponed Law Day in 2021 but intend to return to normal Law Day timing in 2022, we expect to announce next year's Law Day student contest as part of *Ask A Lawyer*, with entries due January 2022.

### FREE LEGAL ADVICE

For the 45th year, we are organizing the Ask A Lawyer community service project, providing answers to Oklahomans' legal questions at



## LAW ★ DAY 2021 ADVANCING THE RULE OF LAW NOW

no cost. This year's project will be Thursday, Sept. 30. Oklahomans will have the option to email [askalawyer@okbar.org](mailto:askalawyer@okbar.org) with their question or call the toll-free hotline to speak with an attorney.

Participating in Ask A Lawyer is a great way for all Oklahoma lawyers to celebrate Law Day. This annual event gives us the opportunity to provide a much-needed community service while demonstrating the good work that OBA members perform every day. Oklahoma and Tulsa county lawyers will work together to staff the statewide toll-free hotline from 9 a.m. to 9 p.m. Some counties will also offer a local phone number for area residents to reach a nearby attorney. Volunteer lawyers in each participating county staff phones at a local location for a predetermined time period, and the numbers are advertised while the *Ask A Lawyer* TV program is airing.

Anywhere you live or work, your help is needed to make this community service project a success. We need attorneys for each two-hour shift to ensure we can answer as many calls as possible. That effort, combined with the local county bars and those answering email questions, creates a huge need for lawyers to step forward. To volunteer, contact your local county Law Day chairperson. If there is not a county chair listed for your county, please contact the OBA Law Day committee chair, Ed Wunch, at [ed.wunch@laok.org](mailto:ed.wunch@laok.org).

### DIRECTIVE AND PROCLAMATION

Chief Justice Darby is continuing the OBA Law Day tradition

of issuing a Law Day Directive, encouraging courts to hold Law Day activities while respecting the health and safety of court personnel and the public. These activities may include virtual or in-person courtroom ceremonies, courthouse tours and mock trials. Many members of our judiciary hold local events at their courthouses and in their communities as well. Gov. Kevin Stitt has also signed a proclamation designating Sept. 30 as Law Day in Oklahoma.

### GET INVOLVED

We urge you to participate by volunteering for the Ask A Lawyer free legal advice project or by contacting your local county bar and participating in the many activities occurring throughout the state. We are always seeking interested lawyers to get involved with the Law Day Committee and will very soon be planning next year's activities. I am privileged to serve as the 2021 Law Day Committee chairperson, and I am encouraged by the support of members of the bar from across the state. If you have ideas for how to improve Law Day, I want to hear from you, and you would be welcome on the Law Day Committee. You can reach me at [ed.wunch@laok.org](mailto:ed.wunch@laok.org).

### ABOUT THE AUTHOR



Ed Wunch is a staff attorney with Legal Aid Services of Oklahoma Inc. He serves as the OBA's 2021 Law Day Committee chair and is a 2013 graduate of the University of California, Irvine School of Law.



*Attorney Luke Homen discusses a recent bankruptcy case during filming for the Ask A Lawyer TV show.*

# VOLUNTEER LAWYERS NEEDED!

Law Day 2021 | Thursday, Sept. 30

## ASK A LAWYER STATEWIDE FREE LEGAL ADVICE

Phone banks located at OETA studios in Oklahoma City and Tulsa, or local lawyers' offices in nonmetro counties. Volunteers may also answer questions by email.

### Oklahoma City:

Connie Resar  
405-236-8421  
[connie@okcbar.org](mailto:connie@okcbar.org)  
[www.okcbar.org/events](http://www.okcbar.org/events)

### Tulsa:

Dan Crawford  
918-240-7331  
[lawdaytulsa@okbar.org](mailto:lawdaytulsa@okbar.org)  
or [liondc@gmail.com](mailto:liondc@gmail.com)

### Other counties:

Contact your Law Day chairperson for details. See the list of chairs at [www.okbar.org/lawday](http://www.okbar.org/lawday).



# County Law Day Chairpersons

## ADAIR

Joe D. Adair  
918-696-2172

## CANADIAN

Jana Knott  
405-262-4040

## CHOCTAW

J. Frank Wolf III  
580-326-6427

## CIMARRON

Judge Christine Larson  
580-544-2471

## CLEVELAND

Jillian Ramick  
405-364-8300

## COMANCHE

Taren Cabelka  
580-585-4410

## CUSTER

Lynn Housley  
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## DELAWARE

Clayton M. Baker  
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## GARFIELD

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580-234-5144

## JACKSON

Cole McMahan  
580-482-5551

## KAY

Todd Burlie  
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## MAYES

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918-825-4558

## OKLAHOMA

Kellie Howell  
405-455-1032

## OTTAWA

Judge Jennifer McAffrey  
and Judge Becky Baird  
918-542-2862

## PITTSBURG

Joe Tate  
918-420-1100

## PUSHMATAHA

Judge Jana Wallace  
580-298-2553

## ROGERS

Tim Wantland  
918-341-5973

## SEQUOYAH

Kent S. Ghahremani  
918-775-5900

## TULSA

Lizzie Riter  
918-430-2428

## WASHINGTON

James M. Elias  
918-336-4132

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580-832-3226

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# Proclamation and Directive





RICHARD B. DARBY  
Chief Justice

**SUPREME COURT OF OKLAHOMA**  
STATE OF OKLAHOMA  
OKLAHOMA JUDICIAL CENTER, SUITE 1  
OKLAHOMA CITY, OKLAHOMA 73105

(405) 556-9359  
FAX (405) 556-9123  
E-mail Address: richard.darby@osca.net

**OKLAHOMA SUPREME COURT DIRECTIVE**

**OBSERVANCE OF LAW DAY  
SEPTEMBER 30, 2021**

**"ADVANCING THE RULE OF LAW NOW"**

All courts in each of the twenty-six judicial districts in Oklahoma are urged to hold Law Day activities. These activities may include courtroom ceremonies, courthouse tours and mock trials. The cooperation of the judges and court clerks is essential for Law Day special events.

This year is the 64<sup>th</sup> annual nationwide observance of Law Day. Law Day is sponsored by the Oklahoma Bar Association, each of the seventy-seven County Bar Associations and the American Bar Association. Law Day programs should be keyed to the 2021 theme: "Advancing the Rule of Law Now."

DONE THIS 17th DAY OF AUGUST, 2021.

SUPREME COURT OF OKLAHOMA

  
Richard B. Darby  
Chief Justice



*Oklahoma Supreme Court Chief Justice Richard Darby signs the Law Day Directive. Witnessing the signing is Law Day Committee Chair Ed Wunch.*



# County Bars Host Law Day Events

**ALTHOUGH SOME LAW DAY** events may have been scaled back or canceled this year due to the COVID-19 pandemic, lawyers are still working to serve their communities. Several county bar associations across Oklahoma have held events in recognition and celebration of Law Day 2021.

### PITTSBURG COUNTY

The Pittsburg County Bar Association held a banquet in June at Pete's Place restaurant in Krebs. Guest speakers included Judge Jane Wiseman, Oklahoma Court of Civil Appeals, and Justice Dana Kuehn, Oklahoma Supreme Court, who kept the crowd engaged and entertained with their quick wit and informative speeches. More than 100 guests attended, including members of the McAlester High Mock Trial Team, who won the Oklahoma championship.

In September, bar members will participate in providing a phone bank for callers with legal questions as a part of the state bar's Ask A Lawyer statewide project.

### PUSHMATAHA COUNTY

The Pushmataha County Bar Association hosted Ask A Lawyer on May 6 from 5:30 - 7:30 p.m. All members of the county bar were present and participated in the program.

### TULSA COUNTY

This year, the Tulsa community commemorated 100 years since the Tulsa Race Massacre, and bar members were encouraged to attend events remembering the

injustice, lives, economic loss and devastation of the community.

Presented by the Tulsa County Bar Foundation, a virtual symposium and Law Day presentation was held April 30. Topics of the two symposium sessions were "Avoiding Unintentional Exclusivity: How the Language

We Use Matters (Even When We Don't Mean It That Way)" and "Let's Talk About IT: Avoiding Micro-Aggressions and Managing Implicit Bias." The symposium was free to members; however, through sponsorships and opportunities for online donations before, during and after the



**Top left:** From left Jim Branam, Amber Duncan and Judge Jana Wallace provide free legal advice during Pushmataha County's Ask A Lawyer event.

**Top right:** From left Tulsa County Law Day Chair Lizzie Riter presents a check to Mimi Martin for the TU College of Law's new legal clinic

**Above:** Pittsburg County Judge Mindy Beare serves as emcee while 112 banquet attendees enjoy a spaghetti dinner at Pete's Place in Krebs.





*OBA President Mike Mordy speaks during the Seminole County Law Day luncheon.*

symposium, the TCBA raised \$10,000 that was donated to the TU College of Law Buck Colbert Franklin Legal Clinic. During the Law Day presentation, winners of the annual Liberty Bell, Brunton-Will CLE and Sandra Day O'Connor awards were announced. The keynote speakers included Phil Armstrong and Hannibal Johnson from the 1921 Tulsa Race Massacre Centennial Commission.

The Tulsa County Bar Association also held a separate Law Day writing and art contest for Tulsa County students. After the winning entries had been selected, students were presented awards during a drive-by ceremony in May, including the 19 students who received a first place, second place or honorable mention award in the OBA Law Day contest.

## SEMINOLE COUNTY

As its birthplace, Law Day has always been special in Seminole County, and this year was no different. In May, the Seminole County Bar Association held a Law Day Seminar with several speakers, including Court of Civil Appeals Judge Deborah Barnes. The seminar was limited to 30 in-person attendees, but it was also available to view virtually. In the afternoon, attendees gathered on the front lawn of the Seminole County Courthouse in Wewoka for a luncheon and to hear the featured speaker, OBA President Mike Mordy.

Did your county bar association host a Law Day event, or is one being planned for later this month to coincide with the state-wide celebration? Send the details to [LawDay@okbar.org](mailto:LawDay@okbar.org). Information will be posted to the Law Day website.



*Rodney Buck, a 28-year Law Day volunteer and chair of the TCBA Student Art and Writing Contest, congratulates winners during a drive-by ceremony.*

# A Day for Justice

*By Katie Dilks*

**M**OST ATTORNEYS ARE aware that our justice system doesn't adequately meet current legal needs. However, you may not know that a full 80% of civil legal needs go unaddressed in the United States, or that a majority of matters in state courts have at least one unrepresented party. You may also be unaware that the recommended ratio of legal services attorneys to population is 10 for every 10,000 people – Oklahoma currently has less than 1 per 10,000. These challenges, among many others, make up the civil justice gap.

Although the civil justice gap presents an array of significant challenges, many creative and dedicated individuals and organizations are working to address these issues daily. To highlight and support these efforts, the Oklahoma Access to Justice Commission and OBA presented Oklahoma's first Access to Justice Summit in October 2018 – a full day of programming featuring national and local speakers on a wide variety of access to justice topics. We are

excited to announce the second statewide Access to Justice Summit is scheduled for Oct. 22, 2021.

Hosted by the Oklahoma Access to Justice Foundation, Access to Justice Commission and OBA, the summit will offer at no cost six hours of CLE credit appropriate for lawyers in all settings. It will also serve as informative and educational programming for judges, law students and others interested in addressing the civil justice gap. Legal Services Corporation President Ron Flagg will join us as the plenary speaker, addressing national trends and opportunities in civil justice.

Other summit topics will include a discussion of the eviction crisis and potential solutions, how attorneys can incorporate limited-scope representation to help meet the needs of modest-income Oklahomans, the challenges of meeting rural legal needs, the impact of law students on access to justice and trends in the use of technology in the courtroom. We will also honor the winners of the Oklahoma Access

to Justice Foundation's Summer Pro Bono Challenge and hear some best practices on incorporating pro bono in a modern legal practice.

The Access to Justice Summit is being planned as a "hybrid" event, where all panels will be livestreamed across the state. This will open the summit to geographically distant attendees as we plan for a safe and healthy live event at the Oklahoma Bar Center in Oklahoma City.

We are thrilled that, thanks to our generous sponsors, we are able to offer this amazing programming at no cost. You can learn more and register at [www.okaccesstojustice.org/summit](http://www.okaccesstojustice.org/summit). If you are interested in learning more about sponsorship opportunities, contact me at [katie.dilks@okaccesstojustice.org](mailto:katie.dilks@okaccesstojustice.org).

### ABOUT THE AUTHOR



Katie Dilks is the Executive Director of the Oklahoma Access to Justice Foundation.

**Access to Justice Summit 2021**  
**Oklahoma Bar Center | Virtual**  
**Oct. 22, 2021**

**8:30 a.m. – 3:30 p.m.**

**Register: [www.okaccesstojustice.org/summit](http://www.okaccesstojustice.org/summit)**

# OPENING YOUR LAW PRACTICE

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- 9 a.m.      The Business of Law**  
Jim Calloway, OBA Management Assistance Program
- 10 a.m.      How to Manage Everything!**  
Jim Calloway and Julie Bays, OBA Management Assistance Program
- 11 a.m.      Break**
- 11:10 a.m.   Fastcase, MyOKBar & More**  
Jim Calloway and Julie Bays, OBA Management Assistance Program
- 11:30 a.m.   Professional Liability Insurance & Risk Management**  
Phil Fraim, President, Oklahoma Attorneys Mutual Insurance Company (OAMIC)
- Noon          Lunch**  
Provided by Oklahoma Attorneys Mutual Insurance Company (OAMIC)
- 12:30 p.m.   Professionalism in the Practice of Law**  
Presiding Judge David Lewis, Oklahoma Court of Criminal Appeals
- 1:10 p.m.      Break**
- 1:20 p.m.      Trust Accounting and Legal Ethics**  
Gina Hendryx, OBA General Counsel
- 2 p.m.          Tools of the Modern Law Office**  
Jim Calloway and Julie Bays, OBA Management Assistance Program
- 2:50 p.m.      Break**
- 3 p.m.          How to Succeed in Law Practice**  
Jim Calloway, OBA Management Assistance Program
- 4 p.m.          Adjourn**

*Sponsored by Oklahoma Attorneys Mutual Insurance Company  
This program does not qualify for MCLE credit.*



# You are ‘Every Lawyer’

*By John Morris Williams*

**WHEN WE STARTED THE** planning process for the 2021 Annual Meeting, the usual quest for a theme for the meeting came up. The theme of Every Lawyer was chosen because we wanted to design a meeting that would be valuable and accessible to every lawyer. We took note that last year we had almost 2,000 first-time attendees participate in the virtual meeting. The Annual Meeting this year is scheduled for Nov. 10-12 at the Sheraton Hotel in downtown Oklahoma City.

This year, we still face some uncertainties as the pandemic continues to linger. We are certain we will have an Annual Meeting. We are certain every lawyer, regardless of the situation, will be able to participate in this year's Annual Meeting. We have developed a flexible meeting that will allow members to make changes in their registration until the last minute. If you register to attend in person and change your mind, just let us know. If you register to attend virtually and change your mind, just let us know. Full refunds will be available through Nov. 4.

This year's meeting will require registration and a \$25 registration fee. Registration gets members six free hours of CLE and a gateway to some other very low-cost, high-quality CLE. The three free hours of “Speed Round: Hot Topics for Every Lawyer” would usually be sold for at least

five times the registration fee. Thus, the value is incredible for every lawyer.

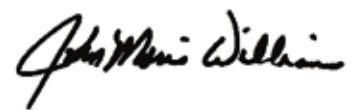
If you wish to come in person or attend online, you can make multiple individual selections and design your Annual Meeting your way. We will have a great Annual Lunch speaker, awards will be given, business will be conducted, and this year, the Diversity Committee will host its Annual Awards Dinner at the Annual Meeting. They have an award-winning author, Hannibal Johnson, doing the keynote. He is an OBA member and a highly sought-after speaker.

It is our wish that every lawyer would attend this year's Annual Meeting one way or another. Plans are in place to ensure the meeting is conducted in accordance with adherence to all city, state and federal safety guidelines, and masks and hand sanitizer will be readily available if the situation at the time calls for those precautions. Like everyone else, we have no idea what the status of COVID will be at the time of the Annual Meeting. What we do know is we are prepared, regardless of the situation, to put on a safe and valuable meeting.

Family Law Section will be holding its annual program, and it will be simulcast like most of the other programming – that means you can be there in person or attend online. Some sections will

be hosting their Annual Meeting programs online on Monday and Tuesday before the official programming begins Wednesday. Wednesday's programming will include “What Every Lawyer Needs to Know About Living and Practicing in Indian Country.” The lineup for this program is extraordinary, and every lawyer, regardless of their practice area, should attend this program. The holding in *McGirt* has brought about a number of legal issues beyond its impact in the criminal law area. All of us need to know this information.

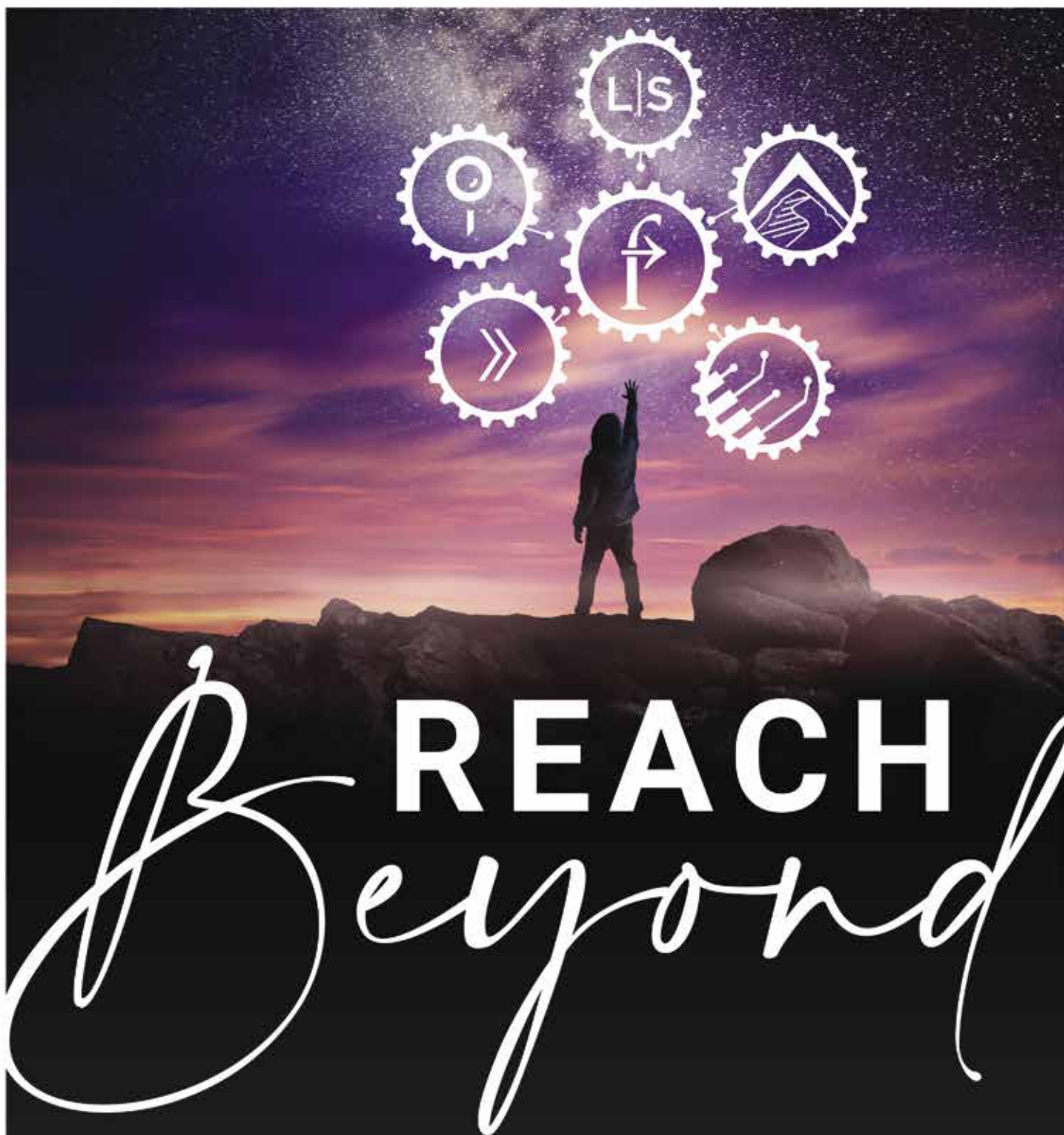
Space, as usual, does not allow the full rundown of the exciting and value-packed Annual Meeting we have in store for every lawyer. We have tried hard to have something for everyone and to have a way for everyone to participate regardless of the COVID conditions and the miles that may separate us. You see, we want to bring every lawyer together for the 2021 Annual Meeting, and I think we have found a way! This means you! This can't happen unless you register because you are Every Lawyer!



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To contact Executive Director Williams, email him at [johnw@okbar.org](mailto:johnw@okbar.org).





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# Technology Competence for Every Lawyer

*By Jim Calloway*

**T**HERE HAS NEVER BEEN A time it was more important for lawyers to have good technology skills. The smaller your law firm, the more important this is. What do lawyers need to master for their personal technology skills? That depends on many factors, including the lawyer's type of practice. Since the theme of the upcoming OBA Annual Meeting is "Every Lawyer," I thought I'd cover technology skills every lawyer should have.

Most jurisdictions now require that lawyers have technology competence as a part of being competent to practice law. Thirty-nine states, including Oklahoma, have adopted what many refer to as "the duty of technology competence."<sup>1</sup>

We should not limit this discussion to lack of technology competence that could prove to be an ethical violation. There are many technology challenges that hurt the law practice rather than the clients. For example, if the firm's billing frequently goes out a week or two late, that is a problem that will impact the law firm. If you don't care enough to get the bills out promptly, why should the client be concerned about paying them promptly?

I recommend selecting a few items below, then calendaring a deadline to master them. Or, if



you are a more "hands off" type, assign someone else in the office to learn the skill and then share with everyone else in a "lunch and learn" or office meeting.

### DOCUMENT REDACTION

Redaction used to be hard, but now it is simple if you have the right tools. Given we often see media reports of very large, prestigious law firms inappropriately redacting documents and allowing journalists to discover the information intended to be hidden, I'd say it's a good bet that others are not doing this properly.

The first step is the most important. Save a digital copy of the document safely in another location on your network. The point of redaction is no one can "un-redact" the document, even you, so keep an unredacted copy somewhere safe. Then use a proper redaction tool. For most lawyers, that will be Adobe Acrobat Professional since they already own it. This is one feature in Adobe Professional not included in Adobe Standard. And make sure everyone uses the redaction tool. Those who just paste black boxes over content are the ones who make the headlines, as

those boxes can easily be removed. There are also redaction tool plugins to Microsoft Word, like Redact Assistant from Payne Group<sup>2</sup> or freestanding redaction tools.

Even though redaction done correctly cannot be broken from a technical standpoint, there are still other possibilities. I believe if someone redacted a word throughout a long brief or court opinion, a lawyer could probably guess the word from context. And if you are redacting a deposition, you might want to read this article from *Slate*, “We Cracked the Redactions in the Ghislaine Maxwell Deposition.”<sup>3</sup> It turns out a deposition index can be the Rosetta Stone that unlocks deposition redactions. I’ve been waiting to hear about someone asking the court to remove or redact the entire index of a sensitive deposition.

## SECURITY

Unless you will stop using email and disconnect your computer from the internet, security is important for every lawyer.

If most lawyers really wanted to understand computer and computer network security, they likely would have taken a different career path. But lawyers are using technology with confidential client information every day, whether you personally touch a keyboard or authorize others to do it for you.

Security items like firewalls and antivirus need to be purchased, installed and maintained. If you use a security tool that came included with your computer purchase, you should first determine if it is still current and receiving upgrades. Most of these require a subscription payment after an initial period. If you haven’t been getting updates for some time, given the rapid changes in security threats, you may not have much protection.

Many of the greatest threats from online criminals, hackers and scammers can be greatly reduced by using two tools: 1) a password manager and 2) multi-factor authentication. Any lawyer

should be able to purchase and use these tools with no special training. Add in periodic staff training on email threats and you will have greatly reduced security risks to your law firm and your clients’ information.

A password manager allows you to use lengthy passwords that are more secure and to never use the same password for any two sites. These tools make it easy to change passwords (and recall the changes) when circumstances warrant a change. Using the same password for many of your login credentials makes passwords easy to remember; however, it also means if that password is ever compromised,





there are likely to be attempts to access other sites using your email address and that password.

Multifactor authentication means even if your login credentials and password are compromised, the criminals cannot log in to your account unless they can access the other factor. Texting a code to the mobile phone is the most common method of doing this, but some other methods are now considered more secure as discussed in my March 2021 Law Practice Tips column, “The Rise of Two-Factor Authentication and the Authenticators.”<sup>4</sup>

If you have a Facebook account, I encourage you to set up multifactor authentication immediately. You may not use Facebook for business, but you still do not want someone masquerading as you after they have hijacked your account. And if you regularly use Facebook, you don’t want to be locked out. Today when a criminal steals your Facebook account, they quickly change the password, the email address (to block password recovery) and set up their own multifactor factor authentication. This comprehensive takeover will remind you that Facebook is free because their tech support to assist you with this issue is often inadequate, to say the least. Several weeks ago, I listened to a radio program interviewing people locked out of Facebook who finally ordered an Oculus headset so they would qualify for superior Facebook tech support by reading the serial number from the outside of the box to a Facebook rep. After their account was unlocked, they then returned the headset – unopened.

Microsoft 365 is another service that should have multifactor authentication enabled because access to that allows access to all files in OneDrive, the calendar and email. I have talked with a lawyer who was out of office for a day,

but his great assistant called him anyway because the email instructions she was receiving “from him” via email about wiring money out of the trust account didn’t sound right. “Chilling” was the word he used to describe the experience.

## THE CLOUD

In the early days of cloud computing, lawyers, as befits our skeptical nature and training, were very cautious. It sounded risky to take client information from the safe confines of the law office and store it somewhere else. Today there’s a greater appreciation that storing important information in the cloud is usually a more secure environment than keeping it on the local computer network, particularly a network not monitored daily by IT professionals.

There are some differences between the various cloud computing providers. But generally, most accounts with multifactor authentication enabled and a unique, lengthy password will be secure. Cloud-based practice management software provides the storage space you need to store scanned images of everything in your client files, along with a lot of other information.

How much cloud storage do you have access to today? You may have an Apple iCloud account, Google Drive, OneDrive via Microsoft 365 and a Dropbox account. You may also subscribe to an online backup service with file sharing potential like IDrive or SugarSync.<sup>5</sup> If you have cloud storage space you aren’t using, consider designating one for personal, non-business uses. If you keep all law firm files in your practice management system or Microsoft 365, Google Drive might be a perfect place for some personal information you don’t want to lose track of.

## CONTEMPORANEOUS TIME CAPTURE

Studies have consistently shown that lawyers who record their time daily as they do the work capture a far greater amount of their time than those who try to recreate the billing entries days or a week later. Even if you decide not to bill everything, it’s great to show the client all the time you expended and then indicate what items were given a “no charge.”

Practice management software solutions include features to allow you to capture time and prepare billing invoices. This is one of the many reasons we continue to

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Today there’s a greater appreciation that storing important information in the cloud is usually a more secure environment than keeping it on the local computer network, particularly a network not monitored daily by IT professionals.





urge those who do not have such a tool to obtain practice management software. There are also free-standing time capture tools like Bill4Time and TimeSolv.<sup>6</sup>

### LEGAL RESEARCH

Lawyers are free to use the legal research tools that serve them best. However, this is a good opportunity to remind everybody that all OBA members receive a Fastcase subscription as a member benefit. You log in using your MyOKBar login. Unlike Facebook, Fastcase features great support from skilled staff. They are available to assist you. On Fastcase.com, there are several training videos available on demand, and one can enroll in scheduled classes taught online that allow for Q&A.

### ELECTRONIC SIGNATURE TOOLS

During 2020 one comment I heard from several people was, "I had not used digital signatures in my practice before, but I will from now on." The utility of these depends a great deal on your practice setting. If you are an Adobe Acrobat user, set up your e-signing and learn how it works. DocuSign also gets great reviews.

### BECOMING A WORD POWER USER

Many law firms are not utilizing the full power of Microsoft Word. Do you have a template set up for stationery, so you don't have to reformat the document every time you are printing on letterhead? Or how about a template with your letterhead built into the template so you can just use the same paper for everything?

Microsoft Word training is where many law firms can improve operations, which leads to the next subject.

### SO HOW DO I BECOME MORE TECH COMPETENT?

Training isn't the challenge for many lawyers. It is finding the time to do the training. Online training is likely the best option for many.

Deborah Savadra, who hosts Legal Office Guru has free tutorials so you can sample her style before subscribing to the other classes at [legalofficeguru.com](http://legalofficeguru.com). The most challenging thing for many about reaching Word expert level is learning styles; so with any Word training, you will certainly want to take the Styles class.

For training on many tech tools, including Outlook and most other

common software, LinkedIn purchased a great training service called Lynda and now sells subscriptions to that as LinkedIn Learning.<sup>7</sup> There is an offer of a free month's training.

The best tip for quick Microsoft Word help is when stumped, do a Google search like "How to insert a Table of Contents into Microsoft Word." That will usually return a link to the Microsoft Word Help file on the subject and links to several YouTube videos made by others. You also may want to build a "cheat sheet" document in Word, saving your favorite tips because they are hard to recall if you don't use them every day. If you hire someone new, this will be a valuable document to share with them.

There are now so many different types of technology it would be impossible to become proficient with all aspects you might use. Hopefully this column has given you a few ideas to fulfill your professional obligation to improve your technology competency.

---

Mr. Calloway is OBA Management Assistance Program director. Need a quick answer to a tech problem or help solving a management dilemma? Contact him at 405-416-7008, 800-522-8060, [jimc@okbar.org](mailto:jimc@okbar.org) or find more tips at [www.okbar.org/map](http://www.okbar.org/map). It's a free member benefit.

### ENDNOTES

1. See Bob Ambrogio's collection of links to the rules/comments which may slightly vary between jurisdictions. [www.lawsitesblog.com/tech-competence](http://www.lawsitesblog.com/tech-competence).
2. [www.thepaynegrup.com/redact-assistant/](http://www.thepaynegrup.com/redact-assistant/).
3. [slate.com/news-and-politics/2020/10/ghislaine-maxwell-deposition-redactions-epstein-how-to-crack.html](https://slate.com/news-and-politics/2020/10/ghislaine-maxwell-deposition-redactions-epstein-how-to-crack.html).
4. [www.okbar.org/lpt\\_articles/the-rise-of-two-factor-authentication-and-the-authenticators/March-2021-OBJ](http://www.okbar.org/lpt_articles/the-rise-of-two-factor-authentication-and-the-authenticators/March-2021-OBJ).
5. See "The Best Cloud Storage and File-Sharing Services for 2021" from *PC Mag* at [www.pcmag.com/picks/the-best-cloud-storage-and-file-sharing-services](http://www.pcmag.com/picks/the-best-cloud-storage-and-file-sharing-services).
6. See "The Best Time Tracking Software for 2021" from *PC Mag* at [www.pcmag.com/picks/the-best-time-tracking-software](http://www.pcmag.com/picks/the-best-time-tracking-software).
7. [www.linkedin.com/learning/subscription/topics](https://www.linkedin.com/learning/subscription/topics).

## Meeting Summary

*The Oklahoma Bar Association Board of Governors met on June 18.*

### REPORT OF THE PRESIDENT

President Mordy reported he attended the Pittsburg County Bar Association Law Day banquet, Lawyers Helping Lawyers Assistance Program meeting at the offices of A Chance to Change in Oklahoma City, which is the OBA's third-party wellness service provider. He participated in meetings with Executive Director Williams concerning Annual Meeting and other matters, worked on various OBA appointments and was a podcast guest on *Oklahoma Appeals*, conducted by attorney Gabe Bass.

### REPORT OF THE PRESIDENT-ELECT

President-Elect Hicks reported he attended a meeting of the Oklahoma Bar Foundation Board of Trustees, OAMIC meeting, continued work on the 2022 appointments process and has planned for the upcoming National Conference of Bar Presidents and the ABA House of Delegates in early August.

### REPORT OF THE EXECUTIVE DIRECTOR

Executive Director Williams reported he attended the YLD board meeting, Annual Meeting preparation meetings with staff, Annual Meeting planning meeting with Lawyers Helping Lawyers Assistance Program members and various other staff meetings on issues relating to security and technology. He also conducted staff evaluations.

### BOARD MEMBER REPORTS

**Governor Davis** reported he attended a Bryan County Bar Association meeting. **Governor Edwards** reported he attended the Pontotoc County Bar Association social and a virtual workshop for grading July's bar examination. **Governor Hutter** reported he attended the Legislative Monitoring Committee meeting. **Governor Pringle** reported he chaired the Legislative Monitoring Committee meeting, attended the Financial Institutions and Commercial Law Section's quarterly meeting and listened to President Mordy's *Oklahoma Appeals* podcast. **Governor Rochelle** reported he attended the Comanche County Bar Association picnic and golf tournament. **Governor Smith** reported she attended the Military Assistance Committee meeting, and in her role as Awards Committee chairperson, she encouraged board members to make award nominations. **Governor Vanderburg** reported as an update to last month's report that an additional law school scholarship was being awarded to Kay County students, bringing the total scholarships to five.

### REPORT OF THE YOUNG LAWYERS DIVISION

Governor Moaning reported Randall Yates with the Appellate Practice Section will do a short presentation at the next YLD meeting. A working meeting is also planned soon to update the Young Adult Guide app.

### REPORT OF THE GENERAL COUNSEL

A written report of PRC actions and OBA disciplinary matters for May was submitted to the board for its review.

### BOARD LIAISON REPORTS

Governor Rochelle said the **Access to Justice Committee** is promoting a new competition sponsored by the Oklahoma Access to Justice Commission and Access to Justice Foundation to encourage firms to perform pro bono service from June through August. Winners will be honored at the Access to Justice Summit in October. Governor Davis said the **Law Schools Committee** is preparing a report that will be submitted to the board soon. He shared that law school enrollment numbers remain steady, but there is a sharp increase in applications. President-Elect Hicks said the **Diversity Committee** is moving forward on planning for its event. Past President Shields said the **Lawyers Helping Lawyers Assistance Program Committee** met at A Chance to Change, and members present toured the facility. Governor Hilfiger said the **Law Day Committee** has confirmed the Ask A Lawyer TV show and statewide free legal advice will be Sept. 30. TV show segments being worked on are a case being handled by the OU College of Law Civil Clinic, tribal courts/*McGirt* and bankruptcy. Former TV news anchor Angela Buckelew has been asked to host again. OETA will again

provide phone banks at its studios in Oklahoma City and Tulsa. He said the committee could use help getting more counties to participate in the AAL statewide community service. Governor Pringle said the Legislature has adjourned, and the **Legislative Monitoring Committee** has set its Legislative Debrief session in August that will include 90 bills in 90 minutes and a panel of legislators. Governor Smith said the **Military Assistance Committee** is working on how to revamp the criteria for heroes eligible for free assistance. She said the **Awards Committee** has asked board members to submit nominations for OBA awards. Governor Garrett said the **Women in Law Committee** held its blood drive in the bar center parking lot, and it was successful. The committee has also finalized the agenda for its Oct. 1 conference at Embassy Suites Hotel

in Oklahoma City. As chair of the board's Audit Committee, Governor Garrett said she has had discussions with the audit firm, and the committee expects to receive the audit report soon.

#### **BOARD OF EDITORS**

The board approved President Mordy's appointment of Jana Knott, El Reno, to complete the unexpired term of Patricia Flanagan, Yukon (Dist. 9) that expires Dec. 31, 2021.

#### **BUILDING SECURITY POLICIES**

Executive Director Williams said the proposed policies have been thoroughly vetted. The board voted to approve the policies.

#### **INTERIM AD HOC REMOTE WORK POLICY**

The board voted to approve an interim remote work policy until a permanent policy is adopted.

#### **OKLAHOMA BAR FOUNDATION TRUSTEE**

The board voted to approve President Mordy's reappointment of Barbara Klepper, Oklahoma City, for a one-year term expiring Dec. 31, 2022.

#### **CHILD DEATH REVIEW BOARD**

The board voted to approve President Mordy's proposal to submit the names of Susan Damron, Oklahoma City; Brett Morton, Ardmore; and Patrick Madden, Ardmore, to Annette Jacobi, director of Oklahoma Commission on Children and Youth, for her selection of one board member with a term expiring Oct. 1, 2023.

#### **COUNCIL ON JUDICIAL COMPLAINTS LEASE**

The board voted to approve the office space lease for the Council on Judicial Complaints in the Oklahoma Bar Center that annually expires June 30.

#### **ORIENTATION**

Management Assistance Program Director Calloway and Educational Programs Director Johnson reviewed the responsibilities of their departments.

#### **NEXT MEETING**

The Board of Governors met in August, and a summary of those actions will be published in the *Oklahoma Bar Journal* once the minutes are approved. The next board meeting will be at 10 a.m. Friday, Sept. 17, at the Oklahoma Bar Center.

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Governor Rochelle said the Access to Justice Committee is promoting a new competition sponsored by the Oklahoma Access to Justice Commission and Access to Justice Foundation to encourage firms to perform pro bono service from June through August. Winners will be honored at the Access to Justice Summit in October.



# 75 Years of Impact: Diamonds & Disco

*By Candice Pace*

**T**HE OBF INVITES YOU TO celebrate 75 Years of Impact with us Friday, Oct. 1. Since our establishment in 1946, we have awarded over \$17.5 million in grants to fund law-related non-profits, court improvements and law school scholarships.

The goals of our 75th anniversary Diamonds & Disco event are to bring our legal community together in philanthropy, raise awareness of our grantee partners and emphasize the ever-present need for legal services funding. Plan to celebrate with us while we raise funds for a great cause! Your participation will help us hit our 75th anniversary event goal of \$50,000 for OBF Grantee Partners:

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CASA of Southern Oklahoma,  
Center for Children & Families,  
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Institute, Oklahoma Lawyers for Children, The Care Center, Tulsa Lawyers for Children, Legal Aid Services of Oklahoma Civil Legal Aid, OCU School of Law Indian Wills Clinic, Trinity Legal Clinic of Oklahoma, Domestic Violence Intervention Services, Wings of Hope Family Services Center, Catholic Charities of Eastern Oklahoma, Catholic Charities of the Archdiocese of Oklahoma City, the Spero Project, TU College of Law Immigrant Rights Project, YWCA Tulsa, Oklahoma County Juvenile Bureau, Teen Court, Youth Services of Tulsa, Western Plains Youth & Family Services, OBA-YLD Mock Trial, YMCA of Greater Oklahoma City, Oklahoma Access to Justice Foundation, 1<sup>st</sup> Step Male Diversion Program, Mental Health Association of Oklahoma,

OCU School of Law Pro Bono Housing Foreclosure & Eviction Assistance Program, Housing Solutions LTRC Foreclosure Prevention Education, Legal Aid Services of Oklahoma Mortgage Foreclosure Defense, Safe Center, South Tulsa Community House, Community Action Agency, Tulsa County Public Defender Project Commutation

One hundred percent of donations and proceeds from event sponsorships and ticket sales will help fund OBF grantee partners who provide legal services and education across Oklahoma.

---

Ms. Pace is OBF director of development & communications.

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# 2022 YLD Leadership

Voting to Open Oct. 1, Closes Oct. 22

*By Jordan Haygood*

**A**CTIVE MEMBERS OF THE OBA Young Lawyers Division are committed to leading and serving. As we welcome incoming YLD Chair Dylan Erwin for 2022, I applaud those within the YLD who have applied for leadership roles beginning next year to carry forward our legacy of public service and advocacy.

It is now the duty of YLD members to select those who will ultimately lead. Please look at the candidates in your district, and don't forget to vote! Remember: Every lawyer who was first admitted to the practice of law in any jurisdiction within the past 10 years is automatically a member of the YLD and is eligible to vote. Offices up for election are:

- Executive Offices: chair-elect, treasurer and secretary
- District 1: One seat; Craig, Grant, Kay, Nowata, Osage, Ottawa, Pawnee, Rogers and Washington counties
- District 2: One seat; Atoka, Bryan, Choctaw, Haskell, Johnston, Latimer, LeFlore, McCurtain, McIntosh, Marshall, Pittsburg, Pushmataha and Sequoyah counties
- District 3: One seat; Oklahoma County
- District 4: One seat; Alfalfa, Beaver, Beckham, Blaine,

Cimarron, Custer, Dewey, Ellis, Garfield, Harper, Kingfisher, Major, Roger Mills, Texas, Washita, Woods and Woodward counties

- District 5: One seat; Carter, Cleveland, Garvin, Grady, Jefferson, Love, McClain, Murray and Stephens counties
- District 6: Two seats; Tulsa County
- District 7: One seat; Adair, Cherokee, Creek, Delaware, Mayes, Muskogee, Okmulgee and Wagoner counties
- District 8: One seat; Coal, Hughes, Lincoln, Logan, Noble, Okfuskee, Payne, Pontotoc, Pottawatomie and Seminole counties
- District 9: Caddo, Canadian, Comanche, Cotton, Greer, Harmon, Jackson, Kiowa and Tillman counties
- At-Large: Three seats; all counties
- At-Large Rural: One seat; all counties except Oklahoma and Tulsa counties

Please take a moment to read the candidate information and vote; voting is a quick and easy process. Voting for YLD elections is conducted by electronic ballot, which will be emailed to you Oct. 1. You may cast your vote any time before midnight, Oct. 22. To ensure you receive a ballot, verify the OBA

roster contains your current email address. You may do so by logging in to MyOKBar or by calling the OBA Membership Department at 405-416-7080. If you do not receive a ballot, email [jordan.haygood@ssmhealth.com](mailto:jordan.haygood@ssmhealth.com).

Uncontested offices will be deemed elected by acclamation. Election results will be announced at the YLD November meeting to be held in conjunction with the OBA Annual Meeting Nov. 10 – 12 in Oklahoma City.

## 2022 LEADERSHIP

### 2022 Chair



### Dylan Erwin

Dylan Erwin joined the Oklahoma City law firm of Holladay & Chilton in 2018. Prior to entering private

practice, Mr. Erwin was an assistant district attorney for Comanche and Cotton counties. During his time in the DA's office, he was able to hone his skills as a trial attorney while serving the people in his hometown of Lawton. After leaving the DA's office, he brought his trial experience with him into the private sector with Andrews Davis, where he worked primarily in their criminal law

and civil litigation practice areas. As a criminal defense attorney, he has represented clients in matters ranging from speeding tickets and misdemeanor DUIs to felony drug charges and multi-defendant racketeering prosecutions. As a civil litigator, he has handled cases ranging from small claims disputes to large-scale construction litigation, complex business litigation and employment and labor claims on behalf of both the employer and the employee.

A fifth-generation Oklahoman, Mr. Erwin graduated *magna cum laude* from OU in 2011 with a bachelor's degree in English and a minor in classical cultures. He received his J.D. from the OU College of Law in 2014. While in law school, he served as president of the Student Bar Association and vice justice of the Harlan Chapter of Phi Alpha Delta law fraternity. He received the Student Bar Association Prize for his service to the student body, the Public Service Award for his pro bono work in both civil and criminal legal clinics, a Top Ten Speaker Award in moot court and was included on the dean's list for his academic achievements. In his free time, he enjoys reading all the books he didn't have time to read while in law school, writing short fiction, traveling and attempting to live out his high school dream of being the frontman of a garage band.

#### 2022 Immediate Past Chair



**April J. Moaning**

April Moaning received a bachelor's degree in economics from OSU and earned her J.D. from the TU

College of Law. While pursuing her law degree, she served as vice president of the TU Black Law Student Association and maintained active involvement in community service organizations. She also received numerous honors and awards, including the CALI Excellence for the Future Award in torts and the Rocky Mountain Black Law Students Association Best Oral Advocate Award.

Ms. Moaning began her legal career practicing family and criminal defense law. She later served as staff counsel at Liberty Mutual Insurance Co., where she gained experience in the areas of insurance defense and civil litigation matters involving personal injury and property damage. Currently, she represents clients in family, personal injury and civil matters. She also continues to focus on her commitment to community outreach by serving on the OBA Diversity Committee and OBA YLD Board of Directors. She has served on the Board of Directors

since January 2015 and has received multiple awards for her involvement and dedication to the division.

#### CONTESTED ELECTIONS

##### District 3



**Thomas Grossnicklaus**

Thomas Grossnicklaus was born in Oklahoma City and enlisted in the U.S. Marine Corps

after graduating from Piedmont High School. He was assigned to the Fleet Anti-Terrorism Security Team, which was created under President Reagan after the Iranian Hostage Crisis. Mr. Grossnicklaus deployed with his unit to Guantanamo Bay, Cuba, and then to Bahrain, where his unit served as a Quick Response Force to the Middle East region and as a protection crew (Raven Crew) to C-130 airplanes and highly important cargo and individuals around the region. During this deployment, he was the section leader for the Designated Marksmen Unit. After the Middle East erupted following the killing of Christopher Stevens in Benghazi, Libya, his unit was activated and sent on an eight-month mission. A bulk of that time was



spent recapturing and securing the American Embassy in Yemen. After this long and difficult deployment, he returned to Oklahoma and dedicate himself to serving his home state and community.

He received his bachelor's degree in political science from OCU and worked for Congressman Steve Russell in his district office and on a successful re-election campaign. While earning his J.D. from the OCU School of Law, Mr. Grossnicklaus worked in Gov. Mary Fallin's office as an aide and liaison to general counsel. He then served as a clerk for Oklahoma Supreme Court Justice Jim Winchester.

Currently, Mr. Grossnicklaus serves as an assistant attorney general in the Legal Counsel Unit. He prosecutes for the Oklahoma Funeral Board and Workers' Compensation Commission, Compliance Department. He is also general counsel for the Secretary of State, Oklahoma Historical Society, Oklahoma State Fire Marshall and Oklahoma State Board of Examiners for Long Term Care Administrators. He is in the Leadership Certificate Program in the Harvard Kennedy School and plans on using these hours towards receiving a master's degree in public administration. He is a graduate of the Leadership Oklahoma City's LOYAL program, a NextGen under 30 recipient and a member of the Oklahoma City Downtown Rotary.



**Bryan R. Lynch**

Bryan Lynch joined Hall Estill as an associate in 2020, practicing in the areas of commercial litigation, corpo-

rate and employment. He received his bachelor's degree *summa cum laude* from OU and his J.D. with honors from the OU College of Law.

While in law school, Mr. Lynch served as assistant executive editor of the *American Indian Law Review* and was twice a member of the school's national moot court team.



**Laura Talbert**

Laura Talbert currently serves as secretary of the OBA's Young Lawyers Division and has been a member of the board for

four years. She is a member of several YLD committees, including Kick It Forward and Community Hospitality. She is also an Oklahoma delegate for the Uniform Law Commission.

Ms. Talbert is a founding partner of Stockton Talbert PLLC, an Oklahoma City boutique law firm, where she practices in the areas of civil litigation and cannabis law. Previously, she worked as a prosecutor in New Mexico, an assistant general counsel for the Oklahoma Department of Corrections and a civil litigator for a private firm in Oklahoma City.

She received her J.D. in 2012 from the OU College of Law, where she served on the *American Indian Law Review* and worked as a licensed legal intern for OU's Criminal Defense Clinic. In 2005, she received her bachelor's degree from Texas A&M University in Corpus Christi, Texas, and she received her master's degree from the John Jay College of Criminal Justice in New York City in 2008.

When she is not working, Ms. Talbert loves playing volleyball, socializing with friends and colleagues, attending community events and finding the best, new food spots in OKC. Most of the time, her dog, Velociraptor, is right there by her side. Laura has enjoyed her time serving on the Young Lawyers Division Board and would love the opportunity to continue!

## District 5



**Patrick Madden**

Pat Madden is currently a general practitioner in Ardmore, with a focus on bankruptcy, family law,

probate and estate planning. He graduated from the OU College of Law in 2018 and is a 2014 graduate of Villanova University, where he earned a master's degree in history. He received his bachelor's degree in 2012 from Mount St. Mary's University in Emmitsburg, Maryland. Mr. Madden currently serves as a member of the Grace Center of Southern Oklahoma Board of Directors. Outside of the practice of law, he enjoys camping, hiking and visiting museums.



**Elizabeth Stevens**

Liz Stevens was born and raised in Norman and received her bachelor's degree in

history from OU. Before attending law school, she spent several years teaching English as a second language in Russia and Rwanda.

In 2019, Ms. Stevens received her J.D. from the OU College of Law, where she served as editor of the *American Indian Law Review* and director of judge recruitment for the Board of Advocates. She received the Masterson Award for her work on the *American Indian Law Review* and the Class of 2019 Pro Bono award. She also received the Cindy Foley Award for her work with the OU Legal Clinic and was an Oklahoma Bar Foundation Fellow. While pursuing her J.D., she served as a judicial intern for Oklahoma Supreme Court Justice Noma D. Gurich and as an

intern for the Committee on the Elimination of Racial Discrimination at the United Nations.

She currently works at the Attorney General's office in the Legal Counsel Unit, and in her spare time, she enjoys traveling to exotic places, reading historical fiction books and playing with her dog, Bear.

#### *District 6*



#### **Joel Auringer**

Joel Daniel Auringer is a staff attorney in the Tulsa office of Legal Aid Services of Oklahoma Inc., where he

serves on the eviction defense team. Mr. Auringer previously taught middle and high school music in the Dallas/Fort Worth, Texas, metroplex before moving to Oklahoma to enter the legal profession. He is a former staff editor for the *Tulsa Law Review* and a former volunteer compact disc reviewer for the *Journal of the International Clarinet Association*.

Mr. Auringer joined the OBA in April. He received his master's degree in library science from the University of North Texas, his J.D. from the TU College of Law and further holds multiple degrees in music performance. He lives in Tulsa with one rambunctious, orange cat named Tennyson.



#### **Caroline Shaffer Siex**

Caroline Shaffer Siex is a December 2016 graduate of the TU College of Law. She currently

works at the Tulsa law firm of Gibbs Armstrong Borochoff PC, where she practices primarily in

the areas of civil litigation, nursing home defense and family law.

Ms. Siex has been a member of the OBA YLD Board of Directors since 2017, serving as secretary in 2020 and treasurer in 2021. She also served as the YLD Hospitality Chair from 2018 to 2019. From 2020 through 2021, she served as the ABA YLD District Representative for District 24 (Oklahoma and Arkansas).

During her time on the board, she has shown her willingness and effort to help other young lawyers, especially those just emerging into practice, from passing out bar exam survival kits, hosting a swearing-in happy hour for newly admitted Tulsa-area lawyers and attending the TU bar preparation class to provide information about the Oklahoma Bar and advice to law students. She has also contributed to publications aimed at assisting young lawyers to grow in their careers. Ms. Siex wants to continue to serve on this board to bring more networking opportunities to young lawyers in Tulsa and ease the daunting transition from law school to the legal field for newly admitted lawyers.



#### **Keaton Taylor**

Keaton Taylor is the founder and managing partner of the Tulsa law firm of Taylor Martuch, practicing primarily in the areas of civil

litigation, business formation and disputes, personal injury claims and criminal defense. Mr. Taylor represents clients from every walk of life and takes each client's situation into account when developing a solution. In the representation of his clients, his focus is always to get the best possible result for each individual client's goals.

A native Tulsan and a graduate of Northeastern State University and the TU College of Law, Mr. Taylor is licensed to practice law in all Oklahoma state courts, Muscogee (Creek) Nation courts, as well as the United States District Court for the Northern District of Oklahoma. He is a member of the American Bar Association, the Tulsa County Bar Association and a District 6 representative for the OBA Young Lawyer's Division. He is also active in the Tulsa Young Professionals, the Tulsa County Bar Association and the Oklahoma Criminal Defense Lawyer's Association (OCDLA). In his spare time, he enjoys getting outdoors and volunteering in the community.

#### **AT-LARGE**



#### **Phoebe B. Mitchell**

Phoebe Mitchell is a third-year litigation attorney with Phillips Murrah PC. She represents

individuals and both privately held and public companies in a wide range of civil litigation matters. Ms. Mitchell received her J.D. from the OU College of Law, where she earned the American Jurisprudence Award for Civil Procedure II and was on the Dean's Honor Roll. She served as research editor and candidate mentor for the *Oklahoma Law Review* and was a member of the Phi Delta Phi legal honor society. She also served as a mentor on the Dean's Leadership Council, was selected as a Dean's Leadership Fellow and served on the Academic Appeals Board. While in law school, she had the opportunity to clerk as a judicial intern for Oklahoma Court of Criminal Appeals Judge Rob Hudson.

Ms. Mitchell was born and raised in Oklahoma City and received her bachelor's degree from Vanderbilt University in Nashville, Tennessee. She is a member of Make-A-Wish Oklahoma's Young Professional's Council and an alumni advisor for OU's Kappa Alpha Theta chapter. Phoebe lives downtown with her mini Aussiedoodle, Rumble, and enjoys Thunder basketball, OU football and cheering on her Vanderbilt Commodores in her spare time.

#### **Jacob T. Reynolds**

Jacob Reynolds received his bachelor's degree from OU in international security studies and is a 2020 graduate of the OU College of Law. While in law school, he was an active member of the Mock Trial team. This year, he joined the McAlester law firm of Wagner & Lynch, where he practices in the areas of criminal defense, personal injury and civil rights litigation. He is licensed to practice in the Eastern and Western Federal Districts of Oklahoma, as well as Choctaw and Creek tribal courts. Mr. Reynolds served in the U.S. Army National Guard and is a veteran of the Global War on Terror and Operation Freedom's Sentinel.

#### **Joel Auringer**

*See bio above*

#### **Thomas Grossnicklaus**

*See bio above*

#### **Bryan R. Lynch**

*See bio above*

#### **Patrick Madden**

*See bio above*

#### **Caroline Shaffer Siex**

*See bio above*

#### **Elizabeth Stevens**

*See bio above*

#### **Laura Talbert**

*See bio above*

### **UNCONTESTED ELECTIONS**

#### *Secretary*



#### **Taylor Venus**

Taylor C. Venus is an attorney with the Enid firm of Long, Claypole & Blakley Law PLC. He prac-

tices primarily in the areas of civil litigation and transactional law for a diversity of clients.

Mr. Venus is a native of Ponca City and graduated from OSU with bachelor's degrees in economics and finance. During his time at OSU, he had the honor of serving as the mascot, Pistol Pete. He received his J.D. and MBA at OU, where he served as the articles editor for the *Oil & Gas, Natural Resources & Energy Journal* and as an officer or representative for multiple student organizations.

He has a passion for serving his local community and with organizations that have transformed his life. In Enid, he is president of the Enid Public Schools Foundation, trustee of the Vance Development Authority, member of the City of Enid Board of Adjustment and actively participates and volunteers with several civic groups in northwest Oklahoma. Outside his community, he has served on his undergraduate fraternity alumni board since graduating and has participated with the Pistol Pete Alumni Association since its founding. Mr. Venus is the current Garfield County Outstanding Young Lawyer, District 4 director for the OBA Young Lawyer Division and part of the Garfield County and OBA Legislative Monitoring Committee.

In his free time out of the office, he enjoys spending time with friends and family, hunting, playing golf and being an armchair expert on his favorite sports teams and political views.

#### *District 4*



#### **Ben Barker**

Ben Barker represents clients in all manners of litigation across Oklahoma, practicing primarily in the

areas of criminal defense and family law in northwest Oklahoma. He is licensed to practice in all Oklahoma state courts, the U.S. District Court for the Western District of Oklahoma and the Cherokee Nation courts. A member of the OBA Family Law Section and the Oklahoma Criminal Defense Lawyer's Association, Mr. Barker's criminal defense work has been featured in national and international news publications, including the *Washington Post*, *New York Daily News* and London's *Daily Mail*. He has also been invited to appear on the NBC television show *Dr. Phil* in connection with his criminal defense work.

After earning his bachelor's degree from OSU in 2010, Mr. Barker received his J.D. from the OU College of Law in 2013. He is an active member of the Garfield County Bar Association, serving as Law Day Committee Chairman since 2017 and representing the county as a delegate at the 2018 OBA Annual Meeting. In 2018, he received the Garfield County Bar Association Outstanding Young Lawyer Award.

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Mr. Haygood practices in Oklahoma City and was 2020 YLD chair. Keep up with the YLD at [www.facebook.com/obayld](http://www.facebook.com/obayld).



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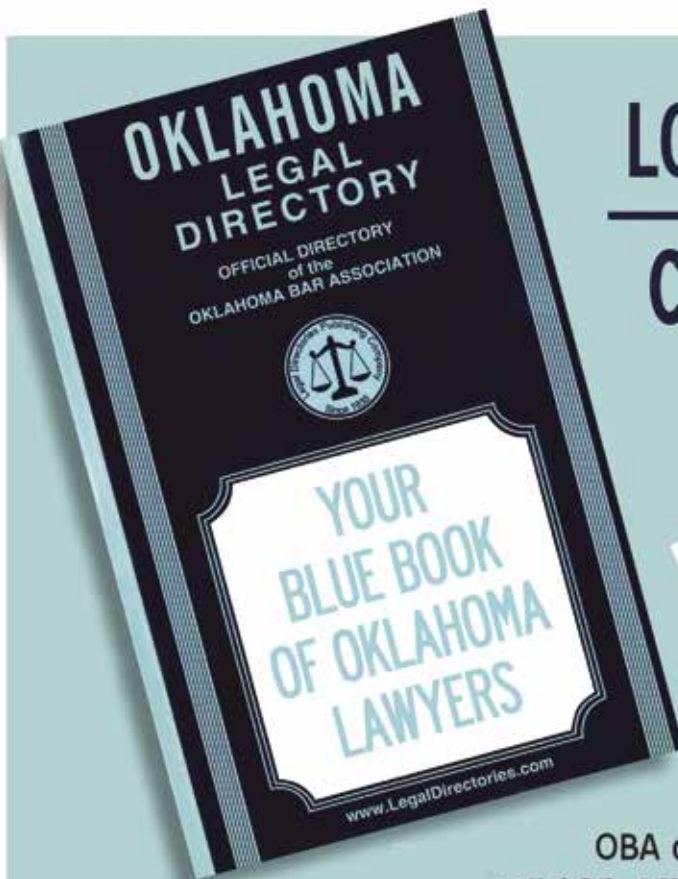
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## JUSTICE KUEHN TO SERVE ON THE SUPREME COURT



*Justice Dana Kuehn*

Justice Dana L. Kuehn was appointed to the Oklahoma Supreme Court by Gov. Stitt, filling the vacancy created by the retirement of Justice Tom Colbert. She is the fourth woman to serve on the Oklahoma Supreme Court and the first woman to serve on both of the state's high courts.

Previously, Justice Kuehn served as presiding judge of the Oklahoma Court of Criminal Appeals, a position held since January. A member of the Court of Criminal Appeals since 2017, she served as vice presiding judge from 2018 to 2020. She is also an active member of the Oklahoma Judicial Conference, serving as appellate judge vice president for the OJC Executive Board. She received her J.D. from the TU College of law in 1996 and has filled the roles of president and secretary of the TU College of Law Alumni Board and was a board member for the Ronald McDonald House of Tulsa.

## JUDGE BLACKWELL APPOINTED TO THE COURT OF CIVIL APPEALS

Gov. Stitt has appointed Gregory Blackwell to serve on the Oklahoma Court of Civil Appeals, filling the vacancy for District 3, Office 1. Prior to his appointment, Judge Blackwell was a staff attorney for Judge Bay Mitchell on the Court of Civil Appeals in Oklahoma City. He received his J.D. from the OU College of Law and has practiced law for 17 years.



*Judge Gregory Blackwell*

## MEET THE NEW OBA COMMUNICATIONS DIRECTOR



*Lori Rasmussen*

The OBA welcomes Lori Rasmussen to the role of director of communications. She returns to the OBA after more than five years in the aerospace communications field; before that, she served several years as the OBA's assistant communications director under long-time Communications Director Carol Manning, who retired in August.

Ms. Rasmussen's career as a communications professional includes media relations, content creation, brand management and strategic communications planning. She is a native Oklahoman with roots in both Enid and Edmond. She has also previously served as a reporter and producer for OETA's "Oklahoma News Report." She has a bachelor's in journalism from OU and an M.S. in communications from Syracuse University. She is a mother of three (and a dog mom to three more). In her spare time, she enjoys traveling, scuba diving, art and reading.

## SOVEREIGNTY SYMPOSIUM 2021

The 2021 Sovereignty Symposium has been scheduled for Oct. 11-12 at the Skirvin Hotel in Oklahoma City. The event, themed "After McGirt?" will coincide with Indigenous People's Day on Oct. 11. Watch for more details at [www.sovereigntysymposium.com](http://www.sovereigntysymposium.com).

## OKLAHOMA ATTORNEY GENERAL SELECTED

John O'Connor was appointed by Gov. Stitt as Oklahoma attorney general, filling the unexpired term ending Jan. 9, 2023. He was sworn into office by Oklahoma Supreme Court Justice John Kane during a July 23 ceremony at the Capitol. An attorney for Hall Estill, Mr. O'Connor has 40 years of legal experience and practices primarily in civil litigation, including complex commercial and general civil litigation.

## CONNECT WITH THE OBA THROUGH SOCIAL MEDIA



Have you checked out the OBA LinkedIn page? It's a great way to get updates and information about upcoming events and the Oklahoma legal community. Follow our page at [www.linkedin.com/company/OKBarAssociation](http://www.linkedin.com/company/OKBarAssociation), and be sure to check out the OBA on Twitter, Facebook and Instagram.



## ON THE MOVE

**Greg E. Summy** has joined the Norfolk, Virginia, law firm of Vandeventer Black LLP as of counsel to continue his transportation law practice. Mr. Summy recently retired from Norfolk Southern Corporation as deputy general counsel.

**Terry Brennan** has joined the Tulsa office of Hall Estill as of counsel. He practices primarily in the areas of complex business and personal litigation, focusing on compliance and risk issues, including oil and gas, environmental law and business and personal torts.

**Trent Shores** was confirmed as a tribal supreme court justice for the Kaw Nation. Mr. Shores, a citizen of the Choctaw Nation of Oklahoma, practices in the areas of complex litigation, Native American law and policy, cybersecurity and high stakes government and corporate investigations. Previously, he was a U.S. attorney for the Northern District of Oklahoma and served as chair of the Native American Issues Subcommittee that was charged with developing and guiding national policy for Indian Country justice and related matters.

**Amy Brown** was named Public Service Company of Oklahoma's new external affairs manager for Tulsa and the metro area. Ms. Brown previously served as deputy mayor and chief administrative officer for Tulsa since 2019. In her new position, she will be responsible for public and community affairs and building partnerships to enhance long-term sustainability and economic vitality.

**Amy Hayes Thompson** has joined the Oklahoma City law firm of Echols & Associates. She practices primarily in the areas of oil and gas transaction law and all stages of family law. Ms. Thompson received her J.D. from the OCU School of Law in 2003.

**Rachel Dallis** was sworn in as the Tahlequah municipal judge. Judge Dallis was previously appointed as acting judge in place of Judge Donn Baker.

**Ashley A. Warshell** has joined the Oklahoma City law firm of Hall & Ludlam PLLC as a member, and **Alexander Hall** has joined the firm as an associate. Ms. Warshell practices primarily in the areas of contract drafting and negotiation, consumer financial services law, regulatory compliance and debtor/creditor law. She is currently serving her second term as scholarship officer of the OBA Financial Institutions and Commercial Law Section.

Phillips Murrah PC has relocated its Dallas office. The firm can now be found in the Regency building, 3710 Rawlins St., Ste. 900.

### HOW TO PLACE AN ANNOUNCEMENT:

The *Oklahoma Bar Journal* welcomes short articles or news items about OBA members and upcoming meetings. If you are an OBA member and you've moved, become a partner, hired an associate, taken on a partner, received a promotion or an award or given a talk or speech with statewide or national stature, we'd like to hear from

you. Sections, committees and county bar associations are encouraged to submit short stories about upcoming or recent activities. Honors bestowed by other publications (*e.g.*, *Super Lawyers*, *Best Lawyers*, etc.) will not be accepted as announcements. (Oklahoma-based publications are the exception.) Information selected for publication is printed at no cost, subject to editing and printed as space permits.

Submit news items to:

Lauren Rimmer  
Communications Dept.  
Oklahoma Bar Association  
405-416-7018  
barbriefs@okbar.org

*Articles for the November issue must be received by Oct. 1.*

## KUDOS

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**Lauren Brown, Benjamin Grubb, Kari Hawthorne, Katherine Mazaheri and Kelli Stump** have joined the OCU School of Law Alumni Association Board beginning July 1 for the 2021-2022 year. As members of the Alumni Association Board, they will work to support current students, foster relationships between alumni and students and advance the mission of excellence in legal education at the school. They will each serve a three-year term. Ms. Brown serves as corporate counsel for Love's Travel Stops & Country Stores Inc. Mr. Grubb is an attorney with the Edmond law firm of DeWitt, Paruolo & Meek. Ms. Hawthorne is a partner at the Oklahoma City law firm of Johnson Hanan Vosler Hawthorne & Snider. Ms. Mazaheri is a founding member and attorney at Mazaheri Law. Ms. Stump is a private practitioner at the Oklahoma City law firm of Kelli Stump PLLC.

**Bartlett Bouse** has been named to the Oklahoma Board of Juvenile Affairs. The nine-member board is the rulemaking body for the Office of Juvenile Affairs (OJA). It approves OJA's annual budget request, assists staff with priorities and policies of the agency and establishes procedures and payment rates for contracting agencies. Mr. Bouse is a private practitioner at the Woodward Bouse Law Firm. Previously, he was an assistant district attorney in the Woodward district attorney's office and served as a member of the Western Plains Youth and Family Service Board, the Woodward County Post Adjudication Review Board and the Woodward United Fund.

**Sharon Voorhees** has been appointed as a Trustee for the Oklahoma City Water Utilities Trust, effective July 20. Ms. Voorhees is the founding partner of the Oklahoma City law firm of Voorhees & Voorhees PC. The firm's practice includes probate, guardianship, real estate, estate planning and small business matters. She received her J.D., with honors, from the OU College of Law in 1991.

**Mike Turpen**, former Oklahoma attorney general and Oklahoma Hall of Fame member, received the United Way of Central Oklahoma Richard H. Clements Lifetime Achievement Award, given to those dedicated to lives of service, leading and volunteerism.

**Edd McNeil** was honored as the Helen Webber Citizen of the Year during the Davis and Sulphur Joint Chambers of Commerce Banquet on July 22. Mr. McNeil, who has practiced law in Davis for 50 years, is a member of the Davis Beautification Group, Davis Chamber of Commerce and Davis Development Authority, and he helped make the Davis Splash Pad a reality.

## AT THE PODIUM

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**Melvin C. Hall** moderated a panel for the 2021 National Conference on Race and Ethnicity special event, "When the Work is Never Done: A Conversation on Civil Rights & the Law," on June 8. The event serves as the leading national forum on issues of race and ethnicity in American higher education. Mr. Hall is a member of the Executive Committee for the Southwest Center, a department within the Public and Community Services Division of the College of Continuing Education at OU.

## IN MEMORIAM

**O** Edwin Adams of Tulsa died April 9. He was born Oct. 22, 1934, in Altus. Mr. Adams earned his bachelor's degree from OU, where he was a member of the Alpha Tau Omega fraternity and active in Air Force ROTC. He received his J.D. from the OU College of Law in 1962 and joined Humble Oil Co/Exxon, working in Oklahoma City, Chicago and Memphis. After working for White Shield Oil & Gas in Tulsa, he entered into private practice with the firm, Sneed, Lang, Adams *et al* until his retirement. He was a member of the Kiwanis Club of Tulsa, and he assisted in the production of the Miss Oklahoma Pageant for many years. Memorial contributions may be made to St. Dunstan's Church Tulsa or Tulsa River Parks Authority.

**S**cott Williams Bradshaw of Tulsa died Aug. 16, 2020. He was born Jan. 13, 1937, in Skiatook. Mr. Bradshaw attended the University of Notre Dame, where he was in the ROTC. **Upon graduation, he was commissioned a second lieutenant in the U.S. Army and served for 15 years, including two tours in Vietnam that involved the Tet Offensive. He attained the rank of major and received two Bronze Stars for Valor, two Purple Hearts, a Combat Infantry Badge and several other medals for gallantry.** He received his J.D. from the TU College of Law in 1976 and practiced law with his wife for many years. Before retiring, he was a federal bankruptcy trustee. Memorial contributions may be made to the Parkinson's Foundation of Oklahoma.

**B**ill J. Bruce of Del City died May 26. He was born Dec. 17, 1935, in Seminole. **After attending OU for a year, he enlisted in the U.S. Air Force in 1955 and served until 1958 in Goose Bay, Canada.** He earned his bachelor's degree from Central State in 1964, becoming the first college graduate in his family. He worked for the Oklahoma County Sheriff's Department as a dispatcher and the Oklahoma City Police Department as an officer. In 1969, Mr. Bruce received his J.D. from the OCU School of Law. He served as an attorney for the Oklahoma County District Attorney's Office and the Attorney General's Office, and in 2001, he retired as deputy commissioner of the Oklahoma Department of Public Safety. Memorial contributions may be made to the Choctaw Boy Scout Troop 275 or the Officer Down Memorial Fund.

**E**rnest B. Day Jr. of Tulsa died July 13. He was born March 4, 1937, in Eufaula. Mr. Day attended OU on a football scholarship and played on the 1956 national championship team. He received his J.D. from the OU College of Law in 1962 and practiced law in Tulsa for 42 years, helping many families with estate planning.

**W**illiam E. Gaddis of Tulsa died July 4. He was born Sept. 13, 1948, in Maryville, Missouri. In 1966, Judge Gaddis attended OU, where he pledged Pi Kappa Alpha fraternity and was named the first recipient of the George Lynn Cross Scholarship. He received his J.D., with honors, in 1973. **While at OIJ, he was commissioned as a second lieutenant**

**in the U.S. Army. As an officer, both on active duty and in the reserves, he attained the rank of major, finishing his service with the 486th Civil Affairs Company in Tulsa in 1981.** He spent over 35 years as a municipal attorney, representing several towns in northeast Oklahoma, and as a municipal judge. He served as president of the OU Club of Tulsa, the OU Alumni Association, the Oklahoma State Society and the Tulsa Chapter of Sons of the American Revolution.

**C**harles Merle Gile of Oklahoma City died July 6. He was born Oct. 25, 1944, in Wellington, Kansas. Mr. Gile received his bachelor's degree from the University of Central Oklahoma and his J.D. from the OCU School of Law in 1972. A trial lawyer for nearly 50 years, he was well known for high-profile criminal trials, but he did not hesitate to also help those accused of petty offenses and often helped on a pro bono basis. In 1990, he was honored by the Oklahoma Criminal Defense Lawyers Association with the Clarence Darrow Award. Memorial contributions may be made to the C. Merle Gile Memorial Scholarship.

**R**oger W. Griffith of Moore died June 18. He was born Oct. 20, 1941, in Moore. Judge Griffith received his J.D. from the OU College of Law in 1956, and his legal career spanned more than 40 years. He served as Cleveland County assistant district attorney, municipal judge of Moore and assistant U.S. attorney, and after retiring, he worked part time as an administrative law judge for the Oklahoma Department of Human Services.



**F**rank M. Hagedorn of Tulsa died July 10. He was born Feb. 11, 1938, in Morgantown, West Virginia. After graduating from TU in 1962, he worked as a teacher, coach and police officer. Mr. Hagedorn received his J.D. from the TU College of Law in 1968. He served as an assistant district attorney and was later appointed director of the Oklahoma State Bureau of Investigation.

**H**arold Kenton Haxton of Muskogee died July 2. He was born Dec. 13, 1931, in Hobart. Mr. Haxton attended OSU and received his J.D. from the OU College of Law in 1961. He was an attorney for the Department of Veterans Affairs and retired from the Veteran's Administration in 1996. He was a member of First Presbyterian Church and Muskogee Rotary Club.

**P**hyllis N. Levy of Tulsa died July 26. She was born Feb. 4, 1947. Ms. Levy received her J.D. from the TU College of Law in 1989. Memorial contributions may be made to the Special Olympics.

**R**ay Dean Linder of Alva died July 15. He was born Jan. 30, 1935, in Waynoka. Judge Linder graduated from Waynoka High School in 1953 as class valedictorian. He received his J.D. from the OU College of Law in 1960 and began his legal career as the county attorney of Woods County. After serving as county judge and associate district judge, he was elected District Judge, Division 1, Fourth Judicial District of Oklahoma in 1982. He served in this position until his retirement in 2015. Memorial

contributions may be made to the Dean Linder Broadcast Scholarship, NWOSU Foundation and Alumni Association or the First Christian Church Disciples of Christ.

**R**obert W. Moore of Tulsa died June 26. He was born Nov. 10, 1945. Judge Moore received his J.D. from the TU College of Law in 1976 and served as a district judge.

**J**ohn Morgan of Wagoner died July 3. He was born April 8, 1936, in Chicago. **Upon graduating from high school, he served in the U.S. Army. He was stationed at Schofield Barracks on Oahu at the same time Hawaii became a state.** Following his service, Judge Morgan received his J.D. from the TU College of Law in 1965. In addition to time spent in private practice, he served as the Tulsa assistant district attorney and city prosecutor for nine years. He then became an assistant U.S. attorney, where he acted as the lead coordinator for the Organized Crime Drug Enforcement Task Force for 11 years. In 2008, he retired after serving eight years as a social security administrative law judge in Dallas. Memorial contributions may be made to Clarehouse.

**L**ynn Dean Nolen of Muskogee died July 3. He was born Sept. 16, 1940, in Wetumka. Mr. Nolen received his J.D. from the OU College of Law in 1964. His 56-year legal practice included criminal defense, civil, probate and mental health law. He wrote for the *Muskogee Phoenix* on topics ranging from youth discipline, classroom discipline, right-to-work laws, regulatory reasonableness and corporate personhood.

**W**illiam James Rinehart of Yukon died June 1. He was born June 2, 1948, in Kansas City, Missouri. **In 1967, he enlisted in the U.S. Army Infantry. Mr. Rinehart served three tours of duty and earned the Combat Infantry Badge in the Central Highlands of the Republic of South Vietnam.** He returned to Oklahoma in 1978 after being honorably discharged and worked at the Federal Correctional Institute in El Reno. **He also continued to serve in the U.S. Army Reserve and the Oklahoma National Guard.** In 1985, he received his J.D. from the OCU School of Law and began his legal career as a litigation attorney with the Oklahoma Department of Transportation. He retired from the U.S. Army Reserve in 1995 and from ODOT in 2001 to start a small business in El Reno. He was a master mason, shiner, member of the Friends of the Central Highlands and lifetime member of the Veterans of Foreign Wars and Disabled American Veterans.

**J**oe S. Rolston III of Oklahoma City died July 7. He was born Feb. 21, 1932, in Burlington, Kansas. **After graduating from Classen High School in 1950, Mr. Rolston served in the U.S. Air Force during the Korean War.** He received his J.D. from the OCU School of Law in 1962, graduating first in his class, and joined the law firm of Elliott, Woodard & Meister, which later became Joe S. Rolston III PC. He practiced in the areas of real property and probate matters and achieved recognition among his peers in those areas with an AV rating from Martindale Hubbell. Mr. Rolston retired in

2017 after practicing for 55 years. Memorial contributions may be made to Neighborhood Services Organization, OSU Foundation or the Servant Foundation.

**G**ene Sharp of Liberal, Kansas, died July 27. He was born Jan. 20, 1929, in East St. Louis, Illinois. Mr. Sharp received his J.D. from the OU College of Law in 1953, where he was the *Oklahoma Law Review* editor in chief. **Upon graduation, he served three years in the U.S. Air Force as a legal officer and was released at Altus Air Force Base in 1956 as the staff judge advocate.** In 1959, he joined the Liberal law firm of Vance, Hobble, Nordling, which has been in existence since 1925 and now operates as Sharp McQueen PA. He retired in 2018 after 66 years of law practice. Mr. Sharp served as Liberal City attorney and was a member of the Scottish Rite, the Shriners and the Order of the Eastern Star. Memorial contributions may be made to the SCCC Foundation for the Champions Center or the OU Gene and JoAnn Sharp Law Review Scholarship.

**G**erald George Zellmer of Moore died July 3. He was born Dec. 13, 1951, in Prairie Grove, Arkansas. After playing football at Northeastern Oklahoma A&M College, he transferred to OU, where he was an active member of the Delta Tau Delta fraternity. Mr. Zellmer received his J.D. from the OCU School of Law in 1978 and ultimately opened his own law practice in McAlester. He served on the Board of Directors of the McAlester Boys and Girls Club, volunteered for Meals on Wheels and was a long-time member of the Pittsburg County Bar Association. Memorial contributions may be made to St. Luke's UMC Food Outreach Ministry or Legal Aid Services of Oklahoma.

## STAFF ATTORNEY

The Office of Legal Counsel to the OSU/A&M Board of Regents has an opening for an entry-level Staff Attorney. The position will report to and receive assignments from the General Counsel, will render legal advice and serve as a higher education generalist, dealing with a wide variety of legal issues, including, but not limited to, student conduct, faculty discipline, employment law, regulatory compliance, real estate transactions, contracts and litigation. Candidates with experience or aptitude in real estate transactions or employment law will be given special consideration. The position requires a bachelor's degree and J.D./LL.B. degree from an accredited law school, membership in good standing in the Oklahoma Bar, and zero (0) to five (5) years legal experience. The position also requires a demonstrated capability for legal research, analysis and reasoning, superior oral and written communication skills, project management skills, an ability to identify and resolve complicated and sensitive problems creatively and with professional discretion, and an ability to interact and function effectively in an academic community. Salary commensurate with experience.

**To receive full consideration, email resume to [cindy.pearson@okstate.edu](mailto:cindy.pearson@okstate.edu) by October 1, 2021.**

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## 2021 ISSUES

### OCTOBER

#### DUI

Editor: Aaron Bundy  
aaron@bundylawoffice.com  
Deadline: May 1, 2021

### NOVEMBER

#### Tax Law

Editor: Melissa DeLacerda  
melissde@aol.com  
Deadline: Aug. 1, 2021

### DECEMBER

#### Elder Law

Editor: Luke Adams  
ladams@tisdalohara.com  
Deadline: Aug. 1, 2021

## 2022 ISSUES

### JANUARY

#### Meet Your Bar Association

Editor: Lori Rasmussen

### FEBRUARY

#### Labor & Employment

Editor: Roy Tucker  
RTucker@muskogeeonline.org  
Deadline: Oct. 1, 2021

### MARCH

#### Impact of

#### McGirt v. Oklahoma

Editor: Aaron Bundy  
aaron@bundylawoffice.com  
Deadline: Oct. 1, 2021

### APRIL

#### Law Day

Editor: Lori Rasmussen

### MAY

#### Energy

Editor: Tony Morales  
antonimorales1984@gmail.com  
Deadline: Jan. 1, 2022

### AUGUST

#### Gaming

Editor: Scott Jones  
sjones@piercecouch.com  
Deadline: May 1, 2022

### SEPTEMBER

#### Bar Convention

Editor: Lori Rasmussen

### OCTOBER

#### Education

Editor: Luke Adams  
ladams@tisdalohara.com  
Deadline: May 1, 2022

### NOVEMBER

#### Municipal Law

Editor: Roy Tucker  
RTucker@muskogeeonline.org  
Deadline: Aug. 1, 2022

### DECEMBER

#### Ethics & Professional Responsibility

Editor: Cassandra Coats  
cassandracoats@leecoats.com  
Deadline: Aug. 1, 2022

*If you would like to write an article on these topics, contact the editor.*



## Journal Courts & MORE

The OBA's new, electronic court issue, Courts & More, highlights Oklahoma appellate court information and news for the legal profession. It is published online and delivered to members by email every Wednesday.



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### OFFICE SPACE

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OFFICE SPACE FOR RENT IN OKLAHOMA CITY one block north of federal courthouse. Both interior and exterior offices available; includes conference room, internet, receptionist and parking. For more information, please call 405-239-2726.

#### Office Space – Midtown Law Center

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**405-229-1476 or 405-204-0404**

OFFICE SPACE – OKC. Up to three offices plus secretarial area, with four established attorneys, Kelley and Britton. Parking, receptionist, phone, internet with WiFi, copier, conference room, security system, referrals possible. Contact Steve Dickey (405) 848-1775.



## OFFICE SPACE

**DOWNTOWN OFFICE SPACE FOR SUBLEASE IN LEADERSHIP SQUARE.** Prime office space available for sublease in Leadership Square, centrally located in downtown OKC and within a short walking distance of the Oklahoma County Courthouse, Federal Courthouse, Bricktown, and major event centers. Space includes external offices, support staff bays, reception, kitchenette, and file room. Parking available. Can be subdivided. For more information, please call Robin at 405-208-8536.

**OKC OFFICE SPACE FOR LEASE.** Minutes from downtown (approx. NW 10th & Western Ave.). Furnished. Two conference rooms. Full kitchen. Full basement. Commercial printer/scanner. Commercial phone system. Security System. Cleaning service. Room for receptionist and assistant. \$500 per month plus portion of bills. Well below market value. This is a shared space with one office already taken by a criminal defense attorney. Please call (405) 413-1646 if interested.

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## POSITIONS AVAILABLE



### Associate Attorney

Hobbs, Straus, Dean & Walker, LLP, a national law firm with offices in Washington, DC; Portland, OR; Oklahoma City, OK; Sacramento, CA; and Anchorage, AK is seeking an

Associate Attorney for its Oklahoma City, OK office. Hobbs Straus specializes in Federal Indian Law and has worked for almost 40 years to realize positive change in Indian Country. Our attorneys are dedicated to promoting and defending tribal rights, expanding opportunities for tribes, and improving the lives of American Indians and Alaska Natives.

Desired qualifications for candidates include: superior research and writing skills, strong academic performance, strong communication skills, ability to participate in a highly collaborative environment, familiarity with tribal communities and cultures, and a commitment to tribal representation.

Prior experience in the field of Federal Indian Law is strongly preferred.

To apply: Interested candidates should submit a cover letter, resume, law school transcript, and recent writing sample to Cindy Bonewitz at [cbonewitz@hobbsstraus.com](mailto:cbonewitz@hobbsstraus.com)

Thank you for your interest in Hobbs, Straus, Dean & Walker, LLP. [www.hobbsstraus.com](http://www.hobbsstraus.com)

**WATKINS TAX RESOLUTION AND ACCOUNTING FIRM** is hiring attorneys for its Oklahoma City and Tulsa offices. The firm is a growing, fast-paced setting with a focus on client service in federal and state tax help (e.g. offers in compromise, penalty abatement, innocent spouse relief). Previous tax experience is not required, but previous work in customer service is preferred. Competitive salary, health insurance and 401K available. Please send a one-page resume with one-page cover letter to [Info@TaxHelpOK.com](mailto:Info@TaxHelpOK.com).

## POSITIONS AVAILABLE

MITCHELL BONDS PLLC, a Sapulpa law firm, is seeking an associate attorney with 5-7 years of experience for a mix of both litigation and transactional work. Practice areas consist of Construction, Banking, Business Disputes, Estate Planning and Probate, Employment Law, Business Formations and other areas of Civil Litigation. Candidates must be able to handle matters from start to finish and have excellent research and writing skills and be comfortable in depositions and in the courtroom. Competitive salary and other benefits commensurate with level of experience. Applications will be kept in strict confidence. Send resume and at least 2 writing samples to Brian Mitchell at [bmitchell@mitchellbonds.com](mailto:bmitchell@mitchellbonds.com).

DEPUTY GENERAL COUNSEL. The Oklahoma Health Care Authority (OHCA) is searching for a Deputy General Counsel. The ideal candidate will prosecute and defend administrative and judicial actions on behalf of OHCA. Candidate will be responsible for representing the OHCA in audit appeals cases before an administrative law judge appointed by the Office of the Oklahoma Attorney General (OAG). Candidate will also serve on a team of OHCA attorneys who work collaboratively with OHCA departments as assigned, review and draft agency documents, work with the OAG's Medicaid Fraud Control Unit and other law enforcement partners to identify and take appropriate agency actions regarding credible allegations of fraud, and other duties as assigned. Must be an active member of the State Bar of Oklahoma. Other relevant legal and/or administrative experience, as well as a background in health care administration, health care insurance, and/or state or federal health care programs preferred. Apply online at: <https://oklahoma.gov/ohca/about/careers.html>.

ASSOCIATE ATTORNEY FOR GROWING CIVIL LITIGATION PRACTICE in NW OKC/Edmond. Candidates must be licensed and in good standing with the OBA, **5+ years litigation experience** with strong references, prioritizes client service with compassion. Resumes to [marquita@mazaherilaw.com](mailto:marquita@mazaherilaw.com).

ASSOCIATE ATTORNEY FOR GROWING CIVIL LITIGATION PRACTICE in NW OKC/Edmond. Candidates must be licensed and in good standing with the OBA, **1-3 years litigation experience** with strong references, prioritizes client service with compassion. Resumes to [marquita@mazaherilaw.com](mailto:marquita@mazaherilaw.com).

## POSITIONS AVAILABLE

BLANEY TWEEDY TIPTON & HIERSCHKE, PLLC SEEKS AN ATTORNEY with 3-5 years relevant experience to work in its civil litigation practice. Candidates must have a strong academic background, good research and writing skills, and the ability to work in a fast-paced practice with frequent deadlines. The ideal candidate would have experience managing all aspects of litigation files ranging from complex commercial litigation, foreclosures, collection, and oil & gas. Salary will be commensurate with experience. Applications will be kept confidential. Send resume to [madison@btlawokc.com](mailto:madison@btlawokc.com).

DISTRICT 2 DISTRICT ATTORNEY seeking assistant district attorneys for positions in Beckham and Custer Counties. Primary responsibilities include the criminal prosecution of felony and misdemeanor offenses and other special assignments. Must reside within the district within a reasonable period of time from acceptance of employment. Salary commensurate with experience. State benefits available. Position available immediately. Please send resume with any salary requirements to [Duaina.megee@dac.state.ok.us](mailto:Duaina.megee@dac.state.ok.us) or District Attorney's Office, P.O. Box 36, Arapaho, OK 73620.

AN AV RATED OKLAHOMA CITY CIVIL LITIGATION FIRM seeks an associate attorney with 0-5 years experience. Excellent research and writing skills essential. Deposition experience a plus. The attorney will work with partners on insurance defense and products liability cases. Health insurance and other benefits included. Resume, transcript and writing sample are required. Please send submissions to Box E, Oklahoma Bar Association, P.O. Box 53036, Oklahoma City, OK 73152.

ASSISTANT DISTRICT ATTORNEY - District 27, Sequoyah County is currently seeking a full time Assistant District Attorney. If you would like to be a part of an exciting team and obtain valuable experience both in and out of the courtroom, please apply. Our office has a fantastic staff and work very well with each other. Prior experience is welcome, BUT NOT REQUIRED. Salary will be commensurate with experience and includes a full benefit package. Please send your inquiries or resume to Diana Baker, at the following email: [diana.baker@dac.state.ok.us](mailto:diana.baker@dac.state.ok.us).

## POSITIONS AVAILABLE

THE PAYNE & LOGAN COUNTY DISTRICT ATTORNEY'S OFFICE DISTRICT 9 is seeking a prosecutor with 1-10 years of experience to work in the Guthrie office. The Guthrie office is located in the historic courthouse in a quaint and friendly town. This office houses 3 full time attorneys and staff. This office works closely with the Stillwater team as well. This is NOT an entry-level position. A commitment to public service and a desire to represent the people of the State of Oklahoma is required. Jury trial experience in the prosecution of white collar and property crimes is a plus. Please forward resume, with references, to Scott Staley at [scott.staley@dac.state.ok.us](mailto:scott.staley@dac.state.ok.us). Salary is commensurate with experience level.

**PUBLIC NOTICE REGARDING MAGISTRATE JUDGE VACANCY.** The United States District Court for the Eastern District of Oklahoma located in Muskogee, Oklahoma, is now accepting applications to fill a full-time United States Magistrate Judge position. To be qualified for appointment an applicant must: Be, and have been for at least five years, a member in good standing of the bar of the highest court of a state, the District of Columbia, the Commonwealth of Puerto Rico, the Territory of Guam, the Commonwealth of the Northern Mariana Islands, or the Virgin Islands of the United States, and have been engaged in the active practice of law for a period of at least five years (with some substitutes authorized); Be competent to perform all the duties of the office; be of good moral character; be emotionally stable and mature; be committed to equal justice under the law; be in good health; be patient and courteous; and be capable of deliberation and decisiveness; Be less than seventy years old; and Not be related to a judge of the United States District Court for the Eastern District of Oklahoma. More details regarding this posting as well as application forms may be obtained from the Court's website – [www.oked.uscourts.gov/employment-opportunities](http://www.oked.uscourts.gov/employment-opportunities). Applications must be received on or before Oct. 8, 2021. Completed applications can be emailed to [bonnie\\_hackler@oked.uscourts.gov](mailto:bonnie_hackler@oked.uscourts.gov) in a PDF file or mailed to: Bonnie Hackler, Chief Deputy Clerk, United States District Court, Eastern District of Oklahoma, P.O. Box 607, Muskogee, OK 74401.

## POSITIONS AVAILABLE

### Making a Difference

Legal Aid Services of Oklahoma (LASO) is URGENTLY hiring Attorneys! LASO will consider Oklahoma licensed attorneys of all levels of experience.

You must have a passion for justice. You will help spare vulnerable Oklahomans from devastating consequences. At your best, you will provide the highest quality representation to those who need it most. You will join LASO's excellent legal team, which has assisted numbers of Oklahomans with issues of injustice.

Full-time positions available and their locations:

- Medical Legal – Lawton, OKC (Oklahoma City County Health Dept.)
- Victims of Crime Act (VOCA) – Woodward, McAlester, Bartlesville/Pawhuska, Lawton
- INCA Tribe – Ardmore
- DHS – Tulsa
- Housing Discrimination – Tulsa
- Staff Attorney – Tulsa, Muskogee
- Eviction Prevention – Norman, Muskogee/Tahlequah, Hugo, Enid, Lawton, Weatherford, McAlester
- Department of Corrections – OKC
- Medicaid – OKC
- NHeLP/Robert Wood Johnson – OKC

Part-time positions available and their locations:

- South Tulsa Community House (STCH) - Tulsa
- The Education and Employment Ministry (TEEM) - OKC

Legal Aid Services of Oklahoma offers staff exceptional benefits to include employer-paid health and dental insurance, an employer-funded pension, generous paid leave and training, just to name a few. But the best benefit LASO offer is for attorneys to Make a Difference.

If you or someone you know has the passion to provide access to justice with us, please apply at: [www.legalaidok.org/employment](http://www.legalaidok.org/employment).

*LASO is an Equal Opportunity Employer.*



## POSITIONS AVAILABLE

EXPERIENCED FAMILY LAW ATTORNEY needed in the Norman office of an established firm. Candidates should have at least 2 years of family law experience. Compensation will be commensurate with experience; bonuses are available. Must be able to work well with other attorneys and staff. This is a tremendous, long-term career opportunity. Submit a confidential resume and cover letter to Box ZA, Oklahoma Bar Association, P.O. Box 53036, Oklahoma City, OK 73152.


HALLMAN & ASSOCIATES, a premier Estate & Tax Planning law firm in Norman, is looking to expand our amazing team and add a SENIOR ASSOCIATE ATTORNEY with Trust, Probate and Real Property experience. Our fun, fast-paced and family-focused environment takes the team approach to practicing law, while handling both hourly and flat fee matters. Very competitive base salary, production bonuses, full benefits and time off. 5-30 years' experience, attention to detail, great writing skills, organization and self-motivation a must! Confidential resume submissions: dhallman@hallman-lawoffice.com, or 2230 McKown Drive, Norman, 73072.

OKC CIVIL LITIGATION FIRM SEEKS ASSOCIATE ATTORNEY with 0-5 years of civil litigation experience. Applicants must be licensed and in good standing. Strong research and writing skills are required. Competitive salary and full benefits are offered. Send resume, writing sample and references to bisel@hvblaw.com.

HILTMAN & BREWER PC located in Edmond/NW OKC is accepting resumes for multiple Attorney positions. These positions involve civil personal injury defense work. We are seeking applicants for one position with 3+ years of experience and the other position with 5+ years of experience. We offer a competitive salary with excellent benefits. Please send resume, writing sample, and references to sfoote@hbokc.law.


## POSITIONS AVAILABLE

THE DISTRICT 16 D.A.'S OFFICE, in conjunction with the Office of Violence Against Women, is seeking an ASSISTANT DISTRICT ATTORNEY. The position is a grant position that offers a unique opportunity to work as a team with an advocate and investigator dedicated exclusively to the cases on the attorney's caseload. Responsibilities include the criminal prosecution of all domestic a&b's, violations of protective order, stalking and sexual assault cases in LeFlore and Latimer Counties, as well as proper documentation of all grant activities. Salary \$65K. Applicant must have a J.D. from an accredited law school; prior jury trial experience and experience in criminal law is preferred. Must be member of good standing with the Oklahoma State Bar. Applicants may submit a resume and writing sample, postmarked no later than 10/01/21, to the following address: District Attorney's Office, 100 S. Broadway, Room 300, Poteau, OK 74953, or Fax: 918-647-3209 or by email: Margaret.nicholson@dac.state.ok.us.


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# WOMEN IN LAW COMMITTEE

# Clothing Drive



**BENEFITTING SUITED FOR SUCCESS | SEPT. 27 - OCT. 1**

**Time to clean out those closets and get ready for fall! Donate your new or gently worn professional clothing, casual clothing, evening wear, sportswear, shoes, accessories and jewelry. Drop off your items from Sept. 27 to Oct. 1 at:**

**1st Impression Resale Clothiers, 4557 NW 23rd Street, Oklahoma City, all Tide Dry Cleaner locations in the OKC metro-area and at the Women in Law Conference on Oct. 1.**

*Suited for Success is a 501(c)(3) organization that assists women with professional clothing and employment related services to gain and maintain sustainable employment. Their clients come to them through community referral partners. Suited for Success also operates a resale clothier shop for the general public to generate funds for other needs of the organization.*



# Past Presidents Weigh In

## Why Every Lawyer Should Attend the OBA Annual Meeting



**2019 OBA  
PRESIDENT  
CHUCK  
CHESNUT:**

In a time when there is a multitude of competing attractions

for one's time and attention, why would you want to attend the OBA Annual Meeting? Let me give you five quick reasons:

1. You get to see old friends that you only see at annual meetings. For years it was the only time of the year I got to see my longtime friend, Steve Barghols. I always looked forward to it.
2. You get to experience first-class continuing education programs in your area of the law, often at little or no cost. The Estate Planning, Probate Trust and the Real Property Law sections' CLE programs have been terrific year after year. You also have the opportunity to go to the OBA's "Speed Round: Hot Topics for Every Lawyer" seminar and stay current.
3. There are entertaining events and speakers. I've seen and heard an NFL referee from Arkansas (Walt Coleman), the head of Mission Control for

the Apollo 13 space flight (Gene Kranz) and a Korean comedian from Nashville, Tennessee, who I thought was hilarious (Henry Cho.)

4. You develop friendships, relationships and networks within the OBA ranging across the state that last a lifetime.
5. You might meet your future spouse. I did. Shangri-La Lodge. 1983.

What can I say? OBA Annual Meetings are worth your time and worth attending!



**2018 OBA  
PRESIDENT  
KIM HAYS:**

The OBA Annual Meeting offers a variety of benefits for those who take the time

to attend. Benefits include networking with fellow attorneys and judges from around our state, the informative CLE and the golden opportunity to be part of the camaraderie that happens when attorneys gather. I always appreciate case referrals from other attorneys with whom I have visited during the meeting events. The luncheons, OBA award presentations and the important business of the association during our General Assembly and House of Delegates

are all reasons to attend. My favorite part of the OBA Annual Meeting is the events on Wednesday and Thursday nights and the hospitality suites where everyone gathers in a relaxed atmosphere.



**2007 OBA  
PRESIDENT  
STEPHEN  
BEAM:**

The OBA Annual Meeting is the greatest. Young and early career

lawyers should make plans now to attend. I have attended every annual meeting since my second year after law school and would not miss it. Early career lawyers should take advantage of the opportunity to meet as many lawyers as possible. It is always helpful to learn the perspectives of judges and other lawyers in a relaxed and informal setting. Networking is extremely important for all lawyers but especially important for those who are just starting out their legal careers. I almost always get at least one referral from someone I saw or met for the first time during the OBA Annual Meeting. I promise it will be worthwhile, and you will have a good time.



FIND THESE TITLES IN OUR  
**CLE ONLINE ANYTIME**  
CATALOG

MCLE 1/0 PART ONE

MCLE 1.5/0 PART TWO

MCLE 0/0 PART THREE (FREE)

MCLE 1.5/0 PART FOUR



**Amber Peckio Garrett,**  
*Amber Law Group, Tulsa*



**Felina Rivera,**  
*Attorney, Felina Law Firm, OKC*

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# CANNABIS SERIES

## BETWEEN TWO WEEDS:

### JOINT SESSIONS: PARTS 1 - 4

**Stay up-to-date on the status of proposed cannabis legislation being considered by the Oklahoma Legislature.**

These programs will provide an update to the status of cannabis related legislation that is currently being considered by the Oklahoma Legislature. These programs follow up on the cannabis law segment presented during the "50 Bills in 50 Minutes" portion of the 2021 Oklahoma Legislative Kickoff CLE provided in February 2021. Cannabis Attorneys Amber Peckio Garrett and Felina Rivera discuss the pros and cons of bills that are actively being considered by the House and Senate and advise on where each bill is on the path to becoming law.

#### ABOUT OUR SPEAKERS:

**Amber Peckio Garrett** is a Martindale-Hubbell® AV rated solo practitioner with Amber Law Group in Tulsa, OK. Ms. Peckio Garrett has 16 years experience and specializes in personal injury, civil litigation and family law. She received dual bachelor's degrees in Economics and Political Science from Southeastern Oklahoma State University. She received her Juris Doctor degree from the University of Tulsa College of Law in 2003 where she currently serves as a member of the Alumni Board.

Ms. Peckio Garrett is a current Trustee of the Oklahoma Bar Foundation where she serves on the Grants and Awards Committee. In addition, she currently serves as the Chairperson of the Law Related Education Committee. Ms. Peckio Garrett has served the OBA as the youngest ever Chairperson of the Women in Law committee (2007).

**Felina Rivera** is a civil litigation and cannabis attorney who has represented a large array of clients in the areas of tax law, insurance defense, personal injury, family law, consumer litigation, and cannabis law. Within her cannabis law practice, Felina assists clients with all aspects of their businesses, including guiding clients through the licensing application process, zoning and building permits, industry contract negotiations, and OMMA compliance. She is admitted to practice law in the State of Oklahoma, the Western District of Oklahoma, and Federal Tax Court. In addition to her legal career, Felina is also an active musician. She can often be found playing guitar and singing at local live music venues throughout the state.



OKLAHOMA BAR ASSOCIATION



# BAR BENEFITS

**You make a difference.  
OBA member benefits  
make it easier.**

## MYOKBAR

### DID YOU KNOW?

Members can update their roster information and access Fastcase, HeinOnline, the OBA member directory plus get quick links to their committees and sections. Plus, MyOKBar Communities serves as the main communication tool for committees and sections, and it automatically links with members' MyOKBar account so information is synced.

### CHECK IT OUT

Log in with the "MyOKBar Login" link at the top of [www.okbar.org](http://www.okbar.org).

**FIND MORE MEMBER BENEFITS AT [WWW.OKBAR.ORG/MEMBERBENEFITS](http://WWW.OKBAR.ORG/MEMBERBENEFITS)**