

**CLIENTS' SECURITY BOARD  
of the Supreme Judicial Court of Massachusetts**

**ANNUAL REPORT FISCAL 2010**

August 31, 2010

Dear Reader:

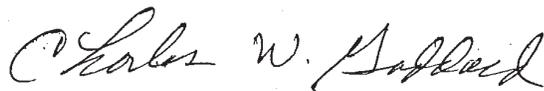
Fiscal 2010 was a busy year indeed. The Board considered 106 claims and made awards in 92 of them amounting to \$2,397,678. This year the four largest awards alone totaled \$1.32 million whereas in all of fiscal year 2009 the Board awarded \$1.33 million. Included in the four largest awards was one for \$655,914 which now stands as the second largest award ever made by the Board. With total awards paid of \$2.4 million, 2010 now ranks as the fourth highest in Board history. As the final statistic, I am especially happy to report that for the first time in the last ten years the number of claims pending at year end is below 100. We concluded the year with 82 claims pending due in large part to streamlined procedures allowing the Board to decide 106 claims, the third highest figure in the last ten years.

For the first time since 2005, trusts and estates was not the practice area with the largest share of the total annual awards. Nevertheless, it was second and accounted for more than \$.5 million. Preventing losses in this practice area remains a challenge and a goal for our profession.

I would like to report on some special Board activities during the year. In May we honored two devoted lawyers with the William LeDoux award. You may read about them on pages 9-10. In October, we conducted our meeting at the new Worcester Law Library. That not only saved some clients a trip to Boston, but it also gave us an opportunity to meet over lunch with many members of the Worcester County bar and explain to them the workings of our Board and how we may be helpful to the bar in general. We hope to continue this practice.

Finally, in July Margaret H. Marshall announced her coming retirement as Chief Justice of the Supreme Judicial Court, a position she has held since 1999. Justice Marshall has been a devoted and unflagging champion of the Board's work throughout her tenure. We thank her for her resolute support and wish her well in the future.

Very truly yours,



Charles W. Goddard  
Chair

**FY10 -- SIGNIFICANT NUMBERS**

Total Awarded	\$2,397,678
Claims decided	106
Total Awards	92
Ten largest awards	\$2,029,918
Next 82 Awards	\$367,760
Largest single award	\$655,914
Smallest single award	\$173.42
Lawyers responsible	46 out of 54,326 (0.08%)
Claims pending, year-end	82
Value of claims pending, year-end	\$3,065,900.16

Summaries of claims decided by the Board may be found at <http://www.mass.gov/ClientsSecurityBoard/>.

A usage analysis for the period 09/08 through 02/10 showed an average of 1,900 site visits per month, 36% of which were visits to the case summaries.

<p><b>STAFF</b>  <b>MICHAEL A. FREDRICKSON, Board Counsel</b>  <b>KAREN D. O'TOOLE, Assistant Board Counsel</b>  <b>ADAM M. LUTYNSKI, Assistant Board Counsel</b></p>
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**CLAIMS ACTIVITY CHART 1975-2010**

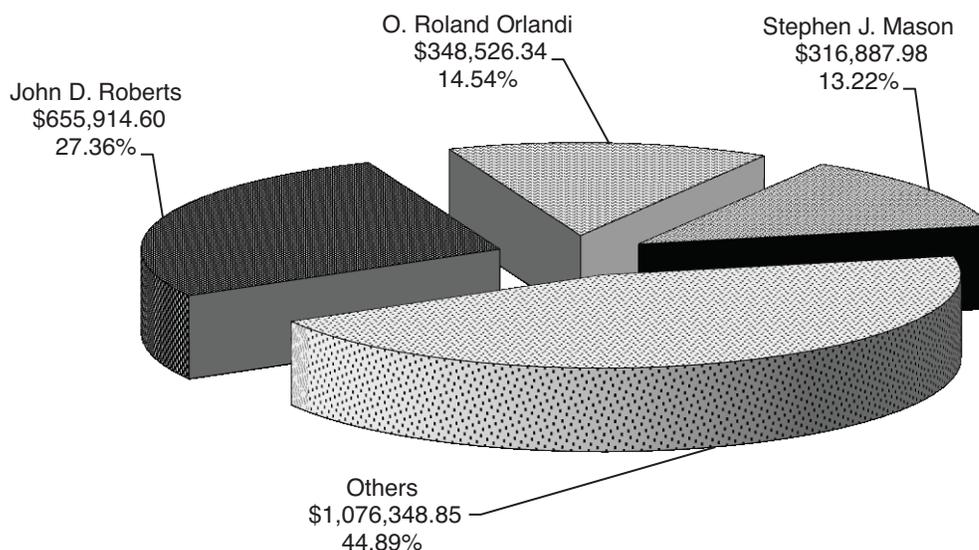
<b>Fiscal Year</b>	<b>Claims Filed</b>	<b>Claims Adjudicated</b>	<b>Cases Dismissed</b>	<b>Awards Made</b>	<b>Award Amounts</b>
1975	14	7	2	5	\$2,808.00
1976	36	28	18	10	\$44,635.00
1977	21	18	13	5	\$22,100.80
1978	71	34	14	20	\$64,734.00
1979	53	39	29	10	\$14,490.00
1980	126	60	38	22	\$71,208.00
1981	42	126	61	65	\$244,276.18
1982	30	29	9	20	\$80,212.00
1983	35	40	7	33	\$152,005.00
1984	45	42	17	25	\$141,125.67
1985	46	34	12	22	\$224,904.17
1986	23	38	7	31	\$214,810.75
1987	42	35	12	22	\$503,776.00
1988	28	24	13	11	\$267,954.24
1989	51	40	16	24	\$146,720.06
1990	74	73	18	55	\$759,025.23
1991	71	55	20	35	\$624,592.42
1992	124	85	16	69	\$968,894.77
1993	146	95	22	73	\$1,111,181.93
1994	109	157	27	130	\$1,203,911.62
1995	90	103	35	68	\$1,602,217.70
1996	139	100	33	67	\$1,696,870.13
1997	81	113	30	83	\$2,058,900.92
1998	119	102	46	56	\$1,254,229.91
1999	80	98	32	66	\$2,119,675.47
2000	83	108	22	86	\$2,744,848.83
2001	119	70	15	55	\$1,963,555.27
2002	82	94	25	69	\$1,066,379.91
2003	116	56	11	45	\$1,055,477.00
2004	90	159	58	99	\$2,412,597.49
2005	81	81	26	55	\$2,203,527.19
2006	91	93	51	42	\$1,653,026.91
2007	77	88	31	57	\$1,958,904.76
2008	108	89	21	68	\$2,654,436.60
2009	95	116	33	83	\$1,328,039.01
2010	82	106	14	92	\$2,397,677.77
<b>TOTAL</b>				<b>1,778</b>	<b>\$37,033,730.71</b>

*There is nothing more to say but thank you very much. CSB-2009-001, 6/17/2010*

## DEFALCATIONS AND AWARDS BY DISCIPLINED LAWYERS

Disciplined Lawyer	Town	County	No. of Awards	Amount Awarded	Defalcation Amounts
John D. Roberts, Jr.	Dennis	Barnstable	1	\$655,914.60	\$655,914.60
O. Roland Orlandi <sup>1</sup>	Boston	Suffolk	1	\$348,526.34	\$348,526.34
Stephen J. Mason <sup>1</sup>	Lowell	Middlesex	2	\$316,887.98	\$316,887.98
Peter Langan Schofield	Grafton	Worcester	1	\$177,598.00	\$177,598.00
Bruce L. Namenson	North Walpole	Middlesex	9	\$162,160.67	\$162,160.67
Bruce Sachar	Lynn	Essex	1	\$96,788.50	\$96,788.50
Wilfred J. Daley	Andover	Essex	1	\$83,925.37	\$83,925.37
Irwin Kwiat	Worcester	Worcester	5	\$75,625.00	\$75,625.00
Arthur M. Khoury	Lawrence	Essex	1	\$69,720.93	\$69,720.93
John Udo	Randolph	Norfolk	14	\$42,770.00	\$42,770.00
Nancy J. Sardeson	Amherst	Hampshire	1	\$42,000.00	\$42,000.00
Bernard J. MacCallum	Revere	Suffolk	1	\$37,116.00	\$37,116.00
James Russell Hodgdon	Norwell	Plymouth	2	\$35,188.00	\$35,188.00
Jon Christopher Taylor	Dorchester	Suffolk	3	\$31,100.00	\$31,100.00
Edward G. Kelly	Fall River	Bristol	8	\$27,250.00	\$27,250.00
Anthony M. Fredella <sup>1</sup>	Boston	Suffolk	1	\$20,000.00	\$20,000.00
Wild Chang	Boston	Suffolk	1	\$19,542.00	\$19,542.00
John B. Sullivan <sup>1</sup>	New Bedford	Bristol	1	\$19,256.76	\$19,256.76
Lawrence P. Novak	Brockton	Plymouth	2	\$13,500.00	\$13,500.00
Richard W. Hynes	Brookline	Norfolk	2	\$12,150.00	\$12,150.00
Berton D. Reed	Melrose	Middlesex	1	\$9,500.00	\$9,500.00
Walter E. Steele, Jr.	Boston	Suffolk	3	\$9,500.00	\$9,500.00
Ennio Cataldo	Danvers	Essex	3	\$8,524.14	\$8,524.14
Robert K. Gordon	Brockton	Plymouth	1	\$8,500.00	\$8,500.00
Edward David Friedman	Springfield	Hampden	1	\$7,637.94	\$7,637.94
Peter B. Dion	Leominster	Worcester	1	\$6,666.67	\$6,666.67
Dennis Michael O'Driscoll	Quincy	Norfolk	1	\$6,033.50	\$6,033.50
Paul Joseph Healy	Pembroke	Plymouth	1	\$5,265.37	\$5,265.37
Wendy Beth Golenbock	Weston	Middlesex	1	\$5,000.00	\$5,000.00
David M. Lipton	Boston	Suffolk	1	\$5,000.00	\$5,000.00
Ronald Gary Pinson	Dorchester	Suffolk	1	\$4,800.00	\$4,800.00
Theodore Scott Geller	Worcester	Worcester	2	\$4,200.00	\$4,200.00
Gary L. Myers <sup>1</sup>	Brookline	Norfolk	1	\$4,000.00	\$4,000.00
Vincent G. Campanella	Lawrence	Essex	1	\$4,000.00	\$4,000.00
James E. Tamagini	Tyngsboro	Middlesex	1	\$4,000.00	\$4,000.00
Yiping Du	Cambridge	Middlesex	2	\$2,890.00	\$2,890.00
Pacifico M. DeCapua	Milford	Worcester	1	\$2,500.00	\$2,500.00
Raymond A. Desautels	Oxford	Worcester	2	\$2,400.00	\$2,400.00
David Ryan O'Desky	Springfield	Hampden	1	\$1,900.00	\$1,900.00
Edward M. Cronin	Cambridge	Middlesex	1	\$1,724.00	\$1,724.00
Andrea Goode-James	Boston	Suffolk	1	\$1,500.00	\$1,500.00
Barbara F. Greenlee	Holyoke	Hampden	1	\$1,480.00	\$1,480.00
Francis Joseph Lafayette <sup>1</sup>	Palmer	Hampden	1	\$1,336.00	\$1,336.00
Michael G. Sites	Brockton	Plymouth	1	\$1,000.00	\$1,000.00
Terrence E. Burke	Stoneham	Middlesex	1	\$600.00	\$600.00
Scott A. Young	North Attleboro	Bristol	1	\$500.00	\$500.00
William Francis Smith	Haverhill	Essex	1	\$200.00	\$200.00
<b>TOTAL</b>			<b>92</b>	<b>\$2,397,677.77</b>	<b>\$2,397,677.77</b>
<sup>1</sup> Deceased					

## LAWYERS WITH HIGHEST DEFALCATION



## AWARD BY CATEGORIES

Category	No. of Awards	% of Total Awards	Total Awarded	% Total \$\$ Awarded	Total Defalcation	% of Total Defalcation
<b>Fiduciary</b>	6	6.52%	\$1,051,918.45	43.87%	\$1,051,918.45	43.87%
<b>Trusts &amp; Estates</b>	6	6.52%	\$545,397.41	22.75%	\$545,397.41	22.75%
<b>Real Estate</b>	8	8.70%	\$353,888.35	14.76%	\$353,888.35	14.76%
<b>Unearned Retainer</b>	57	61.96%	\$279,543.76	11.66%	\$279,543.76	11.66%
<b>Personal Injury Settlement</b>	11	11.96%	\$157,356.38	6.56%	\$157,356.38	6.56%
<b>Settlement</b>	3	3.26%	\$8,573.42	0.36%	\$8,573.42	0.36%
<b>Bankruptcy</b>	1	1.09%	\$1,000.00	0.04%	\$1,000.00	0.04%
<b>Total</b>	92	100.00%	\$2,397,677.77	100.00%	\$2,397,777.77	100.00%

## PRO BONO LAWYERS

The Board is pleased to acknowledge and thank the following lawyers who generously contributed their time and talents during FY 2010 to represent claimants before the Board for which service, by Court Rule, they may not receive compensation.

PAUL AIKEN , HYANNIS, MA

GREGORY J. ANGELINI, LEOMINSTER, MA

ANDREW A. CAFFREY, JR., ANDOVER, MA

DANA E. CASHER, CAMBRIDGE, MA

RUSSELL S. CHANNEN, HAVERHILL, MA

RALPH CIANFLONE, JR. , PITTSFIELD, MA

JOHN W.S. CREEDON, JR. , WORCESTER, MA

EUGENE GETTY, NEW YORK, NY

BERNARD GROSSBERG, BOSTON, MA

HARVEY KAPLAN, BOSTON, MA

DANIEL LAGOSH, JR., BOSTON, MA

MICHAEL M. LONERGAN, CONCORD, NH

JOHN LOSCOCCO, BOSTON, MA

ERIU MONPREMIER, MEDFORD, MA

MARSHALL F. NEWMAN, BOSTON, MA

BRAILEY E. NEWTON, CAMBRIDGE, MA

TIMOTHY J. NUTTER, BOSTON, MA

KIM MARIE PHELAN, REVERE, MA

NATHANIEL S. PUTNAM, BANGOR, ME

JAMES G. REARDON, JR. , WORCESTER, MA

STEPHEN M. SCIALLA, CRANSTON, RI

JOEL R. SHYAVITZ, LOWELL, MA

S. PETER ZIOMEK, JR. , AMHERST, MA

**FIDUCIARY: THE MISUSE OF FUNDS HELD BY AN ATTORNEY ACTING AS A FIDUCIARY ARISING FROM AN ATTORNEY-CLIENT RELATIONSHIP.**

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
John D. Roberts, Jr.	1	\$655,914.60	62.35%
O. Roland Orlandi	1	\$348,526.34	33.13%
James Russell Hodgdon	1	\$31,688.00	3.01%
Ennio Cataldo	1	\$6,524.14	0.62%
Paul Joseph Healy	1	\$5,265.37	0.50%
Gary L. Meyers	1	\$4,000.00	0.38%
<b>Total</b>	<b>6</b>	<b>\$1,051,918.45</b>	<b>100.00%</b>

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

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Bruce L. Namenson	7	\$132,218.27	84.02%
Edward David Friedman	1	\$7,637.94	4.85%
Peter B. Dion	1	\$6,666.67	4.24%
Dennis Michael O'Driscoll	1	\$6,033.50	3.83%
Ronald Gary Pinson	1	\$4,800.00	3.05%
<b>Total</b>	<b>11</b>	<b>\$157,356.38</b>	<b>100.00%</b>

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

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Peter Langan Schofield	1	\$177,598.00	50.18%
Wilfred J. Daley	1	\$83,925.37	23.72%
Bernard J. MacCallum	1	\$37,116.00	10.49%
Bruce L. Namenson	1	\$29,768.98	8.41%
Berton D. Reed	1	\$9,500.00	2.68%
Robert K. Gordon	1	\$8,500.00	2.40%
Walter E. Steele, Jr.	1	\$6,000.00	1.70%
Barbara F. Greenlee	1	\$1,480.00	0.42%
<b>Total</b>	<b>8</b>	<b>\$353,888.35</b>	<b>100.00%</b>

**TRUSTS AND ESTATES: THE MISAPPROPRIATION OF MONEY OR OTHER ASSETS, INTENDED FOR THE HEIRS, BENEFICIARIES OR A TRUST, BY AN ATTORNEY SERVING AS TRUSTEE, EXECUTOR OR COUNSEL TO THE EXECUTOR OR TRUSTEE**

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Stephen J. Mason	2	\$316,887.98	58.10%
Bruce N. Sachar	1	\$96,788.50	17.75%
Arthur M. Khoury	1	\$69,720.93	12.78%
Nancy J. Sardeson	1	\$42,000.00	7.70%
Anthony M. Fredella	1	\$20,000.00	3.67%
<b>Total</b>	<b>6</b>	<b>\$545,397.41</b>	<b>100.00%</b>

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

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Raymond A. Desautels	1	\$1,000.00	100.00%
<b>Total</b>	<b>1</b>	<b>\$1,000.00</b>	<b>100.00%</b>

**SETTLEMENT: MISAPPROPRIATION OF PROCEEDS FROM THE SETTLEMENT OF LITIGATION MATTERS.**

Disciplined Lawyer	No. of Awards	Total Awards	% of Total Awarded
Richard W. Hynes	1	\$7,000.00	81.65%
Raymond A. Desautels	1	\$1,400.00	16.33%
Bruce L. Namenson	1	\$173.42	2.02%
<b>Total</b>	<b>3</b>	<b>\$8,573.42</b>	<b>100.00%</b>

*Thank you to the Clients' Security Board for its generosity in making this award pursuant to this claim. CSB-2008-108, 9/23/2009*

*Our deep appreciation to you and the [Clients'] Security Board for processing this claim on our behalf. Thank you and best wishes. CSB-2009-099, 7/17/2010*

**UNEARNED RETAINER: CLIENT MONEY ACCEPTED BY AN ATTORNEY WHO FAILED TO PERFORM THE AGREED UPON LEGAL SERVICE. THESE CLAIMS SHOULD NOT BE CONFUSED WITH FEE DISPUTES OR MALPRACTICE CLAIMS WHERE AN ATTORNEY NEGLIGENTLY PERFORMS LEGAL SERVICES CAUSING FINANCIAL LOSS TO A CLIENT.**

<b>Disciplined Lawyer</b>	<b>No. of Awards</b>	<b>Total Awards</b>	<b>% of Total Awarded</b>
Irwin Kwiat	5	\$75,625.00	27.05%
John Udo	14	\$42,770.00	15.30%
Jon Christopher Taylor	3	\$31,100.00	11.13%
Edward G. Kelly	8	\$27,250.00	9.75%
Wild Chang	1	\$19,542.00	6.99%
John B. Sullivan	1	\$19,256.76	6.89%
Lawrence P. Novak	2	\$13,500.00	4.83%
Richard W. Hynes	1	\$5,150.00	1.84%
David M. Lipton	1	\$5,000.00	1.79%
Wendy Beth Golenbock	1	\$5,000.00	1.79%
Theodore Scott Geller	2	\$4,200.00	1.50%
James E. Tamagini	1	\$4,000.00	1.43%
Vincent G. Campanella	1	\$4,000.00	1.43%
Walter E. Steele, Jr.	2	\$3,500.00	1.25%
James Russell Hodgdon	1	\$3,500.00	1.25%
Yiping Du	2	\$2,890.00	1.03%
Pacifico M. Decapua	1	\$2,500.00	0.89%
Ennio Cataldo	2	\$2,000.00	0.72%
David Ryan O'Desky	1	\$1,900.00	0.68%
Edward M. Cronin	1	\$1,724.00	0.62%
Andrea C. Goode-James	1	\$1,500.00	0.54%
Francis Joseph Lafayette	1	\$1,336.00	0.48%
Michael G. Sites	1	\$1,000.00	0.36%
Terrence E. Burke	1	\$600.00	0.21%
Scott A. Young	1	\$500.00	0.18%
William Francis Smith	1	\$200.00	0.07%
<b>Total</b>	<b>57</b>	<b>\$279,543.76</b>	<b>100.00%</b>

### RESTITUTION

<b>Category</b>	<b>Amount Collected</b>
Court Ordered	\$16,334.04
CSB Activity	\$193,952.86
Voluntary	\$2,175.00
<b>Total</b>	<b>\$212,461.90</b>

**Information on Filing a Claim for Reimbursement can be found at**

**[www.mass.gov/ClientsSecurityBoard](http://www.mass.gov/ClientsSecurityBoard)**

**or**

**contact the**

**Clients' Security Board, 2nd Floor,**

**99 High Street,**

**Boston, MA 02110**

**Telephone: 617-728-8700**

**Fax: 617-482-8000**

*...I appreciate what you did for us ... thank you very much we received the money  
thanks again CSB-2008-069, 10/17/2009.*

**BASIS FOR DISMISSED CLAIMS**

Category	No. of Claims	% of Total Dismissed	Amount \$\$ Claimed
Insufficient Data	5	35.71%	\$788,300.00
Third-Party Settlement	2	14.29%	\$69,146.97
No Defalcation	3	21.43%	\$46,501.00
No Attorney-Client Relationship	2	14.29%	\$14,560.00
Restitution	1	7.14%	\$6,500.00
Negligence	1	7.14%	\$750.00
<b>Total</b>	<b>14</b>	<b>100.00%</b>	<b>\$925,757.97</b>

**CLAIMS PENDING**

Basis	# of Claims Pending	% of Total Claims Pending	\$\$Total Claims	% of Total \$\$ in Pending Claims
Fiduciary	2	2.44%	\$14,553.70	0.47%
Real Estate	4	4.88%	\$226,742.09	7.40%
Settlement	10	12.20%	\$584,881.82	19.08%
Personal Injury Settlements	4	4.88%	\$15,863.00	0.52%
Trusts & Estates	12	14.63%	\$1,913,531.88	62.41%
Unearned Retainer	49	59.76%	\$300,327.67	9.80%
Tax	1	1.22%	\$10,000.00	0.33%
<b>Total</b>	<b>82</b>	<b>100.00%</b>	<b>\$3,065,900.16</b>	<b>100.00%</b>

**LEDOUX AWARD RECIPIENTS**

Peter H. Sutton, Boston  
 Nathan H. Proctor , Oxford  
 Charles F. Proctor, Oxford  
 Thomas G. Hoffman, Boston  
 Douglas W. Salvesen, Boston  
 Jerry Cohen, Boston  
 Laura Hancock Barry, Worcester  
 Hung Tran, Boston  
 Hang Nina T.K. Nguyen, Boston

*I met with [my client] today and she asked me to convey her sincerest thanks for the Board's consideration. CSB-2009-77, 10/26/2009*

*I just wanted to express my thanks for your consideration and the award. I didn't know that this was possible. Thank you again. CSB-2007-058, 11/19/2009*

## 8TH WILLIAM J. LEDOUX AWARD RECIPIENTS

Supreme Judicial Court Justice Judith A. Cowin presented the Clients' Security Board's 8th William J. LeDoux Award to Haverhill attorney **Russell S. Channen** and Amherst attorney **S. Peter Ziomek, Jr.** at the John Adams Courthouse in May, 2010.



**Russell S. Channen, Esq.**

*In his own words ...*



**Russell S. Channen** is a partner in the firm, Phillips, Gerstein & Channen in Haverhill, MA. He represents numerous businesses and individuals in a variety of litigation matters, including, contract, employment, construction, creditor, collections and personal injury.

Mr. Channen also represents borrowers and lenders in commercial and residential real estate transactions. He has been a member of the Massachusetts bar since 1987 and the New Hampshire bar since 2006.

Attorney Channen graduated from The University of Massachusetts-Amherst (cum laude) in 1984 and New England Law I Boston in 1987.

*When I received the phone call from Attorney O'Toole notifying me of the award, I was shocked and surprised that I was being recognized for simply doing what my client had asked of me. And that was to represent his uncle's estate zealously and effectively. As an attorney, our responsibility is to represent each and every client, whether rich or poor, to the best of our abilities. The prize is knowing at the end of the day that you gave it your personal best and that your client has faith in the judicial system and in you as their representative.*

*I believe the Clients' Security Board's role for the aggrieved party is to not only compensate someone who has been wronged, but more importantly, to renew that party's faith in the judicial system and in the legal profession. The Board serves as a reminder to the client that being an attorney is an honorable profession and that there is somewhere you can turn when your faith has been stolen.*

*Looking back, I personally learned that a lawyer's success cannot and should not be measured solely by the almighty dollar. Restoring someone's faith in the legal profession is perhaps the most satisfying judgment of all.*

*I'm extremely pleased to see that Russell Channen is one of the recipients [of the LeDoux award]. He did an outstanding job representing me in closing out my uncle's estate. It was a long process, but through his diligence, knowledge and patience working with me and the Clients' Security Board, he was able to help our family receive the reimbursement that was due to us. CSB-2009-100, 5/8/2010*

**S. Peter Ziomek, Esq.**



**S. Peter Ziomek, Jr.**, practices with his wife, Megin Ziomek, in the Amherst firm of Ziomek & Ziomek, where he concentrates in the areas of taxation, estate planning, and estate administration. A native of Amherst, Mr. Ziomek received an accounting degree from the University of Massachusetts-Amherst and a law degree from Western New England College School of Law. He was admitted to the Massachusetts Bar in 1984. He is also admitted to the United States Tax Court. Prior to entering private practice, Mr. Ziomek was a senior tax consultant with two international accounting firms.

***In his own words ...***

*The Clients' Security Board is a wonderful safety net for individuals victimized by attorneys who lose sight of their obligations. In a perfect world, there would be no need for the Board, but unfortunately we live in an imperfect world. Attorneys are human; they make mistakes and commit misdeeds. It was with reluctance and a heavy heart that I filed a claim with the Board to help my clients recover from the failings of their attorney. It was a sad case—young children tragically losing their parents and then finding that their court-appointed guardian could not be trusted with their assets. My work involved uncovering the defalcations and helping the young victims recover most of the funds lost through an insurance claim and, ultimately, filing a claim with the Board.*

*I was very pleased to be able to help my clients, but saddened to reveal the wrongdoing of a fellow attorney who had worked in and continues to reside in our community. I take great pride in having worked hard to help my clients obtain some measure of remuneration for their losses, and hopefully renewing their trust in attorneys.*

*The file with Wells Fargo can be closed. The reporting was accurate. I wish to thank you for everything that you have done to bring closure to this matter. Your professionalism was instrumental in helping me see this thing through to the end. I am very grateful to you and your team. CSB-2008-064, 5/3/2010*

*I wanted to thank you for all that you have done for me. CSB-2009-29, 10/21/2009*

FOR MORE INFORMATION ON THE WILLIAM J. LEDOUX RECIPIENTS PLEASE VISIT OUR WEBSITE AT [WWW.MASS.GOV/CLIENTSSECURITYBOARD](http://WWW.MASS.GOV/CLIENTSSECURITYBOARD)

**BOARD MEMBERS**

**Charles W. Goddard, Esq., Chair**, was appointed to the Board on January 1, 2007. He has been a partner in the firm of Goddard, Scuteri & Delaney in Salem, MA, since 1991 where his practice concentrates on civil litigation in all courts of the Commonwealth. Mr. Goddard has served as President of the Essex County Bar Association (1990-1992); as Conciliator in the Superior Court since 1988; as a member of the Joint Bar Committee on Judicial Nominations (1989-1991); and on the Judicial Nominating Council (1991-1993). He has served as Chairman of the Board of Selectman of the Town of Manchester (1970-1972) and as Town Counsel, Manchester, MA (1976-1988). Mr. Goddard is a graduate of Boston College (A.B., 1960) and Boston University School of Law (1963) and was admitted in 1964 to both the Massachusetts Bar and the Federal Bar.



**John J. Egan, Esq., Vice Chair**, was appointed to the Board on December 17, 2007. As a partner in the Springfield firm of Egan, Flanagan and Cohen, P.C. He concentrates his practice in civil litigation. A graduate of the College of the Holy Cross and Boston College Law School, he was admitted to the Bar in 1969. He served as a trial attorney for the Massachusetts Defenders Committee, as an Assistant District Attorney, and as an Assistant Attorney General. He has taught at Western New England Law School and served as an associate editor of the Massachusetts Law Review. He has lectured and written for numerous continuing legal education programs on trial practice in the Massachusetts State and Federal Courts. In 1995, he was invited to Fellowship in the American College of Trial Lawyers and for five years served as a member of its State Committee.



**Edward S. Cheng, Esq.** was appointed to the Board on December 1, 2008. He is a partner in the firm of Sherin and Lodgen LLP where he is co-chair of the Professional Liability Group. He specializes in complex commercial disputes, professional malpractice cases, insurance coverage disputes and real estate litigation. Mr. Cheng serves on the American Bar Association's Standing Committee on Lawyers' Professional Liability, as a Hearing Officer for the Massachusetts Board of Bar Overseers, as Co-chair of the Administration of Justice Section of the Boston Bar Association and as treasurer of the Asian-American Lawyers Association of Massachusetts. Prior to his present position, he was with the law firm of Hill & Barlow. Mr. Cheng is a graduate of Princeton University and Boston College Law School, magna cum laude.



**Denzil D. McKenzie, Esq.** was appointed to the Board on December 17, 2007. He is the managing director/founder of McKenzie & Associates, specialists in civil litigation, estate planning, probate, business law and non-profits. He was a member of the Chapter 180 Task Force of the Boston Bar Association reviewing the General Laws of Massachusetts relating to non-profit organizations, and a former Massachusetts Assistant Attorney General. He is active on the boards of the Community Impact Committee of the United Way of Massachusetts Bay, the Center for Urban Ministerial Education of Gordon-Conwell Theological Seminary, the Massachusetts Family and Probate American Inn of Court, and serves on the Executive Council of Boston University Law School Alumni Association. He lectures for MCLE and Suffolk University's Advanced Legal Studies program. He is a graduate of BU School of Law and studied tax law in the Boston University Graduate Tax Program.

**BOARD MEMBERS**

**Thomas O. Bean, Esq.** was appointed to the Board on November 1, 2005. He is a partner in the firm of McDermott, Will & Emery LLP where he focuses his practice on bankruptcy and commercial litigation. From 1992 through 1998, he served as a Massachusetts Assistant Attorney General in the Government Bureau. He co-chaired the Bankruptcy Section of the Boston Bar Association from 2002 to 2004. He is a member of the American Bankruptcy Institute and a frequent lecturer on bankruptcy topics.



**Michelle M. Porter, Esq.**, was appointed to the Board effective March 1, 2010. She is a Director in the Private Client and Trust Group of Goulston & Storrs whose practice is focused on estate and tax planning, trust and estate administration and charitable giving. Prior to her present position, she practiced with Luce, Forward, Hamilton & Scripps in San Diego, California. Ms. Porter received a B.A. from the College of the Holy Cross and her J.D. from Notre Dame Law School. She is a member and past co-chair of the Boston Bar Association Trusts and Estates New Developments Committee, a member of Professional Advisory Network of the Boston Foundation, a member of the Boston Estate Planning Council, and a volunteer attorney for the AIDS Action Committee.



**Francis C. Morrissey, Esq.**, was appointed to the Board effective March 1, 2010. He is a partner in the firm of Morrissey, Wilson & Zafiroopoulos, LLP, Braintree, where he concentrates his practice on commercial litigation and insolvency matters. His practice encompasses all aspects of the bankruptcy process, including contested and competing plan confirmation hearings, contested relief from stay and cash collateral hearings and fraudulent transfer and preference litigation. In addition, Mr. Morrissey is a faculty member for the LLM Program in Banking and Financial Law at the Morin Center at Boston University School of Law and New England Law | Boston. He serves on the Legal Affairs Committee of the Finance Council of the Archdiocese of Boston, as Co-Chair of the American Bankruptcy Institute's Annual Northeast Bankruptcy Conference and as Co-Chair of the Massachusetts Bar Association's Business Law Council. Mr. Morrissey received his J.D. from Boston University School of Law.



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