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1893-2024

March 2025

President's Post

As some of you may have already heard, our dear Executive Director, Dr. Nancy Low-Hogan will be retiring in the coming weeks. I want to take a moment to express our deepest gratitude to Nancy for her years of dedicated service as our Executive Director. In just under ten (10) years, Nancy has served with six (6) RCBA Presidents (myself included) and several board of director iterations and supervised several different staff members. Under her leadership, our association has remained strong and continues to be a vital resource for our members and the legal community. Nancy has shown grace under pressure, been a steadfast advocate for our mission, a tireless supporter of our members, and a true friend to so many of us. We wish Nancy all the best in her well-earned retirement and next endeavors.

At the same time, I am thrilled to welcome Veronica Jarek-Prinz who will become our new Executive Director later this month. Veronica comes to us from the Archdiocese of New York where she served as Director of Enrollment Management. Veronica, like Nancy, previously worked in higher education and brings experience in planning, recruitment and budgeting. We look forward to Veronica bringing a fresh perspective to the role of Executive Director. I have no doubt that Veronica's leadership will guide us into an exciting new era of growth and innovation.

Please join me in thanking Nancy for her outstanding contributions and in warmly welcoming Veronica to our association. Please also mark your calendar for RCBA's Installation Dinner on June 18th where we will formally honor Nancy's dedicated years of employment to our association.

March is also Women's History Month and we should all recognize the achievements, contributions, and resilience of women—especially those in the legal profession. In honor of Women's History Month, the DEI Committee is sponsoring a contest where the first RCBA member that correctly identifies the most notable women on a collage will receive a \$25 Starbucks gift card and the second place winner will receive a \$15 Starbucks gift card. The contest details are enclosed in this Newsbrief. We hope you all will participate in this contest by testing your knowledge of these important and notable women.

Laurie A. Dorsainvil, Esq.

President

OUR PROFESSIONAL ETHICS

Richard A. Glickel, Esq.*

Upon his passing 30-years ago, trial lawyer Louis Nizer was remembered as the quintessential Renaissance man. In addition to arguing hundreds of cases both here and abroad, Nizer wrote 10 books, composed music, painted, (his paintings were exhibited at galleries in the United States and Canada), and played golf. He advised politicians including New York's popular mayor Fiorello LaGuardia and President Lyndon Johnson, for whom he also wrote speeches.

"When a man points his finger at someone else, he should remember that four of his fingers are pointing to himself" – My Life In Court (1961).

Louis Nizer's bibliography includes his best selling 1961 autobiography, *My Life In Court*, in which the renowned trial lawyer recounts the details – including pre-trial and courtroom strategies – of some of his better known courtroom triumphs.

The autobiographical accounts of America's better known criminal defense attorneys – see, e.g., Clarence Darrow's *The Story of My Life*, Professor Dershowitz's *The Best Defense*, and Lee Bailey's *The Defense Never Rests*, all relate, to one degree or another, the authors' personal insight to the strengths and weaknesses of their most sensational cases – spun to appeal for a lay audience.

Those of us tilling the meadows of ordinary legal practice will, on occasion, be presented with a matter that, upon conclusion, could merit some intellectual discourse. In such instance, can an attorney publish an article addressing the legal issue(s) arising in a case in which the lawyer represented one or more of the parties without running afoul of the Rules governing attorney-client confidentiality? In a lengthy discussion, NYSBA's Committee on Professional Ethics opines that after the representation has ended, a lawyer may publish an article that discusses legal issues in the representation, as long as the article does not reveal confidential information without the consent of the client. See N.Y. State 1268 (07/03/2024).

The Committee spends some time distinguishing "current" from "former" clients (see, e.g., New York's Rules of Professional Conduct 1.6 and 1.9); but when examining client confidentiality, whether the attorney-client relationship has, in fact, terminated makes little difference in our continuing duty not to reveal a client's confidential information as defined by Rules 1.6(a) and 1.9(c), and see Rule 1.6, Comment [16]: "Confidential information includes not only information protected by Rule 1.6(a) with respect to current clients but also information protected by Rule 1.9(c) with respect to former clients."

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The Rule's definition of confidential information excludes, generally, "the accumulation of legal knowledge or legal research that [a] lawyer acquires through practice," and thus does not constitute client information protected by Rule 1.6 (see Comment [4A]). An article that discusses the legal issues arising in a matter from a strictly intellectual perspective without discussing particular facts of the matter that are not "generally known" should not run afoul of the Rules governing client confidential information.

"[A]n article restricted to discussing legal issues and either omitting or masking the facts that come from [the client's] matter should not run afoul of Rule 1.6 unless the [lawyer] has agreed with the client to keep 'a particular product of the lawyer's research' confidential. But if the article uses facts from the client's matter, the [lawyer] should ensure that readers cannot use those facts to ascertain the identity of the client. See Rule 1.6, Comment [4] ('A lawyer's use of a hypothetical to discuss issues relating to the representation . . . is permissible so long as there is no reasonable likelihood that the listener will be able to ascertain the identity of the client'); N.Y. State 1026 ¶ 15 (2014) (in the context of a lawyer writing a novel based on her career as a lawyer-mediator, the Committee stated that 'if confidential information is sufficiently altered, disguised, rearranged, and infused with the inquirer's own imagination so that no one can trace particular information to a particular client, then the book will not reveal 'confidential information' within the meaning of Rule 1.6).'"

While the definition of "confidential information" excludes, also, information that is "generally known" in the local community or in the trade, field or profession to which the information relates, Rule 1.6, Comment [4A], cautions that "[i]nformation is not 'generally known' simply because it is in the public domain or available in a public file." And, to the Committee's view, "information is generally known only if it is known to a sizeable percentage of people in 'the local community, or in the trade, field or profession to which the information relates.'" N.Y. State 991 ¶ 20 (2013).

The New York Rules of Professional Conduct encourage lawyers to speak publicly and write for publication for the legal community on issues of interest. See Rule 7.1, Comment [9], and N.Y. State 1251 ¶ 3 (2023). One overarching and constant consideration is our duty of loyalty to the client. "The touchstone of the client-lawyer relationship is the lawyer's obligation to act with loyalty [throughout] the representation." See Preamble to the Rules of Professional Conduct, ¶ 2.

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Information may become widely recognized and generally known through newspapers, magazines, radio or television; or through publication on internet web sites or through social media; however, information that is publicly available but requires specialized knowledge or expertise to locate, is not “generally known” within the meaning of the Rule. See ABA 479 (2017). The fact that we lawyers can – with relative ease – log onto the NYSCEF and view an electronic file or perform a search to locate a published opinion or decision, entails a modicum of specialized knowledge or legal expertise not possessed by the public at large.

CONCLUSION

A lawyer may publish an article that discusses legal issues in a concluded representation as long as the article does not reveal confidential information without client consent. Confidential information does not include legal knowledge or legal research that lawyers acquires through practice or information that is “generally known” in the local community, or in the trade or profession, etc. to which the matter relates; but information is not generally known merely because it is available in court files. N.Y. State 1268 (2024).

EPILOGUE

It’s said that, at some point in our lives, there’s a great story that resides within each of us. But whether real or imagined, fiction or non-fiction, biography or learned treatise, a lawyer may not impart client confidences in the telling of the story.

** Chair of the RCBA’s Committee on Professional Ethics.*

Members’ questions concerning professional ethics can be addressed to Mr. Glickel: rglickel@glickelaw.com

As a service to Rockland County Bar Association members and the public, the Bar is pleased to sponsor this "Ethics Corner" column. To suggest future column topics, please email David Evan Markus at davidevanmarkus@gmail.com.

Reciprocal Discipline II: “Not So Affirming” Affirmative Defenses

By David Evan Markus, Esq.

Our first “Ethics Corner” column explored reciprocal discipline basics. This follow-up surveys affirmative defenses to reciprocal discipline.

Appellate Division Joint Rule 1240.13(b) specifies three affirmative defenses to reciprocal discipline:

- (1) that the procedure in the foreign jurisdiction was so lacking in notice or opportunity to be heard as to constitute a deprivation of due process; or
- (2) that there was such an infirmity of proof establishing the misconduct as to give rise to the clear conviction that the Court could not, consistent with its duties, accept as final the finding in the foreign jurisdiction as to the respondent's misconduct; or
- (3) that the misconduct for which the respondent was disciplined in the foreign jurisdiction does not constitute misconduct in New York.

Due process, infirm proof and non-sanctionability comprise the universe of permissible affirmative defenses. All others are precluded.⁽¹⁾

Routine civil procedure governs these defenses. An affirmative defense not raised in the responsive pleading is waived, and the burden of proving one lies with the respondent.⁽²⁾ For collateral estoppel reasons, an attorney cannot re-litigate a foreign disciplinary finding absent a due process violation or evidentiary infirmity.⁽³⁾

Presumably because most foreign discipline is procedurally fair and substantively justified, only the rare reciprocal discipline case details why an affirmative defense lacks merit. Rarer still is the winning defense – though several recent cases offer that possibility.

Due Process

Attorney discipline matters are “adversary proceedings of a quasi-criminal nature” entailing “procedural due process rights of fair notice and a reasonable opportunity to be heard.”⁽⁴⁾

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In *In re Dunn*,⁽⁵⁾ a federal magistrate judge deciding a substantive motion sanctioned an attorney for filing a false declaration. The Grievance Committee charged that the false declaration violated Rules 3.3 (candor to tribunal), 8.4(c) (dishonesty), 8.4(d) (prejudice to administration of justice) and 8.4(h) (adverse reflection on attorney fitness). The Court of Appeals held that by the magistrate judge, by making the dishonesty determination in a substantive proceeding, thereby did not accord any opportunity to cross examine or call witnesses as to any rule violation, thereby violating due process for reciprocal discipline purposes.

Thus, sanctions alone, without trial of an alleged rule violation with full adjudicative rights to defend the allegation, will not support reciprocal discipline. *In re Dunn*, however, is the rare case that upholds a due process defense. No due process defect lies because reciprocal discipline follows interim rather than final foreign discipline, so long as the interim proceeding accorded notice and opportunity to be heard.⁽⁶⁾ No due process defect lies where a lawyer in an discipline inquiry invokes a Fifth Amendment right against self-incrimination, so long as discipline does not issue “solely on the basis of invoking the right and without the support of other evidence establishing [lawyer] misconduct.”⁽⁷⁾ Similarly, no case has found a due process violation merely because a disciplinary body denies or limits discovery.⁽⁸⁾ And while prejudicial delay can mitigate sanction,⁽⁹⁾ a due process challenge in laches has never prevailed.⁽¹⁰⁾

Infirm Proof

For full faith and credit reasons, infirm-proof defenses generally yield to a deferential review of whether a violation finding has a record basis⁽¹¹⁾ of clear and convincing evidence.⁽¹²⁾

This author finds only one New York case rejecting reciprocal discipline for infirm proof. In *Matter of Hallock*,⁽¹³⁾ a two-person law partnership’s associate forged a client’s signature on a federal pleading. After a hearing, the District Court sanctioned the associate and partnership, but not the partners due to what the court deemed insufficient evidence that they knew of the forgery or acted dishonestly. The partners consented to federal censure based on admitting violations of Rules 5.1(b) (inadequate supervision), 5.1(d)(2)(ii) (vicarious liability for employee misconduct where partner should have known) and 8.4(h) (adverse reflection on attorney fitness). On New York reciprocal discipline, the partners admitted those violations and sought censure but the Appellate Division suspended the partners, finding that one helped draft the pleading and the other aided its submission.⁽¹⁴⁾ The Court of Appeals reversed, holding that neither the District Court nor its Grievance Committee made any dishonesty finding as to either partner, and thus the Appellate Division’s dishonesty findings lacked record basis.

Given *Matter of Hallock*, it behooves a foreign-disciplined attorney to compare any reciprocal discipline determination to the findings of the original-discipline tribunal. Rare as it may be, an infirm-proof defense may lie if the former exceeds the latter’s scope.

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Non-Sanctionability

This final defense might be illusory: this author finds no instance of reciprocal discipline declined for want of a predicate New York offense. The reason may be that non-sanctionability turns on whether underlying *conduct* violates a New York ethics rule, not whether the foreign ethics *rule* violated is the same in New York: it is sufficient that New York has an ethics rule “counterpart that is substantially similar.”⁽¹⁵⁾

This “close enough” approach also governs discipline after criminal conviction. For instance, a New Jersey conviction for “simple assault” will support reciprocal discipline based on New York’s “essentially similar” crime of assault in the third degree.⁽¹⁶⁾ Even the absence of an equivalent New York offense may not inhibit reciprocal discipline. In *Matter of McKenzie*,⁽¹⁷⁾ an attorney took an *Alford* plea to the Virgin Islands misdemeanor of “compounding a crime” after colluding to rig an auction. On a New Jersey suspension for violating New Jersey Rules 8.4(b) (criminal act reflecting on attorney honesty or trust) and 8.4(c) (dishonesty, fraud, deceit or misrepresentation), New York imposed reciprocal discipline. Though New York recognizes no “compounding a crime” offense, the Appellate Division analogized it to federal misprison of felony, for which New York has imposed one-year suspensions.

Conclusion

Affirmative defenses to reciprocal discipline rarely succeed, but they merit consideration in proper cases. More likely to materially assist the foreign-disciplined attorney are arguments to mitigate sanction. Stay tuned for this topic in a future “Ethics Corner” column.

David Evan Markus, Esq., is chair of the WCBA Committee on Ethics and Professionalism, member of the WCBA Executive Committee and Board of Directors, and Member-Elect of the New York State Bar Association House of Delegates. He serves as Special Counsel for Access to Justice and Supreme Court referee for New York’s Ninth Judicial District. His past service includes statewide Special Counsel for Programs and Policy under Chief Judges Judith Kaye and Jonathan Lippman.

(1) See *Matter of Dancy*, 2024 NY Slip Op 02870, at *3 (1st Dept 2024); *Matter of Solfaghari*, 207 AD3d 111, 114 (2d Dept 2022). Beyond due process, even constitutional challenges are barred. See *Matter of Aljuladi*, 226 AD3d 1254, 1255 (3d Dept 2024); *Matter of Deem*, 208 AD3d 89, 93 (2d Dept 2022); see also *Matter of Sweeney*, 23 AD2d 1 (2d Dept 1965), *mod on other grounds* 30 NY2d 633 (1972).

(2) *Matter of Solfaghari*, 207 AD3d at 114.

(3) *Matter of Ryan*, 206 NYS3d 402, 404-405 (2d Dept 2024); *Matter of Megaro*, 215 AD3d 67, 82 (2d Dept 2023); *In re Carmel*, 154 AD3d 72 (2d Dept 2017).

(4) *Matter of Hallock*, 37 NY3d 436, 442 (2021), quoting *In re Ruffalo*, 390 US 544, 550-551 (1968).

(5) *In re Dunn*, 24 NY3d 699 (2015).

(6) See *Matter of Liebowitz*, 200 AD3d 124, 137 (1st Dept 2021).

(7) *Matter of Campbell* (203 AD3d 1380, 1383 (3d Dept 2022)).

(8) Some foreign cases suggest that denial of discovery in an attorney discipline matter may cause such severe prejudice as to violate due process. See e.g. *In re Crawford*, 827 NW2d 214, 239 (Neb 2013); *Matter of Tobin*, 628 NE2d 1268, 1271 (Mass 1994); *In re Herndon*, 596 A2d 592, 544-545 (DC 1991); *In re Wireman*, 367 NE2d 1368 (Ind 1977).

(9) See *Matter of Greenfield*, 211 AD3d 29 (1st Dept 1995); *Matter of Slater*, 156 AD2d 89 (1st Dept 1990).

(10) Cf. *Matter of Krame*, 222 AD3d 59, 64 (2d Dept 2023).

(11) See *Matter of Matter of Solfaghari*, 207 AD3d at 114. *McIlwain*, 2024 NY Slip Op 02872 (1st Dept 2024); *Matter of McKenzie*, 177 AD3d 134 (1st Dept 2019); *In re Feng Li*, 148 AD3d 238 [2d Dept 2017]).

(12) See e.g. *Matter of Chirico*, 187 AD3d 5, 9 (2d Dept 2020).

(13) *Matter of Hallock*, 37 NY3d 436 (2021).

(14) See *Matter of Hallock*, 181 AD3d 125, 129-130 (2d Dept 2020), *revd* 37 NY3d at 436; *Matter of Malerba*, 182 AD3d 91, 95 (2d Dept 2020), *revd sub nom. Matter of Hallock, id.*

(15) *Matter of Krame*, 222 AD3d at 64; see *Matter of Megaro*, 215 AD3d at 83.

(16) *Matter of Salami*, 157 AD3d 37, 39 (2d Dept 2017).

(17) *Matter of McKenzie*, 177 AD3d at 134.

The Rockland County Bar Association

Lunch with a Judge

Hon. Rachel E. Tanguay, J.S.C.

Supreme Court Justice

Judge of the Integrated Domestic Violence Court

Rockland County Supreme Court



March 20, 2025

12:30pm - 2:00pm

Clarkstown Town Hall

(Main Auditorium)

10 Maple Avenue, New City, NY

The lunches are casual and a chance to catch up with our local judges in an informal atmosphere.

A light lunch will be provided at no charge.

Please note that **SPACE IS LIMITED!**

You must be an RCBA Member to participate.

RSVP to the Bar Association Office at 845-634-2149
or email office@rocklandbar.org

THE PRACTICE PAGE

RESPONSIVE PLEADINGS, LIKE THE GAME OF CHESS

Hon. Mark C. Dillon *

There is a great case that illustrates the importance of thinking strategically about answers to complaints. It will be revealed in one relevant way below.

But let's first touch base with some basics. CPLR 3018 is the provision governing responsive pleadings. The "responsive pleading" is an umbrella term as it includes answers to complaints, answers to third party complaints, answers to interpleader complaints, and answers to cross-claims (CPLR 3011). Another form of responsive pleading is uniquely known as the Reply, which by definition responds only to a defendant's counterclaim (CPLR 3011). Answers to allegations which the party believes to be untrue are to be denied (CPLR 3018[a]). Allegations for which the party lacks knowledge or information sufficient to form a belief about their truth shall be specified, but in the interim has the effect of a denial (CPLR 3018[a]). If allegations or denials are not specifically stated to be made upon information and belief, they are regarded for all purposes as having been made upon personal knowledge, per the mandate of the infrequently-cited CPLR 3023. Significantly, all other statements are deemed admitted including statements for which the party fails to specifically provide a response (*Pacheco v Jabalera*, 214 AD3d 516[1st Dep't. 2023]; *U.S. Bank National Association v Saff*, 191 AD3d 733 [2nd Dep't. 2021]; *Offor v Zucker*, 185 AD3d 1187 [3rd Dep't. 2020]).

To avoid a default, responsive pleadings are due for all pleaded allegations but with one notable exception: If a cross-claim does not specifically demand an answer to it, the cross-claim is *deemed* denied in the absence of a response (CPLR 3011; *Giglio v NTIMP, Inc.*, 86 AD3d 301, 310). Parties interposing cross-claims therefore have no downside to demanding an answer to them, as is permitted by CPLR 3011, to determine the adversary's pleading response and to set up a potential default if the cross-claim is not answered. If an answer is specifically demanded to a cross-claim, the responding party must be sure to answer it.

A further consideration for attorneys in preparing responsive pleadings involves verifications ---when they are or are not required. For that, practitioners should consult CPLR 3020. Generally, and subject to limited exceptions (CPLR 3020[b]), responsive pleadings must be verified if the pleading being responded to is itself verified (CPLR 3020[a]). And CPLR 3020(c) defines *who* may verify responsive pleadings.

Attorneys must of course examine allegations carefully when drafting the responsive pleading. Attorneys do so based on the facts presented to the attorney by the client, the relevant potential legal defenses, and the attorney's ethical obligation to certify that contentions in the responsive pleading are not frivolous (Rules of the Chief Administrator 130-1.1a[b][1]). Those considerations also include the inclusion of affirmative defenses, taking care that none be left out that would be waived if not specifically asserted (CPLR 3211[e]).

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That all said, there is a terrific case on the subject of responsive pleadings, *Urraro v Green*, 106 AD3d 567, from 1984, long ago. *Urraro* involved a pedestrian knockdown from a car owned by a municipality while being operated by a municipal employee. As the bar knows, the statute of limitations for a negligence claim against a municipality is 1 year and 90 days (GML 50-i); but the statute of limitations against the employee-driver was either 1 year and 90 days *or* 3 years depending on whether the accident occurred while the employee was within or without the scope of employment. The limitations would be 1 year and 90 days if the employee was within the scope of employment, as in that instance the municipality would be vicariously liable and required to provide indemnification, rendering the municipality the real party at interest (*Urraro v Green*, 106 AD3d at 567; *Sinvany v Metropolitan Transit Authority*, 79 MIsc.3d 1243[A] *3). If the employee-driver operated the vehicle wholly and unforeseeably outside the scope of municipal employment, then the standard 3-year statute of limitations for negligence would apply as to the employee. The plaintiff's complaint in *Urraro* specifically alleged that the employee was operating the defendant's vehicle *within* the scope of his municipal employment. Quick on the uptake, defense counsel, representing both defendants from a single insurer, *admitted* in the answer that the accident occurred while the employee was within the scope of his employment. Why? Presumably, the admission was based upon the true facts. But notably, the action was commenced by the plaintiff beyond the 1 year 90 day statute of limitations but before the expiration of the 3 year statute of limitations. The admission to the allegation that the employee-driver was within the scope of employment removed it as a contested matter in the case (*Zegarowicz v Ripatti*, 77 AD3d 650, 653), and thereby brought the employee within the applicable 1 year 90 day statute of limitations of GML 50-i. Thereafter, defense counsel made the predictable motion to dismiss the *Urraro* action as to not one, but *both* defendants, on the ground that the entirety of the action was time-barred. Motion granted, case dismissed (*Urraro v Green*, 106 AD2d at 567).

The lesson from *Urraro* is that responsive pleadings be drafted with care and strategy. In preparing the answer in *Urraro*, the defendants' counsel was thinking in terms of a chess game, looking three moves ahead on the board. Doing so is a good approach for attorneys drafting responsive pleadings.

***Mark C. Dillon is a Justice of the Appellate Division, 2nd Dep't., an Adjunct Professor of New York Practice at Fordham Law School, and is a contributing author to the CPLR Practice Commentaries in McKinney's.**



Rockland County Bar Association

337 North Main Street, Suite 1; New City, NY 10956; rocklandbar.org

Dear Colleagues,

The flyer for the event “The Power of Women’s Voices: We Have Something to Say” is on the next page (page 13) featuring a collage of 70 influential women. In honor of Women’s History Month, the RCBA DEI committee is sponsoring a contest! The RCBA member who correctly identifies the most women pictured in this flyer will win a \$25 gift card to Starbucks! Second place gets a \$15 gift card. So take a careful look at the flyer and email your answer list to office@rocklandbar.org. Please write “DEI contest” in the subject line. Submissions are due by close of business on Monday March 17. Good luck!

Contest rules small print: The first RCBA member who correctly identifies all 70 women (or the largest number of correct names if no one identifies all 70) will be the first place winner. The RCBA member who correctly identifies the second most women will be the second place winner. In the case of a tie for first, the first correct submission received will be awarded the first place prize and the second correct submission received will be awarded the second place prize. If there is no tie for first, but there is a tie for second, the first of the tying second place submissions received will be awarded the second place prize and the other second place submissions will get a congratulatory email. Members of the DEI committee are eligible to submit answers, but are not eligible to win either of the prizes.

Please see Flyer on next page (page 13).

With best regards,

The Bar Association

The Power of Women's Voices: We Have Something to Say!

<https://services.nycbar.org/EventDetail?>

[EventKey=CMTE031725&WebsiteKey=f71e12f3-524e-4f8c-a5f7-0d16ce7b3314](https://services.nycbar.org/EventDetail?EventKey=CMTE031725&WebsiteKey=f71e12f3-524e-4f8c-a5f7-0d16ce7b3314)



Monday, March 17, 2025



The Hon. Betty Weissberg Ellerin Committee on Women in the Courts



*New York
Women Judges Association, Inc.*



COMMERCIAL LITIGATION ISSUES OF INTEREST

Submitted by Joseph Churgin, Esq. and Susan Cooper, Esq.*

Your client commenced an action in federal court, Eastern District of New York, for breach of contract, defamation, and tortious interference. During factual discovery, you served a request for admissions, including the details of several discussions between the parties' principals over a specified time period. The defendant responded simply that he cannot recall the details of every communication he had with the plaintiff, without stating, per Fed. R. Civ.P. 36(a)(5), that "it has made reasonable inquiry and that the information it knows or can readily obtain is insufficient to enable it to admit or deny." After sending a brief email to defense counsel about inadequate responses generally, you move to compel answers.

Will your motion to compel answers be granted?

The answer is no.

In *Multi-State Partnership for Prevention LLC v. Kennnedy*, (E.D.N.Y., February 20, 2025), NYLJ 1740151724NY24CV0001, Case No. 24-CV-00013, the plaintiff pleaded claims involving copyright, trademark, breach of contract, defamation, and tortious interference. During factual discovery, plaintiff served a Request for Admissions (RFA), and received deficient responses with many objections to proper requests. Plaintiff moved to compel responses, providing emails between the parties' respective counsel as proof of a good faith attempt to resolve the issues. The Court described these emails as "[p]erfunctory email correspondence that does not squarely refer to the underlying issue."

The Court began its decision by decrying, "this Court faces, once again, a discovery dispute in which the parties failed to meet and confer." The Court noted that Federal Rules of Civil Procedure, the Local Civil Court Rules, and the Court's Individual Rules of Practice "all mandate that parties meet and confer in a good faith attempt to resolve discovery disputes before formally initiating motion practice or raising disputes with the Court," citing *Excess Ins. Co. v. Rochdale Ins. Co.*, No. 05-CV-10174, 2007 WL 2900217, at *12 (S.D.N.Y. Oct. 4, 2007).

The Court denied the motion with leave to renew, and directed the parties "to have a meaningful meet and confer on the issues raised in the motion and report back to the Court.

The Court then took the opportunity to give the parties guidance on just what are proper objections to requests to admit the truth of facts, the application of law to fact, or opinions about either, and the genuineness of documents, per Fed. R. Civ. P. 36((a)(1). The Court noted, "Although Rule 36 is not a discovery device, this does not mean 'that an RFA may only ask about matters that the propounding party believes to be undisputed,'" quoting *U. S. Bank Nat'l Ass'n v. Triaxx Asset Mgmt. LLC*, No. 18-cv-4044 ((BCM), 2020 WL 9549505, at *2 (S.D.N.Y. Nov. 30, 2020). If a party is asked to admit something that it disputes, the only proper response is an answer, not an objection.

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Thus, the Court suggested that the RFA's asking the defendants to admit the details of conferences between two specific individuals, was likely not properly objected to as seeking "to ratify a legal conclusion." And the defendants' response that Mr. Kennedy did speak with the Plaintiff, but could not recall how many times or the sum and substance of each conversation, was impermissible, without more. Citing Fed. R. Civ. P. 36(a)(5), the Court noted, "The answering party may assert a lack of knowledge . . . as a reason for failing to admit or deny, it may do so only if the party states that it has made reasonable inquiry and that the information it knows or can readily obtain is insufficient to enable it to admit or deny." There is no reference to the defendants' reasonable inquiry into the conversations.

The lesson? Do not make a motion in federal court to compel discovery without first engaging in genuine good-faith efforts to resolve the dispute. Do not respond to a request to admit in federal court by saying, "I don't know," without specifying the reasonable efforts your client made to obtain the information, such as checking diaries, emails, notes of phone calls, etc.

Editor's note: The requirement of a genuine effort to resolve a discovery dispute applies in both state and federal courts. See 22 NYCRR 202.7. However, the provisions of CPLR 3123(a) for notices to admit restricts the request to one where the party requesting admission "reasonably believes there can be no substantial dispute at trial."

***By Joseph Curgin, Esq. and Susan Cooper, Esq. of
SAVAD CHURGIN, LLP, Attorneys at Law**



SUCCESSION

How Much is My Practice Worth?

A new Newsbrief column

BY JUDITH BACHMAN



With my continuing focus on building my law firm's value, I think it's important to know how that value will be calculated.

During our January 23 CLE program entitled MASTERING PRACTICE TRANSITIONS: BUYING, SELLING OR MERGING FIRMS we addressed that very question.

Panelist Steven M. Kaplan, CPA/ABV, MBA shared that a rule of thumb for practice valuations is to start at 1x gross revenue. In other words, if your practice grosses \$1,000,000 per year its value would be \$1,000,000.

He noted, however, that valuations require a much deeper analysis than just that simple rule of thumb. An appraiser should look at three (3) years of a firm's financial information, to start. In that review, Steven said that a focus will be on the "quality of earnings," with particular note of what is recurring revenue and what is not. In a sale of a practice, recurring revenue, e.g., subscription or retainer clients, is a much more valuable source of revenue than episodic income; recurring revenue is, by nature, predictable and therefore very important to a buyer.

To that point, fellow panelist, Donalee Berard, CPA, Berard & Associates, CPA's, P.C. explained that in an acquisition, one might price certain streams of revenue, e.g., recurring revenue, at 1.2x gross revenue, and other streams, e.g., non-recurring revenue, at .8x gross revenue.

Mr. Kaplan added that beyond a multiple of gross revenue and consideration of the "quality of earnings," a valuation would also require an examination of EBITA - earnings before interest, taxes, and amortization. He said that EBITA is a helpful tool to assess the true profitability of a firm. Once an appraiser finds the EBITA of a firm, the value may be 6-8x EBITA.

Regardless of the methodology used in appraising a practice, Mr. Kaplan emphasized that looking at the value should be done early in the process for a potential seller. With enough lead time, the appraisal can give a succession planning attorney areas to focus on to build the value before exit (my aim throughout all of the installments of this column).

So for all of you thinking about your eventual exit, focusing on valuation as soon as possible is important. Whether that requires retaining an appraiser or just consulting with the longstanding firm accountant add that to your checklist of steps in succession planning..



SPOTLIGHT



on Women in New York who have Broken Barriers in the Legal Profession

In honor of Women's History Month, the DEI committee chose four groundbreaking female attorneys to spotlight. Each of these women has helped to improve the legal profession and expanded access to justice by taking on roles that had previously not been held by women and/or women of color in New York. Please click on the links below each photo for more information about these women's lives and professional achievements.

Bronx District Attorney Darcel Clark (1962-)



Darcel Clark is the first woman to be elected Bronx District Attorney and the first African American woman to be elected a District Attorney in New York State. She was re-elected to her third term in November 2023.

Prior to her election, Clark had been a judge for 16 years. Clark served as an Associate Justice for the NYS Supreme Court Appellate Division, First Department; a NYS Supreme Court Justice in Bronx County; and a Criminal Court Judge in Bronx and New York Counties.

Clark has created several initiatives to help with alternatives to incarceration, crime prevention, and assistance to victims.

[District Attorney Clark's Bio](#)

Hon. Dorothy Chin-Brandt (1946-2025)



Justice Dorothy Chin-Brandt made history in 1987 when she was elected to the New York City Civil Court, becoming both the first Asian American elected official and first Asian American woman judge in New York State. She was also an original member of the Franklin H. Williams Judicial Commission of the NYS Courts.

"I show up in the clerk's office, and they thought I was the interpreter, because of course I couldn't be the judge," Justice Chin-Brandt recalled of her first day on the bench. She first sat in New York County, but then transferred to Queens County, where she was born and raised.

Justice Chin-Brandt retired in 2016 after nearly 30 years of public service. She recently passed away at the age of 78.

[Hon. Dorothy Chin-Brandt, Trailblazing Asian American Judge \(NYT Article\)](#)

Hon. Carmen Beauchamp Ciparick (Ret.) (1942-)



Hon. Carmen Beauchamp Ciparick, born January 1st, 1942, is the youngest child of Puerto-Rican parents. She attended law school at night while working during the day as a teacher at a junior high school in Harlem. She was one of only eight women in her St. John's Law School graduating class of 1967.

Upon graduation, she worked as a Staff Attorney at the Legal Aid Society, Civil Division in the South Bronx. She was appointed as a Judge of the Criminal Court of the City of New York by Mayor Ed Koch in 1978. She was elected as a Justice of New York State Supreme Court four years later. On December 1, 1993, she was appointed to the New York State Court of Appeals, becoming the first Latina and second woman appointed to the high court. She was re-appointed to a second term in the New York State Court of Appeals, and then retired from the bench in 2013. She is a founding and active member of the Latino Judges Association.

[Hon. Carmen Beauchamp Ciparick—Historical Society of the New York Courts](#)

Kate Stoneman (1841-1925)



Katherine Stoneman was a lawyer, pioneer, and suffragist. In 1885, after working as clerk for a lawyer in Albany, Stoneman became the first woman to pass the New York State Bar Exam. However, her application to join the bar was rejected because of her gender. Stoneman fought to amend the Code of Civil Procedure to permit the admission of qualified applicants regardless of sex or race. She was admitted to the bar on May 22, 1886.

Thirteen years after passing the bar exam, Stoneman became the first woman to graduate from Albany Law School. She maintained a law office in Albany from 1889-1922.

[Kate Stoneman Bio](#)

First annual meeting of the Women's Lawyers' Association – August 28, 1923





Technology Tips for Attorneys



Making Every Touchpoint Count

Michael Loewenberg*

The way clients experience your firm extends far beyond the courtroom or consultation room. Every interaction—whether through a phone call, email, or social media—shapes their perception of your practice. Managing these touchpoints effectively isn't just good business; it's essential for building trust and lasting client relationships.

The Phone: A Client's First Impression

Your telephone system often provides the first human connection to your firm. Ensure receptionist training emphasizes warmth and professionalism. When clients call, they're often anxious or concerned—a compassionate voice can make all the difference.

Consider your voicemail messages too. Are they updated regularly? Do they provide clear information about when callers can expect a response? A simple, "We return all calls within 2 hours" sets expectations and reduces client anxiety. If it's appropriate for your firm, is there an emergency contact function?

Business Cards: Pocket-Sized Marketing

Beyond basic contact information, your business cards should reflect your firm's values and aesthetic. Quality paper stock and clean design signal attention to detail—a trait clients value in their legal representation. Make sure all attorneys have current cards that match in design elements while highlighting individual specialties. When a potential client receives cards from different members of your team, consistency reinforces your firm's cohesive identity. And do use both sides of the card! Leaving the back blank means you're leaving 50% of your marketing opportunities untapped.

Email Communication: Professionalism in the Digital Age

Your email signature is more than contact information—it's a branding opportunity. Include your firm's logo, practice areas, and perhaps a tagline that captures your approach. Ensure all staff members use standardized signature templates. Response times matter tremendously. Even a quick acknowledgment saying, "I've received your email and will respond fully by tomorrow afternoon," helps clients feel valued and informed. It should go without saying but it's also worth saying: make sure all outgoing emails are clear, grammatically correct with properly spelled words.

... Continued

... Continued

Website and Social Media: Your Digital Storefront

Your website should convey the same firm personality and professionalism as your in-person interactions. Regular updates to content demonstrate that your firm stays current with legal developments. On social media, consistent posting schedules and messaging build credibility. Share insights about local legal matters, celebrate community involvement, and occasionally offer glimpses into your firm's culture. This humanizes your practice and makes it more approachable.

Why Consistency Matters

When clients receive the same quality experience across all touchpoints, it builds confidence in your firm's reliability. Inconsistency, however, creates doubt—if your communications vary wildly in tone or quality, clients may question whether your legal work will be equally uneven. Reputation is everything. In communities where word-of-mouth referrals drive business, a consistently positive client experience becomes your most powerful marketing tool.

Practical Steps to Improve Touchpoint Management

1. Conduct a communications audit: Experience your firm as clients do by calling your main line, visiting your website, and reviewing all standard communications.
2. Create style guidelines for all firm communications, ensuring consistent voice, terminology, and visual elements.
3. Invest in staff training so everyone understands the importance of their role in client experience.

Gather feedback regularly through brief follow-up surveys after case closures.

The Lawyer Assistance Program of the New York City Bar Association offers:

It's normal for stress, anxiety and panic to arise when we are working remotely, have changes in routine, are **social distancing** and have concerns for ourselves and our loved ones health and well-being.

If you or anyone in your family has a mental health or substance use issue, it's essential to keep connected.

Please feel free to contact us by phone, email or text for a confidential chat.

Eileen Travis, Director

Emily Lambert, Clinical Coordinator

Confidential helpline: 212-302-5787 (leave a message)

etravis@nycbar.org

elambert@nycbar.org

Eileen Travis, call or text: 917-488-4890

HIGH SCHOOL MOCK TRIAL UPDATE

The RCBA is pleased to announce that the RCBA Mock Trial Committee is running the Rockland County High School Mock Trial tournament for the 8th year in a row. The competition will start on Wednesday, March 5th and continue every Wednesday evening at 5:30PM until the Final round on Wednesday, April 2. That round will be held at the Rockland County Supreme Court in one of the ceremonial courtrooms. Judge Zugibe will preside over the final round. All are welcome to attend the final.

Mock Trial Committee:

Hon. David Ascher

Hon. Andrea Composto

Amy Mara, Esq.

Hon. Aimee Pollak

RCBA Cares

The following resources are provided to you courtesy of the Lawyer to Lawyer Committee.*

Lawyer Assistance Programs

New York State Bar Association: 1-800-255-0569; lap@nysba.org

New York City Bar Association: 212-302-5787; <https://nysba.org/attorney-well-being/>

Suicide Prevention

National Suicide Prevention Lifeline: 1-800-273-TALK (8255) - National, Toll-Free, 24 Hours

Crisis Text Line: Need help? Text START to 741-741

Chemical Dependency and Self-Help Sites

Alcoholics Anonymous (AA): 212-870-3400; www.aa.org

International Lawyers in A.A. (ILAA): www.ilaa.org

Narcotics Anonymous (NA): 818-773-9999; www.na.org

Nicotine Anonymous (NA): 1-877-TRY-NICA; nicotine-anonymous.org

Mental Health

Depressed Anonymous: depressedanon.com

National Mental Health Association (NMHA) - 1-800-273-TALK (8255) to reach a 24-hour crisis center;
Text MHA to 741741 at the Crisis Text Line

Source: Andrew Denney, Bureau Chief of NYLJ and the New York State Association of Criminal Defense Lawyers.

****For more information about the Lawyer to Lawyer Committee,***

please email: office@rocklandbar.org

The Rockland County Bar Association has a [Facebook page](#) where we announce upcoming events and other issues of interest to the local community.

Visit and follow the page and “Like” the postings to help your association be seen!



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If you have a favorite business, please let us know.

Contact Jeanmarie @rocklandbar.org with their contact information so we can reach out to them about these opportunities.

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Contact: Jeanmarie DiGiacomo

Jeanmarie@rocklandbar.org

845-634-2149

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www.rocklandbar.org



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We receive several calls each day from clients looking for local representation. We welcome all members to participate but are especially in need of attorneys in these practice areas:

Civil Appeals

Commercial law

Consumer law, including small claims court

Constitutional and Human Rights

Corporate Law including business formation, dissolution & franchises

Education law

Elder law

Environmental Law

Insurance Law, including automobile, home, disability, long term care

Intellectual Property

Landlord Tenant Law: residential and commercial

Legal Malpractice

Zoning Law

Visit our [webpage](#) or contact office@rocklandbar.org for more information and an application.

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RCBA Members – free, up to 50 words; 51 to 100 words, cost is \$75.00.

Non-Members, cost is \$50 for up to 50 words; 51 to 100 words, cost is \$100.

PLEASE NOTE:

NEWSBRIEF IS NOT PUBLISHED IN JULY

CALL Jeanmarie @ 845-634-2149 or send email to Jeanmarie@Rocklandbar.org

TO ADVERTISE IN NEWSBRIEF

Advertising & articles appearing in the RCBA Newsletter does not presume endorsement of products, services & views of the Rockland County Bar

Association.

All advertisements and articles must be reviewed by the Executive Committee for content.

CLE CORNER

We are working on a ROBUST 2025 CLE Schedule

Please continue to check for updates!

<u>Date of Program</u>	<u>Time</u>	<u>Program Title</u>
Tuesday March 18, 2025	Online/Virtual 6:00 pm-9:00 pm	Mortgage Foreclosure
Coming in April!	Online/Virtual 12:15 pm-1:30 pm	An Overview of Supplemental Needs Trusts Drafting, Practical Applications and Practice Tips
Tuesday, April 29, 2025	Online/Virtual 12:30 pm-2:00 pm	Uncontested Divorce 101 (Details to follow!)
Tuesday, May 20, 2025	Online/Virtual 6:00 pm-8:00 pm	The NY Voting Rights Act: Surviving a Constitutional Challenge
Wednesday, June 4, 2025	In-Person 12:30 pm -2:00 pm	Speedy Trial (Details to follow!)

Missed a CLE program? You can earn credit by watching the video replay.

Contact Jeanmarie@Rocklandbar.org to receive the recording.

***Please note: Not all CLEs have been recorded.**

Payment by check only.

Remember, RCBA Members receive a discounted registration fee for all CLE programs

CLE REQUIREMENTS

CLE REQUIREMENTS

Experienced Attorneys must complete 24 credit hours of CLE during each biennial reporting cycle: 4 credit hours must be in Ethics and Professionalism. The other credit hours may be a combination of the following categories: Ethics and Professionalism, Skills, Practice Management or Professional Practice.

Newly admitted attorneys must complete 32 credit hours of accredited “transitional” education within the first two years of admission to the Bar. Sixteen (16) credit hours must be completed in each of the first two years of admission to the Bar as follows: 3 hours of Ethics and Professionalism; 6 hours of Skills; 7 hours of Practice Management and/or areas of Professional Practice.

ADDITIONAL CLE REQUIREMENT - CYBERSECURITY

In addition to ethics and professionalism, skills, law practice management, areas of professional practice, and diversity, inclusion and elimination of bias courses, there is now a category for cybersecurity, privacy and data protection. This category of credit is effective January 1, 2023.

Effective January 1, 2023 - New Category of CLE Credit - Cybersecurity, Privacy and Data Protection: A new category of CLE credit - Cybersecurity, Privacy and Data Protection - has been added to the CLE Program Rules. This category is defined in the [CLE Program Rules 22 NYCRR 1500.2\(h\)](#) and clarified in the [Cybersecurity, Privacy and Data Protection FAQs](#) and [Guidance document](#). Providers may issue credit in Cybersecurity, Privacy and Data Protection to attorneys who complete courses in this new category on or after January 1, 2023.

See [CLE Program Rules 22 NYCRR 1500.22\(a\)](#).

Experienced attorneys due to re-register on or after July 1, 2023 must complete at least one credit hour in the Cybersecurity, Privacy and Data Protection CLE category of credit as part of their biennial CLE requirement. Newly admitted attorneys need not comply if admitted prior to July 1, 2023 in their newly admitted cycle, but must comply in future reporting cycles. Attorneys admitted on or after July 1, 2023, must complete the 1 CLE credit hour in Cybersecurity, Privacy and Data Protection as part of their new admitted attorney cycle. For more information about the CLE Rules, visit nycourts.gov/Attorneys/CLE.

See [CLE Program Rules 22 NYCRR 1500.12\(a\)](#).

Attorneys may apply a maximum of three (3) credit hours of cybersecurity, privacy and data protection-ethics to the four-credit hour ethics and professionalism requirement.

FINANCIAL HARDSHIP POLICY:

RCBA members and non-members may apply for tuition assistance to attend Association continuing legal education programs based on financial hardship. Any member or non-member of our Association who has a genuine financial hardship may apply in writing, no later than five working days prior to the program, explaining the basis of his/her hardship, and, if approved, may receive tuition assistance, depending on the circumstances.



Hello Spring!



COMMITTEE CORNER

The Rockland County Bar Association has 26 active committees, plus several *ad hoc* committees. Members may join these committees and volunteer their time and expertise for the good of the Bar Association, their colleagues and the public. Here are some of the activities! We look forward to seeing you!

NEW LAWYERS AND SOCIAL COMMITTEE

Nicole DiGiacomo is the new Co-Chair of this Committee and she is looking for new members. The Committee will engage newly admitted attorneys as well as seasoned attorneys who are interested in mentoring those newly admitted.

PRO BONO COMMITTEE

This newly established Committee embraces the spirit of “pro bono” by connecting with Bar Association practitioners from all areas to create a centralized corps of volunteers who will assist those in need who are unable to be assisted by the Legal Aid Society or Legal Services of the Hudson Valley. If you are interested in joining this Committee, please email Nancy at Nancy@rocklandbar.org

IMMIGRATION LAW COMMITTEE

Immigration Law is a critical component of our system of laws. We are pleased to announce that the Rockland County Bar Association is relaunching the Immigration Committee. The committee is being co-chaired by two experienced immigration attorneys, Ivon Anaya, Esq. and Crismelly Morales, Esq. Given the recent influx of Immigration in our community, we are excited to provide insight and updated information about Immigration Law to the members of the Bar Association and our community.

We are looking for new members! If you are interested in joining our committee, please email Ivon at Ianaya@centersc.org and Crismelly at Crismelly@cmoraleslaw.com to express your interest. Stay tuned for our future meetings and events!

PERSONAL INJURY & COMPENSATION LAW COMMITTEE

Your Rockland County Bar Association Personal Injury & Compensation Law (Negligence) Committee regularly meets via zoom. If you are not yet a member and wish to join our committee, please contact the association. If you have a topic that you think may be of interest to the committee, please let us know.

The committee meeting will be held on Zoom.

If you are not on the committee and are interested in participating in one of these meetings, please contact us.

Thank you, **Jeffrey Adams** (Chair) & **Valerie Crown** (Co-Chair)

MEMO

TO ALL RCBA COMMITTEE CHAIRS & VICE – CHAIRS

The Association is seeking articles from your committee for publication in the Bar's monthly Newsletter. The membership would greatly benefit from your input and would appreciate it. The article does not have to be complicated or long- a succinct piece of general interest and importance would be best.

If you are able to submit an article for the Newsletter it should be sent via email to Jeanmarie@rocklandbar.org by the 15th of the month so that the Executive Board may review it.

Thank you!



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or judith@thebachmanlawfirm.com. As a professional courtesy and seeking colleague to colleague conversations, she will help you evaluate options and talk about practice acquisition.

ATTORNEY

Neimark Coffinas & Lapp LLP (New City) seeking attorney with 3 to 5 years' experience in personal injury litigation. Salary commensurate with experience. Generous benefits package.

E-mail resume to: ggc@ncl.law

ASSOCIATE ATTORNEY

Feerick Nugent MacCartney (South Nyack) seeking NYS admitted attorney 3-4 years experience.

Work entails General, Land Use, Personal Injury Litigation – State/Federal Court and familiarity with motion practice, rules of evidence, drafting complaints, discovery responses, memorandum of laws. Salary: \$120,000-\$150,000. Benefits. Higher salary commensurate with experience. Email re-

Matrimonial/Family Law Attorney

Rockland County, NY law firm specializing in matrimonial and family law is seeking a full time associate. Excellent writing skills, trial experience and fluent Spanish speaking a plus. Starting salary range is \$55,000.00 to \$85,000.00+. Please call 845.639.4600 or fax resume to 845.639.4610 or E-mail: michael@demoyalaw.com

OFFICE SPACE AVAILABLE

Beldock & Saunders, PC, located in New City, has 3 offices with 3 separate workstations,

for support staff, available to sublet. Access to conference rooms, reception area, kitchen

& plenty of parking. Rent terms are flexible. Contact Steve at 845-267-4878 or email

PARALEGALS AVAILABLE

Rockland Community College ABA approved Paralegal program can assist attorneys with filling their open job positions for both part and full time employment opportunities. We have students that range from entry level to experienced Paralegals. Paralegals are not permitted to practice law, which means they cannot give legal advice, represent clients in court, set a legal fee or accept a case. All RCC students are trained to work virtually and proficient in virtual computer programs. Contact Amy Hurwitz-Placement Coordinator at (845) 574-4418 or email at amy.hurwitz@sunyrockland.edu

MUNICIPAL ATTORNEY

Feerick Nugent MacCartney (South Nyack) seeking NYS admitted attorney with 2-3 years experience, interest in local government, municipal, labor law. Full-time, requiring attendance at municipal nightly meetings. Starting salary is \$120,000 to \$150,000 - higher starting salary commensurate with experience. Benefits available.

Email resume: shannond@fnmlawfirm.com

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Contact: jeff@injurylaw-ny.com

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Call 845.639.4600 or fax resume to 845.639.4610 or

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