

LYNDA C. SHELY, ESQ.

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Education

- B.A. Government, Franklin & Marshall College, Lancaster, Pennsylvania 1983
- J.D., Columbus School of Law, Catholic University, Washington, DC 1987, top 5%
- Bar Admissions: Arizona, District of Columbia, and Pennsylvania

Employment

- *The Shely Firm, PC*, June 2003 – present
Providing ethics and risk management advice to lawyers on the Rules of Professional Conduct, discipline matters, fee arbitration, conflicts of interest, advertising, fee agreements, billing, staff supervision, docketing, law firm management, and unauthorized practice of law. Also serving as an expert witness on various legal ethics and risk management topics including legal fees, conflicts of interest, standard of care, and unauthorized practice issues.
- *State Bar of Arizona*, Director of Lawyer Ethics, May 1993 – June 2003
Supervised ethics, fee arbitration, client protection fund, peer review, and unauthorized practice of law departments. Provided over 8000 telephonic and 20 written ethics advisory opinions, *each year*, to members of the State Bar. Staff counsel to Ethics, Fee Arbitration, and Peer Review Committees and Client Protection Fund Board of Trustees. Reviewed all Fee Arbitration Awards, Client Protection Fund claims, and Peer Review referrals for assignment to committees.
- *Morgan, Lewis & Bockius*, Associate, Washington, DC, Sept. 1987 – March, 1991
Intellectual property and antitrust representations of clients before the U.S. Patent and Trademark Office, Department of Justice, and Federal Trade Commission. Litigation of franchise disputes in federal district courts.

Teaching Positions

Arizona Summit Law School (f/k/a Phoenix School of Law), Adjunct Professor Law Office Management Module of General Practices Course - Fall 2006, Fall 2007 – Fall 2014

Sandra Day O'Connor School of Law, Arizona State University, Adjunct Professor of Professional Responsibility – Fall 2008, Spring 2012

James E. Rogers College of Law, University of Arizona, Adjunct Professor of Professional Responsibility – Fall - 2012, 2013, 2014

Professional Associations & Committees

- **American Bar Association Committees:**

- * Center for Professional Responsibility Coordinating Council, Member 2000-2003 and 2015-2016
- * Standing Committee on Client Protection, *Chairman* 2000-2003, Member 2003 - 2004
- * Standing Committee on Professionalism, Member 2004 – 2007
- * Center for Professional Responsibility Strategic Committee, Member 2007 - 2010
- * American Bar Foundation, Fellow, 2002 - present
- * Task Force on a Model Definition of the Practice of Law, Member 2002-2003
- * Consortium on the Delivery of Legal Services, Member 2000-2003
- * Task Force on Access to Lawyers, Member 2002 - 2003
- * Planning Committee, National Conference on Prof. Responsibility, 2003 - 2006
- * Center for Professional Responsibility & Law Practice Management Section, 2003 – present
- * ABA Working Group on the Advancement of Lawyer Well-Being, APRL Liaison – August, 2017 - present
- * ABA House of Delegates, State Bar of Arizona Delegate 2016 – present
- * Standing Committee Ethics and Professional Responsibility, APRL Liaison – August 2016 – 2017; Member August, 2017 - present

- **State Bar of Arizona Committees:**

- * Task Force on the Future of the Profession, Member 2000 to 2001
- * Multijurisdictional Practice Task Force, Member 2002 to 2003
- * Ethical Rules Review Group, Member 2001 to 2003
- * Professionalism Task Force and Committee, Member 2003 to present
- * Convention Planning Working Group, Member 2004 to present
- * Convention Planning Committee, Co-chair 2006 - 2007
- * Unauthorized Practice of Law Advisory Opinion Council, Member 2003 to 2013 (Chairman 2008 – 2010)
- * Consumer Education and Information Task Force, May 2008 to 2009
- * Continuing Legal Education Committee, Member 2011 to 2014
- * Task Force on Lawyer Succession Planning September, 2013 to 2015

- **Additional Committees/Task Forces:**

- * APRL/NOBC/ABA CoLAP Joint Committee on Aging Lawyers, Member 2013 - present
- * National Task Force on Lawyer Well-Being, Member 2016 - present
- * Maricopa County Bar Assn. CLE Committee, Chair 2014-2016

- **Awards/Recognitions:**

- * 2002 Attorney Law-Related Education Award, Arizona Foundation for Legal Services and Education
- * 2004 State Bar of Arizona Continuing Legal Education Award
- * 2007 State Bar of Arizona “Member of the Year” Award
- * 2010 Scottsdale Bar Association Award of Excellence
- * June 2015 *Attorney at Law Magazine Greater Phoenix Edition*, Attorney of the Month
- * 2015 Arizona Women Lawyers’ Association, Maricopa Chapter, Ruth V. McGregor Award
- * *Best Lawyers In America, Ethics and Professional Responsibility* 2013 – present
- * *AV Rated* – Martindale Hubbell

- **Bar Admissions:**

- * *Pennsylvania State Bar, Member 1987 – present (inactive)*
- * *District of Columbia Bar Association, Member 1988 – present*
- * *State Bar of Arizona, Member 1994 – present*

- **Memberships:**

- * Association of Professional Responsibility Lawyers, Member 2003 – present (Board of Directors 2010 – present, Treasurer 2012 – 2013, Secretary 2013 – 2014, President-Elect 2014-2015, President 2015-2016)
- * Scottsdale Bar Association: Member Fall 2003 – present (Board of Directors March, 2005 – 2014, President 2008 - 2009)
- * Sandra Day O’Connor Inn of Court, Member 1997 – present
- * Maricopa County Bar Association, Member 2002- present
- * Arizona Women Lawyers’ Assn., Member 2003 – present
- * National Client Protection Organization, Vice President Southwest 2000-2003
- * National Organization of Bar Counsel, Associate Member 1998 – 2010

Representative Seminars & Publications - 2010 - 2017

“*Avoiding Internal and External Fraud*” – May 19, 2010, Omega Legal, Scottsdale

“*Ethics Tips for Bankruptcy Practitioners*” – May 20, 2010, Bankruptcy Trustee, Tempe

”*Restrictions on Lawyer’s Right to Practice*” – June, 2010, American Bar Association, Seattle

“*Annual Ethics Game Show*” – June 10, 2010, State Bar of Arizona, Glendale

“*Ancillary Businesses*” - August 6, 2010, APRL, San Francisco

“*Ethics Considerations for Estate Planning Lawyers*” – September 10, 2010, National Elder Law Assn, Phoenix

“*Representing Bernie Madoff*” - September 23, 2010, ABA LPL Section, Scottsdale

“*Judicial Ethics Update*” - October 22, 2010, Maricopa County Superior Court Education Conference, Mesa

“*Earning and Billing Fees Ethically*” - October 27, 2010, State Bar of Arizona, Phoenix

“*Avoiding the Unauthorized Practice of Law*” - November 3, 2010, State Bar of Arizona, Phoenix

“*Social Media and Lawyers,*” and “*Ethics Tips for Billing*” - November 18 and 19, 2010, State Bar of Arizona Solo Conference, Scottsdale

“*Law Firm Dissolutions*” - December 2, 2010, State Bar of Arizona, Phoenix

- “Tribute to Dan McAuliffe Ethics Seminar”* – April 27, 2011, State Bar of Arizona, Phoenix
- “Arizona Attorney General’s Office Conflict Seminar”* – May 2, 2011, Arizona Attorney General’s Office, Phoenix
- “Avoiding Malpractice and Bar Complaints”* – May 20, 2011, CNA Insurance, Phoenix
- “Ethics Update and Avoiding Common Bar Complaints”* – June 7, 2011, Maricopa County Bar Association, Phoenix
- “Annual Ethics Game Show”* – June 16, 2011, State Bar of Arizona Convention, Tucson
- “File Retention”* – October 19, 2011, ABA Webinar
- “Judicial Ethics Game”* – October 28, 2011, Maricopa Superior Court Judicial Conference, Mesa
- “Ethics Update For Construction Law Section”* – October 28, 2011, State Bar of Arizona, Scottsdale
- “Ten Deadly Sins of Conflicts”* – November 9, 2011, State Bar of Arizona, Phoenix
- “Ethical Billing Practices”* – November 17, 2011, ABA/ALI Teleseminar
- “Social Media Ethics Update”* – November 18, 2011, East Valley Bar Assn, Mesa
- “Annual Scottsdale Bar Ethics Game”* – December 13, 2011, Scottsdale Bar Assn, Scottsdale
- “Branding a Firm”* - January 18, 2012, State Bar of Arizona, Phoenix
- “Family Law Section Ethics Update”* - January 20, 2012, State Bar of Arizona, Scottsdale
- “Conflicts and Other Ethics Issues for Estate Planners”* - February 23, 2012, Estate Planning, Scottsdale
- “Ethics Update and Game”* - February 29, 2012, AWLA, Phoenix
- “Social Media Risk Management Tips”* – March 15, 2012, State Bar of Arizona, Phoenix
- “Dressing for Success – Bar Leadership Institute”* – March 23, 2012, State Bar of Arizona, Phoenix
- “Ethics Issues in Public Lawyer Matters”* – April 19, 2012, State Bar of Arizona, Phoenix
- “Ethics When Representing Non-English Speaking Clients”* – April 26, 2012, Los Abogados, Phoenix
- “Trust Account Basics”* – May 2, 2012, State Bar of Arizona, Phoenix
- “Ethics Issues in Condemnation Law”* – May 4, 2012, Phoenix Biltmore
- “Ethics Update!”* – May 9, 2012, Volunteer Lawyers Program, Tucson
- “Avoiding Malpractice and Bar Complaints,”* – May 14 and 15, 2012, CNA Insurance, Phoenix and Tucson
- “50 Ways to Avoid a Complaint/Claim”* – June 13, 2012, Maricopa County Bar Assn, Phoenix

- “Annual Ethics Game Show”* – June 21, 2012, State Bar of Arizona Convention, Phoenix
- “Professionalism in Family Law”* – June 22, 2012, State Bar of Arizona Convention, Phoenix
- “Avoiding Conflicts in LLC Representations”* – July 20, 2012, State Bar of Arizona, San Diego
- “Branding Your Firm – Trade names for Law Firms”* – Sept. 20, 2012, State Bar of Arizona, Phoenix
- “Ethics Tips for Supreme Court and Court of Appeals Judicial Staff”* – Sept. 28, 2012, Arizona Supreme Court, Phoenix
- “Ethics Tips for New Lawyers”* – November 2, 2012, State Bar of Arizona, Tucson
- “Billing and Fee Agreement Ethics Requirements to Get Paid”* – Nov. 7, 2012, ALI teleseminar
- “Ethics Update on Social Media and Electronic Records”* – Nov. 14, 2012, North Phoenix Bar Association, Phoenix
- “Ethical Billing in Gaming Matters”* – Nov. 16, 2012, State Bar of Nevada Gaming Conference, Las Vegas
- “Ethical Landmines for Family Law Lawyers”* – Jan. 11, 2012, State Bar of Arizona Family Law Conference, Scottsdale
- “Ethics Issues in Estate Planning”* – Feb.23, 2012, State Bar of Arizona, Scottsdale
- “2012 Ethics Update”* – February 29, 2012 Arizona Women Lawyers’ Assn., Phoenix
- “Ethical Use of Technology”* – March 15, 2012, State Bar of Arizona, Phoenix
- “Selling a Law Firm”* – April 11, 2012, State Bar of Arizona, Phoenix
- “Public Lawyer Conflicts and Client Identity”* – April 19, 2012, State Bar of Arizona, Phoenix
- “Ethics Issues when Representing Clients Through Translators”* - April 26, 2012 Los Abogados, Phoenix
- “Condemnation Cases and Ethics Considerations”* - May 4, 2012 Phoenix
- “Trust Account Basics”* – May 2, 2012 State Bar of Arizona, Phoenix
- “Ethics Considerations in Limited Scope Representations”* – May, 2012, Volunteer Lawyers Program, Tucson
- “CNA Risk Management”* – May 14 and 15, 2012, CNA Phoenix, Tucson
- “50 Ways to Avoid Discipline and Malpractice Claims”* - June 13, 2012, MCBA, Phoenix
- “Annual Ethics Game Show”* – June 21, 2012, State Bar of Arizona Convention, Phoenix
- “CLE By the Sea – Ethics Issues When Representing LLCs”* - July, 2012, State Bar of Arizona, San Diego.
- “Updates on Recent ABA Model Rule Changes,”* – November 14, 2012, North Phoenix Bar Assn., Phoenix

“Ethical Billing in Gaming Law” – November 16, 2012, Nevada Bar Assn., Las Vegas

“Teleseminar on Billing and Fee Agreement Requirements” – September 27, 2012, ALI

“Professionalism and Ethics Tips for New Lawyers” - November 2, 2012, State Bar of Arizona, Tucson

“Medicare Set-Aside Seminar” - December 7, 2012, NBI, Phoenix

“Family Law Ethics Update” – January 11, 2013, State Bar of Arizona Conference, Scottsdale

“Character & Fitness Criteria – What Keeps Out Applicants?” – February 8, 2013, Association of Professional Responsibility Lawyers, Dallas

“Ethics Game 2013” – February 12, 2012, Scottsdale Bar Assn., Scottsdale

“Ethics Considerations When Working With Impaired Clients” – February 15, 2013, Arizona Educators Assn., Phoenix

“E-Discovery Professional Responsibility Tips” – March 13, 2013, ASU, Tempe

“Quantum Meruit, Damron Morris Agreements and Other Ethics Issues” – March 22, 2013, Arizona Trial Lawyers Assn., Phoenix

“DUI Law and Ethics” – May 3, 2013, AACJ, Tucson

“Government Lawyer Ethical Landmines” – May 8, 2013, Public Lawyer Conference, Prescott

“Technology and Ethics” – April 4, 2013, Minority Bar Convention, Phoenix

“Public Sector Privilege” - April 17, 2013, Law Seminars, Scottsdale

“Employment Law Ethics Update” – April 15, 2013, State Bar Employment Law Section, Phoenix.

“Advertising Ethics!” – May 2, 2013, State Bar of Arizona, Phoenix

“Ethics for Law Firm Staff” - May 22, 2013, Maricopa County Bar Assn., Phoenix

“CNA Insurance Risk Management Conference” – June 6, 2013, CAN, Phoenix

“Annual Ethics Game Show” – June 20, 2013, State Bar of Arizona Convention, Phoenix

“Ethics and Social Media” – July, 2013, State Bar of Arizona, San Diego

“HIPAA Compliant – New Requirements” - September 2013, State Bar of Arizona, Tucson

“Legal Ethics for Supervised and Supervisors” - October 11, 2013, ABA Law Practice Management Section, Phoenix

“Ethics and Gun Laws” – November 6, 2013, Arizona State University, Tempe

- “Ten Deadly Sins of Conflicts”* - November 7, 2013, State Bar of Arizona, Phoenix
- “Ethics Update for Probate Lawyers”* – December, 2013, State Bar of Arizona, Phoenix
- “Ethics Changes Affecting Family Law Practitioners”* - January, 2014, State Bar of Arizona Family Law conference, Scottsdale
- “Ethics and E-Discovery”* - March 13, 2014, Arizona State University Law School, Tempe
- “Ethics and Email”* – April 11, 2014, ABA Litigation Section Conference, Phoenix
- “Ethical Update”* – April 17, 2014, Volunteer Lawyers Program, Tucson
- “Ethics and Technology”* – May 9, 2014, DRI – Employment Law, Paradise Valley
- “Ethics in Family Law Discovery Issues”* – May 14, 2014, State Bar of Arizona, Phoenix
- “Ethics Update, Billing Tips, and Supervision”* - May 15, 2014, Arizona State University Law School, Tempe
- “Ethics Considerations with Aging Lawyers”* – May 30, 2014, ABA Center for Professional Responsibility Conference, Long Beach CA
- “Ethical Marketing – Can I really do that?”* – June 3, 2014, State Bar of Arizona, Phoenix
- “CNA Risk Management Review”* – June 5, 2014, Health Agencies of the Southwest, Phoenix
- “Bar Convention Annual Ethics Game Show”* – June, 2014, State Bar of Arizona, Phoenix
- “Do You Know the New Amendments?”* – October 1, 2015, State Bar of Arizona Workers Compensation Section, Prescott
- “Succession Planning for All Firms”* – September 11, 2015, MCBA, Phoenix
- “Managing the Message: Communicating with the Media”* – November 4, 2015, MCBA, Phoenix
- “Do You Know the New Amendments?”* – November 20, 2015, State Bar of Arizona Real Property Section, Phoenix
- “Professionalism for New Lawyers”* – November 20, 2015, State Bar of Arizona, Phoenix
- “Do You Know the New Amendments?”* – December 4, 2015, MCBA, Phoenix
- “Annual Ethics Update Quiz”* – January 20, 2015, Scottsdale Bar Association, Scottsdale
- “Annual Ethics Update Quiz”* – January 28, 2015, Arizona Women Lawyers Association, Phoenix
- “Scandal Scarred: Representing High Profile Clients and Managing Their Legal/Media Crisis”* - February 7, 2015, Assn. Professional Responsibility Lawyers, Houston
- “Ethics Update and Reminders”* - March 11, 2015, State Bar Real Estate Section, Tucson

- “Professionalism and Risk Management for Firm Staff,”* – March 12, 2015, NALS, Phoenix
- “Using the Internet – Ethically”* - March 19, 2015, DRI Litigation Section, Las Vegas
- “Lawyers Without Borders – Avoiding UPL”* - March 28, 2015, Am. College Real Estate Lawyers, Scottsdale
- “Spotting and Preventing Evil in Your Firm”* - April 1, 2015, State Bar of Arizona, Phoenix
- “Recent Changes to the Ethical Rules”* – April 8, 2015, North Phoenix Bar Assn, Phoenix
- “Old, New and Proposed Changes to the Rules”* – April 21, 2015, State Bar of Arizona, Phoenix
- “Ethics Reminders for Employment Law Lawyers”* - April 27, 2015, State Bar of Arizona, Phoenix
- “Overwhelmed by Email?”*- May 5, 2015, United States Fifth Circuit Judicial Conference, New Orleans
- “Risk Management and Ethics Update”* - May 1, 7- 8, 2015, Ahern Insurance, Phoenix, Tucson
- “Ethics Landmines for DUI Lawyers”* – May 7, 2015, AACJ, Tucson
- “What Keeps Partners Awake At Night”* – June 16, 2015, MCBA, Phoenix
- “Annual Ethics Game Show”* – June, 2015, State Bar of Arizona Convention, Phoenix
- “Client Files: Yours, Mine and Ours?”* – July 9, 2015, American Bar Assn, teleseminar
- “Ethics in Elder Law”* – September 11, 2015, AzNAELA, Phoenix
- “Recent Amendments to Arizona Ethical Rules”* - September 18, 2015, East Valley Bar Assn., Mesa
- “Tips to Avoid Discipline for Family Law Lawyers”* – September 24, 2015, MCBA, Phoenix
- “Ethical Use of Technology”* – October 5, 2015, Bar Assn. of the Fifth Federal Circuit, New Orleans
- “Ten Deadly Sins of Conflicts”* – November 6, 2015, State Bar of Arizona, Phoenix
- ”Risk Management and Legal Ethics”* – November 13, 2015, CNA and Health Agencies of the Southwest, Tucson
- “New Lawyer Bootcamp”* – November 20, 2015, State Bar of Arizona, Phoenix
- “2016 Amendments to the Ethical Rules,”* – December 10, 2015, MCBA, Phoenix
- “For Better or For Worse Ethics Review”* – January 22, 2016, State Bar Family Law Section Conference, Phoenix
- “2016 Amendments to the Ethical Rules Game Show”* – January 27, 2016, Arizona Women Lawyers’ Assn., Phoenix
- “Outsourcing of Legal Work”* – February 5, 2016, National Conference of Bar Presidents, San Diego
- “To Serve or Be Served: Best Practices for Expert Witnesses”* – March 8, 2016, ABA, Teleseminar

- “Spring Training Convention - Technology Ethics Update”* – March 31, 2016, State Bar of Arizona, Phoenix
- “Liability to Non-clients”* – April 27, 2016, State Bar of Arizona, Phoenix
- “The Ethics Hour: Attorney-Client Privilege and Practicing Across State Lines”* – April 29, 2016, DRI Employment and Labor Law, Austin, TX
- “Trends in Lawyer Discipline”* – May 19, 2016, Federal Bar Assn., Tucson
- “Professionalism Is More than Just Pantyhose”* – May 20, 2016, Arizona Paralegal Assn., Phoenix
- “Advertising Ethics Changes”* – June 3, 2016, ABA Center for Professional Responsibility Conference, Philadelphia
- “Professionalism and Ethics for Judicial Interns”* – June 7, 2016, Maricopa County Superior Court, Phoenix
- “Ethics Trends for Estate Planning Attorneys”* – June 9, 2016, MCBA, Phoenix
- “Annual Ethics Game Show”* – June, 2016, State Bar of Arizona Convention, Chandler
- “Ethical Use of Technology in Law Firms”* – July 13, 2016, State Bar of Arizona, San Diego
- “Can You Hear Me Now? Advertising Regulation in the U.S.”* – August 5, 2016, National Conference of Bar Presidents, San Francisco
- “Getting Paid Ethically: Five Tips You Should Know”* – Sept/Oct. 2016 ABA Law Practice Magazine
- “Advertising Ethically”* – Jan. 12, 2017, State Bar of Arizona, Phoenix
- “Family Law Ethics Update”* – Jan. 20, 2017, State Bar of Arizona, Phoenix
- “Ethics of Serving on Nonprofit Boards”* – February 10, 2017, State Bar of Arizona, Phoenix
- “Litigation Funding”* – February 20, 2017, IADC, Scottsdale
- “How to Get Paid Ethically”* – March 1, 2017, State Bar of Arizona, Phoenix
- “Ethics Issues Unique to Intellectual Property Practice”* – March 24, 2017, State Bar of Arizona, Phoenix
- “CNA Legal Malpractice Risk Management”* – May 5, 2017, CNA, Phoenix
- “DUI Ethics Quiz”* – May 5, 2017, AACJ, Tucson
- “Advertising Changes”* – June, 2017, PilotLegis, Oakland, CA
- “Common Ethics Issues in Family Law”* – July 10, 2017, State Bar of Arizona, Coronado, CA
- “Lawyer Wellness”* – August 12, 2017, APRL/NOBC Joint Session, New York, NY
- “Changing Times”* – Sept. 2017, ABA National Legal Malpractice Conference, Colorado Springs

“10 Deadly Sins of Conflicts” – October 19, 2017, State Bar of Arizona, Phoenix

“Ethics Update for Employment Law Lawyers” – October 20, 2017, State Bar of Arizona, Sedona