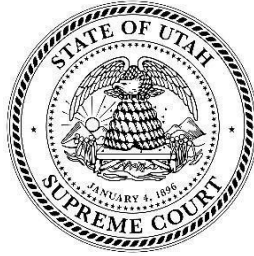


## UTAH SUPREME COURT AD HOC COMMITTEE



### REGULATORY REFORM

Nick Stiles, Co-Chair  
Maryt Fredrickson, Co-Chair

Joint Workgroup Meeting:  
Rule 5.4 and AI/Legal Technology  
June 20, 2025  
12:00 – 1:00  
Education Room - Matheson Courthouse  
[Public Meeting Link](#)

1. Welcome
2. Remarks by Dean Andrew Perlman, Suffolk Law School (Tab 1)
3. Discussion about any needed amendments to both workgroup's charges (Tab 2)
4. Discussion about outcomes – what should the outcome of these workgroups be? Would overlap between workgroups need ongoing collaboration/joint meetings?
5. Action Items & Conclusion

# TAB 1

## **Andrew Perlman Bio**

Andrew Perlman is a nationally recognized voice on the future of legal education and law practice. In 2024, National Jurist named him as one of the top-20 most influential people in legal education.

Among other leadership roles, Dean Perlman has served as an Advisory Council member of the American Bar Association Task Force on the Law and Artificial Intelligence; as the inaugural chair of the governing council of the ABA's Center for Innovation; as the vice chair of the ABA Commission on the Future of Legal Services; and as the chief reporter of the ABA Commission on Ethics 20/20, which was responsible for updating the ABA Model Rules of Professional Conduct to reflect changes in technology and increased globalization.

Dean Perlman's service also has focused on national and local reform efforts ranging from police practices and access to justice to developing alternate paths to law school and bar admission. For example, he has served as a founding dean for the ABA-Legal Education Police Practices Consortium; as a member of the Law School Admission Council's Legal Education Program Advisory Committee; as a member of the American Academy of Arts & Sciences, Access to Justice Advisory Committee; as a co-chair of the Massachusetts Supreme Judicial Court Subcommittee on Alternative Paths to Licensure; and as a member of the Content Scope Committee of the National Conference of Bar Examiners (NCBE).

Dean Perlman's scholarship has included numerous articles on professional responsibility and legal innovation that have appeared in some of the nation's leading law reviews. He also co-authored a civil procedure casebook, *Civil Procedure: A Coursebook* (with Professors Joseph W. Glannon and Peter Raven-Hansen) that has been adopted at more than 80 law schools. Dean Perlman has served as a presenter or panelist at more than 200 academic, judicial, and other professional programs in more than 20 U.S. jurisdictions, three continents, and six countries.

Prior to entering academia, Andy clerked for a federal district court judge in Chicago and practiced as a litigator there. He is an honors graduate of Yale College and Harvard Law School, and he received his LL.M from Columbia Law School.

# TAB 2

## Current AI & Legal Technology Scope

**Suggestion:** Should the charge for the AI/Legal Technology Workgroup be expanded to include explicit direction to analyze the impact that the regulatory framework governing AI and legal technology will have on the broader access-to-justice mission of the Utah Supreme Court.

Artificial Intelligence and Legal Technology	
<ul style="list-style-type: none"><li>• Identify current and emerging trends in legal technology.</li><li>• Research recommendations from legal regulatory reform experts on how to adapt to advancing technology.</li><li>• Examine other states' approaches to regulating or carving out legal technology, including how they define the practice of law and deal with multijurisdictional issues.</li><li>• Draft proposed rule changes, if any.</li></ul>	<ul style="list-style-type: none"><li>• Develop a recommendation:<ol style="list-style-type: none"><li>1. delineating between legal technology that should and should not be regulated as the practice of law,</li><li>2. identifying any additional rules or enforcement mechanisms needed to properly regulate technology-aided legal practice.</li></ol></li><li>• Identify whether collaboration with other branches of government or other stakeholders will be needed to implement recommendations.</li></ul>

## Current 5.4 Scope

Rule 5.4 Workgroup	
<ul style="list-style-type: none"><li>• Research pros and cons of allowing lawyers to partner or share fees with nonlawyers, including any multijurisdictional implications.</li><li>• Analyze lesson learned from Sandbox ABS entities as well as Arizona's ABS program.</li><li>• Consider recommendations from experts on legal regulation.</li></ul>	<ul style="list-style-type: none"><li>• Examine rule 5.4 language from other states.</li><li>• Develop a recommendation on whether rule 5.4 should be amended.</li><li>• Draft proposed rule changes, if any.</li></ul>