



State Bar of New Mexico Paralegal Division

Board of Directors
Meeting Minutes
September 27, 2025

I. Call to Order

Chair, Meryl Barbare-Sutton, called to order the SBNM Paralegal Division Board of Directors Meeting at 9:16 AM on September 27, 2025. The meeting was held hybrid at the State Bar and via Zoom.

II. Attendees

Board of Directors: Meryl Barbere-Sutton, Chair
Ellice Goldstein, Chair Elect
Kay Homan, Past Chair
Christina Babcock, Director
Christy Shije, Director
Michelle Jaramillo, Director
Ruby Silva, Director
Madeline Lovato, Director
Kimberly Zufelt, Chair of CLE Coordination Subcommittee

Directors not Present: John Roberts is not present; Kay Homan is his proxy. Andrea Pompeo is not present; Kay Homan is her proxy. Christina Babcock left the meeting at 10:00 AM; Christy Shije is her proxy after that time. Madeline left the meeting at 11:05 AM; Meryl Sutton is her proxy after that time. Michelle Jaramillo left the meeting at 12:20; Christy Shije is her proxy after that time.

Members: Kathy Campbell, Division Administrative Assistant
Debbie Tope, Member
Nettie Condit, Member

III. Approval of Minutes from last meeting

No minutes have been recorded in 2025.

IV. Officer Reports

See agenda and attached reports for full reports submitted by Board of Directors and Committees. If no particular items are noted, the reports were provided as follows:

1. Chair Report: Meryl Sutton - The report speaks for itself.
2. Chair Elect Report: Ellice Goldstein - The report speaks for itself. Continued to assist in the CLE committee with Kimberly. Continued to send out all of the new member emails after Kathy and Christina approved them. Volunteered for the swag table at the State Bar.

V. Standing Committee Reports

1. CLE Coordination Sub-Committee Report: Kimberly Zufelt - No lunch and learn since last board meeting. Held Paralegal Institute through the state bar. State bar changed the format from hybrid to virtual. There were 18 attendees, 15 paralegals, 3 attorneys. Two more lunch and learns this year. Worked on lunch and learn calendar for 2026. Reached out to members to give them some more ideas on how to get free CLEs.

Action Items: Reach out to presenters to request materials to distribute to the members before the lunch and learns. Email CLE tracking with any emails from members thinking they won't get credit for a CLE they attended. Get attendance log for Paralegal Institute to CLE tracking committee. Send members the form for self tracking in the lunch and learn emails.

2. CLE Provider Approvals: Kay Homan - Deposited about \$7,000 this year, discuss an increase to the budget based on those numbers during the planning session.

3. CLE Tracking: Christina Babcock, Kathy Campbell - Report speaks for itself.

Action Items: Change system to make it easier to track and take less time. Start sending out renewal packet in November.

4. Web Page: Michelle Jaramillo – Report speaks for itself.

5. Social Media: Christy Shije – Report speaks for itself. Can we get professional pictures done for the LinkedIn website since we're the face of the division? We need volunteers specifically for this committee. Possibly we can set up some meet the chair or meet the leadership events for the members.

Action Items: Send out emails to denials for the social media to follow up with the member regarding the denial. Board members to get/send more pictures of PD events – not just sitting down eating pictures. Meryl to get scrapbooks to Christy to post

pictures. Send out a targeted blast for specifically social media volunteers. Expand the description of the responsibilities for the social media committee.

6. **Membership Committee Report:** Kathy Campbell – 6 new members approved this quarter making the total number of members 126 active and 12 inactive members. Assisted with set up of vendor table at the State Bar annual meeting including making poster of law firms that support the division, ordering materials, and assembling swag bags. Submitted Paralegal Day proclamation to publish in Bar Bulletin. Article posted in Bar Bulletin regarding paralegal rules. Email to members regarding self tracking CLEs and pro bono events in August.

Action Items: Following posting of updated CLE tracking to the website, send email reminding members of self tracking CLE hours. Get swag to the State Bar for storage. Get swag to new members. Update the logo to include “established 1995”. Get information for plaque at the State Bar with the names of all the Chairs of the last 30 years.

7. **Pro Bono/Community Service Committee Report:** Meryl Sutton - Report speaks for itself. Only one event since last board meeting. There is one more Wills for Heros in November.

Action Items: Get social media friendly ads to Christy for posting the pro bono events.

8. **Professional Development Committee Report:** Christy Shije - Casey Martinez has been removed. Christy is de facto chair.

Discussion: Meryl brings the NMLBA Fundraiser. They are inviting the paralegal division to buy a table for their brunch. Several different levels of donation are available. Free tickets - Meryl can attend, we have three more seats, reserve one for Christina

MOTION: Meryl – Moves to sponsor NMLBA at \$500 level

Ellice second

All in favor, no opposed

Motion passes

Discussion: Meryl brings the ½ page ad included with Annual Meeting sponsorship to be posted in the Bar Bulletin for the December issue. Proposed ad in board packet. Kathy needs to get new logo and a few typos need to be fixed, then it is ready for publication. Deadline to submit to the State Bar is mid October.

MOTION: Meryl – Moves to approve professional development proposed content for the December 10th ad with the few revisions as discussed

Christy second

All in favor, no opposed

Motion passes

Board Recessed at 11:44 AM – Planning session held

Board Reconvene at 1:51 PM

MOTION: Meryl- Moves to tip the Daily Grind \$50 for lunch as they did not charge us for their mistake

Kay second

No opposed

Motion passes

MOTION: Ellice – Moves to approve the proposed 2026 calendar as presented during the planning session

Ruby second

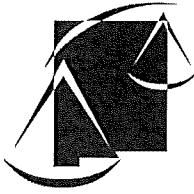
No opposed

Motion passes

VI. Adjournment

Meeting adjourned at 1:54 PM

Minutes prepared by Kimberly Zufelt, Stand in Secretary for single meeting



State Bar of New Mexico Paralegal Division

BOARD MEETING
SEPTEMBER 27, 2025

AGENDA

Meeting called to order at: _____

I.	Approval of July 19, 2025 Meeting Minutes – NO REPORT	(5 minutes)
II.	Officer Reports	(10 minutes)
Chair	Meryl Sutton	Report Attached
Chair-Elect	Ellice Goldstein	Report Attached
Immediate Past Chair	Kay Homan	No Report
Secretary	Vacant	No Report
Treasurer	Andrea Pompeo	Report Attached
III.	Standing Committee Reports	(30 Minutes)
Budget & Finance	Andrea Pompeo	Report Attached
Bylaws & Standing Rules	Ruby Silva	No Report
CLE Coordination	Kimberly Zufelt	Report Attached
CLE Provider Approvals	Kay Homan/Andrea Pompeo	Report Attached
CLE Tracking	Christina Babcock	Report Attached
Communication: eNews & Web Page	Michelle Jaramillo	Report Attached
Communication: Newsletter		No Report
Communication: Social Media	Christy Shije	Report attached
Nominating & Elections	Ruby Silva	No Report
Events Coordination		No Report
Membership	Kathy Campbell	Report Attached
Pro Bono/Community Service	Meryl Sutton/Marissa Gonzalez	Report Attached
Professional Development		No Report
Scholarship		No Report

IV. Old Business

- a. Ratify Swag Order
- b. Ratify Annual Meeting Sponsorship
- c. 30-Year Anniversary Dinner
- d. 30-Year Anniversary Gift
- e. 2025 Minutes and Secretary Position
- f. Chair/ BOD Reimbursement discussion
- g. Social Networking event
- h. Paralegal Institute
- i. Other

V. New Business –

- a. Elections
- b. Annual Mtg. CLE (ethics)
- c. End of the year ad

VI. Planning Session –

- a. Officer/Director Notebook
- b. 2026 Calendar
- c. 2026 Proposed Budget – (6210 Category Discussion)
- d. Committees/Vacancies

VI. ADJOURN

**PARALEGAL DIVISION
BOARD MEETING**

CHAIR REPORT: **Meryl Sutton**

DATE OF REPORT: **September 10, 2025**

ACTIVITIES:

My primary focus this quarter was the Division's 30-year anniversary dinner, held at Les Combes Winery with 40 attendees. While we unfortunately did not meet our minimum again this year, I believe we should explore alternative venues or approaches next year to help reduce costs. A highlight of the evening was presenting Madeline with the 2025 Governor's proclamation and honoring Kay with an award for her outstanding dedication to the Division. I am especially grateful to Kathy, Christina, and Debbie, who worked diligently to assemble the swag bags, create and print the tags, and oversee logistics during the event. Thanks to their efforts and the support of the entire Board, we ensured that every member had the opportunity to receive a gift and that the night was a true success. Thank you to Ellice for suggesting pick-up spots in different areas of the state for members to get their member gift. Lastly, a shoutout to Christy for bringing decorations and making the event sparkle!

In addition, I had the opportunity to attend the BBC board meeting at the State Bar's Annual Meeting, as well as table on behalf of the Paralegal Division to promote our work and connect with members.

Finally, our only other event this quarter was the August 8 Law-La-Palooza, where five paralegals from our division volunteered their time and expertise.

ISSUES REQUIRING BOARD ACTION: Please see Agenda

**PARALEGAL DIVISION
BOARD MEETING**

CHAIR ELECT REPORT

CHAIR ELECT: Ellice Goldstein

DATE OF REPORT: September 13, 2025

ACTIVITIES SINCE LAST REPORT:

I have continued to assist and co-chair the CLE Coordination Committee with Kimberly Zufelt. The CLE Coordination Committee Report speaks for itself and is submitted separately by Kimberly Zufelt.

I sent out Welcome emails to all new members admitted since the last BOD meeting.

I volunteered at the PD table for the SB Annual Meeting and attended the 30th anniversary dinner.

I have started researching how to set up a Listserv and a mentorship program for next year. I started revising BOD documents for 2026 including the 2026 calendar.

ISSUES REQUIRING BOARD ACTION: None

ATTACHMENTS: None

**Paralegal Division
Treasurer/Budget & Finance Committee
Board Meeting Report**

Committee Title: **Treasurer/Budget & Finance Committee**

Committee Chair: **Andrea Pompeo**

Date of Report: **September 8, 2025**

RE: **Report**

Budget vs. Actual as of August is attached.

- Beginning balance as of June 30, 2025. - \$61,197.65
- Balance as of August 31, 2025. - \$60,267.09

Outstanding checks:

- \$210.95 (Aiken-annual mtg, requested on 8/31/2025)
- \$1,566.69 (Kathy-anniversary gifts, requested on 8/8/2025)
- \$190.92 (NMSB-Q2 expenses, requested on 8/13/2025)
- \$62.16 (Babcock-anniversary gifts/party, requested on 8/26/2025)
- \$2,582.90 (Ruby-anniversary dinner, requested on 9/2/2025)

Action Item: **None.**

Notes: Angela Sanchez, our contact at SBNM, will be out on vacation September 22-October 6. I expect that any check requests made during that period will not be processed until she returns.

**PARALEGAL DIVISION
BOARD MEETING**

Continuing Legal Education Coordination Sub-Committee

COMMITTEE CHAIR: Kimberly Zufelt

COMMITTEE MEMBERS: Ellice Goldstein (co-chair), John Roberts, Julia Shang

DATE OF MEETING: September 27, 2025

ACTIVITIES UNDERTAKEN:

No L&L since last board meeting

Paralegal Institute: State Bar decided to change to only virtual. Attendees – 15 paralegals, 3 attorneys. Duncan at the State Bar claims it as a success.

ONGOING ACTIVITIES:

Lunch & Learn calendar set for next year – most presenters are already confirmed, all topics have an idea of who we want to present and we just have to reach out to the rest

Two further L&L this year – October 15th and November 19th

ATTACHMENTS: Lunch & Learn calendar 2026

ISSUES REQUIRING BOARD ACTION: Do we need board approval to do Paralegal Institute next year without the State Bar?

Lunch & Learn Calendar 2026

Month	Topic	Presenter
January	Ethics in Email, Texting, and Social Media	Kimberly Zufelt
February 11th	Kinship Guardian	Holly Healy
March 11th	Tribal Law	Casey Martinez
April 8	Fast Case	TJ Diggins/Lisa Smith-Crissey
May 2nd Law Day	Family Law	Ensamble - TBD
July 8	Real Estate/Foreclosure	Elizabeth Friedenstein or USBC
September 9	RIO Reentry for Criminal Reintegration	Angelica Hall/Judge
October 14	National Disaster Litigation	Antonia Roybal-Mack
November 11 Institute	Death Planning	Ensamble - TBD

**Paralegal Division
CLE Provider(s) Approval Committee
Third Quarter Board Meeting Report**

Committee Title: **CLE Provider(s) Approvals Committee**

Committee Co-Chairs: **Kay L. Homan, CP and Andrea Pompeo**

Committee Member(s)

Date of Report: **September 13, 2025**

RE: **Report**

NBI/IPE is still the only provider currently submitting CLE for approval by the Division. Deposits of approval fees June 1 to August 31 - \$3,600 (if \$450 deposit in early June was not reported on Andrea's report. Looking at the income received from the CLE approvals, I recommend that for the proposed budget being prepared to be approved at the Planning Session should be at least \$10,000.00. Attached are the upcoming webcasts.

09/18/25	100818	5 General, 1 Ethics	Employment Litigation from Start to Finish for Paralegals
09/23/25	100817	5 General, 1 Ethics	Family Law Agreements: Essential Skills for Paralegals
09/24/25	109813	6 General	The Modern Litigation Paralegal
09/25/25	100814	3 General	Corporate Law Paralegal
08/28/25	100699	1 General	The Family Law Paralegal's Guide to Case Development and File Management
09/17/25	100816	5 General, 1 Ethics	Advanced Probate Administration for Paralegals
09/30/25	100772	3 Non-Substantive	Paralegal Power Skills: Productivity and Communication
10/02/25	101089	3 General	Paralegal Tips for Asset and Debt Division in Divorce Cases
09/10/25	100891	1 General	Bankruptcy: A Paralegal's Guide
09/11/25	100889	1 General	Uninsured/Underinsured Motorist Claim Insights for Paralegals
09/16/25	100890	1 General	Using AI for Document Review: Paralegal Does and Don'ts
10/14/25	101091	5 General, 1 Ethics	Subpoenas: Everything Paralegals Need to Know
10/15/25	101047	3 General	Exhibit and Evidence Management Insights for Paralegals
10/16/25	101088	2 Ethics	The Ethical Paralegal: Best Practices for Everyday Decision-Making
10/20/25	100918	3 General	Personal Injury Starter Pack for Paralegals
10/21/25	101092	5 General, 1 Ethics	Wills and Trusts Essentials for Paralegals
10/09/25	100945	5 General, 1 Ethics	Staying Organized and in Control: A Paralegal's Guide
10/28/25	101090	5 General, 1 Ethics	Finding the Facts: A Legal Research Tool Kit for Paralegals
10/01/25	101119	1 General	Discovery in Federal Courts: A Paralegal's Guide to Request and Responses
11/04/25	101201	5 General, 1 Ethics	The Fundamentals of ChatGPT for Paralegals
11/05/25	101204	6 General	27 Ways to Wow Your Attorney in Auto Injury Cases
10/08/25	101120	1 General	Social Media Sleuth: Investigation and Evidence Insights for Paralegals
11/10/25	101136	3 General	Collecting Debt - a Paralegal's Guide
11/13/25	101131	5 General, 1 Ethics	Paralegal's Guide to Family Law
11/17/25	101200	3 General	The Organized Litigation Paralegal: File Management, Checklists, Deadline Trackers, and SOPs
11/18/25	101128	3 General	The Paralegal's Guide to Medical Records Analysis
08/20/25	101397	1 General	Bluebook 22nd Edition Critical Updates Paralegals MUST Know
11/24/25	101203	6 General	Discovery in Personal Injury Cases: Paralegals' Complete Guide
11/25/25	101129	3 Ethics	Top 10 Ethics Mistakes Paralegals Make
10/29/25	101097	1 General	Organizing Template Contract Provisions and Maintaining Your Firm's Contract Library
10/30/25	101118	1 General	Legal Citations and Bluebook: A Paralegal's Guide
12/03/25	101343	6 General	Estate Planning Documents A-Z for Paralegals
11/07/25	101221	1 General	Tax Basis 101 for Estate Planning Paralegals
12/04/25	101338	3 General	Paralegals' Checklist Guide to Real Estate Transactions
11/19/25	101202	6 General	Discovery Management for Paralegals: Logs, Templates, Checklists, and More
12/10/25	101346	5 General, 1 Ethics	Discovery in Divorce: A Game Plan for Paralegals
12/16/25	101312	3 General	Researching People, Assets and Business Using Web Tools and AI
12/17/25	101320	4 Ethics	Paralegal Ethics 2026: Hot Topics and Current Threats
11/20/25	101222	1 General	Navigating UCC Filings: A Guide for Corporate Paralegals
12/18/25	101253	5 General, 1 Ethics	Litigation Boot Camp for Paralegals

**PARALEGAL DIVISION
BOARD MEETING
September 13, 2025**

COMMITTEE:

CLE Tracking

COMMITTEE CHAIR:

Christina Babcock

DATE OF MEETING:

September 13, 2025

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Managed the Paralegal Division CLE and Pro Bono database by adding the list of attendees each month.
- Answered questions about CLE requirements, self-study credits, non-Paralegal Division CLE submissions, and general CLE credit questions from members.

ONGOING ACTIVITIES:

- I will continue to answer questions from members regarding CLE requirements.
- Kathy and I are preparing for renewal!

PARALEGAL DIVISION

QUARTERLY REPORT

COMMITTEE TITLE: **Web Page Committee**

COMMITTEE CHAIR: **Michelle Jaramillo**

DATE OF REPORT: **September 11, 2025**

All edits are now being directed to Virginia Chavers-Soto, Digital Marketing & Communications Coordinator.

ONGOING:

Review web pages monthly for outdated information and submit changes.

Request new events be added to the calendar as needed.

Request completed events be “grayed out”.

Request new members be added to the web page upon approval and send welcome emails.

Review job bank postings and maintain contact with those posting in the job bank to ensure that the postings are up-to-date or removed when positions are filled or postings expire.

Michelle S. Jaramillo, CP

Web Page Committee Chair

**PARALEGAL DIVISION
BOARD MEETING
THIRD QUARTER**

COMMITTEE: Social Media

COMMITTEE CHAIR: Christy Shije

DATE OF MEETING: September 13, 2025

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- FB account is at 60 Members (2 requests to join denied due to not answering all of the questions). IG is up to 24 Followers (2 not accepted attorneys requesting to join), Threads 1 Follower
- Daily Content posts to FB Motivation Monday, Talk it Up Tuesday, Wellness Wednesday, Thoughtful Thursday, Funny Friday
- Random posts attempting to get members participating
- Monitored FB, IG and Threads for new member requests
- Monitored FB posts from other members
- Emailed Marla Jackson about volunteering for Social Media Committee

ONGOING ACTIVITIES:

- Linkin Account need past photos taken from past events
- Upcoming posts Elections
- Post reminders about self reporting CLE
- Working to get Linked In Account fully operational
- Create picture posts for IG and Threads to make IG and Threads a source for members
- Ideas on how to get members to engage on FB
- Compile list of committees in need of volunteers and chairs

ACTION ITEMS:

- Budget to have professional photos of 2026 Board of Directors for Linkin

PARALEGAL DIVISION

COMMITTEE TITLE: **Membership Committee**
(See Standing Rule III.B.6. for Committee Duties)

COMMITTEE: **Kathy Campbell (Administrative Liaison Co-Chair)**
Ellice Goldstein (Membership Liaison Co-Chair)
Christina Babcock (Committee Member)

DATE OF REPORT: **September 24, 2025 (for September 27th Board Meeting)**

2025 Membership Activity:

The following nineteen (19) members were approved to date in 2025, six of whom were approved to date this quarter:

Member	Firm	City	Approved	Category
Anih, Katie*		Alamogordo	6/26/2025	1(b)
Bugg, Christine	The Gentry Law Firm	Albuquerque	7/2/2025	3
Bustos, Stefanie	Law Offices of Larsen & Mender PC	Clovis	4/29/2025	3
Corn, Heather**	Grayson Law Office	Albuquerque	6/13/2025	3
Dominguez, Cristina	Department of Corrections	Santa Fe	9/2/2025	1(b)
Duhigg, David	Saucedo Harrigan Apodaca Grismeyer Apodaca	Albuquerque	3/31/2025	3
Ellis, Christine	Allen Law Firm LLP	Albuquerque	2/25/2025	3
Flores, Miranda		Las Cruces	2/4/2025	2
Forgiarini, Martina	McCarthy & Holthus LLP	Albuquerque	7/2/2025	3
Gonzales, Kaylee*	Santa Fe Law Group	Santa Fe	7/2/2025	1(b)
Gutierrez, Zaira	The Gentry Law Firm	Albuquerque	7/2/2025	3
Hammerschmidt, Joyce	Jennings Haug Keleher McLeod Waterfall LLP	Albuquerque	1/13/2025	1(a)
King, Marla	Jackson Loman Stanford Downey & Stevens-Block	Albuquerque	3/18/2025	3
Paul, Amy**	Butt Thornton & Baehr PC	Albuquerque	3/7/2025	5
Prasad, Aadarsh	Shaharazad Booth Attorney at Law	Las Cruces	6/2/2025	3
Rojo, Sasha	Law Office of Cristy Z. Carbon-Gaul	Albuquerque	1/15/2025	3
Rodas, Sonia	Department of Corrections	Santa Fe	9/11/25	1(b)
Wallace, Michel	NM Local Government Law LLC	Albuquerque	5/6/2025	2
Winn, Amy	The Spence Law Firm NM LLC	Albuquerque	2/6/2025	1(b)

*Initial dues waiver recipient

**Returning member

We currently have 126 active members and 12 inactives.

Miscellaneous:

Assisted with setup of the vendor table for the State Bar Annual Meeting including creating a poster of law firms, ordering printing of materials, and assembling those materials and swag for distribution. Committee Members, Christina and Kathy, and Debbie Tope filled 145 imprinted tote bags with 30th Anniversary member gifts to be distributed at the Anniversary Dinner and to non-attendee members via our out-of-town Board members.

Membership Committee Report
September 2025 Board Meeting
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Submitted the Paralegal Day Proclamation for publication in the *Bar Bulletin* which was published in the August 27th issue. The membership roster as of August 26th and an article authored by Kathy and Debbie regarding the New Mexico paralegal rules was published in the September 24th *Bar Bulletin*. See attached.

Emailed members on August 6th reminding them of their CLE compliance requirements and encouraging them to take advantage of Division-sponsored CLEs and pro bono events. Attendance at Paralegal Division-sponsored CLEs and pro bono events has been recorded for the convenience of members and for auditing purposes in the self-reporting process. Updated Membership and CLE tables will be sent for posting to the webpage at the end of this quarter and an email notifying members and reminding them of their self-reporting responsibilities will be sent following posting.

On August 26, 2025, the Paralegal Division celebrated 30 years as a division of the State Bar of New Mexico. To honor this milestone, the Division recognizes all current and past members of the Paralegal Division for their contribution to the profession and extends its appreciation to their employers, as well as the State Bar of New Mexico staff, for their support. Below is a list of current Paralegal Division members as of August 26, 2025.

Kerrie Allen CP
Hinkle Shanor LLP
Denise Amisi
Davis Miles PLLC
Katie Anh
Laura Trulitt PC Attorneys at Law
Sarah Archuleta
Kevin A. Zangara PA
CIndi Aston CP
Atwood Malone Turner & Sabin PA
Christina Babcock
Central New Mexico Community College
Clydene Baca
S. Bert Atkins Law Office PC
Meryl Barbere-Sutton
NM Legal Aid Inc.
Caprice Bono ACP
NM Legal Aid Inc.
Daniel Berg
Office of the Federal Public Defender
Brandi Breen CP
Myriatt Springer PC
Christine Bugg
The Gentry Law Firm
Susan Burnham
Jill Grant & Associates LLC
Stefanie Bustos
The Law Offices of Larsen & Mender PC
Alonzo Calderon ACP
Third Judicial District Court
Beatrice Carrillo CP
Paul L. Civerolo LLC
Tracy Castle-Diaz
Myriatt Springer PC
Katherine Chee
Rodey Dickason Sloan Akin & Robb PA
Jane Clifford
Long Komer & Associates PA
Barbara Cok
Valle O' Cleirachain Zamora & Harris
Candice Cordova
Jennings Haug Keleher McLeod Waterfall LLP
Corina Cordova
Law Office of Ryan J. Villa
Heather Corn
Grayson Law Office
Katy Cornett
Law Office of David M Houllston
Holly Davis
Davis Miles PLLC
Flina Day
Miller Stratvert PA
Vanessa Delgado
Matthew Watson Attorney at Law LLC
Denise Dubose
Rio Rancho Public Schools Off. of Gen. Counsel
David Duhigg
Saucedo Harrigan Apodaca Grismeyer
Apodaca PC
Christine Ellis
Allen Law Firm LLP
Miranda Flores
Martina Forgiarini
McCarthy & Holtus LLP
Jaelyn Foster
Miller Stratvert PA
Ellice Goldstein
Larkin Padilla McDougall Family Law

Kaylee Gonzales
Santa Fe Law Group
Marlssa Gonzalez
NM Legal Aid Inc.
Charles Good CP
Hinkle Shanor LLP
Christle Grlego
Wiggins Williams & Wiggins PC
Vanessa Grlego
Eaton Law Office PC
Zalra Gutierrez
The Gentry Law Firm
Joyce O'Neill Hammerschmidt
Jennings Haug Keleher McLeod Waterfall LLP
Holly Healy
Eighth Judicial District Court
Lawrence Hernandez
Carrillo Law Firm PC
Laurie Herrera
Batley Riley Family Law PA
Sheri Higgins
Azalea IP Law LLC
Kathryn Holland
Renee Holland
Presbyterian Health Services
Kay Homan CP
Cuddy & McCarthy LLP
Erin Houlihan
Conklin Woodcock & Ziegler PC
Virginia Jackson
Ripley B Harwood P.C.
Michelle Jaramillo CP
Smidt Relst & Keleher PC
Suzette Johnson
Hinkle Shanor LLP
Sue Katz
Miller Stratvert PA
Marla King
Jackson Loman Stanford Downey & Stevens-Block PC
Angela Kuban
Sandoval County
Joanna Linn
Jackson Loman Stanford Downey & Stevens-Block PC
Madeline Lovato
NM Supreme Ct
Barbara Lucero CP
Intrepid Potash - New Mexico
Matthew Lucero
Vanessa Lucero
Christian P. Christensen LLC
Sarah Luna CP
NM Department of Transportation
Lory MacArthur
Presbyterian Health Services
Vicki Marco
Long Komer & Associates PA
Marie Marino ACP
O'Brien & Padilla PC
Gloria Marlow
German • Burnette & Associates LLC
Casey Martinez
Law Offices of Darlene Gomez LLC
Melissa Martinez
Miller Stratvert PA
Vanessa Martinez
Duran & McDonald LLC

Desiree Maynard
The Sawyers Law Group LLC
Leslie McCoy
Law Firm of Daniela Labinoti PC
Renee Medina
Macke Law & Policy LLC
Ann Mollina
Madison Mroz Steinman Kenny & Olexy PA
Laura Morales
McCoy Leavitt Laskey LLC
Neelam Morelos
James Wood Law
Jessica Morin ACP
Modrall Sperling Law Firm
Kayla Morris
575 Law Group LLC
Adriana Moya
Myriatt Springer PC
Ariel Murray
Robins Cloud LLP
Cortney Myers
NM Local Government Law LLC
Norma Oliver
Mayer LLP
Amanda Olsen
NM Educational Retirement Board
Yolanda Ortega
Cuddy & McCarthy LLP
Elizabeth Page
NM Local Government Law LLC
Amy Paul ACP
Butt Thornton & Baehr PC
Michelle Pettit
Atwood Malone Turner & Sabin PA
Andrea Pompeo
Jackson Loman Stanford Downey & Stevens-Block PC
Almee Powers
Evernorth Health Services
Aadarsh Prasad
Shaharazad Booth Attorney at Law
April Puckett AACP
Eastern New Mexico Medical Center
Julie Rael CP
Modrall Sperling Law Firm
Dawne Roberto
Duhigg & Berlin PA
John Roberts ACP
Rodey Dickason Sloan Akin & Robb PA
Lynette Rocheleau
Sandia National Laboratories
Raquel Rodriguez
RHC & LLC & The Harbour Law Firm PC
Sasha Rojo
The Law Office of Cristy Z. Carbon-Gaul
Christopher Rollins ACP
Los Alamos County Attorney's Office
James Romero
Shaharazad Booth Attorney at Law
Shannon Rooney
Madison Mroz Steinman Kenny & Olexy PA
Linda Sanders
Yolanda Sandoval
Spencer Fane LLP
Melanie Scholer
German • Burnette & Associates LLC
Shenlina Sena
Parnall & Adams Law LLC

Julia Shang CP
Catron Catron & Glassman PA
Tanvi Sharma
Parnall & Adams Law LLC
Christy Shije
Law Office of Levi M. Chavez II
Tomma Shumate
Atwood Malone Turner & Sabin PA
Ruby Silva
Wayne G. Chew PC
Donna Sowers
Kenneth C. Leach & Associates PC
Amanda Stahl
Law Office of Matt Madrid
Kim Steele ACP
Rodey Dickason Sloan Akin & Robb PA
Suzanna Tenorio CP
German • Burnette & Associates LLC
Samantha Torrez
Heidel Samberson Cox & McMahon
Tianie Toya
Barnhouse Keegan Sollman & West LLP
Marcia Treadwell
Gaddy Law Firm
Paula Vasquez CP
NM Local Government Law LLC
Mickie Vega
Lincoln County Magistrate Court
Michel Wallace
NM Local Government Law LLC
Devon Westphal
Jennings Haug Keleher McLeod Waterfall LLP
Devany Whipple CP
NM Legal Aid Inc.
Melinda Whitley ACP
Amy Winn
The Spence Law Firm NM LLC
Henri Woodards
Jones Skelton and Holchuli PLC
Nicole Woodards Ph.D.
Law Office of Joel A. Davis
Kimberly Zufelt
Larkin Padilla McDougall Family Law

INACTIVE
Kathleen F. Campbell, ACP Ret.
Carolyn L. Cochran
Nettie L. Condit
Severiana Dixon
Linda C. Flores
Peggy B. Jones, CLAS
Sandra June-Peterson
John Thomas Logan
Natalie Pino
Linda L. Schillling
Deborah R. Tope, CP Ret.
Richard C. Wade

2025 Officers
Meryl Barbere-Sutton, Chair
Ellice Goldstein, Chair-elect
Kay L. Homan, CP, Past Chair
Vacant, Secretary
Andrea Pompeo, Treasurer



State Bar of New Mexico
Paralegal Division

Directors
Christina Babcock (2025-2026)
Michelle Jaramillo, CP (2024-2025)
Madeline Lovato (2025)
John Roberts, ACP (2025-2026)
Christy L. Shije (2024-2025)
Ruby Silva (2025)

To learn more about the Paralegal Division and to see the qualifications to join, visit our webpage: www.sbnm.org/paralegals.

Attorneys and Paralegals—How Familiar are You with the New Mexico Rules Governing Paralegal Services and the Paralegal Division of the State Bar of New Mexico?

By Kathleen F. Campbell, MPS, ACP Ret., and Deborah R. Tope, CP Ret., Charter Paralegal Division Members and Former Division Chairs

In 1981, following the national trend and the American Bar Association's endorsement of the "legal assistant" profession in the late 1960s, the New Mexico Supreme Court adopted **Rules Governing Legal Assistant Services**—now **Rules Governing Paralegal Services**—**Rule 20-101 through Rule 20-115 NMRA**; but it was not until 1995 that through the efforts of a group of paralegals, the New Mexico Supreme Court created a division of the State Bar of New Mexico for legal assistants (now known as the Paralegal Division)—one of only a handful of state bar paralegal divisions throughout the country—by amending **Rule 24-101.1 NMRA** of the **Rules Governing the New Mexico Bar**.

Subsequently, the term "paralegal" was adopted on a national basis as the preferred term to identify a highly-trained, highly-skilled legal support staff member who engages primarily in substantive work under an attorney's supervision—work that the attorney otherwise would perform. New Mexico followed suit in 2004 by amending its "legal assistant" rules to conform to the use of the term "paralegal." In New Mexico, the terms "paralegal" and "legal assistant" are *not* synonymous.

In Rule 20-101 of the Rules Governing Paralegal Services, the Supreme Court states the purpose of the Rules as follows:

Increasing the availability of legal services to the public at a cost the public can afford is a goal of the legal profession and one which finds its support in Article 5 of the Rules of Professional Conduct. The employment of paralegals is a particularly significant means by which lawyers can render legal services more economically, in greater volume and

with maximum efficiency while maintaining the quality of legal services. Rapid growth in the employment of legal assistants and paralegals and the trend in the legal community toward the use of the designation "paralegal" to identify highly-trained, highly-skilled legal support staff who engage in substantive legal work increases the necessity of providing guidelines for the qualifications and use of paralegals.

The Rules go on to define "paralegal" (**Rule 20-102**), set out qualifications for calling oneself a paralegal in New Mexico (**Rule 20-115**), and outline ethical duties of paralegals and attorneys who use paralegal services.

In **Rule 24-101.1** of the **Rules Governing the New Mexico Bar**, the Supreme Court established qualifications for joining the Paralegal Division that include categories identical to **Rule 20-115** with the exception of the experience-only category. That distinction serves to advance the professional status of paralegals in New Mexico.

The Paralegal Division will celebrate 30 years as a division of the State Bar on August 26, 2025. It continues to promote the profession through the following goals:

- encourage a high order of ethical and professional attainment;
- further education among its members;
- carry out programs within the State Bar; and
- establish cooperation and respect among Division members, the State Bar of New Mexico, and the members of the legal community.

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Vacant, Secretary
Andrea Pompeo, Treasurer



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John Roberts, ACP (2025-2026)
Christy L. Shije (2024-2025)
Ruby Silva (2025)

*To learn more about the Paralegal Division and to see the qualifications to join, visit our webpage:
[State Bar of New Mexico > Leadership > Divisions > Paralegal](#).*

**PARALEGAL DIVISION
BOARD MEETING
July 19, 2025**

COMMITTEE: **Pro Bono Committee**

COMMITTEE CHAIRS: **Meryl Sutton & Marissa Gonzalez**

DATE OF MEETING: **September 27, 2025**

ACTIVITIES UNDERTAKEN SINCE LAST REPORT:

- Law-La-Palooza August 8, 2025 (5 volunteers)

ONGOING ACTIVITIES:

- Continue to work with the legal community to expand volunteer opportunities for the Division.

In celebration of 30 years as a division of the State Bar of New Mexico in August 2025, the Paralegal Division recognizes all current and past members for their contribution to the profession and extends special appreciation to the following members who have served as Chair.

*Peggy B. Jones, CLAS—1995-1996
Cynthia S. Gilbert, CLAS—1996-1997
Timothy Reardon—1997-1998
Kathleen F. Campbell, ACP—1998-1999
Jennifer L. Schouman—1999-2000
Christiane I. Wilson—2001
Sandra B. Byer, CP—2002
Linda C. Stocky—CP—2003
Kay L. Homan, CP—2004
Linda A. Murphy—2005
Bonita Ortiz, ACP—2006
Carolyn L. Cochran—2007
Robin Gomez—2008
Tina L. Kelbe, CP—2009*

*Deborah R. Tope, RP, CP—2010
Ruby Silva—2011
Evonne Sanchez—2012
Krista GIANES—2013
Andrew Polnett, ACP—2014
Eileen Casadevall, CLA—2015
Yolanda R. Ortega—2016
Barbara C. Lucero, CP—2017
Christina Babcock—2018
Lynette Rocheleau—2019
Yolanda K. Hernandez—2020
Angela Minefee—2021
Linda Sanders—2022-2023
Meryl Barbere-Sutton—2024-2025*

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Company Name: Paralegal Division
Report Name: Chart Of Accounts Report
Created On: 8/12/2021

Account no	Title	Type	Balance
4000	Membership Dues	BAL	CR
4100	Sales Discount	INC	CR
4200	Penalties Earned	INC	DB
4300	Interest Earned	INC	CR
4500	CLE Seminars	INC	CR
5250	Contract Labor	INC	DB
6100	SBNM Admin Fee	INC	DB
6110	State Bar Administrative Fees	INC	DB
6125	Bank Fees	INC	DB
6140	Contributions & Donations	INC	DB
6160	Receptions/Meetings	INC	DB
6210	Printing Expense	INC	DB
6230	Office Supplies	INC	DB
6260	Web Page	INC	DB
6270	Postage & Delivery	INC	DB
6310	Travel Expense	INC	DB
6393	Mileage Reimbursement	INC	DB
6741	CLE Seminars	INC	DB
6751	Scholarship	INC	DB
6995	Miscellaneous	INC	DB

State Bar of New Mexico, Paralegal Division

2026 Budget to Actual

	Starting Balance	Ending Balance
1000 Checking 403-8		a/o

Income	Budget	Actual	% to Budget
4805 CLE Provider Approvals	\$ 7,000.00		0%
4500 CLE Seminars	\$ 100.00		0%
4300 Earned Interest	\$ 50.00		0%
4000 Membership Dues	\$ 9,000.00		0%
4220 Miscellaneous Income	\$ 1,000.00		0%
Total Income	\$ 17,150.00	\$ -	0%
Expenses	Budget	Actual	% to Budget
6741 CLE Subsidy/Expenses	\$ 3,000.00		0%
5250 Contract Labor	\$ 5,200.00		0%
6100 State Bar Admin/IT/Technology	\$ 2,500.00		0%
6140 Donations/Contributions	\$ 6,000.00		0%
6310 Mileage/Travel Reimbursements	\$ 500.00		0%
6995 Misc. Expenses	\$ 1,400.00	\$ -	0%
6210 Elections/Printing Expenses	\$ 200.00	\$ -	0%
6230 Member Benefits	\$ 4,000.00	\$ -	0%
6270 Postage & Delivery	\$ 150.00	\$ -	0%
6160 Receptions & Meetings	\$ 7,000.00		0%
6751 Scholarships	\$ 1,000.00		0%
6260 Web/Zoom/Jot Form	\$ 500.00		0%
6210 Professional Development	\$ 3,000.00		0%
Total Expenses	\$ 34,450.00	\$ -	0%

Paralegal Division
CLE Provider(s) Approval Committee
Third Quarter Board Meeting Report

Committee Title: **CLE Provider(s) Approvals Committee**

Committee Co-Chairs: **Kay L. Homan, CP and Andrea Pompeo**

Committee Member(s)

Date of Report: **September 27, 2025**

RE: **Report**

NBI/IPE is still the only provider currently submitting CLE for approval by the Division. Deposits of approval fees June 1 to August 31 - \$3,600. Looking at the income received from the CLE approvals, I recommend that for the proposed budget being prepared to be approved at the Planning Session should be at least \$7,000.00. Attached are the upcoming webcasts.

09/18/25	100818 5 General, 1 Ethics	Employment Litigation from Start to Finish for Paralegals
09/23/25	100817 5 General, 1 Ethics	Family Law Agreements: Essential Skills for Paralegals
09/24/25	109813 6 General	The Modern Litigation Paralegal
09/25/25	100814 3 General	Corporate Law Paralegal
08/28/25	100699 1 General	The Family Law Paralegal's Guide to Case Development and File Management
09/17/25	100816 5 General, 1 Ethics	Advanced Probate Administration for Paralegals
09/30/25	100772 3 Non-Substantive	Paralegal Power Skills: Productivity and Communication
10/02/25	101089 3 General	Paralegal Tips for Asset and Debt Division in Divorce Cases
09/10/25	100891 1 General	Bankruptcy: A Paralegal's Guide
09/11/25	100889 1 General	Uninsured/Underinsured Motorist Claim Insights for Paralegals
09/16/25	100890 1 General	Using AI for Document Review: Paralegal Does and Don'ts
10/14/25	101091 5 General, 1 Ethics	Subpoenas: Everything Paralegals Need to Know
10/15/25	101047 3 General	Exhibit and Evidence Management Insights for Paralegals
10/16/25	101088 2 Ethics	The Ethical Paralegal: Best Practices for Everyday Decision-Making
10/20/25	100918 3 General	Personal Injury Starter Pack for Paralegals
10/21/25	101092 5 General, 1 Ethics	Wills and Trusts Essentials for Paralegals
10/09/25	100945 5 General, 1 Ethics	Staying Organized and in Control: A Paralegal's Guide
10/28/25	101090 5 General, 1 Ethics	Finding the Facts: A Legal Research Tool Kit for Paralegals
10/01/25	101119 1 General	Discovery in Federal Courts: A Paralegal's Guide to Request and Responses
11/04/25	101201 5 General, 1 Ethics	The Fundamentals of ChatGPT for Paralegals
11/05/25	101204 6 General	27 Ways to Wow Your Attorney in Auto Injury Cases
10/08/25	101120 1 General	Social Media Sleuth: Investigation and Evidence Insights for Paralegals
11/10/25	101136 3 General	Collecting Debt - a Paralegal's Guide
11/13/25	101131 5 General, 1 Ethics	Paralegal's Guide to Family Law
11/17/25	101200 3 General	The Organized Litigation Paralegal: File Management, Checklists, Deadline Trackers, and SOPs
11/18/25	101128 3 General	The Paralegal's Guide to Medical Records Analysis
08/20/25	101397 1 General	Bluebook 22nd Edition Critical Updates Paralegals MUST Know
11/24/25	101203 6 General	Discovery in Personal Injury Cases: Paralegals' Complete Guide
11/25/25	101129 3 Ethics	Top 10 Ethics Mistakes Paralegals Make
10/29/25	101097 1 General	Organizing Template Contract Provisions and Maintaining Your Firm's Contract Library
10/30/25	101118 1 General	Legal Citations and Bluebook: A Paralegal's Guide
12/03/25	101343 6 General	Estate Planning Documents A-Z for Paralegals
11/07/25	101221 1 General	Tax Basis 101 for Estate Planning Paralegals
12/04/25	101338 3 General	Paralegals' Checklist Guide to Real Estate Transactions
11/19/25	101202 6 General	Discovery Management for Paralegals: Logs, Templates, Checklists, and More
12/10/25	101346 5 General, 1 Ethics	Discovery in Divorce: A Game Plan for Paralegals
12/16/25	101312 3 General	Researching People, Assets and Business Using Web Tools and AI
12/17/25	101320 4 Ethics	Paralegal Ethics 2026: Hot Topics and Current Threats
11/20/25	101222 1 General	Navigating UCC Filings: A Guide for Corporate Paralegals
12/18/25	101253 5 General, 1 Ethics	Litigation Boot Camp for Paralegals

**Paralegal Division
Treasurer/Budget & Finance Committee
Board Meeting Report**

Committee Title: **Treasurer/Budget & Finance Committee**

Committee Chair: **Andrea Pompeo**

Date of Report: **September 8, 2025**

RE: **Report**

Budget vs. Actual as of August is attached.

- Beginning balance as of June 30, 2025. - \$61,197.65
- Balance as of August 31, 2025. - \$60,267.09

Outstanding checks:

- \$210.95 (Aiken-annual mtg, requested on 8/31/2025)
- \$1,566.69 (Kathy-anniversary gifts, requested on 8/8/2025)
- \$190.92 (NMSB-Q2 expenses, requested on 8/13/2025)
- \$62.16 (Babcock-anniversary gifts/party, requested on 8/26/2025)
- \$2,582.90 (Ruby-anniversary dinner, requested on 9/2/2025)

Action Item: None.

Notes: Angela Sanchez, our contact at SBNM, will be out on vacation September 22-October 6. I expect that any check requests made during that period will not be processed until she returns.

State Bar of New Mexico, Paralegal Division

2025 Budget v Actual

	Starting Balance	Ending Balance	
1000 Checking 403-8	\$59,261.46	\$60,267.09	8/31/2025

Income	Budget	Actual	% to Budget
4805 CLE Provider Approvals	\$ 6,500.00	\$ 11,325.00	174%
4500 CLE Seminars	\$ 100.00		0%
4300 Earned Interest	\$ 50.00	\$ 82.31	165%
4000 Membership Dues	\$ 9,000.00	\$ 7,825.00	87%
4220 Miscellaneous Income	\$ 1,000.00		0%
Total Income	\$ 16,650.00	\$ 19,232.31	116%
Expenses	Budget	Actual	% to Budget
6741 CLE Subsidy/Expenses	\$ 3,000.00		0%
5250 Contract Labor	\$ 5,200.00	\$ 2,581.50	50%
6100 State Bar Admin/IT/Technology	\$ 2,500.00	\$ 590.42	24%
6140 Donations/Contributions	\$ 6,000.00	\$ 5,000.00	83%
6310 Mileage/Travel Reimbursements	\$ 500.00	\$ 119.84	24%
6995 Misc. Expenses	\$ 1,400.00	\$ 29.00	2%
6210 Elections/Printing Expenses	\$ 200.00		0%
6230 Member Benefits	\$ 4,000.00	\$ 932.56	23%
6270 Postage & Delivery	\$ 150.00		0%
6160 Receptions & Meetings	\$ 7,000.00	\$ 851.61	0%
6751 Scholarships	\$ 1,000.00		0%
6260 Web/Zoom/Jot Form	\$ 500.00	\$ 234.00	47%
6210 Professional Development	\$ 3,000.00	\$ 3,587.23	120%
Total Expenses	\$ 34,450.00	\$ 13,926.16	40%

Outstanding checks	\$ 210.95		6210 Aiken-annual mtg	8/31/2025
	\$ 1,566.69		Kathy-anniversa	8/8/2025
	\$ 190.92		NMSB-Q2 exper	8/13/2025
	\$ 62.16		Babcock-annive	8/26/2025
	\$ 2,582.90		Ruby-anniversar	9/2/2025

Lunch & Learn Calendar 2026

Month	Topic	Presenter
January 10th	Ethics for Professionalism in Email and Communication	Kimberly Zufelt
February 11th	Kinship Guardianship	Holly Healy
March 11th	Real Estate/Foreclosure	Elizabeth Friedenstein
April 8	Fast Case	TJ Diggins/Lisa Smith-Crissey
May 2nd Law Day	Family Law	Ensemble - TBD
July 8	Tribal Law	Casey Martinez
September 9	RIO Reentry for Criminal Reintegration	Angelica Hall/Judge
October 14	Natural Disaster Litigation	Antonia Roybal-Mack
November 14 Institute	End of Life Planning	Ensemble

End of Life Planning Ensemble

Sharon Hutson, Justin Welch, Erin Marshall, Sasha Rojo, Cristy J. Carbón-Gaul, Brad Yablonsky