



THE DOCKET

News of the National Conference of Appellate Court Clerks



**49th Annual
NCACC Conference
Williamsburg, VA
July 31-August 4, 2022**

The annual conference is in-person this year. We will be congregating in Colonial Williamsburg and enjoying the Virginia sunshine and the historic atmosphere. This is a great opportunity to meet your colleagues from across the country and spend some time sharing ideas, learning together, and frolicking in the world's largest living history museum. If you haven't yet registered for this year's conference, time is running out. In an effort to ensure your seat at this great conference, please register by **July 9th**. The hotel will only hold our block through **July 9th**. Also, conference registration prices will increase after **July 9th**. This year's conference is going to be revolutionary — you don't want to miss this great opportunity. Please go to our newly designed website and get registered today.

<https://appellatecourtclerks.org/conference>

CALL FOR THE ANNUAL MEETING

President Larry Royster, through Secretary Claudia Jenks, and pursuant to the provisions of Article V, Section 5 of the Bylaws, hereby issues the call for the 49th Annual Meeting of the National Conference of Appellate Court Clerks to be held in Williamsburg, Virginia on Sunday, July 31 through Thursday, August 4, 2022, at the Woodlands Hotel & Suites.

Respectfully Submitted,
Claudia Jenks,
Secretary

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THE DOCKET

News of the National Conference of Appellate Court Clerks

President: Larry Royster (MI)

President-Elect: Chris Prine (TX)

Vice-President: Greg Hilton (MD)

Past-President: Edythe (Eydie)
Gaiser (WV)

Secretary: Claudia Jenks (TX)

Treasurer: Jim Hivner (TN)

Executive Committee:

Polly Brock (CO)

Mary Beth Kuenzel (FL)

Kevin Lane (CA)

Greg Pachmayr (IN)

Doug Shima (KS)

Amy Wood (AZ)

Communications Committee:

Meredith Montgomery (AK), Chair

mmontgomery@akcourts.gov

(907) 264-0606

Polly Brock (CO)

Greg Hilton (MD)

Mary Beth Kuenzel (FL)

Scott Mitchell (AL)

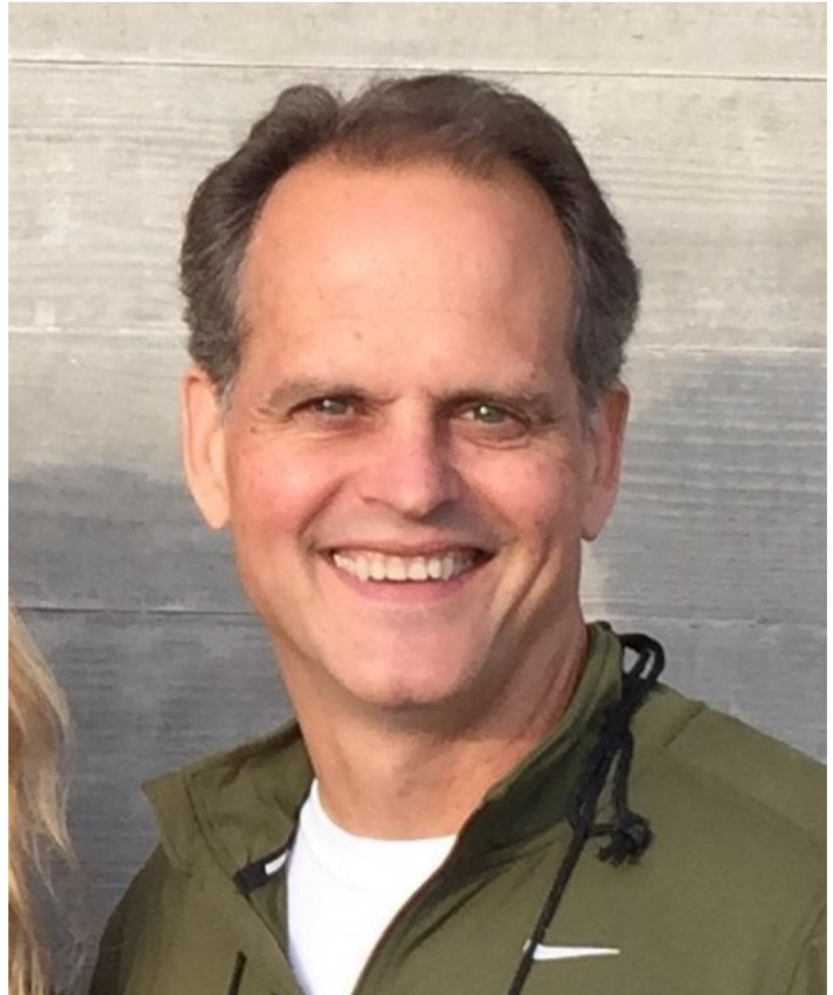
Greg Pachmayr (IN)

Doug Shima (KS)

THE PRESIDENT'S PAGE

LARRY ROYSTER (MI)

As I was struggling to write this quarter's "President's Page" article for *The Docket*, a news alert popped up on my computer screen about the U.S. Supreme Court overturning the federal constitutional protection to abortion access established in *Roe v Wade* and *Planned Parenthood of Southeastern PA v Casey*. I don't intend to criticize, or even analyze, the majority opinion in *Dobbs v Jackson Women's Health Organization* in this article. I know that people's views on abortion are sincerely held and deeply divided. Moreover, Michigan has several pending lawsuits involving our felony abortion statute that were filed in anticipation of the *Dobbs* decision after the draft opinion was leaked to the media. As a court officer, it would be wholly inappropriate for me to say anything at all in light of that litigation. I am troubled, though, about another news story that appeared with the *Dobbs* news feed. That article reported that a Gallup poll released on June 23 showed that only 25% of Americans have "quite a lot" or a "great deal" of confidence in SCOTUS. That beats the previous record low of 30% in 2014 and represents a decrease of 11 percentage points in just one year. The lack of confidence in SCOTUS doesn't necessarily implicate other courts but I think many of us have seen signs of eroding confidence in our own courts. The webinar this past March on verbal diffusion and violence de-escalation techniques was a result of numerous members expressing concern



over the increase in the number of angry and verbally abusive litigants doing business with their courts. When people begin to doubt the impartiality or wisdom of a court's decisions, they become angry and may act out in aggressive and threatening ways. Each of us and our staffs, being the public "faces" of our courts, often endure the brunt of those negative exchanges.

How we interact with the attorneys, litigants (yes, even those angry and abusive ones), and public plays a huge role in determining how our courts are perceived. We all know that to be true. But it's often difficult to be patient with a caller who, on a busy work day, insists on telling you every detail of their case and why the lower courts were wrong in not ruling in their favor. And it's a normal human reaction to raise your voice when the person on the other end of the call is shouting at you. Lord knows I have returned anger with anger and have abruptly ended phone calls many times (I'm ashamed to admit it but there is something very cathartic about slamming down a phone receiver in disgust). Not always but usually, I feel terrible about my reactions to these episodes after a few minutes of deep breathing. Over the years, I have come up with a few standard responses that seem to work well most instances. For the person who insists on telling me their life story, I will listen for a few minutes before interrupting and saying, "I'm sorry for interrupting but I have to leave for a meeting shortly and I want to make sure I can answer any questions you have before I need to hang up. Do you have a specific question about your case?" For the person who is angry or frustrated at the lower court(s) and takes that anger/frustration out on me, I will say: "I'm very sorry that you had such a bad experience with the XXXX court but I'm not your enemy. My job is to help you and other litigants in this court." If a person is angry with my office or court, I might say, "Please tell me what you would like from me (or the court). If it's something I'm allowed to do, I promise you I will give it my best effort. If it's something I'm not allowed to do, I will explain to you why." Thankfully, for my office and I hope for yours, such negative interactions are the rare exception and not the norm.

Even though I might congratulate myself now and again for not reaching through the receiver to slap the caller on the other end, I know that creating a positive perception of the court actually comes from the everyday and seemingly benign interactions with the attorneys, litigants, and public. To illustrate, a few months back I phoned a lower court because I needed to speak with someone about a case that was initiated in that court but was now pending in my court. An answering machine picked up and, after I spent several minutes selecting different menu options, the call was disconnected. Needless to say, my impression of that court is not positive. In other instances not involving the courts, I've been placed on hold for what seems like hours (in purgatory, time apparently slows down, although if you're calling an airline to reschedule a canceled flight, the hours-long wait is in real time) or have left numerous messages without ever receiving a call-back. Answering phone calls directly, limiting hold times to under one minute or offering to

take messages if the hold times are likely to be longer, and returning phone calls the same day, if not within an hour or two, will go a long way in improving your court's Yelp reviews. Here are some other examples from Highlights magazine that may affect the public's perception and confidence in your court:

Goofus and Gallant	
Goofus answers the phone by tersely saying, "Michigan Supreme Court."	Gallant says in a friendly voice, "Michigan Supreme Court, how may I help you?"
Goofus answers a second call and says, "Hold please. [Followed by immediate background music]."	Gallant says to the second caller, "May I put you on hold? [Waits for a response]. Thank you, I will be right back."
Goofus says in response to a wrong call, "This is the Clerk's Office. You want the IT Department. [Hangs up]."	Gallant says, "I'm sorry, you've reached the Clerk's Office. You'll need to speak with someone in the IT Department. Would you like me to find that number for you?"

As clerks, we do many things every day that can either enhance or diminish the respect and confidence that the attorneys, litigants, and public have for our courts. The bottom line is this: Don't be a Goofus. I'd love to hear your tips, tricks, and strategies in operating a user-friendly office and handling difficult situations or people. Send them to me at RoysterL@courts.mi.gov and I'll compile them and post them on the NCACC's new website.

Speaking of the new website, it has been operational for about a month. If you haven't had an opportunity to check it out yet, go to <https://appellatecourtclerks.org/>. I've heard from many people about how great it looks. I agree! The web designer, Steve Circeo of Maxcreative, really did an amazing job. There's still lots of content to be added but the website will always be a work in progress. We are now at the point where we'd like all members, active and retired, to register for access to the Member Area, which is where we will keep the content for members only (e.g., the online member directory created by Thomson Reuters). To register, click on one of the selections that appear when you hover your cursor over the Member Area link at the top of the home page or go directly to <https://appellatecourtclerks.org/register>. Enter the password "members" and click the Enter button. That will take you to the registration page with numerous fields, such as Username, First Name, Last Name, etc. Once you've filled out all of the fields, click the Register button. If you're able, please complete the registration process in the next few days.

If you have any trouble registering, there will be a member of the Convention Assistance Committee stationed at the registration table for the Williamsburg conference to assist you. Shortly after the conference, we will eliminate the “members” password so that your individual login credentials will be required to access the members only content.

It’s hard to believe the Williamsburg conference is less than one month away. I hope everyone has finalized their travel plans and reserved their rooms at the Woodlands Hotel. It promises to be a great conference thanks to the hard work and efforts of co-hosts Jim Hivner (TN) and Amy Funderburk (former clerk, NC), Program Committee chair Scott Mitchell (AL) and his committee members, and vendor chair Deana Williamson (TX). At the business meeting on the last day of the conference, we will vote on the slate of new Officers and Executive Committee members. Kevin Lane (CA), the chair of the Nominating Committee, has listed the nominees and provided their biographies elsewhere in this edition of *The Docket*. As we get ready to select this new group of leaders, I want to thank the out-going leadership team, Edyth Nash Gaiser (WV), Past President, and Greg Pachmayr (IN) and Doug Shima (KS), Executive Committee members, for their service to the NCACC. I also want to especially recognize and thank Christopher Prine (TX) for his wise counsel and many years of service to the organization. Chris was to succeed me as President at the conclusion of the conference but, unfortunately, he had to resign the position due to unforeseen circumstances. In his resignation letter, Chris said, “I truly looked forward to serving as President and greatly appreciated the faith the membership had in me in selecting me to serve in this position. I deeply regret not being able to fully repay that faith but look forward to continuing to support the conference in any way possible.” Thankfully, Greg Hilton (MD), who was in line to be President-Elect, has agreed to serve as the next President. And although we normally select just a Vice-President at our business meetings, who then moves up the line of succession to President-Elect and then President, at Williamsburg we will vote to fill both the VP and President-Elect positions with nominees Doug Shima (KS) and Jenny Kitchings (SC), respectively. The NCACC is fortunate to have such a deep bench of talented and dedicated members.

After two long years of Zoom conferences and meetings, I look forward to seeing everyone in person at the Williamsburg conference.

Larry Royster, NCACC President Clerk of the Michigan Supreme Court

Ph: (517) 373-2553

Email: RoysterL@courts.mi.gov

2022 FINANICAL REPORTS

Jim Hivner (TN), Treasurer

July 1, 2022

Larry Royster, President
National Conference of Appellate Court Clerks

Re: Treasurer's Report for NCACC

Dear President Royster:

Attached to this correspondence is a copy of the Bank Account Statement for the NCACC for the period ending June 23, 2022 as well as the Investment Account Statement for the period ending May 31, 2022. As you can see, the Conference investments have taken a slight downturn during this economic turmoil. Overall, the Conference is in good financial position and the Finance & Investment Committee continues to monitor the activities of the investments of the Conference. I look forward to seeing everyone at our conference in Williamsburg.

Best Regards,

Jim Hivner, Treasurer



[REDACTED]
NATIONAL CONFERENCE OF APPELLATE
COURT CLERKS
300 NEWPORT AVE
WILLIAMSBURG VA 23185-4147

Your account statement

For 06/23/2022

Contact us



Truist.com



(844) 4TRUIST or
(844) 487-8478

If you are traveling outside of the USA and have concerns about accessing your account while you are traveling, please contact your Branch Banker or call us at 844-4TRUIST.

Account summary

Your previous balance as of 05/23/2022	\$121,072.10
Checks	- 0.00
Other withdrawals, debits and service charges	- 2,651.28
Deposits, credits and interest	+ 831.03
Your new balance as of 06/23/2022	= \$119,251.85

Interest summary

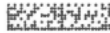
Interest paid this statement period	\$1.03
2022 interest paid year-to-date	\$5.77
Interest rate	0.01%
Annual percentage yield (APY) earned	0.01%

Other withdrawals, debits and service charges

DATE	DESCRIPTION	AMOUNT(\$)
06/13	ACH CORP DEBIT Payables Bill.com National Conference of CUSTOMER ID 016QTBSEY29EJBA	13.78
06/22	ACH CORP DEBIT Payables Bill.com National Conference of CUSTOMER ID 016HHOPQA29RZZW	2,637.50
Total other withdrawals, debits and service charges		= \$2,651.28

Deposits, credits and interest

DATE	DESCRIPTION	AMOUNT(\$)
05/27	AmazonSmile AMZN1KU48ZM1 National Conf of Appel CUSTOMER ID 44IN95OC16MUOU5	5.00
05/27	DEPOSIT	525.00
06/10	DEPOSIT	300.00
06/23	INTEREST PAYMENT	1.03
Total deposits, credits and interest		= \$831.03



ENV# CEBMLQLPBBFTMZN_BBBBB
TRUIST INVESTMENT SERVICES INC
P.O. BOX 596
RICHMOND, VA 23286



Client Advisory Center
Truist Investment Services, Inc.
SECURITIES, BROKERAGE ACCOUNTS AND INSURANCE (INCLUDING ANNUITIES) ARE OFFERED BY TRUIST INVESTMENT SERVICES, INC., A
SEC REGISTERED BROKER-DEALER, MEMBER FINRA, SIPC, AND A LICENSED INSURANCE AGENCY INVESTMENT ADVISORY
SERVICES ARE OFFERED BY TRUIST ADVISORY SERVICES, INC., A SEC REGISTERED INVESTMENT ADVISER.

[REDACTED]
NATL CONFERENCE OF APPELLATE
COURT CLERKS
300 NEWPORT AVE
WILLIAMSBURG VA 23185

STATEMENT FOR THE PERIOD MAY 1, 2022 TO MAY 31, 2022

NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation
[REDACTED]

Separate Acc't Manager: TRUIST ADVISORY SERVICES INC.
Investment Discipline: PASSIVE BALANCED ETF

YOUR FINANCIAL ADVISOR IS:
DOUGLAS MCLEOD
RR#: MZJ

For questions about your accounts:
Local: 800-874-4770

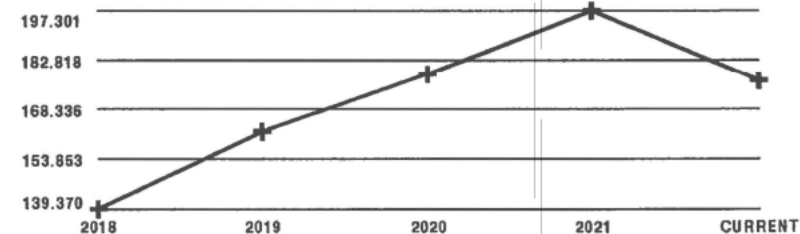
TOTAL VALUE OF YOUR PORTFOLIO **\$176,823.44**

FOR YOUR INFORMATION

Effective May 14th, 2022, the rate of the fee charged by the SEC pursuant to Section 31 of the Securities Exchange Act of 1934 applied to securities transactions on the exchanges will increase to \$22.90 per million. This fee is deducted from proceeds when equities and options are sold and is displayed on confirms as Activity Assessment Fee.

CHANGE IN VALUE OF YOUR PORTFOLIO

\$ thousands



Change In Value Of Your Portfolio information can be found in Miscellaneous Footnotes at the end of this statement.

Truist Investment Services, Inc.
[REDACTED]

Account carried with National Financial Services LLC, Member
NYSE, SIPC

Statement for the Period May 1, 2022 to May 31, 2022

NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation

Separate Acc't Manager: TRUIST ADVISORY SERVICES INC.
Investment Discipline: PASSIVE BALANCED ETF



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Account Overview

CHANGE IN ACCOUNT VALUE	Current Period	Year-to-Date
BEGINNING VALUE	\$175,569.95	\$197,301.50
Additions and Withdrawals	\$0.00	\$0.00
Misc. & Corporate Actions	\$0.00	\$0.00
Income	\$138.31	\$857.79
Taxes, Fees and Expenses	\$0.00	(\$1,286.32)
Change in Value	\$1,115.18	(\$20,049.53)
ENDING VALUE (AS OF 05/31/22)	\$176,823.44	\$176,823.44

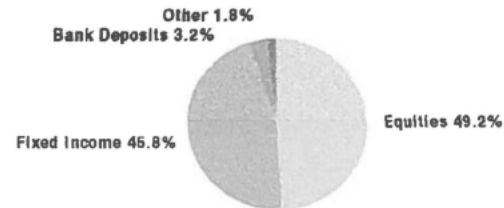
Refer to Miscellaneous Footnotes for more information on Change in Value.

INCOME	Current Period	Year-to-Date
TAXABLE		
Taxable Dividends	\$137.29	\$856.11
Taxable Interest	\$1.02	\$1.68
TOTAL TAXABLE	\$138.31	\$857.79
TOTAL INCOME	\$138.31	\$857.79

Taxable income is determined based on information available to NFS at the time the statement was prepared, and is subject to change. Final information on taxation of interest and dividends is available on Form 1099-Div, which is mailed in February of the subsequent year.

TAXES, FEES AND EXPENSES	Current Period	Year-to-Date
Account Fees	\$0.00	(\$1,286.32)
TOTAL TAXES, FEES AND EXPENSES	\$0.00	(\$1,286.32)

ACCOUNT ALLOCATION



	Percent	Prior Period	Current Period
Bank Deposits	3.2 %	\$5,529.84	\$5,668.15
Equities	49.2	\$86,073.65	\$86,877.98
Fixed Income	45.8	\$80,536.44	\$81,008.00
Other	1.8	\$3,430.02	\$3,269.31
TOTAL	100.0 %	\$175,569.95	\$176,823.44

Other holdings are infrequently traded instruments or other securities which are not easily categorized.

Account Allocation shows the percentage that each asset class represents of your total account value. Account Allocation for equities, fixed income, and other categories may include mutual funds and may be net of short positions. NFS has made assumptions concerning how certain mutual funds are allocated. Closed-end mutual funds and Exchange Traded Products (ETPs) listed on an exchange may be included in the equity allocation. The chart may not reflect your actual portfolio allocation. Consult your broker/dealer prior to making investment decisions.

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
NYSE, SIPC

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Statement for the Period May 1, 2022 to May 31, 2022

NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation

Separate Acc't Manager: TRUIST ADVISORY SERVICES INC.
Investment Discipline: PASSIVE BALANCED ETF

TRUIST 

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Truist Investment Services, Inc.

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Account Overview *continued*

REALIZED GAIN (LOSS)	Current Period	Year-to-Date
Short Term Gain	\$0.00	\$760.61
Short Term Loss	\$0.00	\$1,251.89
Disallowed Short Term Loss	\$0.00	\$0.00
TOTAL SHORT TERM GAIN (LOSS)	\$0.00	(\$491.28)
Long Term Gain	\$0.00	\$889.67
Long Term Loss	\$0.00	\$1.35
Disallowed Long Term Loss	\$0.00	\$0.00
TOTAL LONG TERM GAIN (LOSS)	\$0.00	\$888.32

NFS-provided cost basis, realized gain (loss) and holding period information may not reflect all adjustments necessary for your tax reporting purposes. Please refer to Footnotes and Cost Basis Information at the end of this statement for more information.

MESSAGES AND ALERTS

*NOT FDIC INSURED*NO BANK GUARANTEE*MAY LOSE VALUE Services provided by the following affiliates of Truist Financial Corporation. Securities, brokerage accounts and insurance- including annuities-are offered by Truist Investment Services, Inc., a SEC registered broker-dealer, member FINRA, SIPC, and a licensed insurance agency. Investment advisory services are offered by Truist Advisory Services, Inc. , and GFO Advisory Services, LLC, SEC registered investment advisers. Mutual fund products are advised by Sterling Capital Management, LLC.

Please consult with your financial advisor prior to making investment decisions and promptly inform your financial advisor of any changes to your financial situation or investment objectives or if you wish to impose or modify reasonable restrictions with regard to the management of your account.

If you have an investment advisory agreement with Truist Advisory Services, Inc., only advisory share class annuities referenced under the Assets Held Away section of this statement are included in your investment advisory assets. Truist Advisory Services, Inc. does not provide ongoing investment advice or charge advisory fees on non-advisory share class annuities.

Visit www.truist.com/wealth/tis-disclosure for Truist Investment Services clear, easy-to-understand information related to its products, accounts, and services, including disclosures relating to the SEC Regulation Best Interest and Volatile Markets.

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
NYSE, SIPC

Statement for the Period May 1, 2022 to May 31, 2022

NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation

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Holdings

NFS-provided cost basis, realized gain (loss) and holding period information may not reflect all adjustments necessary for tax purposes. Please refer to Footnotes and Cost Basis Information at the end of this statement for more information.

For additional information regarding your holdings, please refer to the footnotes at the end of the statement.

Client Investment - Reflects the amount from share purchases, transfers and conversions that have customer or third party provided cost basis. The amount does not reflect all account activity, including, but not limited to shares acquired via certain corporate actions, gifted/inherited, date of death step-up, or dividend reinvestments. The amount may fluctuate over time based on activity within the account due to buying, transferring or converting additional shares or selling all or part of a security. Transfers or conversions that do not have cost basis will not be reflected in the Client Investment amount. The reflected Client Investment amount does not represent your cost basis reported on IRS Form 1099-B, as it is a separate calculation.

CASH AND CASH EQUIVALENTS - 3.21% of Total Account Value

Description	Symbol/Cusip Account Type	Quantity	Price on 05/31/22	Current Market Value	Estimated Annual Income
Bank Deposits					
Bank deposits are not securities and are not covered by the Securities Investor Protection Corporation (SIPC). Funds used to purchase or sweep to a bank deposit are SIPC protected until deposited to a Program Bank at which time funds may be eligible for FDIC insurance. Customers are responsible for monitoring their total deposits at each Program Bank to determine the extent of available FDIC insurance. Refer to the Bank Deposit Detail section which appears later in this statement for information on the banks holding your deposits. If your account was established on the last business day of this month, your statement will not include a Bank Deposit Detail section. The Interest Rate below is the interest rate effective for Cash Balances in your FDIC-Insured Bank Deposit Sweep on the last day of the statement period.					
LEVEL RATE MULTIBANK SWEEP MANAGED	QTMMQ	5,668.15	\$1.00	\$5,668.15	
Interest Rate	0.22% CASH				
Total Cash and Cash Equivalents				\$5,668.15	

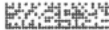
HOLDINGS > EXCHANGE TRADED PRODUCTS - 96.79% of Total Account Value

Description	Symbol/Cusip Account Type	Quantity	Price on 05/31/22	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
Equity							
INVESCO EXCHANGE TRADED FD TR S&P500 EQL WGT	RSP CASH	66	\$148.93	\$9,829.38	\$137.63	\$10,005.94	(\$176.56)
Estimated Yield 1.40%							
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost	\$151.61						
Client Investment	\$10,005.94						

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
NYSE, SIPC

00215945
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Statement for the Period May 1, 2022 to May 31, 2022



NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation

Separate Acc't Manager: TRUIST ADVISORY SERVICES INC.
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SERVICES ARE OFFERED BY TRUIST ADVISORY SERVICES, INC., A SEC REGISTERED INVESTMENT ADVISER.

HOLDINGS > EXCHANGE TRADED PRODUCTS *continued*

Description	Symbol/Cusip Account Type	Quantity	Price on 05/31/22	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
ISHARES CORE HIGH DIVIDEND ETF	HDV	49	\$108.80	\$5,331.20	\$166.39	\$5,301.66	\$29.54
Estimated Yield 3.12%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$108.20							
Client Investment \$5,301.66							
ISHARES CORE S&P SMALL-CAP E	IJR	34	\$101.28	\$3,443.52	\$56.35	\$2,915.62	\$527.90
Estimated Yield 1.63%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$85.75							
Client Investment \$2,915.62							
ISHARES S&P MIDCAP 400 INDEX FUND	IJH	17	\$251.18	\$4,270.06	\$60.00	\$2,847.31	\$1,422.75
Estimated Yield 1.40%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$167.49							
Client Investment \$2,847.31							
ISHARES S&P 500	IVV	126	\$414.87	\$52,273.62	\$743.06	\$36,062.19	\$16,211.43
Estimated Yield 1.42%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$286.21							
Client Investment \$36,062.19							
ISHARES TRUST CORE MSCI EAFE ETF	IEFA	178	\$65.90	\$11,730.20	\$293.73	\$11,784.31	(\$54.11)
Estimated Yield 2.50%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$66.20							
Client Investment \$11,783.69							
Total Equity				\$86,877.98	\$1,457.16	\$68,917.03	\$17,960.95
Fixed Income							
INVESCO EXCH TRADED FD TR II SR LN ETF	BKLN	92	\$21.07	\$1,938.44	\$62.57	\$2,041.65	(\$103.21)
Estimated Yield 3.22%	CASH						
Dividend Option Cash							

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
NYSE, SIPC

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Statement for the Period May 1, 2022 to May 31, 2022



NATIONAL CONFERENCE OF APPELLATE COURT CLERKS - Corporation

Separate Acc't Manager: TRUIST ADVISORY SERVICES INC.
Investment Discipline: PASSIVE BALANCED ETF

Client Advisory Center
Truist Investment Services, Inc.

SECURITIES, BROKERAGE ACCOUNTS AND INSURANCE (INCLUDING ANNUITIES) ARE OFFERED BY TRUIST INVESTMENT SERVICES, INC., A SEC REGISTERED BROKER-DEALER, MEMBER FINRA, SIPC, AND A LICENSED INSURANCE AGENCY. INVESTMENT ADVISORY SERVICES ARE OFFERED BY TRUIST ADVISORY SERVICES, INC., A SEC REGISTERED INVESTMENT ADVISER.

HOLDINGS > EXCHANGE TRADED PRODUCTS *continued*

Description	Symbol/Cusip Account Type	Quantity	Price on 05/31/22	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
INVESTCO EXCH TRADED FD TR II SR LN ETF	BKLN	<i>continued</i>					
Capital Gain Option Cash							
Average Unit Cost							
Client Investment							
ISHARES TR BROAD USD HIGH	USHY	128	\$37.49	\$4,798.72	\$264.03	\$5,278.72	(\$480.00)
Estimated Yield 5.50%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost							
Client Investment							
ISHARES TR MBS ETF	MBB	214	\$99.17	\$21,222.38	\$281.02	\$22,297.10	(\$1,074.72)
Estimated Yield 1.32%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost							
Client Investment							
ISHARES TR US TREAS BD ETF	GOVT	1,262	\$24.13	\$30,452.06	\$345.68	\$31,699.56	(\$1,247.50)
Estimated Yield 1.13%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost							
Client Investment							
ISHARES TR USD INV GRDE ETF	USIG	375	\$52.70	\$19,762.50	\$512.61	\$20,676.51	(\$914.01)
Estimated Yield 2.59%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost							
Client Investment							
ISHARES TRUST 1-3 YEAR TREASURY BOND ETF	SHY	34	\$83.35	\$2,833.90	\$8.05	\$2,828.46	\$5.44
Estimated Yield 0.28%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Next Dividend Payable: 12/07/22							
Average Unit Cost							
Client Investment							
Total Fixed Income				\$81,008.00	\$1,473.96	\$84,822.00	(\$3,814.00)

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
NYSE, SIPC

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Statement for the Period May 1, 2022 to May 31, 2022



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HOLDINGS > EXCHANGE TRADED PRODUCTS *continued*

Description	Symbol/Cusip Account Type	Quantity	Price on 05/31/22	Current Market Value	Estimated Annual Income	Original/Adjusted Cost Basis	Unrealized Gain (Loss)
Other							
VANGUARD REAL ESTATE ETF	VNQ	33	\$99.07	\$3,289.31	\$99.52	\$3,247.74	\$21.57
Estimated Yield 3.04%	CASH						
Dividend Option Cash							
Capital Gain Option Cash							
Average Unit Cost \$98.42							
Client Investment \$3,275.11							
Total Exchange Traded Products				\$171,155.29	\$3,030.64	\$156,986.77	\$14,168.52
Total Exchange Traded Products Client Investment		\$157,036.59					
Total Securities				\$171,155.29	\$3,030.64	\$156,986.77	\$14,168.52
TOTAL PORTFOLIO VALUE				\$176,823.44	\$3,030.64	\$156,986.77	\$14,168.52

TOTAL CLIENT INVESTMENT \$157,036.59

Activity

NFS-provided cost basis, realized gain (loss) and holding period information may not reflect all adjustments necessary for tax purposes. Please refer to Footnotes and Cost Basis Information at the end of this statement for more information.

CORE FUND ACTIVITY

For more information about the operation of your core account, please refer to your Customer Agreement.

Settlement Date	Account Type	Transaction	Description	Quantity	Amount
05/06/22	CASH	YOU BOUGHT	LEVEL RATE MULTIBANK SWEEP MANAGED MORNING TRADE @ 1	131.67	(\$131.67)
05/31/22	CASH	YOU BOUGHT	LEVEL RATE MULTIBANK SWEEP MANAGED MORNING TRADE @ 1	5.62	(\$5.62)
05/31/22	CASH	REINVESTMENT	LEVEL RATE MULTIBANK SWEEP MANAGED NET INT REINVEST	1.02	(\$1.02)

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
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ACTIVITY *continued*

	Amount
TOTAL CORE FUND ACTIVITY	(\$138.31)

ACTIVITY > INCOME > TAXABLE INCOME

Settlement Date	Account Type	Transaction	Description	Quantity	Amount
Taxable Dividends					
05/06/22	CASH	DIVIDEND RECEIVED	ISHARES TRUST 1-3 YEAR TREASURY BOND ETF		\$1.48
05/06/22	CASH	DIVIDEND RECEIVED	ISHARES TR MBS ETF		\$31.77
05/06/22	CASH	DIVIDEND RECEIVED	ISHARES TR USD INV GROE ETF		\$44.22
05/06/22	CASH	DIVIDEND RECEIVED	ISHARES TR US TREAS BD ETF		\$32.66
05/06/22	CASH	DIVIDEND RECEIVED	ISHARES TR BROAD USD HIGH		\$21.54
05/31/22	CASH	DIVIDEND RECEIVED	INVESTCO EXCH TRADED FD TR II SR LN ETF		\$5.62
Total Taxable Dividends					\$137.29
Taxable Interest					
05/31/22	CASH	INTEREST RECEIVED	LEVEL RATE MULTIBANK SWEEP MANAGED		\$1.02
Total Taxable Interest					\$1.02
Total Taxable Income					\$138.31
TOTAL INCOME					\$138.31

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
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Statement for the Period May 1, 2022 to May 31, 2022

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ACTIVITY > BANK DEPOSIT DETAIL

Bank Deposits are not securities and are not covered by the Securities Investor Protection Corporation (SIPC). Funds are not FDIC insured until swept to a Program Bank. Customers are responsible for monitoring their total deposits at each Program Bank to determine the extent of available FDIC insurance. Your ending balance at each Program Bank as of the end of this statement period is shown below. If you participate in the Bank Deposit Sweep Program, the Bank Deposit Detail section lists banks and ending balances. Funds pending settlement reflect deposits to (credit) or withdrawals from (debit) to a Program Bank.

Bank	Beginning Balance	Ending Balance
Truist Bank	\$5,529.84	\$5,668.15
Total Bank Deposits	\$5,529.84	\$5,668.15

Footnotes and Cost Basis Information

Amortization, accretion and similar adjustments to cost basis have been provided for many fixed income securities (and some bond-like equities), however, they are not provided for certain types, such as short-term instruments, Unit Investment Trusts, foreign fixed income securities, or those that are subject to early prepayment of principal (pay downs). Where current year premium or acquisition premium amortization is provided, the prior years' cumulative amortization is reflected in the adjusted cost basis, but we cannot provide a breakdown or the total of such prior amortization amounts.

NFS is required to report certain cost basis and related information to the IRS on the Form 1099-B. Your official 1099-B forms for certain transactions will reflect which lots have been sold for tax purposes. To apply a specific identification cost basis method to 1099-B reporting, appropriate instructions must be on file with NFS or be received by NFS before the trade has settled. Absent such instructions, NFS determines cost basis at the time of sale based on its default methods of average cost for open-end mutual funds and first-in, first-out (FIFO) for all other (including ETFs) unless your broker dealer has elected to use another default method. NFS applies FIFO (or other disposal method, if applicable) based on its records, which may be different from yours. For transactions that are not subject to 1099-B cost basis reporting, you should refer to your trade confirmations and other applicable records to determine which lots were considered sold for tax purposes.

While NFS must meet IRS requirements with respect to certain information required to be reported to the IRS, NFS-provided cost basis, realized gain and loss, and holding period information may not reflect all adjustments necessary for your tax reporting purposes. NFS makes no warranties with respect to and specifically disclaims any liability arising out of a customer's use of, or any tax position taken in reliance upon, such information.

For investments in partnerships, NFS does not make any adjustments to cost basis information as the calculation of basis in such investments requires supplemental information from the partnership on its income and distributions during the period you held your investment. Partnerships usually provide this additional information on a Form K-1 issued by April 15th of the following year.

Consult your tax advisor for further information.

Cost basis and gain/loss information is provided as a service to corporate accounts. The information listed in the year-to-date gain/loss summary section is based on a calendar year (January - December). If your business/entity has a fiscal year end other than December 31st for tax purposes, the year-to-date information will not apply. If you have questions about your tax situation, consult your tax advisor.



Statement for the Period May 1, 2022 to May 31, 2022

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Miscellaneous Footnotes

CHANGE IN VALUE OF YOUR PORTFOLIO is the change in market value of your portfolio assets over the time period shown. The portfolio assets include the market value of all the securities in the account, plus insurance and annuity assets if applicable. The time frame of the graph is from account opening or September 2011, whichever is later, to the current period. Please note that large increases and/or declines in the change in the value of the portfolio can be due to additions, distribution and/or performance.

CHANGE IN VALUE reflects appreciation or depreciation of your holdings due to price changes plus any activity not reflected within Additions and Withdrawals, Misc. & Corporate Actions, Income, Taxes, Fees and Expenses, and Other Activity sections. Change in Value does not reflect activity related to assets in which NFS is not the custodian (e.g. Insurance and Annuities, Assets Held Away and Other Assets Held Away).

CALLABLE SECURITIES LOTTERY - When street name or bearer securities held for you are subject to a partial call or partial redemption by the issuer, NFS may or may not receive an allocation of called/redeemed securities by the issuer, transfer agent and/or depository. If NFS is allocated a portion of the called/redeemed securities, NFS utilizes an impartial lottery allocation system, in accordance with applicable rules, that randomly selects the securities within customer accounts that will be called/redeemed. NFS' allocations are not made on a pro rata basis and it is possible for you to receive a full or partial allocation, or no allocation. You have the right to withdraw uncalled fully paid securities at any time prior to the cutoff date and time established by the issuer, transfer agent and/or depository with respect to the partial call, and also to withdraw excess margin securities provided your account is not subject to restriction under Regulation T or such withdrawal will not cause an undermargined condition.

PRICING INFORMATION - Prices displayed are obtained from sources that may include pricing vendors, broker/dealers who clear through NFS and/or other sources. Prices may not reflect current fair market value and/or may not be readily marketable or redeemable at the prices shown.

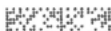
FOREIGN EXCHANGE TRANSACTIONS - Some transaction types necessitate a foreign currency exchange (FX) in order to settle. FX transactions may be effected by Fidelity Forex, LLC. on a principal basis. Fidelity Forex, LLC., an affiliate of NFS, may impose a commission or markup on the prevailing interbank market price, which may result in a higher price to you. Fidelity Forex, LLC. may share a portion of any FX commission or markup with NFS. More favorable rates may be available through third parties not affiliated with NFS. The rate applicable to any transaction involving an FX is available upon request through your broker-dealer.

COST BASIS LEGISLATION - New IRS Rules will require National Financial Services to report cost basis and holding period information for the sale of shares of open end Mutual Fund holdings purchased on or after January 1, 2012 on Form 1099-B. National Financial Services determines the cost basis for all shares of open end mutual funds using a default method of average cost. Alternatively, account owners or their brokers and advisors can instruct National Financial Services to determine the cost basis for shares of open end mutual funds by 1) setting up their non-retirement accounts with one of our eleven tax lot disposal methods available to investors or 2) identifying specific tax lots to sell at the time of a transaction. Contact your broker or advisor to learn more about the cost basis tracking of your holdings.

Truist Investment Services, Inc.

Account carried with National Financial Services LLC, Member
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GLOSSARY Short Account Balances—If you have sold securities under the short sale rule, we have, in accordance with regulations, segregated the proceeds from such transactions in your Short Account. Any market increases or decreases from the original sale price will be marked to the market and will be transferred to your Margin Account on a weekly basis. **Market Value**—The Total Market Value has been calculated out to 9 decimal places but the individual unit price is displayed in 5 decimal places. The Total Market Value represents prices obtained from various sources, may be impacted by the frequency in which such prices are reported and such prices are not guaranteed. Prices received from pricing vendors are generally based on current market quotes, but when such quotes are not available the pricing vendors use a variety of techniques to estimate value. These estimates, particularly for **fixed income securities**, may be based on certain minimum principal amounts (e.g. \$1 million) and may not reflect all of the factors that affect the value of the security, including liquidity risk. In certain situations, a price may be derived from a single broker quote. The prices provided are not firm bids or offers. Certain securities may reflect "N/A" or "unavailable" where the price for such security is generally not available from a pricing source. The Market Value of a security, including those

CUSTOMER SERVICE: Please review your statement and report any inaccuracy or discrepancy immediately by calling the telephone number of your broker-dealer reflected on the front of this statement. Reports of any inaccuracy or discrepancy regarding your brokerage account or the activity therein should be directed to your broker-dealer at the telephone number and address reflected on the front of this statement and National Financial Services LLC ("NFS").

NFS carries your brokerage account and acts as your custodian for funds and securities that are deposited with NFS by you or your broker-dealer. In addition to your initial contact with your broker-dealer you may contact NFS at (800) 801-9942. Any oral communications regarding inaccuracies or discrepancies should be reconfirmed in writing to protect your rights, including those under the Securities Investor Protection Act ("SIPA"). When contacting either your broker-dealer or NFS, remember to include your entire brokerage account number to ensure a prompt reply.

ADDITIONAL INFORMATION Free credit balances ("FCB") are funds payable to you on demand. FCB are subject to open commitments such as uncleared checks and exclude proceeds from sales of certificated securities without delivery of the certificate. If your FCB is swept to a core position, you can liquidate the core position and have the proceeds sent to you or held in your account subject to the terms of your account agreement. Required rule 10b-10(a) information not contained herein will be provided on written request. Fidelity may use this free credit balance in connection with its business, subject to applicable law.

Credit Adjustment Program. Accountholders receiving payments in lieu of qualified dividends may not be eligible to receive credit adjustments intended to help cover additional associated federal tax burdens. NFS reserves the right to deny the adjustment to any accountholder and to amend or terminate the credit adjustment program.

Options Customers. Each transaction confirmation previously delivered to you contains full information about commissions and other charges. If you require further information, please contact your broker-dealer.

Assignments of American and European-style options are allocated among customer short positions pursuant to a random allocation procedure, a description of which is available upon request. Short positions in American-style options are liable for assignment at any time. The writer of a European-style option is subject to exercise assignment only during the exercise period. You should advise your broker-dealer promptly of any material change in your investment objectives or financial situation. **Splits, Dividends, and Interest.** Expected stock split, next dividend payable, and next interest payable information has been provided by third parties and may be subject to change. Information for certain securities may be missing if not received from third parties in time for printing. NFS is not responsible for inaccurate, incomplete, or missing information. Please consult your broker-dealer for more information about expected stock split, next dividend payable, and next interest payable for certain securities.

Equity Dividend Reinvestment Customers. Shares credited to your brokerage account resulted from transactions effected as agent by either: 1) Your broker-dealer for your investment account, or 2) through the Depository Trust Company (DTC) dividend reinvestment program. For broker-dealer effected transactions, the time of the transactions, the exchange upon which these transactions occurred and the name of the person from whom the security was purchased will be furnished upon written request. NFS may have acted as market maker in effecting trades in "over-the-counter" securities.

Retirement Contributions/Distributions. A summary of retirement contributions/distributions is displayed for you in the activity summary section of your statement. **Income Reporting.** NFS reports earnings from investments in Traditional IRAs, Rollover IRAs, SEP-IRAs and, Keoghs as tax-deferred income. Earnings from Roth IRAs are reported as tax-free income, since distributions may be tax-free after meeting the 5 year aging requirement and certain other conditions. A financial statement of NFS is available for your personal inspection at its office or a copy of it will be mailed to you upon your written request.

Statement Mailing. NFS will deliver statements by mail or, if applicable, notify you by e-mail of your statement's availability, if you had transactions that affected your cash balances or security positions held in your account(s) during the last monthly reporting period. At a minimum, all brokerage customers will receive quarterly statements (at least four times per calendar year) as long as their accounts contain a cash or securities balance.

Sales Loads and Fees. In connection with (i) access to, purchase or redemption of, and/or maintenance of positions in mutual funds and other investment products such as alternative investments or private placements ("funds") or (ii) infrastructure needed to support such funds, some funds, or their investment affiliates, pay your

priced at par value, may differ from its purchase price and may not closely reflect the value at which the security may be sold or purchased based on various market factors. Investment decisions should be made only after consulting your broker-dealer.

Estimated Annual Income (EAI) & Estimated Yield (EY) - EAI for fixed income is calculated using the coupon rate. For all other securities, EAI is calculated using an indicated annual dividend (IAD). The IAD is an estimate of a security's dividend payments for the next 12 months calculated based on prior and/or declared dividends for that security. EY reflects only the income generated by an investment and not changes in its price which may fluctuate. Interest and dividend rates are subject to change at any time and may be affected by current and future economic, political and business conditions. EAI and EY are estimates only and may include return of principal and/or capital gains, which would render them overstated. EAI and EY are provided for informational purposes only and should not be used or relied on for making investment, trading or tax decisions. EAI and EY are based on data obtained from information providers believed to be reliable, but no assurance can be made as to accuracy, timeliness or completeness.

introducing broker dealer and/or NFS sales loads and 12b-1 fees described in the Offering Materials as well as additional compensation for shareholder services, start-up fees, infrastructure support and maintenance, and marketing, engagement and analytics programs. Additional information about the source(s) and amount(s) of compensation as well as other remuneration received by FBS or NFS will be furnished to you upon written request. At time of purchase fund shares may be assigned a load, transaction fee or no transaction fee status. At time of sale, any fees applicable to your transaction will be assessed based on the status assigned to the shares at time of purchase. **Margin.** If you have applied for margin privileges and been approved, you may borrow money from NFS in exchange for pledging the assets in your account as collateral for any outstanding margin loan. The amount you may borrow is based on the value of securities in your margin account, which is identified on your statement. If you have a margin account, this is a combined statement of your margin account and special memorandum account other than your non-purpose margin accounts maintained for you under Section 220.5 of Regulation T issued by the Board of Governors of the Federal Reserve Board. The permanent record of the separate account, as required by Regulation T, is available for your inspection upon request. **NYSE and FINRA.** All transactions are subject to the constitution, rules, regulations, customs, usages, rulings and interpretations of the exchange market and its clearing house, if any, where the transactions are executed, and of the New York Stock Exchange (NYSE) and of the Financial Industry Regulatory Authority ("FINRA"). The FINRA requires that we notify you in writing of the availability of an investor brochure that includes information describing FINRA Regulation's BrokerCheck Program ("Program"). To obtain a brochure or more information about the Program or FINRA Regulation, contact the FINRA Regulation BrokerCheck Program Hotline at (800) 289-9999 or access the FINRA's web site at www.finra.org. **FINRA Rule 4311** requires that your broker-dealer and NFS allocate between them certain functions regarding the administration of your brokerage account. The following is a summary of the allocation services performed by your broker-dealer and NFS. A more complete description is available upon request. **Your broker-dealer is responsible for:** (1) obtaining and verifying brokerage account information and documentation, (2) opening, approving and monitoring your brokerage account, (3) transmitting timely and accurate orders and other instructions to NFS with respect to your brokerage account, (4) determining the suitability of investment recommendations and advice, (5) operating, and supervising your brokerage account and its own activities in compliance with applicable laws and regulations including compliance with margin rules pertaining to your margin account, if applicable, and (6) maintaining required books and records for the services that it performs. **NFS shall, at the direction of your broker-dealer:** (1) execute, clear and settle transactions processed through NFS by your broker-dealer, (2) prepare and send transaction confirmations and periodic statements of your brokerage account (unless your broker-dealer has undertaken to do so). Certain securities pricing and descriptive information may be provided by your broker-dealer or obtained from third parties deemed to be reliable, however, this information has not been verified by NFS, (3) act as custodian for funds and securities received by NFS on your behalf, (4) follow the instructions of your broker-dealer with respect to transactions and the receipt and delivery of funds and securities for your brokerage account, and (5) extend margin credit for purchasing or carrying securities on margin. Your broker-dealer is responsible for ensuring that your brokerage account is in compliance with federal, industry and NFS margin rules, and for advising you of margin requirements. NFS shall maintain the required books and records for the services it performs. **Securities in accounts carried by NFS** are protected in accordance with the Securities Investor Protection Corporation ("SIPC") up to \$500,000. The \$500,000 total amount of SIPC protection is inclusive of up to \$250,000 protection for claims for cash, subject to periodic adjustments for inflation in accordance with terms of the SIPC statute and approval by SIPC's Board of Directors. NFS also has arranged for coverage above these limits. Neither coverage protects against a decline in the market value of securities, nor does either coverage extend to certain securities that are considered ineligible for coverage. For more details on SIPC, or to request a SIPC brochure, visit www.sipc.org or call 1-202-371-8300. Funds used to purchase or sweep to a bank deposit are SIPC protected until deposited to a Program Bank at which time funds may be eligible for FDIC insurance. Assets Held Away, commodities, unregistered investment contracts, futures accounts, loaned securities and other investments may not be covered. Precious metals are not covered by SIPC protection. Mutual funds and/or other securities are not backed or guaranteed by any bank, nor are they insured by the FDIC and involve investment risk including possible loss of principal.

End of Statement

722239.9.0

Truist Investment Services, Inc.

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PROPOSED AMENDMENTS TO THE NCACC'S BYLAWS

Dan Shearouse (SC), Bylaw Committee Chair

First Proposed Amendment:

The NCACC website is the primary method used to inform members, prospective members and the public of the mission, organization, history, and educational and other activities of the NCACC. In light of this important communication role of the website, the Bylaws Committee recommends that of the NCACC Bylaws be amended to give the Communications Committee responsibility regarding the website:

ARTICLE VII

* * *

3. Standing Committees.

* * *

(d) List of Committees

* * *

(3) Communications Committee. The purpose of this committee is to:

(a) inform the membership of the activities of the Conference, to provide information to enhance the professionalism of appellate court clerks and their offices, and to publish the NCACC newsletter at least quarterly, and

(b) promote the mission and objectives of the NCACC by providing information about the Conference and its members to appropriate individuals and groups, and

(c) coordinate timely updates with the webmaster to ensure the content on the NCACC website provides accurate, timely and useful information regarding the mission, organization, history, and educational and other activities of the NCACC. The Communications Committee may make recommendations to the Executive Committee regarding the operation and functionality of the website. As appropriate, the Communications Committee may consult with the Technology Committee or other Committees in making any recommendations regarding the website.

Second Proposed Amendments:

These proposed amendments to the duties of the Treasurer and the responsibilities of the Finance and Investment Committee are intended to reflect current needs and practices, and help delineate the roles of the Executive Committee, the Finance and Investment Committee, and the Treasurer regarding investments.

ARTICLE V

* * *

6. Duties of Treasurer.

(a) The treasurer is responsible for overseeing the receipt, investment, and proper utilization of all dues, registration fees, and other revenue of the Conference, including any funds collected by the National Center for State Courts and a clerk hosting any conference.

(b) The treasurer serves as the chair of the Finance and Investment Committee and is responsible for executing the decisions of the Committee with respect to the investment of Conference assets, including assets in any separate fund, such as the Educational Fund. At least two weeks prior to each regularly scheduled Executive Committee meeting, the treasurer shall provide the president with all statements of any bank, brokerage, or other entity that holds or manages any assets of the Conference.

(c) The treasurer serves as a member of the Education Fund Committee and is responsible for overseeing the receipt and deposit into the Educational Fund of any revenue designated for the fund.

(d) The treasurer must, at or before the annual business meeting each year, furnish all members with a financial report. This requirement may be met by publishing the financial report in an edition of the Conference's newsletter, *The Docket*, published before the annual meeting.

[proposed bylaw amendments continued on next page]

ARTICLE VII

* * *

3. Standing Committees.

* * *

(d) List of Committees

* * *

(7) Finance and Investment Committee. Subject to an investment strategy promulgated by the Executive Committee,[1] the Finance and Investment Committee shall determine what funds of the Conference, including those in any separate fund such as the Educational Fund, should be invested, and how those funds will be invested. In addition, the Finance and Investment Committee assists the Executive Committee, as the Executive Committee requests, in developing the Conference's budget. . . . [The rest of the paragraph remains unchanged.]

[1] This investment strategy provides guidance regarding investments. It can include, but is not limited to, guidance regarding the goals of any investments, diversification of investments, acceptable risk, types of investments to be considered or excluded, and any limitations on the funds available for investment.

Sunday July 31: Silent Auction —

Everyone is encourage to donate an item for the auction.

And bring your checkbook to bid on the items to support the Educational Fund, which is used to pay for conference speakers and scholarships



NOMINATION COMMITTEE SELECTIONS

Kevin Lane (CA), Nominating Committee Chair

The Nominating Committee Presents the Following Candidates:

President Elect – Jenny Kitchings (SC)

Vice President – Doug Shima (KS)

Secretary – Claudia Jenks (TX)

Executive Committee

Member – Pauline Brock (CO)

Member – Lonn Weissblum (FL)

Member – Tracie Lindeman (AZ)

Jenny Kitchings



Jenny Abbott Kitchings received a Bachelor of Arts from Converse College with a major in Modern Languages, including Spanish, Italian, and French. She went on to graduate from the University of South Carolina School of Law with a Juris Doctor and from the top-ranked Moore School of Business with an International Masters of Business Administration.

Upon graduation, Jenny came to work in the judicial system as a law clerk for the Honorable Daniel F. Pieper, then a circuit judge who was later elected to the Court of Appeals. She transitioned to private practice as an associate with Thurmond, Kirchner, and Timbes in Charleston, South Carolina. She later returned to the court system as a law clerk at the Court of Appeals, until her appointment as Clerk of Court on January 25, 2012.

Upon becoming Clerk, Jenny implemented a new case management system, had her first child, and co-hosted the Charleston NCACC conference. And that was just in her first year as Clerk! She has served on the following committees: Executive Committee, Program Committee, including serving as Chair for the Lexington conference, Technology Committee, Awards/Memorials/Resolutions Committee, Site Selection Committee, and Convention Assistance. Jenny and her husband, Craig, are lucky enough to be the parents of two wonderful daughters. They enjoy hiking, traveling, and family game night.

Nominations, continued.

Doug Shima

Douglas T. Shima is the Clerk of the Appellate Courts in Kansas. Doug attended Bethel College in North Newton, Kansas, graduating with dual degrees in history and German and then Washburn Law School in Topeka, Kansas, graduating with Honors in 1994. He started his law career in the Kansas Court of Appeals central research staff and then hired on as chambers counsel with the Hon. G. Joseph Pierron, Jr., of the Kansas Court of Appeals in 1995. Doug served as chambers counsel with Judge Pierron until Chief Justice Lawton Nuss appointed him as Clerk of the Kansas Appellate Courts in January 2016 overseeing the Kansas Supreme Court and Kansas Court of Appeals.



As should every new appellate court clerk, Doug immediately joined the NCACC in 2016 upon his appointment as Clerk of the Appellate Courts. Doug quickly learned that committee work is the lifeblood of the NCACC and also the best way to grow in his role as an appellate court clerk. Doug has chaired the Award, Resolutions and Memorials Committee and also chaired the Membership and Pictorial Committee. Doug has also served on the Executive Committee, Communications Committee, Convention Assistance Committee, and Program Committee.

Claudia Jenks



Claudia Jenks has served as the Chief Deputy Clerk of the Supreme Court of Texas since March 3, 2003. In that role, Claudia assists the Clerk of the Court in managing and supervising the operation of the Clerk's Office and issues orders of the Court. Prior to working for the Court, Claudia was employed at the Office of Attorney General working with attorneys who represented the Texas Department of Transportation. Claudia holds two bachelor's degrees, in Speech and in Mass Communication, and a Masters Degree in Public Administration from Texas State University-San Marcos. Claudia has been an active member of the NCACC since 2003. Claudia served as secretary these last two years during COVID pandemic and has served numerous times on the Convention Assistance Committee.

Nominations, continued.

Pauline Brock

Pauline Brock is the Clerk of the Colorado Court of Appeals. Polly graduated from the University of Colorado School of Law in 1992. She has worked in several positions for the Court of Appeals, including Deputy District Administrator. She was a staff attorney for the Colorado Court of Appeals specializing in appellate motions and jurisdiction for over 10 years. She is a graduate of the Colorado Judicial Executive Leadership Development Program (2015) and the Colorado Institute for Faculty Excellence in Judicial Education (2017). She currently serves on the Executive Committee, she was the host for the 2015-2016 Annual Conference in Denver, CO and has facilitated many of our discussions in the What's Bugging You sessions of our conference.



Lonn Weissblum



Lonn Weissblum was appointed Clerk of Florida's Fourth District Court of Appeal effective April 7, 2014. Before becoming the Clerk of the Court, Mr. Weissblum served as a career staff attorney to the Honorable Jonathan D. Gerber of the Fourth District Court of Appeal. Mr. Weissblum also served as a law clerk to the Honorable David L. Levy of the Third District Court of Appeal, and was in private practice.

Mr. Weissblum received his B.A. in Psychology with Highest Honors from the University of North Carolina at Chapel Hill in 1997, and his J.D. with Honors from the University of Florida in 2001. Mr. Weissblum has been a member of the Commission on District Court of Appeal Performance and Accountability and the Florida Courts Technology Commission. In addition, he has served on the Appellate Court Website Technical Advisory Board and the Public Online Docket Advisory Group. Mr. Weissblum also has achieved the Certified Court Manager and Certified Court Executive credentials from the National Center for State Courts' Institute for Court Management.

Mr. Weissblum has been a member of the National Conference of Appellate Court Clerks ("NCACC") since 2014. He has served on the conference's Membership, Technology, and Scholarship committees.

Nominations, continued.

Tracie Lindeman



Tracie Lindeman is currently the Clerk of the Arizona Supreme Court, although she originally became involved in NCACC in 2008 when she was appointed Clerk of the Nevada Supreme Court, a position she held for 9 years. After a 4-year semi-retirement, Tracie was appointed Clerk of the Arizona Supreme Court, effective March 15, 2021. She received her undergraduate degree from Stanford University and her law degree from Gonzaga University School of Law. Tracie previously served on the Executive Committee of NCACC, as well as serving as Treasurer. She also hosted the 44th Annual Conference at Lake Tahoe.

NEW MEMBER SPOTLIGHTS

Doug Shima (KS), Membership Committee Chair

Kristy Uemura has been Clerk of the Court of the Court of Appeals and Supreme Court of Hawaii since 2021. Kristy is no stranger to the Hawaii Judiciary having worked in the judiciary since 2014. Being relatively new to her position as Clerk however, Kristy is constantly learning new things every day and knows being a member of NCACC will improve her knowledge of the appellate court system. I'm sure everyone is jealous of Kristy's pastime of trying new restaurants around Oahu. Fun fact is that Kristy is a huge fan of "Friends" and she claims to have seen the entire series well over 20 times---Queue the Friends theme song!! Kristy likes to travel and a bucket list item is to travel to Thailand and visit an elephant sanctuary. Oh, and Kristy wants to go see Taylor Swift in concert. Maybe we could have Taylor Swift as the entertainment for a NCACC annual conference !! That would be awesome.



NEW MEMBERS, continued

Doug Shima (KS), Membership Committee Chair

William “Basil” Tsimpris recently assumed his role as Chief Deputy Clerk of the Supreme Court of Virginia in February 2022. Even though he just started in the Clerk’s Office, he was struck by the professionalism and the camaraderie in the office. All of us share Basil’s feeling when he says that he takes great pride in being a repository upon which the bench, bar, and public can rely with confidence. One of Basil’s mentors was his late grandfather, Father John Geranios, a Greek Orthodox priest. Although he passed away when Basil was a young boy, he was a man of great wisdom and patience. One of Basil’s claims to fame is that he was a resident assistant with actress Kerry Washington in the same freshman dorm. Basil wants to sail the Mediterranean, hit a hole-in-one in golf, and get his dog to stop barking all the time—the last being more of problem than a bucket list item. It is clear Basil’s wife and kids (daughter age 6 and son age 10) are the center of his life.



Javier O. Sepúlveda Rodríguez, Esq., served as Judicial Law Clerk of the Hon. Edgardo Rivera García, Associate Justice of the Supreme Court of Puerto Rico, for more than four years. After being nominated by the Governor and confirmed by the Senate in 2020, Javier served as Assistant Prosecutor of the Department of Justice of Puerto Rico. In addition, Javier served as Deputy Solicitor General of Puerto Rico, where he represented the Government of Puerto Rico in the state and federal appellate courts. In September 2021, Javier was appointed the Clerk of the Supreme Court of Puerto Rico. Javier is also a Law Professor in the School of Law of the University of Puerto Rico. Javier has four dogs: Vela, Gypsy, Lea and, the new born in June 2022, Bruno. He loves spending time with his family and would like to travel the world. In order to relax, Javier loves to go outside every night and listen to the coquis and the sound of the nature.





National Conference of Appellate Court Clerks

49th Annual Meeting · July 31- August 4, 2022 · Williamsburg, Virginia

Saturday, July 30, 2022

8:00 a.m. – 12:00 p.m.	Executive Committee Meeting	Magnolia Room
2:00 p.m. – 5:00 p.m.	Registration	Foyer

Sunday, July 31, 2022

9:30 a.m. – 12:30 p.m.	Registration	Foyer
12:45 p.m. – 1:15 p.m.	New Members and First Time Attendees Orientation	Garden Room
12:45 p.m. – 1:15 p.m.	Family and Guest Orientation	Maple Room
 1:30 p.m. – 3:15 p.m.	Roll Call of the States and Business Meeting (Session I)	Dogwood Room
 BREAK: 15 MINUTES		
 90 3:30 p.m. – 5:30 p.m.	<i>An Afternoon with George Wythe</i> Robert Weathers - Colonial Williamsburg	Dogwood Room
 BREAK: 15 MINUTES		
 5:45 p.m. – 7:30 p.m.	Reception	Cascades Terrace
7:30 p.m. – 8:30 p.m.	Education Fund Silent Auction & Morgan Thomas Slideshow	Dogwood Room
 9:00 p.m. – 12:00 a.m.	Hospitality Room Opening Night	Hospitality Suite

Monday, August 1, 2022

8:20 a.m. – 8:30 a.m.	Morning Announcements & Mindfulness with Ashley Dunasta	Dogwood Room
 90 8:30 a.m. – 10:00 a.m.	<i>Adapting Quality Management Practices to Appellate Court Operations</i> Jarrett Perlow – Chief Deputy Clerk, United States Court of Appeals for the Federal Circuit	Dogwood Room
 BREAK: 15 MINUTES		
 60 10:15 a.m. – 11:15 a.m.	<i>Real Leaders Negotiate! (Opperman Speaker)</i> Jeswald Salacuse – Dean Emeritus, The Fletcher School of Law and Diplomacy, Tufts University	Dogwood Room


 Educational Session
  Business Session
  Vendor Show
  Vendor Supported or Sponsored

	LUNCH ON YOUR OWN:	1 HOUR, 45 MINUTES	
90	1:00 p.m. – 2:30 p.m.	<i>A Forgotten History: Trial by Jury and the American Revolution</i> Beth A. White – Executive Director, West Virginia Association for Justice	Dogwood Room
	BREAK: 15 MINUTES		
75	2:45 p.m. – 4:00 p.m.	<i>Courtroom Technology for Appellate Courts</i> Fred Lederer & Martin Gruen – Center for Legal & Court Technology, William & Mary Law School	Cascades Terrace
60	4:00 p.m. – 5:00 p.m.	<i>Hybrid Courtroom Technology</i> Polly Brock – Clerk, Colorado Court of Appeals; Jenny Kitchings – Clerk, South Carolina Court of Appeals; Laruen Vint – Chief Deputy Clerk, Maryland Court of Appeals; Tristen Worthen – Clerk, Washington Court of Appeals: Division III	
	6:00 p.m. – 10:00 p.m.	Thomson Reuters Event	Jamestown Settlement
	9:00 p.m. – 12:00 a.m.	Hospitality Room	Hospitality Suite

 Educational Session
  Business Session
  Vendor Show
  Vendor Supported or Sponsored

	BREAK: 10 MINUTES		
	10:40 a.m. – 10:55 a.m.	Vendor Introductions & Opening of Vendor Show	Dogwood Room
	BREAK: 5 MINUTES		
	11:00 a.m. – 11:30 a.m.	Vendor Showcase I Vendor 1 Vendor 2 Vendor 3	Garden Room Oak Room – Sec. 1 Oak Room – Sec. 2
	BREAK: 10 MINUTES		
	11:40 a.m. – 12:10 p.m.	Vendor Showcase II Vendor 1 Vendor 2 Vendor 3	Garden Room Oak Room – Sec. 1 Oak Room – Sec. 2
	12:10 p.m. – 1:30 p.m.	Vendor Lunch	Dogwood Room
	1:30 p.m. – 2:00 p.m.	Vendor Showcase III Vendor 1 Vendor 2 Vendor 3	Garden Room Oak Room – Sec. 1 Oak Room – Sec. 2
	BREAK: 15 MINUTES		
60	2:15 p.m. – 3:15 p.m.	<i>A Conversation with United States Supreme Court Clerk Scott Harris</i>	
60	3:15 p.m. – 4:15 p.m.	<i>Preventing Burnout, Setting Boundaries, and Creating Work-Life Harmony</i> Danielle M. Hall – Executive Director, Kansas Lawyers Assistance Program	Dogwood Room
	4:15 p.m. – 5:15 p.m.	Vendor Happy Hour	
	6:00 p.m. – 10:00 p.m.	LexisNexis Event	American Revolution Museum
	9:00 p.m. – 12:00 p.m.	Hospitality Room	Hospitality Suite

Thursday, August 4, 2022

	7:30 a.m. – 8:20 a.m.	Continental Breakfast	
	8:20 a.m. – 8:30 a.m.	Morning Announcements & Mindfulness with Ashley Dunasta	Dogwood Room
60	8:30 a.m. – 9:30 a.m.	<i>Ethics and the Role Our Emotions Play in Meeting Our Obligations</i> Danielle M. Hall – Executive Director, Kansas Lawyers Assistance Program	Dogwood Room

 Educational Session
  Business Session
  Vendor Show
  Vendor Supported or Sponsored

90	9:30 a.m. – 11:00 a.m.	<i>What's Bugging You?</i> Greg Hilton – Clerk, Maryland Court of Special Appeals	Dogwood Room
	BREAK: 10 MINUTES		
	11:10 a.m. – 12:00 p.m.	Business Meeting (Session II)	Dogwood Room
	12:00 p.m. – 1:30 p.m.	Awards Luncheon SPEAKER: Mary McQueen – President, National Center for State Courts	Dogwood Room
	2:30 p.m. – 3:30 p.m.	Critique Session	Dogwood Room
	9:00 p.m. – 12:30 p.m.	Hospitality Room	Hospitality Suite