



Meeting Minutes Supreme Court's Office of Legal Services Innovation Committee

Held via Zoom

Tuesday, May 19, 2026

1:00 pm to 2:30 pm

COMMITTEE MEMBERS

Alyson Carter McAllister – <i>Chair</i>	Present	Kimberly Farnsworth	Present
Nick Hafen – <i>Vice Chair</i>	Excused	Ciriac Alvarez Valle	Present
Lindsey Brandt	Present	Barclay Burns	Present
Christopher Martinez	Excused	Elizabeth Wright – <i>Ex Officio</i>	Excused
J. Brett Chambers	Present	Andrea Donahue – <i>Staff</i>	Present
Janine Liebert	Present	Tanya Rosado – <i>Staff</i>	Present
Megan Glasmann	Present	Nick Stiles – <i>Staff</i>	Present
Gretchen Lee	Present		

GUEST(S)

Ramon Samoza – *Synergy Legal*
Hayley Cousin – *CJAU*

Jaxon Didericksen – *USU TCI*

1. Discussion: **Alyson McAllister**
Welcome and Public Comment

Ms. McAllister welcomed all attendees and opened the floor for public comments. There were no public comments.

2. Vote: **Alyson McAllister**
Approval of April Meeting Minutes

Ms. McAllister invited a motion for approval of the April 2026 Meeting minutes.

Ms. Brandt moved to approve the minutes. Mr. Chambers seconded the motion, and it passed unanimously.

3. Discussion: **Andrea Donahue**
Phase 3 Announcement

Ms. Donahue explained that the Supreme Court issued a letter on Monday announcing Phase 3 and providing guidance for winding down the Sandbox for the final year. She then went through the main points.

Applications will be closed to new applications effective May 29, 2026; remaining applications received prior to 5:00PM on that day will be considered.

There is an additional metric for application review. In addition to meeting all existing requirements, an application should have a plausible connection to the regulatory reforms that will be permitted after the Sandbox sunsets.

The Committee should collaborate with the Ad Hoc Committee on Regulatory Reform, which has been charged with producing a final report that recommends which reforms should be institutionalized after the Sandbox sunsets. The LSI Committee will assist with this effort.

The Committee should focus on tasks necessary to regulate existing entities. There is no need to focus on previous efforts or concepts that are not necessary to regulate current entities.

Additionally, the letter instructed the Bar to collect the annual fee for the final year. Staff have already reached out to current entities.

The Committee discussed messaging regarding the cut-off date of applications. Ms. Donahue invited Committee input on messaging potential applicants. She explained that the Bar uses ILG, an online platform for applications, and described the logistics for adding updates. The Court set a short window before the cut-off date, so there may be limits to what is feasible through ILG, but staff will reach out. There are some potential applicants that have reached out with inquiries and there may be applicants with incomplete applications that haven't been submitted.

Ms. McAllister asked about the most efficient route to get the information out. Ms. Donahue stated that they added an announcement on the Innovation Office website, including in the application instructions, right after receiving the letter. A potential method for messaging would be to reach out to prospective applicants from the past 2-3 months. Ms. McAllister noted that the past 90 days seemed feasible. ILG will have to be contacted regarding incomplete applications.

To wrap up the item, Ms. Donahue gave a special thank you to Justice Hagen for her service as judicial liaison, which was echoed by Ms. McAllister. The Committee does not have a judicial liaison for the foreseeable future in Phase 3. Ms. McAllister asked Mr. Stiles to pass on the Committee's thank you.

**4. Discussion and Vote:
Amendment Request**

Andrea Donahue

Ms. Donahue explained that Legalogic/Lawgeex had submitted an amendment request to update its authorization order to add Superlegal as a DBA. Lawgeex has stated that Superlegal is only a DBA and not a separate entity. She described that the entity had asked about this previously, but there was a period of uncertainty with the Sandbox review and institution of Phase 2, particularly with ABSs. However, the Committee has been referring to the entity with Superlegal included, including on the website, for more clarity to consumers.

Ms. Brandt moved to recommend approval of the amendment request for Legalogic/Lawgeex. Mr. Chambers seconded the motion, and it passed unanimously.

**5. Discussion and Vote:
Entity Reporting**

Brett Chambers

Mr. Chambers informed the Committee that his subcommittee discussed the potential benefit of adding non-lawyer providers to the monthly reporting form. This would allow for more regular updates on how many non-lawyer providers are out there.

Mr. Chambers moved to include the number of non-lawyer providers in the monthly reporting requirement. Ms. Brandt seconded the motion, and it passed unanimously.

**6. Discussion and Vote:
Applications**

Lindsey Brandt

Ms. Brandt informed the Committee that two entities (Herman Legal/MyLingoLaw USA and Salt Lake Injury) submitted Requests for Reconsideration but failed to show that the original grounds of denial do not still stand. The Applications Working Group found that the two Requests for Reconsideration and amended application from Synergy Legal/Somoza Law Firm appear to present Low Innovation/ABS models that focus on non-lawyer ownership rather than needing authorization for their software tools. Additionally, Herman Legal/My Lingo seems to still lack a Utah-specific model; the Committee has not resolved the additional question as to whether its model qualifies as solely or primarily providing immigration-related services.

Ms. Brandt motioned for the Committee to go into closed session. Mr. Chambers seconded the motion, and the Committee closed the meeting.

7. Post-Closed Session

Ms. McAllister moved the Committee into voting on applications.

Mr. Chambers moved to deny the Request for Reconsideration from Herman Legal and MyLingoLaw on the basis of being a Low Innovation/ABS-only entity with no Utah-specific model. Ms. McAllister also mentioned that their focus on immigration is a concern for the Committee, as well. Ms. Brandt seconded the motion, and it passed unanimously.

Ms. Brandt moved to deny Salt Lake Injury's request for reconsideration for being Low Innovation/ABS-only. Mr. Chambers seconded the motion, and it passed unanimously.

Mr. Chambers moved to deny Synergy Legal's application on the basis of being Low Innovation/ABS-only. A concern of potential UPL and inconsistencies in the application was also raised. Ms. Brandt seconded the motion, and it passed unanimously.

The AI components did not seem to need a rule waiver, and there does not appear to be a path forward for the nonlawyers.

Mr. Somoza inquired about the process and whether his entity would have the chance to be heard. Ms. McAllister explained that the Committee didn't have any questions for Synergy Legal. Ms. Donahue described that applicants are issued denial forms with instructions for the appeal process, starting with how to request reconsideration. The reconsideration process allows for entities to address the Committee's reasons for denial and state if they disagree. Committee meetings allow for public comments, but Ms. McAllister reiterated that this is the official process for applicants. Ms. Donahue noted that the denial form will first need to be updated to incorporate the Court's new Phase 3 guidance, so this will add some time.

Ms. Brandt motioned to adjourn the meeting. Mr. Chambers seconded the motion, and the meeting was adjourned.