



OFFICE OF LEGAL SERVICES INNOVATION  
An Office of the Utah Supreme Court

# Sandbox Authorization Packet

## Olsen & Partners Law LLC

August 15, 2022

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1. Utah Supreme Court Order for Authorization to Practice Law
2. Innovation Office Recommendation to the Court

# Document 1

# In the Supreme Court of the State of Utah

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## In re: Application of Olson & Partners Law LLC

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### ORDER FOR AUTHORIZATION TO PRACTICE LAW

*Based upon the Utah Supreme Court's plenary and constitutionally granted authority to regulate the practice of law in Utah, and the tenets of Standing Order 15, the Utah Supreme Court orders that Olson & Partners is authorized to practice law within the regulatory sandbox and subject to the restrictions outlined below.*

The Court has reviewed the recommendation of the Office of Legal Services Innovation ("Innovation Office") for Olson & Partners Law LLC ("Olsen & Partners") to be authorized to practice law.

Olson & Partners seek authorization to form an ABS between tax lawyers and nonlawyer experts in virtual currency and blockchain technology in order to streamline services and facilitate communication between the attorneys and clients.

The Innovation Office has assessed the risk of harm to Olson & Partners targeted consumers relative to the risk of harm they currently face and has determined that the risk of harm presented by Olson & Partners' service is Low.

In light of the Court's responsibility to the public to effectively regulate the practice of law in Utah and in keeping with the tenets of Standing Order 15, the Court now orders as follows:

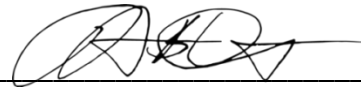
1. Olson & Partners is authorized to offer legal services through the following methods:
  - a. Lawyer employed or managed by a nonlawyer
  - b. Nonlawyer ownership
  - c. Lawyers sharing profits with nonlawyers
  
2. Olson & Partners is authorized to provide legal services across the following legal service areas, subject to the restrictions outlined below:
  - a. Business
  - b. Consumer Financial Issues

3. Olson & Partners Law shall conform to the Low innovation reporting requirements imposed by the Innovation Office.
4. Olson & Partners Law will prominently display the following disclosure requirements:
  - a. Innovation Office Badge
  - b. Nonlawyer ownership disclosure

If Olson & Partners Law wishes to alter these conditions or requirements, it must submit any such change to the Innovation Office for further assessment. The Innovation Office will assess the proposed change and may permit the change if it deems the change does not materially increase the risks to consumers. If the Innovation Office finds a material increase in risk, then it will present the issue to the Court for further consideration.

This authorization is granted for the duration of the existence of the Sandbox, or until exit and permanent licensure at the discretion of the Court. Authorization is subject to Olson & Partners' compliance with the conditions and requirements set forth in the Innovation Office Manual and the Innovation Office Recommendation to the Court and to a verification by the Innovation Office that the company's services are not causing material harm to consumers.

DATED this 10th day of August, 2022.



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Matthew B. Durrant  
Chief Justice

# Document 2



# Sandbox Recommendation to the Court

## App No.0077 - Olson & Partners Law LLC

August 10, 2022

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Executive Summary

Recommendation: Authorize ABS

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Applicant: Olson & Partners Law LLC

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Proposed Model/Service: Olson & Partners seek authorization to form an ABS between tax lawyers and nonlawyer experts in virtual currency and blockchain technology in order to streamline services and facilitate communication between the attorneys and clients.

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Target Consumer Market This law firm will be providing specific tax law advice and help to virtual currency "mine" entities and individuals, as well as other virtual currency holders and blockchain technology entities.

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Sandbox Qualifiers: This business model/service qualifies for the Sandbox because it would feature the following characteristics:

- Lawyers employed or managed by nonlawyers
  - Nonlawyer ownership
  - Lawyers sharing profits with nonlawyers
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Regulatory Objective Qualifier:<sup>1</sup> Olson & Partners' proposed model increases consumer accessibility and affordability.

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Utah Qualifier: Adapted for Utah requirements

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Implementation Qualifier: Ready for immediate implementation

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Innovation Assessment

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General Assessment: Low

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Specific Risks: As with any ABS there are common risks regarding:  
1. Confidentiality

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<sup>1</sup> Regulatory Objective: To ensure consumers have access to a well-developed, high-quality, innovative, affordable, and competitive market for legal services. (Standing Order No. 15)

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2. Non-lawyer oversight of services
  3. Corporate interest in protecting profit

Olson & Partners Law has appropriately addressed these concerns.

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### Sandbox Recommendation

We recommend the Court authorize Olson & Partnersto offer legal services in the state of Utah, subject to such requirements as the Innovation Office may impose.

### Scope of Recommended Authorization

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Term of authorization	The Innovation Office recommends that authority be granted for the duration of the existence of the Sandbox, or until exit and permanent licensure at the discretion of the Court. Any such licensure would be subject to the applicant complying with the conditions and requirements set forth below and also verification by the Innovation Office that the Entity has a record of compliance with all requirements and the company’s services are not causing harm to consumers.
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Recommended legal service models	This section presents a numbered list of the recommended service models. <ol style="list-style-type: none"><li>1. Lawyer employed or managed by a nonlawyer</li><li>2. Nonlawyer ownership</li><li>3. Lawyers sharing fees with nonlawyers</li></ol>
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Legal service models not recommended	None
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Recommended consumer service areas	<ol style="list-style-type: none"><li>1. Business</li><li>2. Consumer Financial Issues</li></ol>
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Recommended waivers	None
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Recommended qualitative compliance requirements	Standardized disclosure statements on website and in mobile applications (see Manual): <ol style="list-style-type: none"><li>1. Badge</li><li>2. Nonlawyer ownership disclosure</li></ol>
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Note: All lawyers employed by Olson & Partners remain subject to the rules of professional conduct and the disclosure requirements imposed by Rule 5.4.

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Recommended data reporting requirements      Low Innovation data reporting requirements (see Manual)