

From: Del Ciampo, Joseph
Sent: Thursday, February 17, 2022 12:36 PM
To: Biello, John
Cc: Louis, Bucari; Boughton, Mark; Sherman, Susan; Rules Committee; Marin, Carolina
Subject: RE: DRS Letter to Rules Committee (RC ID # 2022-003)
Attachments: Rules Committee - Occupational Tax.pdf; Revised language provided by CBA.docx; Re: CT DRS Proposal to Amend Attorney Practice Book

Follow Up Flag: Follow up
Flag Status: Flagged

Dear Deputy Commissioner Biello,

Thank you for this information. It will be provided to the Rules Committee for consideration.

Thank you.

Joseph J. Del Ciampo
Director of Legal Services
Connecticut Judicial Branch
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Hartford, Connecticut 06106

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From: Biello, John <John.Biello@ct.gov>
Sent: Thursday, February 17, 2022 11:40 AM
To: Del Ciampo, Joseph <Joseph.DelCiampo@jud.ct.gov>
Cc: Louis, Bucari <Louis.Bucari@ct.gov>; Boughton, Mark <Mark.Boughton@ct.gov>; Sherman, Susan <Susan.Sherman@ct.gov>; Rules Committee <RulesCommittee@jud.ct.gov>
Subject: FW: DRS Letter to Rules Committee

You don't often get email from john.biello@ct.gov. [Learn why this is important](#)

Attorney DelCiampo

I am sending you this email to follow-up on the discussion had during the February 7th Rules Committee meeting concerning agenda item 2022-003, a proposal to amend PB sec. 2-27(d) to include DRS as an agency that can access attorney non-public information in connection with the collection of the attorney occupational tax.

Since the February 7th meeting, I spoke with representatives of the CT Bar who provided language that is acceptable. The department has reviewed the revisions put forth by the bar and are in agreement. The revised language is attached to this email. If you should have any questions, I am available to discuss.

Kind Regards,

John Biello
Deputy Commissioner
Connecticut Department of Revenue Services

Marin, Carolina

From: Robert L. Day III <robert@lawbyday.com>
Sent: Thursday, February 10, 2022 10:07 AM
To: Luke T. Tashjian
Cc: Biello, John; Louis, Bucari
Subject: Re: CT DRS Proposal to Amend Attorney Practice Book

EXTERNAL EMAIL: This email originated from outside of the organization. Do not click any links or open any attachments unless you trust the sender and know the content is safe.

John and Lou,

Thank you for taking the time to speak with us today. As discussed, below please find one approach to excluding the IOLTA account information from the nonpublic information disclosed to the Department.

Best,

Robert

Proposed Amendment to Subsection (d) of Connecticut Practice Book § 2-27

(d) Each attorney shall register with the Statewide Grievance Committee, on a form devised by the committee, the address of the attorney's office or offices maintained for the practice of law, the attorney's office e-mail address and business telephone number, the name and address of every financial institution with which the attorney maintains any account in which the funds of more than one client are kept and the identification number of any such account. Such registrations will be made on an annual basis and at such time as the attorney changes his or her address or addresses or location or identification number of any such trust account in which the funds of more than one client are kept. The registration forms filed pursuant to this subsection and pursuant to Section 2-26 shall not be public; however, all information obtained by the Statewide Grievance Committee from these forms shall be public, except the following: trust account identification numbers; the attorney's home address, unless no office address is registered and then only if the home address is part of the public record of a grievance complaint as defined in Section 2-50 or the attorney uses the attorney's personal juris number to appear in a matter in this state; the attorney's office e-mail address; and the attorney's birth date. Unless otherwise ordered by the court, all nonpublic information obtained from these forms shall be available only to the Statewide Grievance Committee and its counsel, the reviewing committees, the grievance panels and their counsel, the bar examining committee, the standing committee on recommendations for admission to the bar, disciplinary counsel, the client security fund committee and its counsel, a judge of the Superior Court, a judge of the United States District Court for the District of Connecticut, any grievance committee or other disciplinary authority of the United States District Court for the District of Connecticut, ~~the Department of Revenue Services in connection with the collection of the occupational tax on attorneys pursuant to section 51-81b of the Connecticut General Statutes~~, or with the consent of the attorney, to any other person. Excluding trust account identification numbers, nonpublic information obtained from these forms shall be available to the Department of Revenue Services in connection with the collection of the occupational tax on attorneys pursuant to section 51-81b of the Connecticut General Statutes. In addition, the trust account identification numbers on the registration forms filed pursuant to Section 2-26 and this section shall be available to the organization designated by the judges of the Superior Court to administer the IOLTA program pursuant to Rule 1.15 of the Rules of Professional Conduct. The

registration requirements of this subsection shall not apply to judges of the Supreme, Appellate or Superior Courts, judge trial referees, family support magistrates, federal judges, federal magistrate judges, federal administrative law judges or federal bankruptcy judges.

Robert L. Day III | +1-860-767-7893 | robert@lawbyday.com

On Tue, Feb 8, 2022 at 5:10 PM Luke T. Tashjian <ltashjian@wbamct.com> wrote:

John,

Robert and I are available at 10:AM Thursday for a Microsoft Teams meeting.

Sincerely,

Luke

From: Biello, John <John.Biello@ct.gov>
Sent: Tuesday, February 8, 2022 4:35 PM
To: Luke T. Tashjian <ltashjian@wbamct.com>; Louis, Bucari <Louis.Bucari@ct.gov>
Cc: Robert Day - Goodwin (robert@lawbyday.com) <robert@lawbyday.com>; Chapman, Bill <bchapman@ctbar.org>
Subject: RE: CT DRS Proposal to Amend Attorney Practice Book

Luke

This really is a simple matter concerning the agency's ability to accurately administer the attorney occupational tax. We are happy to speak with you. We are available Thursday at 10am. If that works for you, we can send you a TEAMS invite.

John

From: Luke T. Tashjian <ltashjian@wbamct.com>
Sent: Tuesday, February 8, 2022 11:11 AM
To: Biello, John <John.Biello@ct.gov>; Louis, Bucari <Louis.Bucari@ct.gov>
Cc: Robert Day - Goodwin (robert@lawbyday.com) <robert@lawbyday.com>; Chapman, Bill <bchapman@ctbar.org>
Subject: CT DRS Proposal to Amend Attorney Practice Book

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John and Louis,

Robert Day and I would like to discuss the attached proposal with you regarding CBA questions.

What is your availability for a call tomorrow or Thursday?

Thank you,

Luke