



VSB

Special Committee on Lawyer Insurance

September 26, 2023

Virtual

**VIRGINIA STATE BAR**  
**SPECIAL COMMITTEE ON LAWYER INSURANCE**  
**FULL COMMITTEE MEETING**

**SEPTEMBER 26, 2023**  
**Virtual Meeting**

**AGENDA**

- A. Introductions - David D. Hudgins, Chair, LIC
- B. Approval of Minutes - David D. Hudgins, Chair, LIC
- a. 2/16/2023 Minutes
  - b. 5/18/2023 Minutes
- (Attachment: Minutes 02-16-23 LIC Meeting (draft); Minutes 5-18-2023 LIC Meeting (draft))*
- C. Virginia State Bar Members' Insurance Center Quarterly Update (*Attachment: VSB Members Insurance Center September 2023 Report*) – Debbie Stocks, Jennifer Stevens
- Action Items:
- Proposal to Offer Critical Illness Coverage – 2024
  - Affirm Approval of new Third Party Administrator
- D. ALPS report – Chris Newbold, Executive Vice President, ALPS
- a. ALPS Report
  - b. Virginia update (*Attachment: 2023 Q2 VA Comparison Data; Reading VA Comparison Data Report*)
  - c. Policyholder Feedback (*Attachment: Virginia ALPS Trustpilot Reviews Q2*)
- E. Risk Management Activities
- a. Fall Ethics and Professionalism Tour Update (*Attachment: The Firm Retreat Mailer*)
  - b. Q2 VA Risk Management Activity Report (*Attachment: Q2 Virginia Risk Management Report*)
  - c. Q2 RM Budget Review (*Attachment: 2023 VA RM Budget*)
- F. Next Schedule Meetings:
- a. November 14, 2023    Richmond
  - b. February 15, 2024    Virtual
  - c. May 16, 2024    Richmond
- G. Adjourn

**MINUTES OF THE VIRGINIA STATE BAR  
SPECIAL COMMITTEE ON LAWYER INSURANCE**

**Date** Thursday, February 16, 2023  
**Virtual** Microsoft Teams Meeting ID 240 350 167 057

The VSB Special Committee on Lawyer Insurance held its' quarterly meeting, via Microsoft Teams on Thursday, February 16, 2023. At 1:00 p.m., committee chair David Hudgins called the meeting to order.

**Committee members attending virtually:**

David D. Hudgins

W. H. ("Hunter") Byrnes, Sr.

Joan B. Davis

Marialuisa S. Gallozzi

Jeffrey H. Geiger

Andrew S. Gerrish

Matthew W. Lee

David L. Marks

Earl S. Murphy

William B. Porter

Louis R. Richman

mgallozzi@cov.com

jgeiger@sandsanderson.com

agerrish@faplawfirm.com

dmarks@davidmarkslaw.com

wporter@bklawva.com

LRRICHMA@sentara.com

**Absent:**

James A. Cales III

Lawrence A. Dunn

Althea H. Randolph

Alanna C. Williams

**Also attending virtually:**

Cameron M. Rountree, VSB

Michael Flaherty, ALPS

Shawne D. Moore, VSB

Chris Newbold, ALPS

Alison Riley, ALPS

Jennifer Stevens, VSBMIC

Debbie Stocks, VSBMIC

CRountree@vsb.org

mflaherty@alpsinsurance.com

smoore@vsb.org

cnewbold@alpsinsurance.com

ariley@alpsinsurance.com

jennifer.stevens@onedigital.com

debbie.stocks@onedigital.com

**I. Welcome and Introductions – David D. Hudgins, chair**

The chair acknowledged everyone in attendance. Attached to these minutes is a copy of the Microsoft Teams meeting attendance list.

**II. Approval of the Minutes - David D. Hudgins, chair**

A motion was made to vote to approve the minutes of the November 15, 2022 meeting. The Committee approved by unanimous vote the minutes of the November 15, 2023 meeting.

**III. Virginia State Bar Members' Insurance Center Quarterly Update – Debbie Stocks, VSBMIC Senior Client Executive**

A copy of the VSBMIC report, dated January 30, 2023, was included in the meeting materials. The report was presented by Debbie Stocks as follows:

- Meeting attendance - Jennifer Stevens attended the following meetings/events: Loudon County Bar Association Meeting (Nov 16), Henrico County Bar Association (Dec 8), Metro Richmond Women's Bar Association (Dec 9), Newport News Bar Association (Jan 11), Williamsburg Bar Association (Jan 12).
- Planned events for 2023:
  - VSB Annual Meeting, Virginia Beach. Opening reception Diamond sponsor - \$10,000.
  - CLE Presentations requested by Loudon County Bar Association (HR Consulting – Hiring trends and retaining quality employees)
  - VTLA and VADA annual conferences
  - Civility Cup golf event
- Health Insurance - Currently there are no major changes planned for our industry. 2023 rate increases are significantly higher in the small group market than 2022, with trend at 9-11% but many plans seeing 15-20%.
- Q4 2022 – Assisted 41 small firms with sole proprietor or small group medical plans, over 20 individuals with Marketplace medical plans.
- Disability insurance - Sun Life (who purchased Assurant) is the current carrier for the VSB long term disability insurance plan
- Life Insurance (Prudential) - We completed our fall mailing to VSB members under age 60 and added 111 new insureds to the VSB group plan. Letters to VSB members with President Stephanie Grana's signature is greatly appreciated. Stephanie is the sixth VSB President to assist with this life insurance letter. See attached report with life applications coinciding with VSB member letter.
- Enhancements to the VSB Members' Group Life Plan with Prudential:
  - New "Life Express" for members under age 40. Allows members to apply for up to \$200,000 with MIB & Pharma lookup only required for approval (no other underwriting). Amounts over \$200k subject to simplified or full underwriting.
  - Prudential "short form" simplified underwriting for members under age 60.
  - Considering new AD&D to be available to all new applicants AND current members of the VSB group life plan.
- Enhancements to billing services:
  - Currently offer paper billing and/or auto payment with ACH.
  - No later than Q2 – will offer online payment function.

**IV. ALPS Report – Chris Newbold, Executive Vice President, ALPS Corporation**

The ALPS report was included in the meeting materials. The report was presented by Chris Newbold as follows:

**A. Year End Results**

**B. Virginia Update**

Copies of the Guide to Reading the VA Comparison Data Sheet and the ALPS Property & Casualty Insurance Company Q4 2022 Comparison Data were included in the meeting materials.

**C. Policyholder Feedback**

The Q4 2022 ALPS Virginia Trustpilot Reviews were included in the meeting materials. The following reviews were highlighted:



Dec 6, 2022

**Very Responsive!**

They are so responsive and helpful whenever we have a question or reach out. Also have good resources available for their users.



Nov 7, 2022

**Alps proves that E&O renewal can be easy!**

Alps gave me notice of renewal with plenty of time to complete. My application was extremely easy as it incorporated the prior year information so only updates were needed. I did promptly submit my application and received a very quick response to our renewal. The rate was higher than expected but I did receive a clear explanation for the increased rate.



Oct 6, 2022

**ALPS - User Friendly in Every Way**

October 6, 2022. Alps was quick, convenient, and user friendly in every way. James was available to me to answer every question I had. Professional, friendly and patient.

**V. Risk Management Activities - Alison Riley, Educational Services Coordinator, ALPS Insurance Agency**

The 2022 Q4 Virginia Risk Management Report, John Brandt 4<sup>th</sup> Quarter Hotline Activity Report and the Virginia Risk Management Year over Year VA Budget Summary was included in the meeting materials. The risk management report was presented by Alison Riley as follows:

**A. Q4 2021 Risk Management Activity Report**

- Quarterly Result: In Q4, we had 42 VA registrants complete on-demand programs, with 34 ALPS insureds and 8 non-insured.

- YTD Result: In 2022, we had 141 VA registrants complete on-demand programs with 107 ALPS insureds and 34 non-insured.

Webinar Programming: In Q4 we hosted six webinars, three exclusively for Virginia Attorneys:

- How to Protect Yourself and Keep the Hackers at Bay, October 19 w/ Mark Bassingthwaite
  - 27 live VA attendees
- Solo and Small Firm Basics: The Insurance Coverages Law Firms Need to Thrive, November 16 w/Mark B. and Business Insurance Specialist Kurt Whitmire
  - 15 live VA attendees
- 10 Sloppy Tech Habits Your Firm Needs to Break, December 7 w/ Mark B.
  - 15 live VA attendees
- Ethics Tonight Parts 1, 2, and 3 on October 12, 13, and 14, respectively.
  - Ethics Tonight Part 1: 665 live attendees
  - Ethics Tonight Part 2: 664 live attendees
  - Ethics Tonight Part 3: 650 live attendees

Quarterly Result: In Q4, we had 2036 VA registrants for Live Webinars, with 811 ALPS insureds and 1225 non-ALPS insured.

YTD Result: In 2022, we had 2276 VA registrants for Webinars with 978 ALPS insureds and 1721 non-ALPS insured.

Webinars Scheduled:

Q1 2023 features one webinar:

Practice Management: Calendaring, hosted by Mark Bassingthwaite

Fall CLE Tour:

The tour has ended. The full report was included in the Q3 meeting packet. Planning is underway for the 2023 tour. This year's tentative schedule will be as follows:

Live Tour, September 18-29: Richmond, Charlottesville, Roanoke, Virginia Beach, Chesapeake, Alexandria, Fairfax

Virtual Tour, October 24, 25, 26: virtual online webcasts.

**B. 2022 Year End Risk Management Report**

Copies of the final 2022 Risk Management Report Summary and Year Over Year Risk Management Budget Summary were included in the meeting materials

**VI. Next Meeting**

The chair announced the next quarterly meeting will be held in person on Thursday, May 18, 2023 in Richmond at the Virginia State Bar office.

At 1:52 p.m., the meeting was adjourned.

## 1. Summary

Meeting title	VSB Special Committee on Lawyer Insurance quarterly meeting
Attended	19
Start time	2/16/23, 12:22:41 PM
End time	2/16/23, 1:52:17 PM
Meeting duration	1h 29m 36s
Average attendance time	49m 2s

## 2. Participants

Name	First join	Last leave	In-meeting duration	Email	Participant ID (UPN)	Role
Moore, Shawne	2/16/23, 12:50:32 PM	2/16/23, 1:52:17 PM	1h 1m 45s	smoore@vsb.org	smoore@vsb.org	Organizer
Hunter Byrnes (Guest)	2/16/23, 12:50:44 PM	2/16/23, 1:50:44 PM	59m 59s			Presenter
Andrew S. Gerrish	2/16/23, 12:52:14 PM	2/16/23, 1:50:03 PM	57m 49s	agerrish@faplawfirm.com	agerrish@faplawfirm.com	Presenter
Matt Lee	2/16/23, 12:52:15 PM	2/16/23, 1:49:44 PM	57m 29s			Presenter
David Marks	2/16/23, 12:53:18 PM	2/16/23, 1:49:49 PM	56m 30s	dmarks@davidmarkslaw.com	dmarks@davidmarkslaw.com	Presenter
William B. Porter	2/16/23, 12:55:29 PM	2/16/23, 1:49:46 PM	54m 17s	wporter@bklawva.com	wporter@bklawva.com	Presenter
David Hudgins	2/16/23, 12:55:40 PM	2/16/23, 1:49:46 PM	54m 5s			Presenter
Chris Newbold	2/16/23, 12:56:08 PM	2/16/23, 1:49:48 PM	53m 40s	cnewbold@alpsinsurance.com	cnewbold@alpsinsurance.com	Presenter
Geiger, Jeffrey Hamilton	2/16/23, 12:56:28 PM	2/16/23, 1:49:46 PM	53m 17s	jgeiger@sandsanderson.com	jgeiger@sandsanderson.com	Presenter
Stan Murphy	2/16/23, 12:56:47 PM	2/16/23, 1:49:46 PM	52m 59s			Presenter
Mike Flaherty	2/16/23, 12:57:00 PM	2/16/23, 1:49:49 PM	52m 48s	mflaherty@alpsinsurance.com	mflaherty@alpsinsurance.com	Presenter
Gallozzi, Marialuisa	2/16/23, 12:57:24 PM	2/16/23, 1:49:46 PM	52m 21s	mgallozzi@cov.com	mgallozzi@cov.com	Presenter
Alison Riley	2/16/23, 12:58:15 PM	2/16/23, 1:50:01 PM	51m 46s	ariley@alpsinsurance.com	ariley@alpsinsurance.com	Presenter
Debbie Stocks	2/16/23, 12:58:23 PM	2/16/23, 1:49:46 PM	51m 23s	debbie.stocks@onedigital.com	deborah.stocks@onedigital.com	Presenter
Jennifer Stevens	2/16/23, 12:58:47 PM	2/16/23, 1:49:45 PM	50m 57s	jennifer.stevens@onedigital.com	jennifer.stevens@onedigital.com	Presenter
BOBBY RICHMAN	2/16/23, 12:58:54 PM	2/16/23, 1:49:45 PM	50m 50s	LRRICHMA@sentara.com	LRRICHMA@sentara.com	Presenter
Rountree, Cameron	2/16/23, 12:59:27 PM	2/16/23, 1:49:48 PM	50m 21s	CRountree@vsb.org	CRountree@vsb.org	Presenter
Joan Davis	2/16/23, 1:03:10 PM	2/16/23, 1:03:48 PM	38s			Presenter
Joan Davis	2/16/23, 1:05:52 PM	2/16/23, 1:14:36 PM	8m 44s			Presenter

## 3. In-Meeting Activities

Name	Join time	Leave time	Duration	Email	Role
Moore, Shawne	2/16/23, 12:50:32 PM	2/16/23, 1:52:17 PM	1h 1m 45s	smoore@vsb.org	Organizer
Hunter Byrnes (Guest)	2/16/23, 12:50:44 PM	2/16/23, 1:50:44 PM	59m 59s		Presenter
Andrew S. Gerrish	2/16/23, 12:52:14 PM	2/16/23, 1:50:03 PM	57m 49s	agerrish@faplawfirm.com	Presenter
Matt Lee	2/16/23, 12:52:15 PM	2/16/23, 1:49:44 PM	57m 29s		Presenter
David Marks	2/16/23, 12:53:18 PM	2/16/23, 1:49:49 PM	56m 30s	dmarks@davidmarkslaw.com	Presenter
William B. Porter	2/16/23, 12:55:29 PM	2/16/23, 1:49:46 PM	54m 17s	wporter@bklawva.com	Presenter
David Hudgins	2/16/23, 12:55:40 PM	2/16/23, 1:49:46 PM	54m 5s		Presenter
Chris Newbold	2/16/23, 12:56:08 PM	2/16/23, 1:49:48 PM	53m 40s	cnewbold@alpsinsurance.com	Presenter
Geiger, Jeffrey Hamilton	2/16/23, 12:56:28 PM	2/16/23, 1:49:46 PM	53m 17s	jgeiger@sandsanderson.com	Presenter
Stan Murphy	2/16/23, 12:56:47 PM	2/16/23, 1:49:46 PM	52m 59s		Presenter
Mike Flaherty	2/16/23, 12:57:00 PM	2/16/23, 1:49:49 PM	52m 48s	mflaherty@alpsinsurance.com	Presenter
Gallozzi, Marialuisa	2/16/23, 12:57:24 PM	2/16/23, 1:49:46 PM	52m 21s	mgallozzi@cov.com	Presenter
Alison Riley	2/16/23, 12:58:15 PM	2/16/23, 1:50:01 PM	51m 46s	ariley@alpsinsurance.com	Presenter
Debbie Stocks	2/16/23, 12:58:23 PM	2/16/23, 1:49:46 PM	51m 23s	debbie.stocks@onedigital.com	Presenter
Jennifer Stevens	2/16/23, 12:58:47 PM	2/16/23, 1:49:45 PM	50m 57s	jennifer.stevens@onedigital.com	Presenter
BOBBY RICHMAN	2/16/23, 12:58:54 PM	2/16/23, 1:49:45 PM	50m 50s	LRRICHMA@sentara.com	Presenter
Rountree, Cameron	2/16/23, 12:59:27 PM	2/16/23, 1:49:48 PM	50m 21s	CRountree@vsb.org	Presenter
Joan Davis	2/16/23, 1:03:10 PM	2/16/23, 1:03:48 PM	38s		Presenter
Joan Davis	2/16/23, 1:05:52 PM	2/16/23, 1:14:36 PM	8m 44s		Presenter

**MINUTES OF THE VIRGINIA STATE BAR  
SPECIAL COMMITTEE ON LAWYER INSURANCE**

**Date** Thursday, May 18, 2023

**In-Person** Virginia State Bar, Bank of America building 3<sup>rd</sup> floor conference room, 1111 E. Main Street, Richmond

**Virtual** Microsoft Teams Meeting ID 270 208 704 896

The VSB Special Committee on Lawyer Insurance held its' quarterly meeting in-person on Thursday, May 18, 2023. Seven (7) members were in attendance. Based upon member attendance, the committee did not meet a quorum to take any action. At 12:36 p.m., committee vice-chair Lawrence A. Dunn called the meeting to order.

**Committee members attending in-person:**

W. H. ("Hunter") Byrnes, Sr.  
James A. Cales III  
Joan B. Davis  
Lawrence A. Dunn  
Marialuisa S. Gallozzi  
Andrew S. Gerrish  
Louis R. Richman

**Absent:**

Jeffrey H. Geiger  
David D. Hudgins  
Matthew W. Lee  
David L. Marks  
Earl S. Murphy  
William B. Porter  
Althea H. Randolph  
Alanna C. Williams

**Also attending:**

Cameron M. Rountree, VSB  
Mark Bassingthwaighe, ALPS (virtual)  
Michael Flaherty, ALPS  
Shawne D. Moore, VSB  
Chris Newbold, ALPS  
Alison Riley, ALPS (virtual)  
Debbie Stocks, VSBMIC

**I. Welcome and Introductions**

- A. Lawrence Dunn, committee vice-chair, welcomed everyone present and invited introductions from those in attendance.



## **II. Approval of the Minutes**

A copy of the minutes for the February 16, 2023 meeting were included in the meeting materials. No action was taken on the approval of the minutes.

## **III. Members' Insurance Center Quarterly Update**

A copy of the VSB Members' Insurance Center report dated May 1, 2023 and VSB Member Term Life Plan marketing letter and brochure were included in the meeting materials. Debbie Stocks, VSBMIC Manager, presented the report to the committee highlighting the following topics:

- Meeting Attendance
- Planned Events for 2023
- Health Insurance
- Enhancements to the VSB Members' Group Life Plan with Prudential
- New Critical Illness Group Policy proposed as requested by VSB Insurance Committee member
- Enhancements to Billing Services

## **IV. ALPS Report**

### **A. ALPS Report**

The ALPS Report was presented by Chris Newbold, Executive Vice President, ALPS Corporation.

### **B. Virginia Update**

Copies of the Guide to Reading the VA Comparison Data Sheet and the 2023 Q1 Comparison Data were included in the meeting materials.

### **C. Policyholder Feedback**

A copy of the 2023 Q1 ALPS Virginia Trust Pilot Reviews was included in the meeting materials.

## **V. Risk Management Activities**

Alison Riley, ALPS Educational Services Coordinator, presented the risk management activity report to the committee highlighting the following topics:

### **A. Q1 Risk Management Activity Report**

A copy of the 2023 Q1 Virginia Risk Management Report was included in the meeting materials.

### **B. Q1 Risk Management Budget Review**

A copy of the 2023 Risk Management Report Summary was included in the meeting materials.

Mark Bassingthwaite, ALPS Risk Manager, presented the following topic:

### **C. ChatGPT & the Implications on Law Practice and Risk**

A copy of the summary *ChatGPT Generative AI in Law Firms* from Thomson Reuters Institute, and a copy of The New York Times article *AI is Coming for Lawyers, Again* were included in the meeting materials.

**VI. Next Meeting**

It was announced the next quarterly meeting will be Tuesday, September 26, 2023 in Richmond.

At 2:39 p.m., the meeting was adjourned.

To: Chidi James, Cameron Roundtree, and Shawne Moore

From: Debbie Stocks

Date: September 12, 2023

Subject: VSB Lawyer Insurance Committee Meeting---September 26, 2023

Please allow me to provide an update on VSBMIC operations:

- Meeting attendance - Jennifer Stevens continues to attend local bar meetings/events around the Commonwealth.
- VSB Annual Meeting, Virginia Beach. One Digital was once again the Opening reception Diamond sponsor.
- Health Insurance – Anthem plans to terminate the Association Value-Added benefit of \$10k life insurance for each employee on an “association” small group employer plan as of February 1, 2024. Anthem will notify clients in Q4 2023.
- Life Insurance (Prudential) - We are preparing our fall mailing to VSB members. This mailing will include a link for online enrollment as well as a paper application and information re: the new guaranteed issue life insurance and AD&D benefits.
- **New Critical Illness** group policy proposed as requested by VSB Insurance Committee member. Cameron Rountree reviewed VSB rules and regulations re: offer of new benefits to VSB members. Debbie spoke with VBA executive, Paul Fletcher, re: new benefit offerings.
  - The proposal was reviewed by VSB Lawyer Insurance Committee at the May 18 meeting. Request approval of committee to offer this new benefit to members in 2024.
  - Critical Illness will help cover 14 conditions including: cancer, stroke, heart attack, Alzheimer’s, severe coronary artery disease and major organ failure, among others. \*

- Guaranteed issue to \$10,000 per occurrence. Max benefit is \$40,000 per occurrence. Initial and annual open enrollments with no EOI (evidence of insurability). \*
- Average monthly premium for GI amount ages 25-64 years is \$11.45 with 3-year rate guarantee. Premiums are age banded. Minimum 25 participants. \*
- Product offering and roll out dates TBD.
- \*These are a few brief benefits. Prudential brochure will be available to members with full details.
- Change in TPA and enhancements to billing services:
  - Currently offer paper billing and/or auto payment with ACH.
  - Benefit Coordinators Corporation (BCC) is unable to offer online payment with options requested by members.
  - Member Benefits selected as new TPA for billing and policy management to provide a better member experience.
    - Online policy review and online payment functions (monthly, quarterly, semi-annually, and annually)
    - Online application abilities through Prudential
- Propose change to Long Term Disability carrier from SunLife to Prudential
  - Improves member experience with one application and underwriting step. Apply online or with a paper application. (SunLife only offers paper application)
  - Enhancements to LTD plan include COLA with all plans to age 65, limited Guaranteed Issue with an open enrollment, small rate reduction.

Respectfully submitted by:

Debbie Stocks

Senior Client Executive, One Digital Health & Benefits

Manager – VSB Members' Insurance Center

**ALPS Virginia Comparison Data is Proprietary  
Information and not Publicly Available**

# Q2 ALPS Virginia Trustpilot Reviews



Jun 9, 2023

## **Solo Practice Insurance**

I spoke with Shawn MacDonald initially and he answered all of my questions. The application was SO easy and simple to fill out. It took me 10 minutes or less. I got the quotes within seconds and was able to chose the plan that works best for me. I have never had such a seamless and painless experience with insurance. Highly recommend!



Apr 17, 2023

## **ALPS provided a quick and efficient...**

ALPS provided a quick and efficient renewal of my policy. I will definitely seek future renewals through ALPS.



Apr 28, 2023

## **The renewal process was easy to...**

The renewal process was easy to complete and we find the Ethics CLE course very informative.



May 4, 2023

## **Im a solo**

Im a solo, specialized practitioner. Other insurance companies did not want to work with me. Alps understood my needs and made it easy to get comprehensive, affordable coverage.



May 15, 2023

## **Ease of use..**

Ease of use... the process was straightforward and easy.



Jun 5, 2023

## **Excellent service a totally streamlined...**

Excellent service a totally streamlined experience. 10 million times better than all the competition! I got malpractice insurance for Virginia in 15 min.



Jun 7, 2023

## **Easy to renew**

The process is much easier now and the attention and help we get from our representative is incredible.



 P.O. BOX 9169  
MISSOULA, MT  
59807 - 9169

**REGISTER  
TODAY!**

Now **FREE**  
for all Virginia  
attorneys!

# THE FIRM RETREAT



THE FALL  
ETHICS CLE TOUR  
OF **VIRGINIA**

POWERED BY  


Join us this fall for the largest annual ethics CLE event in Virginia **FREE for all Virginia attorneys!** The Virginia State Bar and ALPS, the Bar-endorsed lawyers' professional liability insurance carrier, invite you to our annual Ethics CLE tour of Virginia!

**The Firm Retreat** takes us behind the scenes as a law firm facing ethical dilemmas holds its annual staff retreat and navigates a host of potential legal malpractice missteps they'd all rather avoid. A panel of your peers will apply the Virginia Rules of Professional Conduct to their analysis of the issues presented. During the panel discussions, attendees will be encouraged to ask questions and share comments.

Each live, in-person session is 3-hours long and **approved for 3 Virginia Ethics CLE credits.**

# REGISTER TODAY!

WHILE SEATS ARE LEFT!

[www.alpsinsurance.com/virginiacle](http://www.alpsinsurance.com/virginiacle)



# FIND YOUR SESSION

***Fairfax: Monday, September 18***

Fairfax Marriott at Fair Oaks  
AM SESSION: 8:30 - 11:45 AM  
PM SESSION: 1:30 - 4:45 PM

***Alexandria: Wednesday, September 20***

Alexandria Belle Haven  
AM SESSION: 8:30 - 11:45 AM  
PM SESSION: 1:30 - 4:45 PM

***Roanoke: Friday, September 22***

Roanoke Higher Education Center  
AM SESSION: 8:30 - 11:45 AM

***Richmond: Tuesday, September 26***

Greater Richmond Convention Center  
AM SESSION: 8:30 - 11:45 AM  
PM SESSION: 1:30 - 4:45 PM

***Charlottesville: Wednesday, September 27***

Charlottesville Doubletree  
AM SESSION: 8:30 - 11:45 AM

***Virginia Beach: Thursday, September 28***

Virginia Beach Convention Center  
AM SESSION: 8:30 - 11:45 AM

***Newport News: Friday, September 29***

Newport News Marriott  
AM SESSION: 8:30 - 11:45 AM

Can't make it to an in-person session?  
Live virtual sessions will run from 12:00 - 1:00 p.m.  
(Eastern) on October 3, 4, & 5.





## Virginia Risk Management Report

### 2023 Q2

- **On-Demand Programing:** Currently, 28 programs exist in the Virginia on-demand library. They range in length from 60-min to three hours. Charges for on-demand seminars are as follows: one-hour programs are \$40 for ALPS policyholders, \$70 general; two-hour programs are \$50 for ALPS policyholders, \$80 general; and three-hour programs are \$70 for ALPS policyholders, and \$100 general. Info on ALPS CLE programming can be found at <https://www.alpsinsurance.com/cle>.

**Quarterly Result:** In Q2, we had 31 VA registrants for on-demand programs, 19 were ALPS policyholders, 12 were not ALPS policyholders.

**YTD Result:** At the end of Q2, we had 32 VA registrants for on-demand programs.

**Webinar Programming:** In Q2 we held 5 webinars, 4 of which were CLE accredited in Virginia.

- Practice Management: Client Selection, 4/5 (18 VA attendees)
- Your Cyber Insurance Questions Answered, 5/10 (not CLE, no VA attendees)
- The Rise of AI in the Legal Profession: Lawyers Brace for Impact, 5/24 (59 VA attendees)
- Trust Account Basics for New Lawyers, 6/7 (no VA attendees)
- How to Start Your Own Law Firm, 6/28 (1 VA attendee)

**Quarterly Result:** In Q2, we had 78 VA registrants for Webinars, with 56 ALPS policyholders and 22 non-policyholders.

**YTD Result:** YTD, we had 114 VA registrants for Webinars, with 87 ALPS policyholders and 29 non-policyholders.

- **Webinars Scheduled:**

Q3 features 1 live webinar:

- “Ethics Tonight, Season 2022” (August 17, hosted by Mark B., Mike Flaherty, and Jean Marie Clavere, WSBA Senior Professional Responsibility Counsel)

Q4 will feature 7 live webinars:

- “The Firm Retreat” Parts 1, 2, & 3 (October 3, 4, & 5) See Fall Tour section
- “A Penny Pincher’s Guide to Ethical Cybersecurity for Law Firms” (October 18, hosted by Sharon Nelson of Sensei Enterprises in Fairfax)



- “10 Things They Didn’t Teach You in Law School” (November 15, hosted by Mark Bassingthwaighte)
- “How to Avoid Conflict of Interest Malpractice Missteps” (December 6, hosted by Mark B.)

▪ **Fall CLE Tour:**

**Timeline and dates for in-person tour:**

Monday, 9/18 AM & PM – Fairfax Marriott Fair Oaks  
Wednesday, 9/20 AM & PM – Belle Haven Country Club, Alexandria  
Friday, 9/22 AM – Roanoke Higher Education Center  
  
Tuesday, 9/26 AM & PM – Greater Richmond Convention Center  
Wednesday, 9/27 AM – Charlottesville DoubleTree  
Thursday, 9/29 AM – Virginia Beach Convention Center  
Friday, 9/30 AM – Newport News Marriott

We will also offer a virtual option of the tour. Like in 2020 & 2021, we’ve structured three segments, 60-minutes each around each of the three Fall Tour vignettes. Each can be viewed separately and distinctly from the other parts, but together they will provide three Live Interactive ethics credits. The virtual tour will be provided free of charge to all Virginia lawyers and will run once with the option for on-demand credit for those who can’t make it live.

**Timeline and dates for virtual tour:**

Tuesday, 10/3 (12 PM Eastern) - *Part 1* / 60 min  
Wednesday, 10/4 (12 PM Eastern) - *Part 2* / 60 min  
Thursday, 10/5 (12 PM Eastern) - *Part 3* / 60 min

**Virginia  
Risk Management Report Summary  
2023**

<b>Specific Allocations</b>	<b>Budget</b>	<b>3/31/2023</b>	<b>6/30/2023</b>	<b>9/30/2023</b>	<b>12/31/2023</b>	<b>Total</b>	<b>Budget Variance (over) / under</b>	<b>Budget Variance %</b>
<b>Revenue</b>								
ALPS 3% Contribution	279,476	69,869.00	69,869.00	69,869.00	69,869.00	279,476.00	0.00	0%
Face to Face CLE Revenue	-	-	-	-	-	-	0.00	0%
Total Revenue less 3% ALPS Contribution	-	-	-	-	-	-	0.00	
<b>Total Revenue</b>	<b>279,476</b>	<b>69,869.00</b>	<b>69,869.00</b>	<b>69,869.00</b>	<b>69,869.00</b>	<b>279,476.00</b>	<b>0.00</b>	0%
<b>Expenses</b>								
Fall CLE Tour	133,500.00	12,576.86	38,778.45			51,355.31	82,144.69	62%
Lawyers Helping Lawyers	30,000.00	-	30,000.00			30,000.00	0.00	0%
RM Claims Prevention Hotline	14,000.00	2,804.93	5,039.92			7,844.85	6,155.15	44%
RM Seminars VA Local, County, Specialty Bars, VSB Section, Other Organized Bars	6,000.00	-	-			-	6,000.00	100%
Support of VSB Events - VA Tech show / Forum	8,000.00	-	-			-	8,000.00	100%
Local Bar Grant Pool	15,000.00	-	2,500.00			2,500.00	12,500.00	83%
RM Coordinator Costs	35,000.00	8,750.00	8,750.00			17,500.00	17,500.00	50%
Administrative/Miscellaneous	3,000.00	621.00	894.00			1,515.00	1,485.00	50%
RM Marketing Budget	30,500.00	9,936.00	500.00			10,436.00	20,064.00	66%
ALPS Liaison Travel	4,500.00	-	1,197.20			1,197.20	3,302.80	73%
<b>Total Expenses</b>	<b>279,500</b>	<b>34,688.79</b>	<b>\$87,659.57</b>	<b>\$0.00</b>	<b>\$0.00</b>	122,348.36	157,151.64	
<b>Net Income (Loss)</b>	<b>(24)</b>	<b>35,180.21</b>	<b>(17,790.57)</b>	<b>69,869.00</b>	<b>69,869.00</b>	<b>157,127.64</b>	<b>157,151.64</b>	
						157,127.64		

<b>2023 Budget Allocation</b>	
<b>Virginia Risk Management</b>	
Direct Premiums Earned at 9/30/22	9,315,850
<b>2023 Budget @ 3%</b>	279,476

# Committee Roster for Committee on Lawyer Insurance

Period: Current

Type: Committee Members

Member	Position	Begin Date	End Date
<b>David Drake Hudgins</b> Hudgins Law Firm, P.C. Suite 100 2331 Mill Road Alexandria, VA 22314 UNITED STATES dhudgins@hudginslawfirm.com Work Phone: (703) 739-3300	Chair	7/1/2019	6/30/2024
<b>Wells Huntington Byrnes, Sr.</b> 555 Tilley Ct Crozet, VA 22932-2532 UNITED STATES hbyrnes@infinityrp.com	Member	7/1/2022	6/30/2026
<b>James Arthur Cales, III</b> Furniss, Davis, Rashkind and Saunders, P 6160 Kempsville Circle Ste 341B Norfolk, VA 23502 UNITED STATES jcales@Furnissdavis.com Work Phone: (757) 461-7100	Member	7/1/2021	6/30/2026
<b>Joan Bellefield Davis</b> Schroder Brooks Law Firm PLC 15 S Belmont Street Richmond, VA 23221 UNITED STATES jdavis@schroderbrooks.com Work Phone: (804) 510-0700	Member	7/1/2022	6/30/2026
<b>Marialuisa Sabina Gallozzi</b> Covington & Burling LLP 850 Tenth St NW Ste 540 N Washington, DC 20001 UNITED STATES mgallozzi@cov.com Work Phone: (202) 662-5344	Member	7/1/2023	6/30/2028

# Committee Roster for Committee on Lawyer Insurance

Period: Current

Type: Committee Members

Member	Position	Begin Date	End Date
<b>Jeffrey Hamilton Geiger</b> Sands Anderson, PC 1111 E Main St Ste 2400 PO Box 1998 Richmond, VA 23218-1998 UNITED STATES jgeiger@sandsanderson.com Work Phone: (804) 783-7248	Member	7/1/2019	6/30/2024
<b>Jacquelyn Fromal Gerlach</b> Friedman Law Firm 9401 Courthouse Road Suite A Chesterfield, VA 23832 UNITED STATES jgerlach@friedmanlawva.com Work Phone: (804) 297-2364	Member	7/1/2023	6/30/2028
<b>Andrew Shane Gerrish</b> Frith Anderson & Peake PC 29 Franklin Road SW Roanoke, VA 24011 UNITED STATES agerrish@faplawfirm.com Work Phone: (540) 725-3370	Member	7/1/2021	6/30/2026
<b>Matthew William Lee</b> Wilson Elser Moskowitz Edelman and Dicke Suite 510 8444 Westpark Drive McLean, VA 22102 UNITED STATES matthew.lee@wilsonelser.com Work Phone: (703) 245-9300	Member	7/1/2021	6/30/2026
<b>David Lyndon Marks</b> Law Offices of David L. Marks Suite 204 10513 Judicial Drive Fairfax, VA 22030 UNITED STATES dmarks@davidmarkslaw.com Work Phone: (703) 385-1100	Member	7/1/2020	6/30/2025

# Committee Roster for Committee on Lawyer Insurance

Period: Current

Type: Committee Members

Member	Position	Begin Date	End Date
<b>Earl Stanley Murphy</b> 40 First Street P.O. Box 85 White Stone, VA 22578 UNITED STATES stan@murphylawplc.com Work Phone: (804) 493-4075	Member	7/1/2019	6/30/2024
<b>William Boyle Porter</b> Blankingship & Keith, P.C. 4020 University Dr Ste 300 Fairfax, VA 22030 UNITED STATES wporter@blankeith.com Work Phone: (703) 691-1235	Member	7/1/2023	6/30/2028
<b>Althea Hurt Randolph</b> 7802 Fairview Farm Road Scottsville, VA 24590 UNITED STATES althearandolph05@gmail.com Work Phone: (434) 296-8433	Member	7/1/2023	6/30/2028
<b>Louis Robert Richman</b> Sentara Health 824 N. Military Hwy #100 Norfolk, VA 23502 UNITED STATES lrrichma@sentara.com Work Phone: (757) 233-4913	Member	12/13/2019	6/30/2024
<b>Alanna Camille Williams</b> Cook, Craig & Francuzenko, PLLC 3050 Chain Bridge Rd Ste 200 Fairfax, VA 22030 UNITED STATES awilliams@cookcraig.com Work Phone: (703) 865-7480	Member	7/1/2019	6/30/2024

# Committee Roster for Committee on Lawyer Insurance

Period: Current

Type: Committee Members

Member	Position	Begin Date	End Date
<b>Cameron Michael Rountree</b> Virginia State Bar 1111 E Main St Ste 700 Richmond, VA 23219 UNITED STATES crountree@vsb.org Work Phone: (804) 775-0560	Liaison		
<b>Shawne Moore</b> Virginia State Bar 1111 E Main St 700 RICHMOND, VA 23219 UNITED STATES smoore@vsb.org	Committee Administrator		

**Total Members: 17**