

CLIENTS' SECURITY BOARD

OF THE

SUPREME JUDICIAL COURT OF MASSACHUSETTS

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ANNUAL REPORT

TO THE

SUPREME JUDICIAL COURT

FISCAL YEAR 2024

July 1, 2023 – June 30, 2024



**MASSACHUSETTS CLIENTS' SECURITY BOARD**  
**ANNUAL REPORT**  
**TO THE**  
**SUPREME JUDICIAL COURT**  
**FISCAL YEAR 2024**  
**BOARD MEMBERS**

Sally R. Gaglini, Esq., Chair  
Judith A. Goldberg, Esq., Vice Chair  
Brian D. Bixby, Esq., Treasurer  
Lauren F. Olanoff, Esq., Secretary  
Tal M. Unrad, Esq.  
Leticia Medina-Richman, Esq.  
Adam J. Ruttenberg, Esq.

**STAFF**

Linda G. Bauer, Esq.,  
General Counsel and Executive Director

Edward A. Beagan, Esq.,  
Deputy General Counsel

**Mission**

**To discharge, as far as practicable and in a reasonable manner, the collective professional responsibility of Massachusetts lawyers for actual losses caused by the theft of client funds or property by Massachusetts lawyers, acting either as attorneys or fiduciaries.  
S.J.C. Rule 4:04, § 1.**

Clients' Security Board  
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Boston, MA 02108

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**CLIENTS' SECURITY BOARD**  
**of the Supreme Judicial Court of Massachusetts**  
**June 30, 2024**

Dear Reader,

Fiscal year 2024 marked the 50<sup>th</sup> anniversary of the creation of the Clients' Security Board (CSB) and our sister agencies, the Board of Bar Overseers (BBO) and Office of Bar Counsel (OBC). This past year, all three organizations jointly celebrated our efforts to strengthen and preserve the public's trust in the legal profession by reflecting on our history and engaging in outreach to the public and the bar.

The CSB's specific mission is to reimburse clients whose lawyers have stolen their funds, upon the suspension, disbarment, resignation or death of the lawyers. Since 1974, the CSB has awarded over \$61 million to more than 2,600 claimants. During fiscal year 2024 alone, the CSB made awards to 65 claimants totaling \$1.75 million. Consistent with past years, the 11 disciplined or deceased lawyers responsible for those claims represented less than 0.02% of the 73,221 licensed lawyers in Massachusetts, whose funds reimbursed the client victims.

Three attorneys were responsible for the largest amounts of reimbursable losses. During fiscal year 2024 alone, the CSB paid former clients of Benjamin B. Tariri \$717,305.00 in total awards; former clients of Andrew William Piltser Cowan \$507,096.31 in total awards; and former clients of George C. Maroun, Jr. \$222,880.00 in total awards. Two of these attorneys were also responsible for the greatest number of awards last year. Out of 65 total awards, the CSB made 24 awards to former clients of Benjamin B. Tariri and 22 awards to former clients of George C. Maroun, Jr. Both attorneys represented many immigrant clients, who were particularly vulnerable to dishonest conduct by the attorneys they trusted. Because many claimants do not speak English as a primary language, the CSB continued to engage a part-time translator to assist claimants who speak Portuguese and Spanish with pursuing claims at the CSB. The CSB also used a translation service to assist with interviews of claimants and witnesses who speak other languages.

CSB began fiscal year 2024 with 43 pending claims seeking \$2,172,060.01, and ended the year with 42 pending claims seeking \$1,572,921.72. During fiscal year 2024, the CSB met eleven times, including four meetings in person and seven by videoconference. The CSB received 66 new claims, decided 72 claims, conducted 10 claimant hearings, made 65 awards, and dismissed 7 claims. The largest awards were paid due to thefts from Trusts and Estates (\$613,798.70) and of Fiduciary Funds (\$573,357.50), together accounting for 67.83% of the total \$1,750,230.98 awards paid. The most common category of claims paid was due to unearned retainers or excessive fees collected by the responsible attorneys and not reimbursed. These claims resulted in 54 of the total 65 awards paid or 83.08%, although the total amount awarded due to unearned retainers or excessive fees was \$350,304.78 or only 20.01% of the total awards made in fiscal year 2024.

Last year, the CSB made 4 awards totaling \$85,927.50 to clients of 2 deceased lawyers. This number is slightly down from the 20 awards totaling \$99,956.40 made to clients of 6 deceased lawyers in fiscal year 2023. Most of these awards were to reimburse clients for unearned fees paid to the lawyers for work that was not performed before their deaths. In many cases, the lawyers had not received public discipline and were in good standing at the time of their deaths. However, the lawyers' failure to maintain client funds in IOLTA or other client accounts with adequate records resulted in uncertainty and disruptions for their clients and created burdens on stressed or grieving family members or colleagues who tried to pick up the pieces after the lawyers' deaths. When sufficient funds were not available to reimburse the clients, the CSB stepped in. To try to reduce the frequency of such claims, the CSB has been working with bar associations and other groups to assist lawyers to better prepare their practices for transitions including death. The CSB plans to continue this outreach in the coming fiscal year so that more lawyers will take steps to leave better records and trusted representatives to assist clients in reclaiming their funds and property if lawyers experience disruptions to their practices including death.

In December 2023, Chair Gary M. Weiner and Secretary David R. Kerrigan completed five-year terms on the Board. In January 2024, the Court appointed Leticia Medina-Richman and Adam Ruttenberg to five-year terms ending December 1, 2028. The Court also named Sally R. Gaglini as Chair, and Judith A. Goldberg as Vice Chair. At the same time, Lauren F. Olanoff was elected Secretary, and Brian D. Bixby agreed to continue to serve as Treasurer. In February 2024, Bernice Addonizio announced that she would be leaving her position as Legal Administrative Specialist for the CSB, a position she has held since May 2011. The CSB then began a search for a new administrative assistant, which was continuing at the end of the fiscal year.

During fiscal year 2024, Citizens Bank and Clarfeld Financial Advisors, LLC, continued to provide the CSB with banking and investment advisory services. The CSB engaged three attorneys -- John O. Postl, Esq., of Quincy; Jonathan H. Allen, Esq. of Springfield; and Douglas F. Hartman, Esq. of Boston -- to serve as collection counsel to assist the CSB in pursuing restitution from attorneys or other responsible parties for awards paid to client victims. Attorney Joseph H. Baldiga of Westborough also assisted the CSB in obtaining restitution from a respondent's bankruptcy estate. AAFCPAs, Inc. once again conducted an annual audit of the CSB. The CSB did not enter into any material written contracts in fiscal year 2024.

The CSB is continuing efforts to increase public awareness of the Fund. Staff made presentations to law schools and bar associations and contacted affinity bar associations directly about the mission and work of the CSB. The CSB continued to work with The Beacon Agency to re-design the CSB website and improve CSB's social media presence. The CSB published updates in each of the BBO's quarterly newsletters sent by email to all licensed Massachusetts lawyers. CSB's General Counsel, through her work as Regional Vice President of the National Client Protection Organization (NCPO) and as the NCPO liaison to the ABA's Standing Committee on Public Protection in the Provision of Legal

Services (PPPLS), also continued to work with other jurisdictions to better manage and share outreach resources among client protection programs.

Looking back over the last five years serving on the CSB as one of its board members in addition to its Secretary, Vice-Chair and this past year as Chair, I wish to extend my gratitude to my fellow Board members who, through their benevolence as volunteers, brought their time, experience and invaluable knowledge and talents to our board. I also wish to acknowledge Linda G. Bauer, General Counsel and Executive Director, Edward A. Beagan, Deputy General Counsel, Adam Lutynski, former Deputy Counsel (who retired in 2022) and Bernice Addonizio, Legal Administrative Specialist. Their individual and collective knowledge, honed capabilities, and generosity of support made the CSB's work in preparation for and on hearing days just about seamless. It has been both an honor and a privilege to serve those whose faith in the legal profession has been shattered by the actions of a virulent minority of lawyers who betrayed them and the oath they were sworn to uphold. Although I will miss the remarkable community of lawyers and support staff dedicated to fulfillment of the CSB's mission in restoring the public's trust in the legal profession by recompensing victims whose lawyers stole from them, I know the Board will successfully carry on with irrepressible vigor and professional decorum in the years ahead.

Very truly yours,



Sally R. Gaglini, Esq.  
Chair

## **History and Operation of the Clients' Security Board and Fund**

In 1974, the Supreme Judicial Court of Massachusetts created the Clients' Security Board and Fund by Court rule. Their purpose is to preserve the public's trust in the legal profession by reimbursing clients whose lawyers have stolen their funds. All funds used to make awards come from Massachusetts lawyers through their annual registration fees. No public funds or tax dollars are used for any reimbursements.

A volunteer Board of seven Massachusetts lawyers appointed by the Court makes all awards. Board members serve five-year terms without compensation and act as public trustees for the Fund. The Board has sole discretion whether to allow or deny client claims in whole or in part. The Board generally meets monthly, and most meetings include one or more hearings attended by claimants, sometimes alone but often accompanied by *pro bono* counsel. Although invited, disciplined attorneys rarely attend. The Board meets in person and also by video conference. The Board's staff investigates each claim, prepares confidential memoranda on claims, pursues restitution, maintains records of claims and collection efforts, and engages in outreach to inform the public and the bar about the Fund.

### **Overview**

Since 1974, the Board has awarded over \$61 million to more than 2,600 claimants. In fiscal year 2024, the Board awarded over \$1.75 million to 65 claimants. The 11 disciplined or deceased lawyers responsible for those claims represent less than 0.02% of the 73,221 licensed lawyers in Massachusetts, whose funds reimburse the client victims. Massachusetts has no limit on individual awards, no limit on aggregate awards per lawyer, and no statute of limitations on filing a claim.

### **Eligibility for CSB Awards**

A claimant must be a law client who suffered a reimbursable loss caused by the dishonest conduct of a Massachusetts lawyer acting either as a lawyer or a fiduciary when the loss occurred. The responsible lawyer must have been suspended or disbarred, or have resigned or died. S.J.C. Rules 4:04, § 1 and 4:05, § 1. "Dishonest conduct" includes theft, embezzlement, or conversion of money or property, regardless of where the loss occurred. Other examples of "dishonest conduct" include failing to refund unearned fees received in advance as required by Mass. R. Prof. C. 1.16(d); borrowing money without the intention to repay it; and settling a case without authorization and misappropriating the settlement proceeds. CSB Rule 2(E). Awards do not include any loss to the extent that the client has recovered or may recover the funds from a collateral source; any loss arising solely out of an investment, lending, personal, or business relationship; or any consequential or incidental damages, such as lost interest, lawyer's fees, or other costs incurred in seeking recovery of a loss. CSB Rule 2(G). Examples of common claims where the losses are not reimbursable include lawyer malpractice or simple fee disputes. More information about eligibility and how to file a claim can be found at [www.masscsb.org](http://www.masscsb.org).

**FY 2024 – SIGNIFICANT NUMBERS**

Total Awarded	\$1,750,230.98
Claims Adjudicated	72
Total Awards	65
Lawyers Responsible	11 out of 73,221 (0.02%)
Claims Dismissed	7
# Claims Pending, Year-End	42
\$ Claims Pending, Year-End	\$1,572,921.72

**BASIS FOR DISMISSED CLAIMS**

Category	No. of Claims
No Reimbursable Loss	3
Restitution	1
Fee Dispute	2
No Attorney/Client Relationship	1
<b>Total</b>	<b>7</b>

**CLAIMS PENDING**

Basis	# of Claims Pending	Total Claims
Fiduciary Funds	3	\$615,045.50
Real Estate Funds	1	\$9,015.92
Settlement	1	\$73,022.23
Trusts & Estates	2	\$594,462.50
Unearned Retainer	35	\$281,375.57
<b>Total</b>	<b>42</b>	<b>\$1,572,921.72</b>

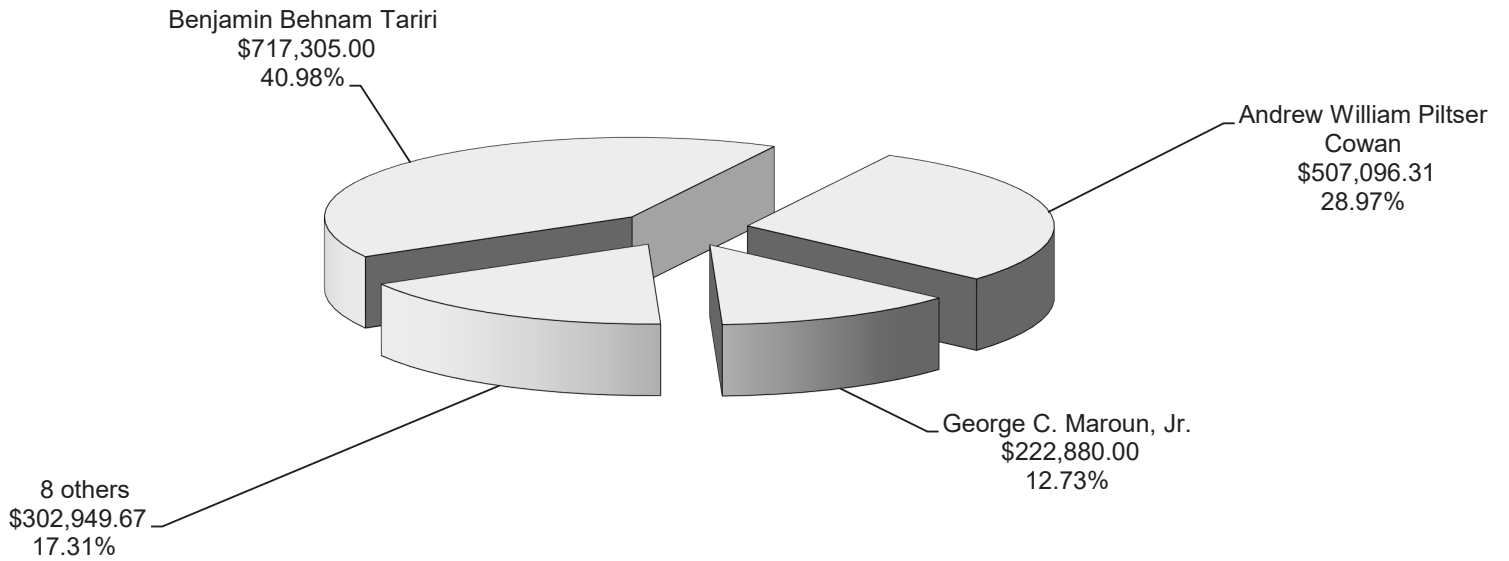


**FY 2024 – LOSSES AND AWARDS BY DISCIPLINED/DECEASED LAWYERS**

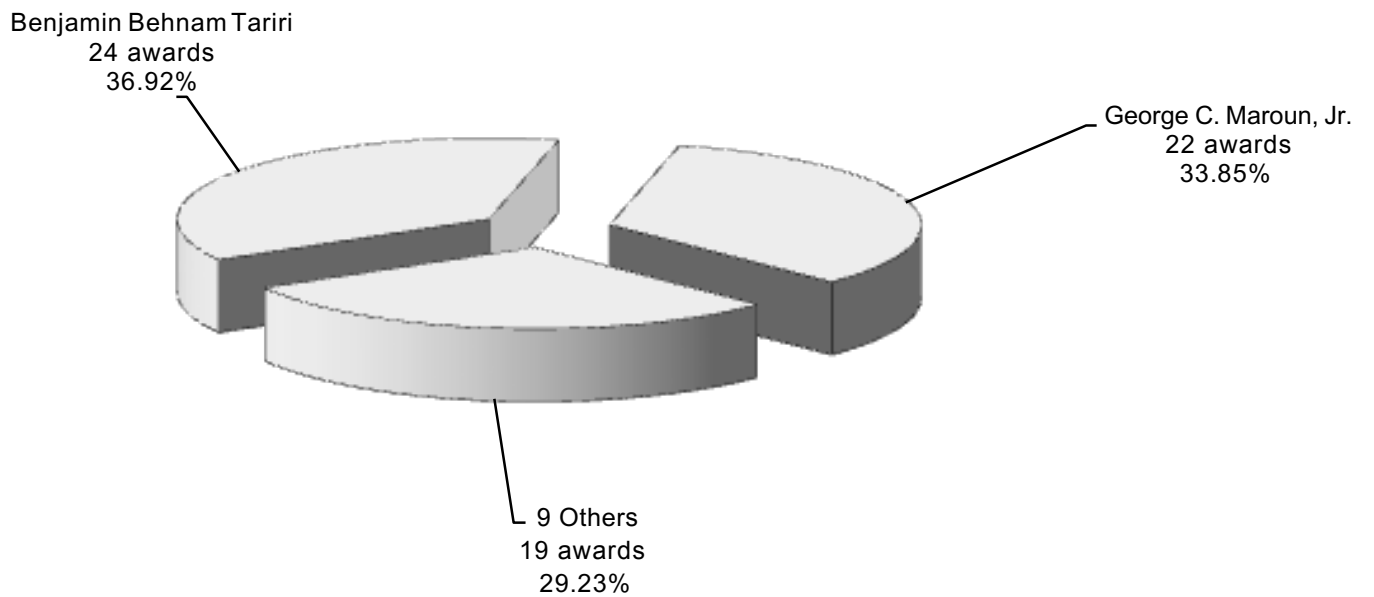
<b>Disciplined/Deceased Lawyer</b>	<b>Town/State</b>	<b>County</b>	<b>No. of Awards</b>	<b>Amount Awarded</b>	<b>Reimbursable Loss Amounts</b>
Benjamin Behnam Tariri	Boston	Suffolk	24	\$717,305.00	\$717,305.00
Andrew William Piltser Cowan	Somerville	Middlesex	4	\$507,096.31	\$507,096.31
George C. Maroun, Jr.	Amherst, NH	Hillsborough	22	\$222,880.00	\$222,880.00
Richard W. Larkin	Bolton	Worcester	2	\$113,798.70	\$113,798.70
Robert Schneiders*	Quincy, MA	Norfolk	3	\$83,927.50	\$83,927.50
Wassem M. Amin	Boston	Suffolk	4	\$82,873.47	\$82,873.47
Ross A. Annenberg	Hopkinton	Middlesex	1	\$6,660.00	\$6,660.00
Abby R. Williams	Uxbridge	Worcester	1	\$6,660.00	\$6,660.00
H. Paul Carroll	Hampton, NH	Rockingham	2	\$3,630.00	\$3,630.00
Gregory John Curcio	San Diego, CA	San Diego	1	\$3,400.00	\$3,400.00
Francis A. O'Meara, III*	Norwell	Plymouth	1	\$2,000.00	\$2,000.00
<b>TOTAL</b>			<b>65</b>	<b>\$1,750,230.98</b>	<b>\$1,750,230.98</b>

\*Deceased

### FY 2024 Lawyers Causing Largest Reimbursable Losses



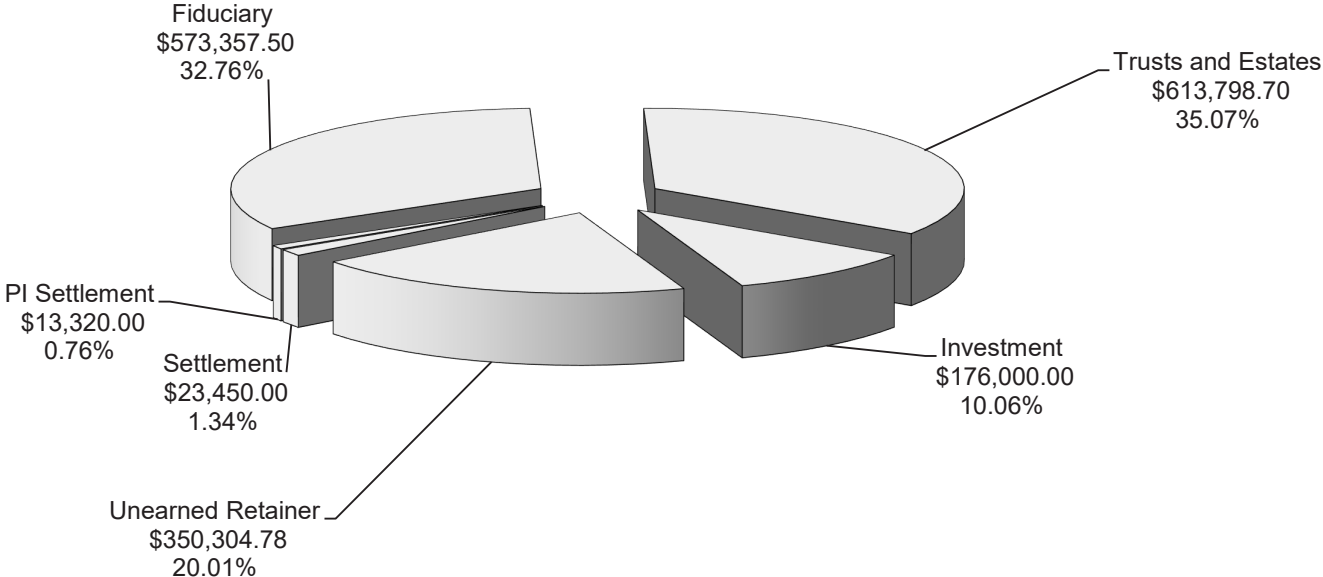
### FY 2024 Lawyers Responsible for Most Number of Awards



### FY 2024 AWARDS BY CATEGORIES

Category	No. of Awards	% of Total Awards	Total Awarded	% Total \$\$ Awarded	Total of Reimbursable Loss	% of Total Reimb. Loss
Trusts & Estates	3	4.62%	\$613,798.70	35.07%	\$613,798.70	35.07%
Fiduciary	3	4.62%	\$573,357.50	32.76%	\$573,357.50	32.76%
Unearned Retainer	54	83.08%	\$350,304.78	20.01%	\$350,304.78	20.01%
Investment	2	3.08%	\$176,000.00	10.06%	\$176,000.00	10.06%
Settlement	1	1.54%	\$23,450.00	1.34%	\$23,450.00	1.34%
PI Settlement	2	3.08%	\$13,320.00	0.76%	\$13,320.00	0.76%
<b>TOTAL</b>	<b>65</b>	<b>100.00%</b>	<b>\$1,750,230.98</b>	<b>100.00%</b>	<b>\$1,750,230.98</b>	<b>100.00%</b>

### FY 2024 AWARDS BY CATEGORIES



**FIDUCIARY:** THE MISUSE OF FUNDS HELD BY AN ATTORNEY ACTING AS A FIDUCIARY ARISING FROM AN ATTORNEY-CLIENT RELATIONSHIP.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Benjamin Behnam Tariri	1	\$430,500.00	75.08%
Robert Schneiders*	1	\$82,477.50	14.39%
Wassem M. Amin	1	\$60,380.00	10.53%
<b>Total</b>	<b>3</b>	<b>\$573,357.50</b>	<b>100.00%</b>

**INVESTMENT:** ATTORNEY STEALS CLIENT FUNDS INTENDED FOR GENUINE OR FAKE INVESTMENTS RECOMMENDED BY THE LAWYER DURING AN ATTORNEY-CLIENT RELATIONSHIP.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Benjamin Behnam Tariri	2	\$176,000.00	100.00%
<b>Total</b>	<b>2</b>	<b>\$176,000.00</b>	<b>100.00%</b>

**UNEARNED RETAINER:** CLIENT MONEY ACCEPTED BY AN ATTORNEY WHO FAILED TO PERFORM THE AGREED-UPON LEGAL SERVICE. THESE CLAIMS SHOULD NOT BE CONFUSED WITH FEE DISPUTES OR MALPRACTICE CLAIMS WHERE AN ATTORNEY NEGLIGENTLY PERFORMS LEGAL SERVICES CAUSING FINANCIAL LOSS TO A CLIENT.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
George C. Maroun, Jr.	22	\$222,880.00	63.62%
Benjamin Behnam Tariri	20	\$87,355.00	24.94%
Wassem M. Amin	3	\$22,493.47	6.42%
Andrew William Piltsner Cowan	3	\$7,096.31	2.03%
H. Paul Carroll	2	\$3,630.00	1.04%
Gregory John Curcio	1	\$3,400.00	0.97%
Francis A. O'Meara, III*	1	\$2,000.00	0.57%
Robert Schneiders*	2	\$1,450.00	0.41%
<b>Total</b>	<b>54</b>	<b>\$350,304.78</b>	<b>100.00%</b>

**TRUSTS AND ESTATES:** THE MISAPPROPRIATION OF ASSETS FROM A TRUST, AN ESTATE, OR THEIR RESPECTIVE BENEFICIARIES BY AN ATTORNEY ACTING AS AN ATTORNEY OR AS A FIDUCIARY.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Andrew William Piltsner Cowan	1	\$500,000.00	81.46%
Richard W. Larkin	2	\$113,798.70	18.54%
<b>Total</b>	<b>3</b>	<b>\$613,798.70</b>	<b>100.00%</b>

\*Deceased

**SETTLEMENT: MISAPPROPRIATION OF PROCEEDS FROM THE SETTLEMENT OF NON-PERSONAL INJURY LITIGATION MATTERS.**

<b>Disciplined Lawyer</b>	<b>No. of Awards</b>	<b>Total Awards</b>	<b>% of Total Awarded</b>
Benjamin Behnam Tariri	1	\$23,450.00	100.00%
<b>Total</b>	<b>1</b>	<b>\$23,450.00</b>	<b>100.00%</b>

**PERSONAL INJURY SETTLEMENT: MISAPPROPRIATION OF PROCEEDS FROM THE SETTLEMENT OF PERSONAL INJURY MATTERS.**

<b>Disciplined Lawyer</b>	<b>No. of Awards</b>	<b>Total Awards</b>	<b>% of Total Awarded</b>
Ross A. Annenberg**	1	\$6,660.00	50.00%
Abby R. Williams**	1	\$6,660.00	50.00%
<b>Total</b>	<b>2</b>	<b>\$13,320.00</b>	<b>100.00%</b>

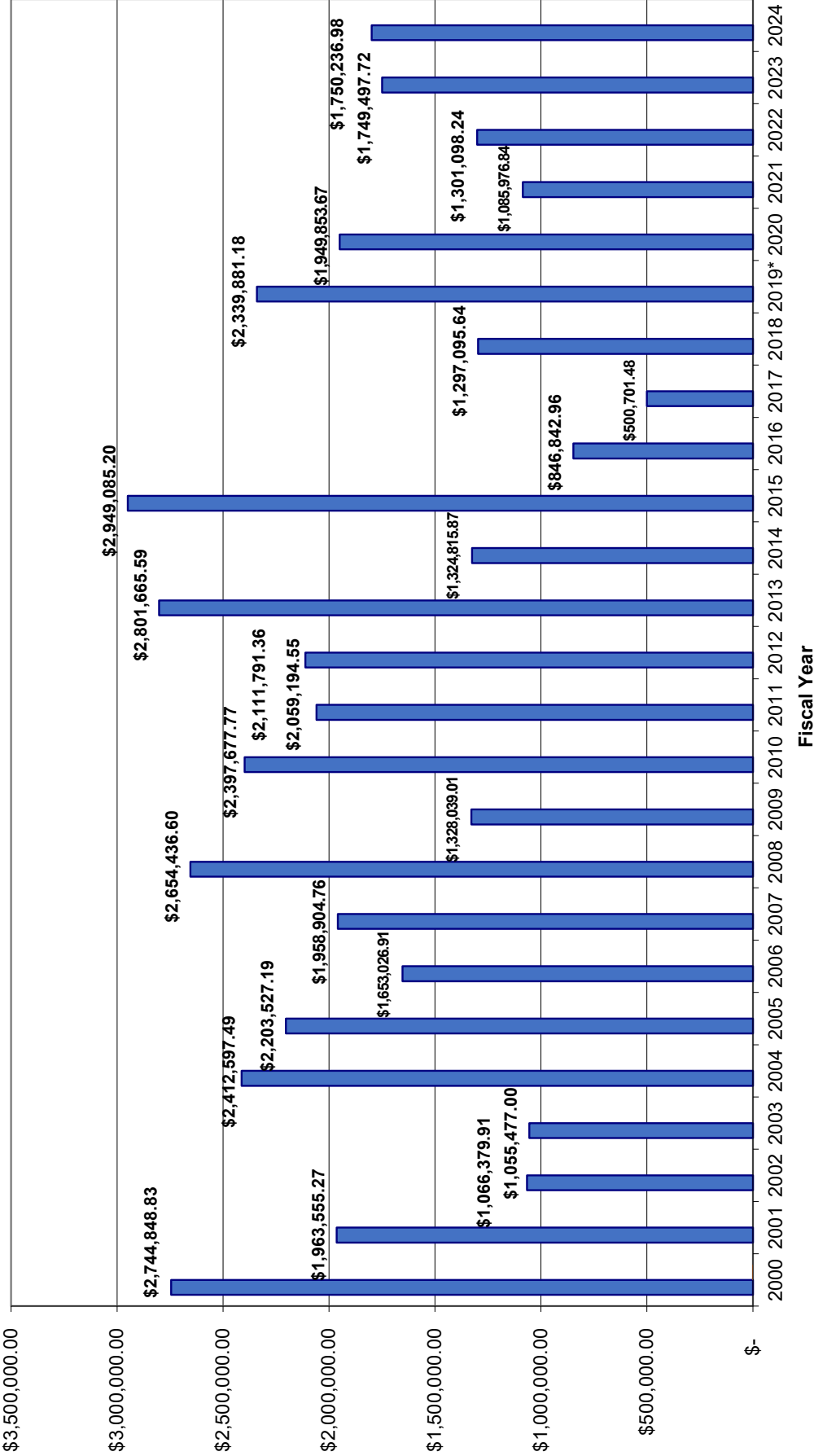
\*\*Abby Williams and Ross Annenberg were each found to be jointly and severally responsible for the \$13,320.00 award paid to the claimant.

## Claims Activity Chart Fiscal Years 1975-2024

Fiscal Year	Claims Filed	Claims Adjudicated	Claims Dismissed	Awards Made	Total Awards
1975-1979	195	126	76	50	\$ 148,767.80
1980	126	60	38	22	\$ 71,208.00
1981	42	126	61	65	\$ 244,276.18
1982	30	29	9	20	\$ 80,212.00
1983	35	40	7	33	\$ 152,005.00
1984	45	42	17	25	\$ 141,125.67
1985	46	34	12	22	\$ 224,904.17
1986	23	38	7	31	\$ 214,810.75
1987	42	34	12	22	\$ 503,776.00
1988	28	24	13	11	\$ 267,954.24
1989	51	40	16	24	\$ 146,720.06
1990	74	73	18	55	\$ 759,025.23
1991	71	55	20	35	\$ 624,592.42
1992	124	85	16	69	\$ 968,894.77
1993	146	95	22	73	\$ 1,111,181.93
1994	109	157	27	130	\$ 1,203,911.62
1995	90	103	35	68	\$ 1,602,217.70
1996	139	100	33	67	\$ 1,696,870.13
1997	81	113	30	83	\$ 2,058,900.92
1998	119	102	46	56	\$ 1,254,229.91
1999	80	98	32	66	\$ 2,119,675.47
2000	83	108	22	86	\$ 2,744,848.83
2001	119	70	15	55	\$ 1,963,555.27
2002	82	94	25	69	\$ 1,066,379.91
2003	116	56	11	45	\$ 1,055,477.00
2004	90	157	58	99	\$ 2,412,597.49
2005	81	81	26	55	\$ 2,203,527.19
2006	91	93	51	42	\$ 1,653,026.91
2007	77	88	31	57	\$ 1,958,904.76
2008	108	89	21	68	\$ 2,654,436.60
2009	95	116	33	83	\$ 1,328,039.01
2010	82	106	14	92	\$ 2,397,677.77
2011	106	97	34	63	\$ 2,059,194.55
2012	85	113	27	86	\$ 2,111,791.36
2013	108	83	14	69	\$ 2,801,665.59
2014	121	142	28	114	\$ 1,324,815.87
2015	59	86	25	61	\$ 2,949,085.20
2016	47	50	22	28	\$ 846,842.96
2017	68	62	15	47	\$ 500,701.48
2018	89	101	10	91	\$ 1,297,095.64
2019*	49	42	7	35	\$ 2,339,881.18
2020	30	44	9	35	\$ 1,949,853.67
2021	52	73	8	65	\$ 1,085,976.84
2022	34	30	3	27	\$ 1,301,098.24
2023	66	50	6	44	\$ 1,749,497.72
2024	66	72	7	65	\$ 1,750,230.98
<b>TOTALS</b>	<b>3700</b>	<b>3677</b>	<b>1069</b>	<b>2608</b>	<b>\$ 61,101,461.99</b>

\*Ten-month fiscal year

Awards Paid from 2000-2024



**Restitution**

Before paying any award, the CSB requires the claimant to sign an assignment or subrogation agreement transferring to the Board the right to pursue collection actions against the claimant’s former lawyer or responsible third parties. The CSB also demands full payment of the award from the responsible lawyer, and notifies the lawyer that the CSB may exercise its subrogation rights and will likely oppose any petition for reinstatement by the disciplined lawyer unless full restitution is made.

Where a reasonable likelihood of success exists, the CSB engages private counsel to pursue collection actions against lawyers when awards are greater than \$25,000.00, or when aggregate awards resulting from one lawyer’s misappropriations exceed \$25,000.00. The CSB also receives court-ordered payments following criminal convictions of lawyers, and voluntary payments from other disciplined lawyers.

In FY 2024, the CSB received a total of \$77,995.30 in restitution. Over 29% of the FY 2024 restitution came from a voluntary payment from respondent Michael O’Reilly to reimburse his former clients for a personal injury settlement. The client victims were awarded a total of \$22,700.00 by an arbitrator in June 2017. The defendant’s insurer sent two settlement checks totaling \$22,700.00 to the respondent, who deposited them to his IOLTA account but never disbursed any funds to the claimants until after they filed a claim with the Clients’ Security Board. The remaining \$55,295.30 in restitution received in FY 2024 came from collection activity, court-ordered restitution, and other voluntary payments from disciplined attorneys.

**RESTITUTION FY24**

<b>Category</b>	<b>Amount Collected</b>
Court-Ordered	\$19,566.97
CSB Activity	\$20,410.00
Voluntary	\$38,018.33
<b>Total</b>	<b>\$77,995.30</b>

**HISTORICAL RESTITUTION CHART**

<b>Fiscal Year</b>	<b>Amount of Restitution</b>
1974-1984	\$181,636.62
1985-1995	\$511,055.94
1996-2006	\$1,445,663.29
2007-2017	\$1,646,722.64
2018-2024	\$760,660.86
<b>Total</b>	<b>\$4,545,739.35</b>



## PRO BONO LAWYERS

The Board is pleased to acknowledge and thank the following lawyers who generously contributed their time and talents during FY 2023 and FY 2024 to represent claimants before the Board for which service, by Court Rule, they may not receive compensation.

Adam M. Bond, Esq.  
Middleboro, MA

John A. Bosk, Esq.  
Fitchburg, MA

Laurel E. Bretta, Esq.  
Medford, MA

Andrew R. Burger, Esq.  
Andover, MA

Sean Lewis Cannon, Esq.  
Wakefield, MA

John J. Flanagan, Esq.  
Norfolk, MA

Christopher T. Lilly  
Ayer, MA

Laura Maslow-Armand, Esq.  
Cambridge, MA

Francis C. Morrissey, Esq.  
Braintree, MA

David Thomas Musen, Esq.  
Boston, MA

Christopher Kevin Sweeney, Esq.  
Boston, MA

Judith Ann Wayne, Esq.  
Salem, MA

Joblin C. Younger, Esq.  
Beverly, MA

## FY 2024 CLAIMANTS' THOUGHTS

“Thank you so much – always! I have no words. This money will help me a lot. Maybe I can put a down payment on an apartment for me. Thank you. Thank you very, very much.”

Claimant message (July 2023)

“I would like to thank you tremendously for this great news.... Thank you so much for your help!”

Claimant message (July 2023)

“What wonderful news! Thank you so much for all of your help.”

Claimant message (October 2023)

“Thank you[.] I just got the check[.] May God bless you for all your help for everything you did for me[.]”

Claimant message (October 2023)

“I don't know if you heard from [the claimant], but suffice to say she and family were thrilled with the award.... We wish to thank you for your concerted efforts....”

Claimant message (November 2023)

“I have no words to describe how happy and grateful I am for everything.... Thank you so, so much.”

Claimant message (January 2024)

“Thank you so very much for this wonderful news. I am grateful that the Security Board took time on my case and I deeply appreciate the decision the board made.”

Claimant message (February 2024)

“I really appreciate you for helping.”

Claimant message (April 2024)

“I just want to thank you for being the people who were always by my side when I needed it most.”

Claimant message (May 2024)

“It is difficult to . . . state how appreciative I am of the Board's generous decision. It's been 12 years since my father passed, and nearly half of that time was spent in litigation . . . with [my former attorney]. Suffice it to say, it's been a difficult journey. I cannot thank the CSB enough for this award . . . I'm looking forward to putting this behind me finally.”

Claimant message (June 2024)

## Board Members

**Sally R. Gaglini, Esq., Chair**, was appointed to the Board effective February 2020. She served as Chair from



January 2024 through December 2024, and as Vice Chair from January 2023 through December 2023. She is the founder of the Gaglini Law Group LLC. Her private practice over a 30-year period has concentrated in probate, fiduciary and family law with emphasis on guardianships and conservatorships in addition to entertainment law with a specialized emphasis on young performers and entities that bind them. She remains a court-certified guardian ad litem, accepting appointments from the courts advancing the needs of children, impaired adults requiring assistance, and also accepting appointments as a fiduciary. Her entertainment practice focuses on transactions in media including licensing and other contracts, with a unique subspecialty in child labor and trust relative to the entertainment industry, bringing Hollywood together with probate and family law.

An AV-rated attorney, Ms. Gaglini is a past president and active member of the Massachusetts Family & Probate American Inn of Court, also holding memberships with the Massachusetts Bar Association and American Bar Association. In 2014, she was honored by *Massachusetts Lawyers Weekly* as a “Top Women of Law”. She proposed and authored, with lawmakers, the inaugural child performer law in Massachusetts.

Since 1990, Ms. Gaglini has taught Entertainment Law at Suffolk University Law School, her alma mater. A graduate of Brandeis University where she earned her BA cum laude, she authored *Young Performers at Work: Child Star Survival Guide*. The book was awarded the Silver IPPY by Independent Publisher as Best Adult Non-Fiction Informational E-Book.

**Judith A. Goldberg, Esq., Vice-Chair**, was appointed to the Board effective January 13, 2022, and served as Vice Chair from January 2024 through December 2024. She is the Deputy Director of the Bureau of Program Integrity in the Massachusetts Office of the Inspector General. She has also worked as a litigation associate at McDermott, Will and Emery, Deputy General Counsel in Governor Romney’s Legal Office, Deputy General Counsel for the Executive Office of Health and Human Services, and as in-house counsel at Five Star Quality Care, Inc., a publicly-traded company that manages senior living facilities across the country.



Ms. Goldberg earned a B.A. in psychology and sociology from Boston University, an Ed.M. from Harvard University in counseling processes, and a J.D. from Boston University where she was the managing editor of the Law Review.

**Brian D. Bixby, Esq., Treasurer**, was appointed to the Board effective February 2020, and served as Treasurer from January 2023 through December 2024. He is a partner at Wilchins Cosentino & Novins. Previously he spent 25 years as the Chair of the Private Client Group at Burns & Levinson LLP, and was also Head of the Fiduciary Litigation Department, as well as a member of the Trusts & Estates and Divorce & Family Law Departments. His practice concentrates on probate court litigation, estate planning, fiduciary administration, family law, guardianship and conservatorship law, and representation of individuals and fiduciaries in matters relating to estates and trusts. Mr. Bixby is an active member of the American Bar Association, Massachusetts Bar Association, Boston Bar Association, and the Boston Estate Planning Council. He is also involved in the Boston Probate and Estate Planning Forum, and the



American College of Trust and Estate Counsel, and is a board member in the New England Chapter of the Family Firm Institute. He is a former President of the Massachusetts Family and Probate Inn of Court, and was a U.S. Delegate to the XII International Congress on Family Law, and also received recognition in 2016 as a “Litigation Trailblazer” by the National Law Journal. Mr. Bixby received his A.B. from Brown University and his J.D. from Northeastern University School of Law.

## Board Members

**Lauren F. Olanoff, Esq., Secretary**, was appointed to the Board effective January 10, 2023. She has served as Secretary since January 2024. She is a partner at Egan, Flanagan and Cohen, P.C. located in Springfield, where her primary area of practice is civil litigation.



Ms. Olanoff is a member of the board of directors of the Hampden County Lawyers for Justice, Inc.; the Hampden County Bar Association; and the Massachusetts Board of Bar Overseers Pro Bono Panel. She was selected by her peers in 2021 and 2022 as a Super Lawyers' "Ones to Watch" in commercial litigation.

Ms. Olanoff received her undergraduate degree from Johns Hopkins University in 2003 and her *juris doctorate* from Tulane University Law School in 2007.

**Tal Unrad** was appointed to the Board effective January 10, 2023. He is a partner at ArentFox Schiff LLP where he concentrates his practice on commercial transactions including mergers, acquisitions, and distressed transactions. He regularly advises clients regarding corporate structuring and governance. Prior to his admission to the bar, Mr. Unrad worked at Travelers Insurance in its Bond and Surety division.



He is a member of the Boston Bar Association, its Business Transactions and Bankruptcy Sections, the Association for Corporate Growth, American Bankruptcy Institute, and the Turnaround Management Association.

Mr. Unrad received his B.A. degree in International Relations and Political Science from Tufts University and his J.D. from the University of Connecticut School of Law.

He is admitted to practice in Massachusetts, New York, and Connecticut

**Leticia Medina-Richman**, was appointed to the Board effective January 5, 2024. She has been serving as the Chief Operating Officer for Community Legal Aid, Inc. since January 2022. Prior to that appointment, she was the Director of CLA's subsidiary, the Central West Justice Center for seven years, overseeing the day-to-day operations and supervising staff in a variety of practice areas. Leticia worked for CLA and its predecessor organization, Legal Assistance Corporation of Central Massachusetts for close to 10 years, specializing in landlord-tenant matters, housing discrimination and foreclosure defense work, prior to becoming the Director of the Justice Center.



Leticia graduated from Smith College with a degree in English Literature and earned her J.D. at Northeastern University. She was admitted to practice in Massachusetts in 1997. Leticia is a member of the Worcester County Bar Association and serves as a Commissioner on the Access to Justice Commission.

**Adam J. Ruttenberg, Esq.**, was appointed to the Board effective January 5, 2024. He is a partner at Beacon Law Group, LLC, where his principal areas of practice are bankruptcy litigation and business reorganization, representing debtors, creditors, and bankruptcy trustees. He learned bankruptcy during almost five years at the Federal Deposit Insurance Corporation in an office responsible for the defaulted loans of approximately 40 failed banks. Mr. Ruttenberg was previously an attorney at Looney & Grossman LLP, Posternak Blankstein & Lund LLP, and ArentFox Schiff LLP.



Mr. Ruttenberg majored in mathematics in college and worked in an actuarial program at John Hancock Mutual Life Insurance Company prior to attending law school. He earned his B.A. *summa cum laude* at Yale University and his J.D. *magna cum laude* at Harvard Law School. He was admitted to practice in the Commonwealth of Massachusetts in 1989, following a judicial clerkship in New Haven, Connecticut with Judge Jose A. Cabranes, then of the US District Court for the District of Connecticut.

He is a member of the Massachusetts Bankruptcy Court Attorney Advisory Committee for the Local Rules (where he is chair of the Business Subcommittee), the Boston Bar Association (where he is co-chair of the Strategic Thought Leadership Committee of the Bankruptcy Section), the MCLE Business and Commercial Law Curriculum Advisory Committee, and the American Bankruptcy Institute.

## William J. LeDoux Award Recipients

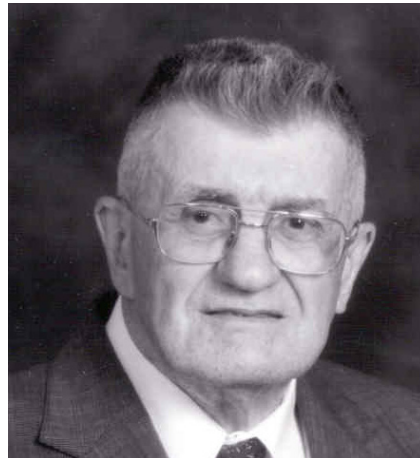
**William J. LeDoux** served as a member of the Board from 1987 to 1997, including seven years as Chairman. He distinguished himself by tirelessly advancing the Board's goals of serving the public. In 1997 the Board established this award to recognize a lawyer who has demonstrated extraordinary skill and perseverance in representing a claimant before the Board.



William J. LeDoux  
(1931-1999)



Peter H. Sutton, Boston  
1998 Recipient



Nathan H. Proctor, Oxford  
1999 Recipient



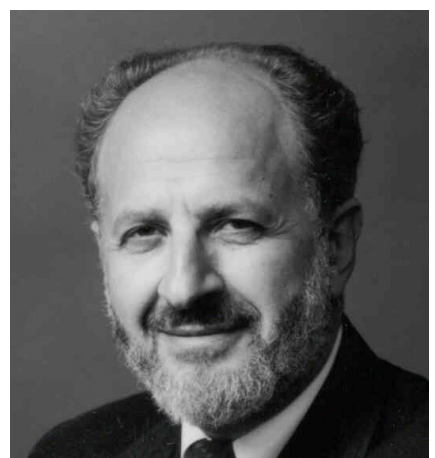
Charles F. Proctor, Oxford  
1999 Recipient



Thomas G. Hoffman, Boston  
2000 Recipient



Douglas W. Salvesen, Boston  
2002 Recipient



Jerry Cohen, Boston  
2003 Recipient



Laura Hancock Barry, Worcester  
2004 Recipient



Hung Tran, Boston  
2005 Recipient



Hang Nina T.K. Nguyen, Boston  
2005 Recipient



Russell S. Channen, Haverhill  
2010 Recipient



S. Peter Ziomek, Jr., Amherst  
2010 Recipient



Leonard A. Frisoli, Cambridge  
2012 Recipient



Timothy J. Perry, Boston  
2014 Recipient



Saman S. Wilcox, Worcester  
2018 Recipient



Mary M. Howie, Salem, NH  
2023 Recipient

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2022- )  
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Evelynne L. Swagerty (1999-2004)  
\*Berge C. Tashjian (1978-1980)  
Tal Unrad (2023- )  
\*Charles Y. Wadsworth (1977-1982)  
Gary M. Weiner (2019-2023)  
Lucy W. West (2002-2007)

\*Deceased





