

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 (inactive)

Employment

- *The Shely Firm, PC*, June 2003 – present
Providing ethics and risk management advice to lawyers on the Rules of Professional Conduct, alternative business structures, 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, professionalism, billing practices, 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
Advised clients on trademark and franchising matters and represented applicants before the U.S. Patent and Trademark Office. Assisted representation of clients in antitrust matters before the Department of Justice, and Federal Trade Commission. Litigated 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, 2015-2016, 2020-2022
- * 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 - 2019
- * 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 – 2020, *Chairman* Aug. 2020 – Aug. 2023

- **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 2018
- * 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, Member September, 2013 to 2015
- * Ethics Advisory Group, Member 2019 - present

- **Additional Committees/Task Forces:**

- * APRL/NOBC/ABA CoLAP Joint Committee on Aging Lawyers, Member 2013 - 2015
- * National Task Force on Lawyer Well-Being, Member 2016 - 2017
- * Maricopa County Bar Assn. CLE Committee, Chair 2014-2016
- * APRL Future of Lawyering Committee, Member 2018 – present
- * Arizona Supreme Court Task Force on the Future of the Profession, Volunteer 2019-2020
- * Chicago Bar Association/Foundation Task Force on the Sustainable Practice of Law & Innovation, National Advisory Panel, 2019-present
- * Arizona Supreme Court Entity Regulation Working Group, Member 2020
- * Arizona Supreme Court Board of Nonlawyer Legal Service Providers, Member Jan. 2021 – June 2022
- * Arizona Supreme Court Alternative Business Structure Committee, Member June 2022 - present

- ***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 – 2017, Treasurer 2012 – 2013, Secretary 2013 – 2014, President-Elect 2014 - 2015, President 2015 - 2016)
- * *Scottsdale Bar Association*: Member Fall 2003 – present (Board of Directors 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’ Association.*, Member 2003 – present
- * *National Client Protection Organization*, Vice President Southwest 2000-2003
- * *National Organization of Bar Counsel*, Associate Member 1998 – 2010

Representative Seminars & Publications - 2015 - 2022

“*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

“For Better or For Worse – Ethics Issues” – January 19, 2018, State Bar of Arizona, Scottsdale

“Ethics Issues in Addressing Liens” – February 9, 2018, AZ Trial Lawyers, Phoenix

“Professionalism Course” – February 20, 2018, State Bar of Arizona, Phoenix

“Practice Management Ethics” – March 14, 2018, State Bar of Arizona, Phoenix

“Advertising Rule Changes” - March 28, 2018, ABA webinar

“CLE in the Garden – Ethics Issues for IP Lawyers” – April 6, 2018, State Bar of Arizona, Phoenix

“Ten Tips to Keep Your Firm Ethically Compliant in 2018” – April 20, 2018, Az. Paralegal Assn.

“Self-Defense Exceptions to Confidentiality” - June 1, 2018, ABA, Louisville, KY

“Ethical Marketing with New Technology” – June 6, 2018

“Judicial Ethics Jeopardy” – June 21, 2018, Arizona Judicial Conference, Tucson

“25th Annual Ethics Game Show” – June 28, 2018, State Bar of Arizona, Chandler

“Mindfulness as an Ethics Component” – August 3, 2018, Mindfulness in the Law, Chicago

“Lawyer Wellness Initiatives” – August 3, 2018, APRL, Chicago

“Swindlers, Scammers, and Sharks: Protecting Trust Account Funds” – August 16, 2018, ABA webinar

“Ethics Tips for Every Firm” – September 20, 2018, NALS, Phoenix

“Int’l Developments in Legal Privilege” – November 9, 2018, APRL/Law Society of England, Washington, DC

“Ethics in the Me Too Age” – November 15, 2018, American Constitution Society, Phoenix

“Annual Ethics Game” – December 11, 2018, Scottsdale Bar Assn., Scottsdale

“The Future of Prohibited Referral Fees and For-Profit Services” - January 25, 2019, APRL, Las Vegas

“Adopting Well-Being Programs in Your Organization” – January 26, 2019, Nat’l Conference Bar Presidents, Las Vegas

- “Legal Ethics Update for Marketing Professionals”* – February 13, 2019, Legal Marketing Assn., Phoenix
- “Annual Ethics Game”* – February 27, 2019, AWLA, Phoenix
- “Ethics in Family Law”* – March 13, 2019, AAML, Cancun
- “Legal Administrators Ethics Update”* – March 26, 2019, ALA, Phoenix
- “The ABA Advertising Rule Changes”* – May 2, 2019, ABA Litigation Section, New York
- “Ethics in Employment Law Representations”* – May 9, 2019, DRI, Phoenix
- “Thomas Jefferson and Legal Ethics”* – May 10, 2019, State Bar of Arizona, Scottsdale
- “Ethics in Working with Experts”* – May 23, 2019, MCBA, Phoenix
- “Risk Management Update”* – June 10, 2019, CNA Health Agencies, Flagstaff
- “Judicial Ethics Game”* – June 19, 2019, Arizona Judicial Conference, Tucson
- “Annual Ethics Game Show”* – June 27, 2019, State Bar of Arizona, Phoenix
- “Wild West Changes in the Profession”* – August 10, 2019, APRL, San Francisco
- “Law Practice Management”* – September 25, 2019, State Bar of Arizona, Phoenix
- “Workers Compensation Conference”* – September 25, 2019, Workers Comp Section, Prescott
- “Wellness as a Risk Management Requirement”* – October 21, 2019, State Bar of AZ, Phoenix
- “Ten Deadly Sins of Conflicts”* – October 30, 2019, State Bar of AZ, Phoenix
- “Lawyer Well-Being Requirements”* – December 9, 2019, State Bar of AZ, Phoenix
- “Annual Ethics Game”* – December 10, 2019, Scottsdale Bar Assn., Scottsdale
- “Business Law Ethics Update”* – December 10, 2019, Business Law Section, Phoenix
- “Ethics for Defense Counsel”* – January 10, 2020, Banner Health, Phoenix
- “Possible Rule Changes in AZ”* – January 14, 2020, Arizona Judicial Retreat, Flagstaff
- “ABA Consults for Lawyer Regulation”* – February 13, 2020, National Organization Bar Counsel, Austin, TX
- “Ethics in Charitable Giving”* – February 18, 2020, Desert Botanical Gardens – Phoenix
- “Annual Ethics Quiz”* – February 26, 2020, AWLA, Phoenix
- “Ethics When Representing Clients With Disabilities”* – February 28, 2020, AZ. Disability Law Conference
- “The Ethics Rules May be Changing”* – April 14, 2020, State Bar of Arizona, virtual

“*What is Normal in the New Normal?*” – May, 27, 2020, Maricopa County Bar Assn., virtual

“*The New Normal: Ethics Considerations for Remote Practices*” - June, 2020 Arizona Attorney
“*Possible Rule Changes – An In-Depth Discussion*” – June 12, 2020, State Bar of Arizona – virtual

“*Chicago Bar Association Sustainability of the Profession and Innovation Recommendations*” – July 21, 2020, Chicago Bar Association – virtual

“*Ethics in Practicing Remotely*” – July 22, 2020, Pima County Bar Association – virtual

“*The Law of New Law*” – September 8, 2020, PLI – virtual

“*Succession Planning for Solos*” – September 17, 2020, State Bar of Arizona – virtual

“*Estate Planning Ethics Update*” – September 18, 2020, NAELA – virtual

“*Ethical Advertising*” – September 30, 2020, MCBA - virtual

“*Law Firm Divorces*” – October 7, 2020, State Bar of AZ – virtual

“*New Rules New Opportunities!*” – October 8, 2020, MCBA – virtual

“*New Referral Regulations*” – October 23, 2020, ABA Lawyer Referral Conference - virtual

“*New Rules – Calm Down*” – November 12, 2020, West Valley Bar – virtual

“*Annual Ethics Game Show*” – December 2, 2020, State Bar of AZ – virtual

“*The New Legal Industry Regulatory Regime*” – December 7, 2020, CLI Australia - virtual

“*New Rules Ethics Game*” – December 8, 2020, Scottsdale Bar Assn. – virtual

“*Shaping the Future of the Profession*” – February 4, 2021, National Conference of Bar Presidents – virtual

“*ER 1.8 Conflicts of Interest*” – March 2, 2021 – State Bar of Arizona - virtual

“*The Sky Isn’t Falling*” – March 4, 2021, LMRM Conference – virtual

“*Reregulation – an Update*” – March 5, 2021, Association of Professional Responsibility Lawyers – virtual

“*New Rules – Just Calm Down*” - March 24, 2021 – ABOTA – virtual

“*New Rules, Fee Agreements, and Supervision Duties*” – April 22, 2021, Procover – virtual

“*Working with Other Professionals*” – May 13, 2021, MCBA – virtual

“*Update on Reregulation Efforts*” – June 3, 2021, ABA CPR Conference – virtual

“*New Rules, New Opportunities*” – June 11, 2021, AADC – virtual

“*Annual Ethics Game Show*” – June 17, 2021, State Bar of Arizona – hybrid

“*Recent Arizona Rule Changes*” – July 27, 2021, Clio – virtual

“*Arizona’s New Rules: How is it Working so Far*” – Oct. 1, 2021, MCBA – Phoenix

“*What’s Going on In Arizona*” - October 6, 2021 – ALA Conference – Austin, TX

“*The Law and Ethics of NewLaw 2021*” – October 7, 2021 – PLI -virtual

“*Succession Planning*” – October 8, 2021 – State Bar Solo Conference – virtual

“*Policy Summit on Recent Changes*” – October 13, 2021 - Responsive Law – virtual

“*Ethics Rule Change Update*” - October 13, 2021 – State Bar of Arizona Workers Comp – virtual

“*Ethical Considerations for Using Social Media*” – October 15, 2021 – ABA Environmental Section – virtual

“*Tweets, Likes, and Posts*” – October 19, 2021 – State Bar of Arizona virtual

“*Arizona’s Brave New World*” – October 19, 2021 – Sandra Day O’Connor Inn of Court – Phoenix

“*Redesigning Legal*” – October 20, 2021 – IAALS and ABA – virtual

“*Virtual Ethics Update*” – October 20, 2021 – Lorna Lockwood Inn of Court – virtual

“*Legal Ethics Risk Management*” – October 28, 2021 – Procover – Phoenix

“*Ethical Advertising*” – November 10, 2021 – Pima County Bar – virtual

“*New Rules*” – November 12, 2021 – MCBA Paralegal Conference

“*Responding to Online Reviews*” – November 15, 2021 – ABA – virtual

“*New Rules in Arizona*” - November 16, 2021 – ALA – Phoenix

“*Legal Ethics for Mental Health Court Lawyers*” – November 17, 2021 – Maricopa Cty Superior Court – virtual

“*Ten Deadly Sins of Conflicts*” – November 18, 2021 – State Bar of Arizona

“*Ethics & the Future of Lawyering*” – November 30, 2021 – LawLine – virtual

“*New Rules and Business Law Ethics*” – December 1, 2021 – State Bar Business Law Section – Phoenix

“*Technology and Innovation Summit*” – December 8, 2021 – AILA – virtual

“*Annual Ethics Review*” - December 14, 2021 – Scottsdale Bar Assn. – Scottsdale

“*Avoiding UPL By Lawyers*” - January 24, 2022 - ABA – virtual

“*Annual Ethics Quiz*” - January 26, 2022 - AWLA – virtual

- “Ethics to Avoid Bar Intake”* - January 27, 2022 – State Bar of Arizona Family Law - virtual
- “Arizona Opportunities for Law Firms”* - February 1, 2022 – National Trial Lawyers – Miami, FL
- “Arizona ABS Business Model”* – February 10, 2022 – Velawcity Conference - Scottsdale
- “Ethics Café – Withdrawing From Representation”* – March 1, 2022 – SBA - Phoenix
- “Nuts and Bolts of ABS Applications”* - April 28, 2022 – SBA – Phoenix, AZ
- “Ethics Changes”* – May 25, 2022 – Yavapai County Bar – Prescott, AZ
- “Whither Thou Goes Will UPL Follow”* – June 1, 2022 – ABA – Baltimore, MD
- “This Just In: ABA Ethics Highlights”* – June 22, 2022 – virtual
- “Ethics Reminders in Estate Planning”* – June 23, 2022 – MCBA – Phoenix, AZ
- “Annual Ethics Game Show”* – June 28, 2022 – State Bar of Arizona Convention – Chandler, AZ
- “CLE By the Sea – Ethics in 30 Years”* – July 7 – 9, 2022, State Bar of Arizona – Coronado, CA
- “Will We See Changes to Rule 5.5 In Our Lifetime?”* – August 4, 5, 2022 – APRL/NOBC – Chicago, IL
- “Regulatory Changes in the Southwest,”* – August 12, 2022 – New Mexico Bar – Albuquerque, NM