

CLIENTS' SECURITY BOARD

OF THE

SUPREME JUDICIAL COURT OF MASSACHUSETTS

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ANNUAL REPORT

TO THE

SUPREME JUDICIAL COURT

FISCAL YEAR 2022

July 1, 2021 – June 30, 2022

**MASSACHUSETTS CLIENTS' SECURITY BOARD**  
**ANNUAL REPORT**  
**TO THE**  
**SUPREME JUDICIAL COURT**  
**FISCAL YEAR 2022**

**BOARD MEMBERS**

David R. Chenelle, Esq., Chair  
Gary M. Weiner, Esq., Vice Chair  
Steven B. Stein, Esq., Treasurer  
Sally R. Gaglini, Esq., Secretary  
David R. Kerrigan, Esq.  
Brian D. Bixby, Esq.  
Judith A. Goldberg, Esq.

**STAFF**

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

Bernice Addonizio  
Legal Specialist

**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  
99 High Street  
Boston, MA 02110-2320

Telephone: 617-728-8758  
Fax: 617-482-8000

Email: [info@masscsb.org](mailto:info@masscsb.org)  
Website: [www.masscsb.org](http://www.masscsb.org)

**CLIENTS' SECURITY BOARD**  
**of the Supreme Judicial Court of Massachusetts**  
**June 30, 2022**

Dear Reader,

Fiscal year 2022 was a period of strong growth and renewal for the Clients' Security Board (CSB). The CSB started fiscal year 2022 with 23 claims from clients seeking aggregate reimbursements of approximately \$2.5 million, up from the approximately \$1.2 million sought by 25 claimants at the beginning of fiscal year 2021. The Board met eight times and held its first in-person meeting since February 2020. The CSB conducted seven claimant hearings, decided 30 claims, and made 27 awards totaling \$1,301,098.24. During fiscal year 2022, the CSB received 34 new claims, including 11 claims from former clients of deceased lawyers (or 32% of all new claims). By the end of fiscal year 2022, the CSB had 26 pending claims seeking over \$2.65 million in awards.

Once again, only a very few lawyers (16 or 0.03% of the Commonwealth's almost 60,000 lawyers) were responsible for the awards paid from the Clients' Security Fund. Just three lawyers, Paul George Kolesnikovas, Kirk Y. Griffin, and Philip Robert Williams, accounted for nearly 70% of the misappropriations. The category of Trusts and Estates was again the area of practice where most of the losses occurred, accounting for most (more than 68%) of the \$2.65 million awarded.

In August 2021, the CSB settled a collection action filed in fiscal year 2021 after the CSB awarded \$330,832.31 to former clients of John H. Kelleher, a Massachusetts lawyer who fraudulently took title to his clients' home in 2003. Kelleher had died in 2007 while awaiting sentencing on multiple federal convictions. The CSB successfully negotiated a settlement with the successors in interest of Kelleher. The settlement not only restored the property with clear title to his client victims, but also reimbursed more than \$158,000.00 to the Clients' Security Fund. In total, during fiscal year 2022, the CSB recovered \$181,195.13 for the Fund, including reimbursements from collection activities, court-ordered restitution, and voluntary payments from disciplined attorneys.

CSB experienced many transitions in fiscal year 2022. In December 2021, Vice Chair Regina Snow Mandl completed her five-year term on the Board. In January 2022, the Board welcomed Judith A. Goldberg as a new Board member. At that time, Gary M. Weiner was appointed as the new Vice Chair, and Sally R. Gaglini was elected Secretary. In January 2022, Adam M. Lutynski retired from his position as CSB Deputy General Counsel after more than seventeen years. The CSB initiated a search for a new Deputy General Counsel, resulting in the hiring in September 2022 of Edward A. Beagan, formerly Senior Trial Counsel for the Attorney General's White Collar and Public Integrity Division, and Division chief of the Fraud and Financial Crimes Division.

During fiscal year 2022, the Board explored many options for increasing public awareness of the Fund. Staff continued to make presentations to law schools and bar associations and

contacted affinity bar associations directly about the mission and work of the CSB. In March and April, the Board engaged a Suffolk University senior advertising student as a part-time intern to review websites of other client protection agencies and to consider possible website and social media options for the CSB. The Board published updates concerning the CSB's work in each of the BBO's quarterly newsletters sent by email to licensed Massachusetts attorneys. CSB's General Counsel, through her work as a Regional Vice President of the National Client Protection Organization (NCPO), met with leaders from other states to discuss ways to share outreach resources among client protection programs. Staff also worked with bar counsel to contact former clients of suspended or disbarred attorneys directly to inform them about the Fund.

In March 2022, the CSB learned that after a twelve-day trial, Suffolk Superior Court Judge Christopher Barry-Smith ordered Massachusetts lawyer George C. Maroun, Jr. to pay \$81,800.00 in restitution to ten clients and penalties to the Commonwealth for unfair and deceptive acts or practices in connection with Maroun's legal representation of undocumented Brazilian clients concerning their immigration status or proceedings. *Commonwealth v. George C. Maroun, Jr., et al.*, Suffolk Superior Court C.A. No. 1881CV00157 (March 18, 2022). The Court found that the lawyer made false guarantees and promises to clients and failed to explain the legal process and the risks and benefits before inducing vulnerable clients to pay him large legal fees for immigration services. *Id.*, slip op. at pp. 51- 59. The Court also determined an appropriate inference existed that Maroun's unfair or deceptive conduct likely impacted dozens of similarly situated clients. *Id.*, at p. 2. CSB staff contacted the Massachusetts Attorney General's Office (AGO) and began working on a plan to coordinate outreach to between 300-1000 former immigration clients after disciplinary proceedings concerning Attorney Maroun concluded. Since most of these clients speak only Portuguese, the CSB engaged as a consultant a former investigator from the AGO who had worked with these same victims to assist with translations and outreach to the former clients. The CSB also updated its claim application form, and posted English, Portuguese, and Spanish versions of the application form and information on our website. In addition, the CSB obtained a dedicated telephone line for applicants to leave messages in English, Portuguese or Spanish. After Mr. Maroun's suspension became effective on September 9, 2022, the CSB, jointly with the AGO, sent letters to his former clients who had previously contacted the AGO and began notifying the immigration bar and the public to refer potential claimants to the Board.

During fiscal year 2022, the Board continued its oversight of Citizens Bank, the outside investment manager of the Clients' Security Fund. The Board approved the investment of \$300,000.00, a small portion of the Fund, in Massachusetts state bonds consistent with the Fund's investment policies. The Board also surveyed Massachusetts-chartered banks to determine what interest rates and investment services they offered and invited banks with investment advisory services to submit applications to serve as investment advisors to the Board. As the fiscal year closed, the Board scheduled interviews with banks that were seeking to serve as investment managers of the Fund. After completing its review process, in September 2022, the Board voted to continue to engage Citizens Bank as its investment manager. The CSB did not enter into any material written contracts in fiscal year 2022.

In conclusion, as I finish my fifth and final year on the CSB and third as Chair, I would like to thank my fellow Board members, whose combined knowledge, experience and professionalism has been invaluable. I am also deeply grateful to Linda Bauer, Edward Beagan, Bernice Addonizio and Adam Lutynski (who retired early in 2022), for their knowledge and support in the administration of the claims brought to the CSB. Lastly, I would like to thank the Court for the honor and privilege to have served on the CSB. It has been an extremely rewarding experience. Meeting remotely over the past several years has not always been easy, but we have done it through a great team effort. I will miss my time on the CSB but know that the Board will continue to successfully fulfill its mission of restoring the public's trust in the profession through the reimbursement of lawyer thefts to client victims.

Very truly yours,



David R. Chenelle, Esq.  
Chair



Members of the current Board (minus Sally Gaglini) and General Counsel and Executive Director Linda Bauer, at June 2022 event honoring former Vice Chair Regina Snow-Mandl and former General Counsel and Executive Director Karen O'Toole.

## **History and Operation of the Clients' Security 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. Since March 2020, the Board has generally met 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 \$57 million to more than 2,400 claimants. In fiscal year 2022, the Board awarded over \$1.3 million to 28 claimants. The 16 disciplined or deceased lawyers responsible for those claims represent less than 0.03% of the almost 60,000 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 3(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 3(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 2022 – SIGNIFICANT NUMBERS**

Total Awarded	\$1,301,098.24
Claims Adjudicated	30
Total Awards	27
Lawyers Responsible	16 out of 59,708 (0.03%)
Claims Dismissed	3
# Claims Pending, Year-End	26
\$ Claims Pending, Year-End	\$2,653,634.94

**BASIS FOR DISMISSED CLAIMS**

<b>Category</b>	<b>No. of Claims</b>
No Defalcation	2
Restitution	1
<b>Total</b>	<b>3</b>

**CLAIMS PENDING**

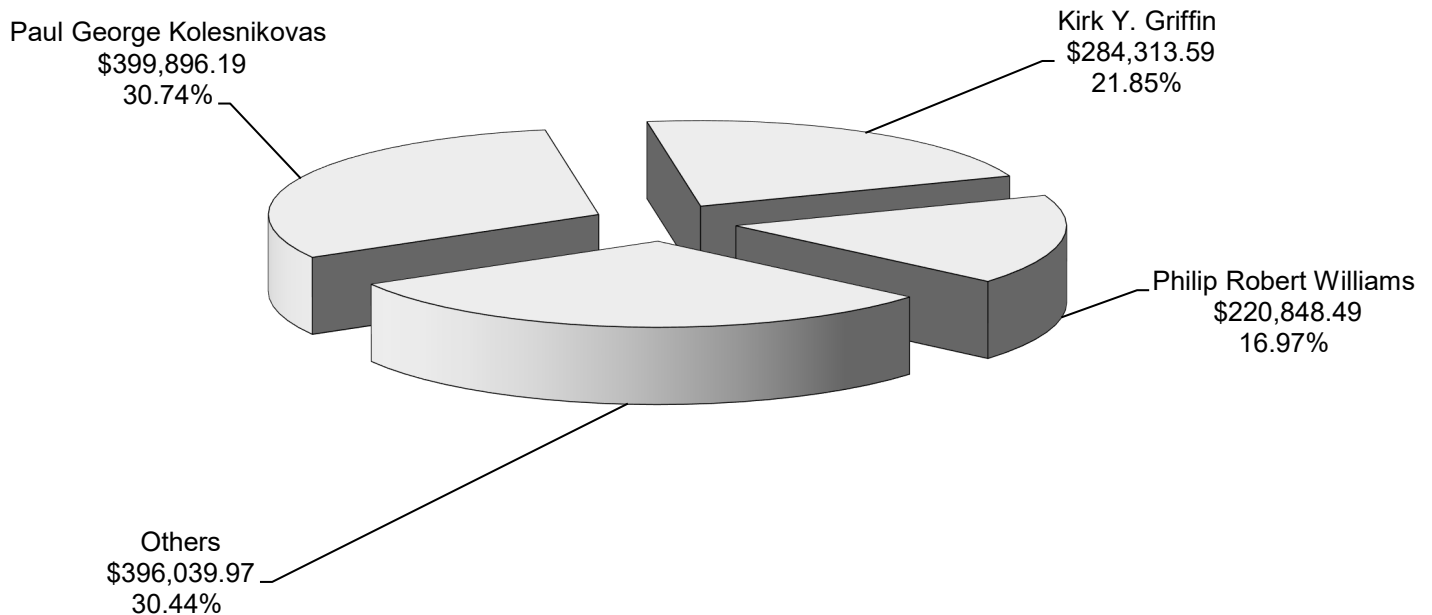
<b>Basis</b>	<b># of Claims Pending</b>	<b>Total Claims</b>
Personal Injury Settlement	1	\$7,075.00
Real Estate Funds	1	\$139,750.00
Settlement	4	\$255,942.56
Trusts & Estates	3	\$1,817,953.35
Unearned Retainer	17	\$432,914.03
<b>Total</b>	<b>26</b>	<b>\$2,653,634.94</b>

### FY 2022 LOSSES AND AWARDS BY DISCIPLINED/DECEASED LAWYERS

Disciplined/Deceased Lawyer	Town/State	County	No. of Awards	Amount Awarded	Reimbursable Loss Amounts
Paul George Kolesnikovas	Charlton	Worcester	4	\$399,896.19	\$399,896.19
Kirk Y. Griffin	Marblehead	Essex	2	\$284,313.59	\$284,313.59
Philip Robert Williams	Easthampton	Hampshire	1	\$220,848.49	\$220,848.49
Deborah Ann Anthony	Methuen	Essex	1	\$160,794.65	\$160,794.65
Arthur J. McCabe, II	Andover	Essex	1	\$129,312.99	\$129,312.99
Michelle Lee Brennan	Salisbury	Essex	4	\$29,400.00	\$29,400.00
Neil J. DePaul	Cambridge	Middlesex	4	\$21,199.00	\$21,199.00
Edward J. McCormick, III*	Norfolk	Norfolk	1	\$14,600.00	\$14,600.00
Stephen J. Mason*	Tewksbury	Middlesex	1	\$13,333.33	\$13,333.33
Jasmin Polanco	Lawrence	Essex	1	\$10,500.00	\$10,500.00
Howard M. Lewis*	Walpole	Norfolk	1	\$9,400.00	\$9,400.00
Linda A. Wagner	Buzzards Bay	Barnstable	1	\$2,500.00	\$2,500.00
Richard G. Barry*	Cotuit	Barnstable	1	\$2,500.00	\$2,500.00
Cynthia Lee Andersen	Westfield	Hampden	2	\$1,200.00	\$1,200.00
Richard J. Reilly, Jr.	Dorval, QC	Canada	1	\$1,000.00	\$1,000.00
Robert Weinstein	Waban	Middlesex	1	\$300.00	\$300.00
<b>TOTAL</b>			<b>27</b>	<b>\$1,301,098.24</b>	<b>\$1,301,098.24</b>

\*Deceased

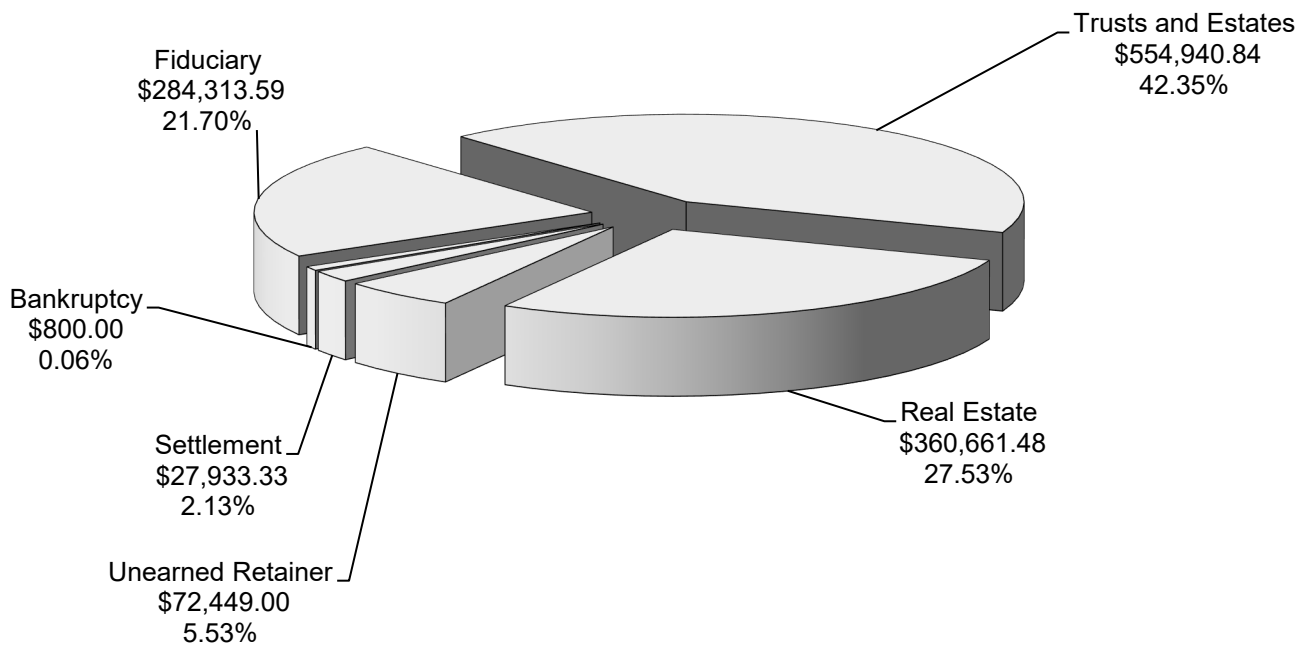
### FY 2022 Lawyers Causing Largest Reimbursible Losses





## FY 2022 AWARDS BY CATEGORIES

Category	No. of Awards	% of Total Awards	Total Awarded	% Total \$\$ Awarded	Total Defalcation	% of Total Defalcation
Fiduciary	2	7.41%	\$284,313.59	21.85%	\$284,313.59	21.85%
Trusts & Estates	3	11.11%	\$554,940.84	42.65%	\$554,940.84	42.65%
Real Estate	3	11.11%	\$360,661.48	27.72%	\$360,661.48	27.72%
Unearned Retainer	16	59.26%	\$72,449.00	5.57%	\$72,449.00	5.57%
Settlement	2	7.41%	\$27,933.33	2.15%	\$27,933.33	2.15%
Bankruptcy	1	3.70%	\$800.00	0.06%	\$800.00	0.06%
	27	100.00%	\$1,301,098.24	100.00%	\$1,301,098.24	100.00%



**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
Kirk Y. Griffin	2	\$284,313.59	100.00%
<b>Total</b>	<b>2</b>	<b>\$284,313.59</b>	<b>100.00%</b>

**REAL ESTATE:** MISAPPROPRIATION OF DEPOSITS, ESCROWS, PURCHASE-MONEY OR SALE PROCEEDS IN PURCHASE, SALE, AND REFINANCE TRANSACTIONS.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Philip Robert Williams	1	\$220,848.49	61.23%
Arthur J. McCabe, II	1	\$129,312.99	35.85%
Jasmin Polanco	1	\$10,500.00	2.91%
<b>Total</b>	<b>3</b>	<b>\$360,661.48</b>	<b>100.00%</b>

**BANKRUPTCY:** MISAPPROPRIATION OF CLIENT FUNDS INTENDED AS PAYMENTS TO THE BANKRUPTCY COURT OR TO CREDITORS.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Neil J. DePaul	1	\$800.00	100.00%
<b>Total</b>	<b>1</b>	<b>\$800.00</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
Michelle Lee Brennan	4	\$29,400.00	40.58%
Neil J. DePaul	3	\$20,399.00	28.16%
Howard M. Lewis*	1	\$9,400.00	12.97%
Paul George Kolesnikovas	2	\$5,750.00	7.94%
Richard G. Barry*	1	\$2,500.00	3.45%
Linda A. Wagner	1	\$2,500.00	3.45%
Cynthia Lee Andersen	2	\$1,200.00	1.66%
Richard J. Reilly, Jr.	1	\$1,000.00	1.38%
Robert Weinsten	1	\$300.00	0.41%
<b>Total</b>	<b>16</b>	<b>\$72,449.00</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, EXECUTOR OR TRUSTEE.

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Paul George Kolesnikovas	2	\$394,146.19	71.02%
Deborah Ann Anthony	1	\$160,794.65	28.98%
<b>Total</b>	<b>3</b>	<b>\$554,940.84</b>	<b>100.00%</b>

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

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Edward J. McCormick, III*	1	\$14,600.00	52.27%
Stephen J. Mason*	1	\$13,333.33	47.73%
<b>Total</b>	<b>2</b>	<b>\$27,933.33</b>	<b>100.00%</b>

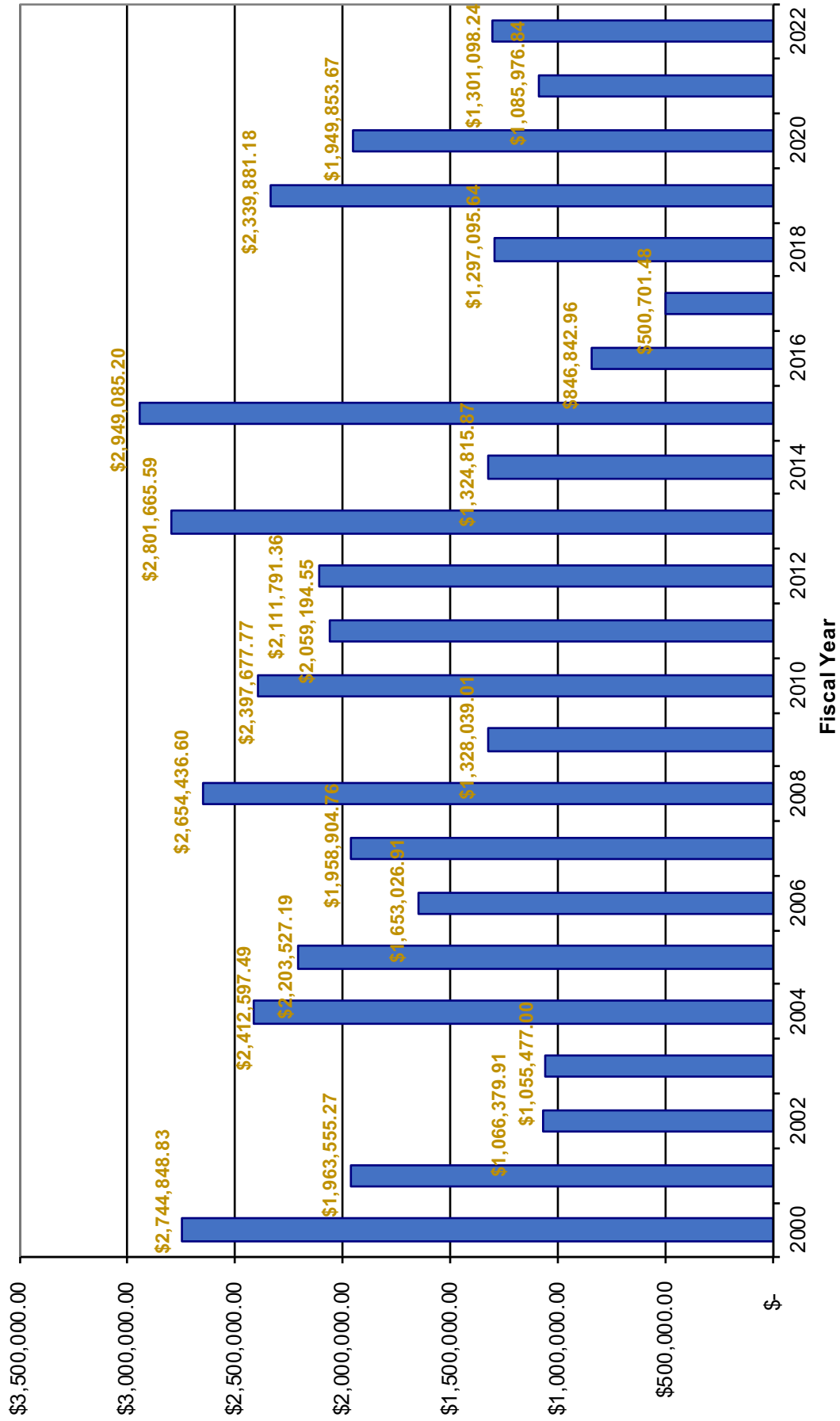
\*Deceased

## Claims Activity Chart Fiscal Years 1975-2022

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
<b>TOTALS</b>	<b>3568</b>	<b>3555</b>	<b>1056</b>	<b>2499</b>	<b>\$ 57,601,733.29</b>

\*Ten-month fiscal year

Claims Filed from 2000-2022



## **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 2022, the CSB received a total of \$181,195.13 in restitution. Over 87% of the FY 2022 restitution came from an unprecedented settlement of a collection action CSB initiated in FY 2021, after the CSB awarded \$330,823.31 to former clients of John H. Kelleher. Kelleher was a Massachusetts lawyer who fraudulently took title to his clients’ home in 2003. Kelleher died in 2007 while awaiting sentencing on multiple federal convictions. The FY 2022 settlement not only restored the property with clear title to the client victims, but also reimbursed \$158,124.24 to the Fund. The remaining \$23,070.89 in restitution received in FY 2022 came from other collection activity, court-ordered restitution, and voluntary payments from disciplined attorneys.

### RESTITUTION

<b>Category</b>	<b>Amount Collected</b>
Court-Ordered	\$14,553.62
CSB Activity	\$164,324.24
Voluntary	\$2,317.27
<b>Total</b>	<b>\$181,195.13</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
2018-2022	\$640,923.16
<b>Total</b>	<b>\$4,426,001.65</b>

PRO BONO LAWYERS

The Board is pleased to acknowledge and thank the following lawyers who generously contributed their time and talents during FY 2022 to represent claimants before the Board for which service, by Court Rule, they may not receive compensation.

Alexandria A. Jacobs, Esq.  
North Andover, MA

Thomas J. O'Connor, Esq.  
Springfield, MA

Walter H. Jacobs, Esq.  
North Andover, MA

Kristin W. Shirahama, Esq.  
Boston, MA

## **FY 2022 CLAIMANTS' THOUGHTS**

“Thank you for all your hard dedicated work on this. I will start my process to have closer to one long, long overdue past history. I cannot thank you enough as if you didn't help me I would have never been able to figure this out. I will further my closer by getting things moving now. I just needed some direction.”

Claimant message (November 2021)

“I received and signed for the CSB check today. Many thanks again to you and the CSB for seeing this through with me and for making a bad situation right. Best wishes to you for a safe and Happy Holiday Season!”

Claimant message (December 2021)

“Thank you, and the Clients' Security Board, for awarding my claim. My experience over the years with the Bar Counsel attorneys and staff has always been positive. I appreciate that there was a mechanism to help me file and follow a complaint against my lawyer.”

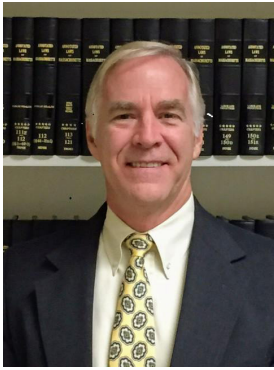
Claimant message (December 2021)

“My mother and I just wanted to let you know that we truly appreciate you! Thank you so much for all your help!”

Claimant message (January 2022)

## Board Members

**David R. Chenelle, Esq., Chair**, was appointed to the Board effective June, 2018. He is a Partner and Director of Perkins & Ancil, P.C., located in Westford, MA where he manages the firm's Condominium Lien Enforcement and Bankruptcy departments. He also works closely with the firm's Community Association clients providing guidance and representation for lien enforcement and general matters. He is an active member of the CAI New England (CAI-NE) chapter participating in its attorneys' committee. He is a strong advocate for his clients and specializes in the representation of consumer, commercial and business clients in all aspects of the bankruptcy process.



In 2021, the United States Bankruptcy Court for the District of Massachusetts awarded Mr. Chenelle the District of Massachusetts Pro Bono Award. He is an active member of the Massachusetts Bar Association; New Hampshire Bar Association; past Co-Chair of the Worcester Bar Association's Bankruptcy Section; a member of the Local Rules Committee for the U.S. Bankruptcy Court, District of Massachusetts; the National Association of Consumer Bankruptcy Attorneys (NACBA); the American Bankruptcy Institute (ABI) for which he is a frequent speaker; and has been appointed by the Supreme Judicial Court as a Commissioner in an Attorney Suspension case.

Mr. Chenelle received his BS from Lowell Technological Institute; MBA from UNH, and his JD from the Massachusetts School of Law.

**Gary M. Weiner, Esq., Vice-Chair**, was appointed to the Board effective December 26, 2018. He is the sole shareholder of Weiner Law Firm, P.C. located in Springfield, where his primary area of practice is bankruptcy, commercial litigation, and collections. Mr. Weiner has been on the panel of Chapter 7 Trustees for the United States Bankruptcy Court for District of Massachusetts, Western Division since 1997. Mr. Weiner was the recipient of the 2013 Pro Bono Publico Award from the Massachusetts Justice Project and Volunteer Lawyer Service. Mr. Weiner is a member of the Commercial Law League of America, Massachusetts Bar Association, Hampden County Bar Association, National Association of Bankruptcy Trustees, and the American Bankruptcy Institute. Mr. Weiner presently serves as a member of the Local Rules Committee for the United States Bankruptcy Court, District of Massachusetts. In the Commercial Law League of America he served on the Board of Governors for over 11 years including as President in 2010-2011 and presently serves on the Finance Board. Mr. Weiner is a frequent lecturer on bankruptcy and collection topics for bar associations, various clients, and trade organizations. Mr. Weiner received his undergraduate degree in Business Administration from Syracuse University in 1983 and his J.D. degree from Suffolk University in 1986.



**Steven B. Stein, Esq. Treasurer**, was appointed to the Board effective June, 2018. He is the managing counsel of the Travelers Indemnity Company staff counsel offices in Massachusetts and Rhode Island where he concentrates on handling subrogation matters including property, automobile, workers' compensation and bond cases. Prior to becoming managing counsel he served as associate managing counsel, practice group leader and senior counsel. Before joining Travelers, he was employed in private practice at Batty & Stein. Mr. Stein received his B.A. degree in History and Economics from State University of New York at Binghamton in 1979 and his J.D. from Boston University School of Law in 1982 where he was involved in the National Trial Competition. He is admitted to practice in Massachusetts, Rhode Island and Florida. He served for many years as a Boston Municipal Court Pre-Trial case conference volunteer and is a Massachusetts Bar Association Legal Fee Arbitration Board Arbitrator, and former chair and board member.





## Board Members

**Sally R. Gaglini, Esq., Secretary**, was appointed to the Board effective February, 2020. 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.

**David R. Kerrigan, Esq.** was appointed to the Board effective December 26, 2018. He is a litigator with the firm Kenney & Sams, P.C. where he represents clients in challenges to state regulations and statutes and in defending and asserting civil rights claims drawing upon his experience as a former Chief of the Government Bureau of the Massachusetts Attorney General’s Office. His administrative law practice includes representing individuals involved with a variety of trades – contractors, plumbers, electricians and engineers - with disputes with professional licensing boards alleging violations of professional conduct standards. As a commercial litigator, he represents clients with construction and employment disputes, employment discrimination claims, breach of lease claims, and franchise disputes. Mr. Kerrigan received a B.A. from Colby College and a J.D. from Boston University School of Law.



**Brian D. Bixby , Esq.,** was appointed to the Board effective February, 2020. He is a partner at Burns & Levinson LLP, where he served for many years as a Chair of the Private Client Group and as 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.



**Judith A. Goldberg, Esq.,** was appointed to the Board effective January 13, 2022. 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.



## 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.



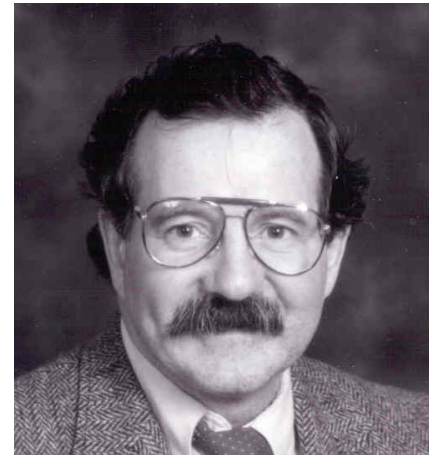
William J. LeDoux  
(1931-1999)



Peter H. Sutton, Boston  
1998 Recipient



Nathan H. Proctor, Oxford  
1999 Recipient



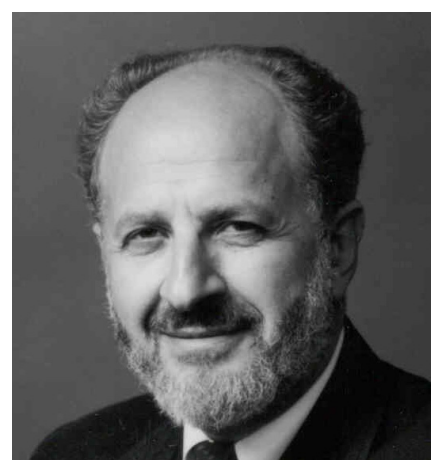
Charles F. Proctor, Oxford  
1999 Recipient



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

**ADAM M. LUTYNSKI**



**IN  
APPRECIATION  
FOR**

- Devoting more than 17 years of his professional career to serving and advancing client protection during which the Clients' Security Board awarded more than \$35 million to over 1000 client victims;
- Bringing an unmistakable passion to investigating claims and to helping the client victims overcome barriers including language, culture, time, and distance to seek compensation for their losses;
- Thoroughly investigating all claims and presenting the claims with gusto to the Board, breathing life into even the most complicated or dense claim scenarios;
- Inspiring new Board members to dedicate their volunteer time and skills to the cause of client protection and to enhancing the reputation of the legal profession; and
- Treating everyone with kindness, compassion and thoughtfulness, and thereby making the Clients' Security Board a welcoming place for Board members, staff, claimants, respondents, their counsel, and anyone else having dealings with the Board.

**CLIENTS' SECURITY BOARD MEMBERSHIP 1974 TO PRESENT**

\*Philip J. Assiran (1981-1983)  
John G. Bagley (2013-2018)  
Joseph H. Baldiga (2012-2016)  
\*William J. LeDoux (1987-1997)  
Thomas O. Bean (2005-2010)  
George N. Beauregard (1982-1986)  
\*Barry D. Berkal (1981-1986)  
Mark N. Berman (1997-2002)  
\*Stanley B. Bernstein (1992-1996)  
Mark I. Berson (1995-2000)  
Brian D. Bixby (2020- )  
David R. Chenelle (2018- )  
Edward S. Cheng (2008-2013)  
\*Thomas H. Collins (1974-1981)  
J. Elizabeth Cremens (1987-1992)  
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John J. Egan (2007-2013)  
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Sally R. Gaglini (2020- )  
John R. Gobel (2001-2006)  
Charles W. Goddard (2007-2012)  
Judith Goldberg (2015-2019 &  
2022- )  
Joel S. Greenberg (1980-1988)  
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\*Paul F. Hannah (1974-1976)  
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David R. Kerrigan (2019- )  
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D. Ethan Jeffery (2011-2018)  
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Denzil D. McKenzie (2007-2013)  
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Thomas E. Peisch (1994-1999)  
Michelle M. Porter (2010-2014)  
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Mary H. Schmidt (1997-2002)  
Edward D. Simsarian (1984-1989)  
Thomas G. Sitzmann (1996-2001)  
Regina Snow Mandl (2017-2021)  
Steven B. Stein (2018- )  
Joseph D. Steinfield (1998-2003)  
Peter H. Sutton (2000-2005)  
Evelynne L. Swagerty (1999-2004)  
\*Berge C. Tashjian (1978-1980)  
\*Charles Y. Wadsworth (1977-1982)  
Gary M. Weiner (2019- )  
Lucy W. West (2002-2007)

\*Deceased



