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# FOCUS

## President's Message

**Kelli Cubeta, General Counsel, BSG Billing Services Group**

### What would I be doing if I weren't an attorney?

What would I be doing if I weren't an attorney? I was recently asked this intriguing question by a good friend of mine. Without a moment's hesitation, I said that I would travel the world with my family as a five-star resort and spa critic. It's the perfect combination of my three favorite things: family, travel, and fantastic hotels. I envisioned days filled with the difficult task of deciding whether to describe my massage at the Four Seasons in Bora Bora as "phenomenal" or "spectacular." I would be in a constant state of relaxation and my family's passports would be filled with stamps from exotic locations.

Since not many people would guess international spa critic as my alternate career, I began to wonder what some of my fellow ACC members might choose to do if being an attorney wasn't an option. Their responses were both interesting and enlightening and ranged from unique to unexpected. The following are some of my favorites.

**Anthony Fetter** (Zachry Industrial) said that his choice all depends on the day of the week. "Being a teacher and coach speak to me on Monday through

Wednesday. After "hump day," it is downhill and my interest turns to being a brewmaster at my own brewpub or micro-brewery — that usually carries me until Saturday morning. Saturday has professional poker player written all over it. But then after a "bad beat," I wake up Sunday and am enlightened to something bigger than myself and my focus turns to sharing with and doing for others — perhaps entailing faith formation with the youth or young adults."

**Lauren Wood** (Clear Channel Communications) said that she would be doing something with her hands like remodeling old homes. Photography or poetry is what **Kelly Anderson** (Southwest Research Institute) said that she would choose to do if she weren't an attorney. **Michael Shearn** (Genzyme Corporation) said that he would be a public policy maker (elective or appointive) supporting constitutional limited government including reduced government budgets/spending and decreased taxes.

Last, but certainly not least, **Ingrid Etienne** (NuStar Energy) said that she



would be a small business owner. "I'd jump on the first plane to the Trader Joe's headquarters and convince them to sell me a franchise (yes, I know they are privately held, but I am confident

that they would make an exception for me). Why? I'm a foodie and love their concept."

The clear common denominator in all of the responses was that we chose hobbies and passions that we don't get to spend enough time doing and often get neglected in our busy schedules. So, how can we maintain our fulfilling legal careers, but still have time for the things we love? Prioritizing is the key. You have to make time for yourself and the things you enjoy doing. Numerous studies have shown that partaking in hobbies makes us happier and more balanced. Sounds simple, right? I know it's easier said than done, but please take this as a friendly reminder to make time for your passions and the things that make you happy. Your mind, family, and career will thank you for it.

# Revenge of the Value Champions

By **Amar Sarwal**, ACC Vice President & Chief Legal Strategist

Do you remember the end of the iconic movie, *Revenge of the Nerds*, when Lewis takes the mic from Gilbert and suggests that more of us are nerds than jocks? The pretty cheerleader exclaims she's a nerd too; most of the crowd joins Lewis, Gilbert and his nerd fraternity brothers in an effort to end nerd persecution, and the familiar strains of "We are the Champions" begin to play. Well, that cinematic moment was one of the formative experiences of my youth (I didn't get out much) and it came to mind when I was thinking about ACC's new Value Champions program, our new initiative to identify and celebrate law department and law firm leaders who incorporate value practices into their legal projects.

*I've paid my dues/Time after time  
I've done my sentence/But committed no crime  
And bad mistakes/I've made a few/I've had  
my share of sand kicked in my face -  
But I've come through*

Three years ago, ACC challenged the legal community to embrace value practices that are commonplace in every service industry, save one. While we heard some folks sing their hosannas, there were, and still are, folks who believe that the legal services industry can remain the same and still meet client expectations. Like the dinosaurs that were unaware of the meteor, the firms and law departments that continue with the old business model will not find the future climate hospitable. Wait a sec. Wrong analogy. Like the jocks who thought that they would continue to rule the campus on their terms. Sorry about that.

But, like Lewis and his new self-proclaimed nerd supporters, those of us implementing change are in a growing group. In fact, outside and inside counsel who focus on value practices, such as effective project management, value-driven fee arrangements and continuous improvement, are fast becoming the norm, not the exception. And, that's what the Value Champions program is all about. We'd like to shine a spotlight on them, so that the world can see their accomplishments and learn from them.

*I've taken my bows/And my curtain calls  
You brought me fame and fortune and  
everything that goes with it/I thank you all  
But it's been no bed of roses/No pleasure  
cruise*

*I consider it a challenge before the whole  
human race/And I ain't gonna lose*

Of course, some value practices are easier than others. Some of them require the simple application of business principles from other industries. And, we want to identify and celebrate individuals who have employed those practices, because we believe their accomplishments can be replicated by our members and the rest of the legal community. But, of course, some projects are harder, more complex and more frustrating at times, because the ideas animating them are so novel. Think of the nerds' effort to beat the jocks in the fraternity competition. So, we'd like to celebrate innovative strategies as well. If you've tried something novel or something more garden-variety, please let us know about it. Our only requirement is that the submitted project has reduced legal spend, increased predictability and/or reduced the unwelcome types of legal issues confronted by the company over time.

*We are the champions - my friends/And  
we'll keep on fighting - 'til the end  
We are the champions/We are the champions  
No time for losers  
'Cause we are the champions - of the world*

Our deadline for submission is March 15, 2012. If you're in the legal community and you've ever cared about value enough to incorporate it into your day-to-day practice, turn up the volume on Freddie Mercury's classic and join us and submit a nomination form. The legal services industry just won't meet client expectations until value persecution ends. We look forward to hearing from you.

\*\*\*

## ACC Value Champions Celebrate Value Champions

ACC Value Champions are law department and law firm leaders who have made great strides in improving the value of legal spending. By implementing pricing and other management practices advo-

cated as part of the ACC Value Challenge, you could be recognized as an ACC Value Champion.

### Eligibility

- Law department leaders can be nominated (or self-nominate) for in-house team projects that did not involve a law firm or firms.
- Law department and law firm leaders can co-nominate firm/client partnerships.
- ACC membership or sponsorship is not required.

### Demonstrate Your Leadership

Whether you achieved great results on a single matter, or over a multi-year, multi-dimensional effort, just define the scope and duration of the project and tell us about the results you achieved and how they were measured. For example, you can highlight results measured year-over-year, relative to hourly-based pricing, against an industry benchmark, and/or any other relative metric.

The story is important. Let us know what management tactics you used, bearing in mind that there are many ways to drive value. Innovation and collaboration (whether internal or between clients and firms) are also important, as is creating programs that others can replicate. If you have used or developed tools, templates, or dashboards, please share them as well.

### Honors and Recognition

If selected, you will receive public recognition for your innovation and success. You'll receive an engraved, crystal "trophy," media exposure, profiling in ACC's member publication, *ACC Docket*, and the opportunity to present your value initiatives as part of an ACC educational program.

### Process and Timing

Nominations are requested by March 15th. A panel of ACC staff and *ACC Value Challenge Steering Committee members* will review the nominations, and will contact nominees if additional information is needed. The ACC Value Champions will be announced in Spring 2012.

# Practical Law Company

## Document Retention Policy: US Checklist

A Checklist addressing why a company should implement a document retention and disposal policy and the key issues to consider when drafting the policy (also known as a records and information management policy).

### Reasons for Implementing a Document Retention Policy

A document retention policy ([www.practicallaw.com/3-501-8809](http://www.practicallaw.com/3-501-8809)) (also known as a records and information management policy) establishes and describes how company employees are expected to manage company data (electronic and hard copy) from creation through destruction. There are many reasons why a company should implement a document retention policy. For example:

- If a company's *litigation hold* ([www.practicallaw.com/9-501-9293](http://www.practicallaw.com/9-501-9293)) obligations to preserve documents are triggered by a potential litigation or government investigation, a document retention policy can help it more efficiently:
  - judge whether documents from a particular period are still held by the company;
  - find any relevant records.
- If documents that are relevant to a lawsuit or government investigation were previously destroyed by the company (before it reasonably anticipated the investigation or lawsuit), having a company-wide document retention policy may help demonstrate to a judge or government agency that the company had a legitimate (and neutral) purpose for the document destruction.
- A company can reduce the costs of storing records and other information that are outdated or no longer serve a legitimate business purpose by implementing a document retention policy.
- Unnecessarily retaining archives can make a company vulnerable to claims based on old and trivial documents drafted by former employees who may be unable to put their words in the proper context (due to fading memories, for example).

### Developing the Document Retention Policy

When developing a document retention policy, a company should:

- Consult with its data management and IT personnel.
- Tailor the policy to the company's specific needs and goals.
- Address employee document preservation and disposal protocol clearly and explicitly.

### Key Considerations When Drafting a Document Retention Policy

When drafting a document retention policy, a company should:

- Identify who is responsible for records and information management and determine whether this responsibility should be:
  - centralized in a dedicated individual or department;
  - decentralized among representatives of the company's business units; or
  - shared among employees in a records compliance task force.
- Consider creating an oversight or steering committee composed of departmental representatives, including employees from IT and legal.
- Identify all of the places where company documents and other information may be stored, and expressly state that the policy covers all documents and other information in these locations.
- Ensure that the policy explicitly applies to electronically stored information and paper documents in addition to other physical items (for example, slides, tapes and discs).
- Include in the policy a clear definition of "business record" and distinguish it from documents that have no retention requirements. Find out whether the company's home state has adopted the Uniform Preservation of Private Business Records Act, which includes a definition of this term.
- Plainly state that employees have no expectation of personal privacy in either:
  - communications they send or receive through the company's e-mail system; or

- documents they create or store on company equipment or premises.
- Describe the categories and types of documents that are confidential or sensitive and cover the steps necessary to protect this type of information. These can include documents containing keywords or phrases.
- List the types of documents that must be retained and the required retention time for each. If a specific format should be used for storing the resource, include that information.
- Note how often back-up tapes may be overwritten, if at all.
- Prohibit employees from creating documents that are:
  - inaccurate;
  - incomplete;
  - misleading;
  - fraudulent;
  - harassing;
  - profane;
  - racist;
  - sexually explicit; or
  - obscene.
- Outline the possible consequences for violating the policy.
- Include provisions that address the following life cycle elements of the various categories of information:
  - creation;
  - use;
  - maintenance;
  - retention; and
  - disposal. Disposal provisions should address federal, state and regulatory recrudescing requirements. The Securities and Exchange Commission ([www.practicallaw.com/9-382-3806](http://www.practicallaw.com/9-382-3806)) (SEC), for example, requires certain SEC-regulated companies to keep e-mails for a minimum of three years (*Rule 17a-4, Securities and Exchange Act*).
- Ensure that the policy (or accompanying standard operating procedure) fully addresses:
  - suspension of disposal procedures when a litigation hold is commenced;
  - all facets of electronic communication (including mailbox sizes,

*continued on page 4*

continued from page 3

- o auto-delete agents, e-mail storage, e-mail archiving, voicemail messages, instant messages and text messages); and
- o the purpose and use of disaster recovery media, including a recycling schedule.
- If not already covered in another policy (such as an acceptable use policy or security policy), explain the acceptable use (if any) of the following for conducting company business:
  - o home computers;
  - o personal smart phones;
  - o personal e-mail accounts;
  - o personal internet sites, blogs and social media networks, including Facebook, MySpace and Twitter (see *Company Use of Social Media: Best Practices Checklist* ([www.practical-law.com/7-501-1472](http://www.practical-law.com/7-501-1472))).

- Ensure that appropriate employee training is ready and available when the policy is issued.
- Implement written procedures for departing employees regarding the return or disposal of company records stored on their personal laptops, universal serial bus (USB) drives and personal digital assistants (PDAs). Include instructions for obtaining departing employees' new contact details in case the company needs to interview them in the future.
- Analyze the costs and benefits of using third-party service providers, e-mail archives and software products to implement the company's retention practices and disposal mechanisms.
- Incorporate the policy's relevant requirements into company contracts and agreements.

- Review and update the policy periodically.

Contributed by *Carol A. Poindexter and Mark W. Cowing, Shook Hardy & Bacon LLP*

#### About Practical Law Company

Practical Law Company provides practical legal know-how for in-house counsel, law firms and law schools. Our online resources help lawyers practice more efficiently, get up to speed quickly and spend more time on the work that matters most. For more information or for free trial, please visit [www.plclawdepartment.com](http://www.plclawdepartment.com).

## Don't Miss!

We continue to hold our monthly luncheons on the first Wednesday of the month from 12–1:30 PM at the San Antonio Plaza Club. The cost to attend the luncheons is \$10.00 for members and \$20.00 for non-members (In-house counsel and sponsoring firm only, please). Check out our chapter website at <http://www.acc.com/chapters/sanant.php> for our current calendar of events and registration information.

No other professional organization in San Antonio offers better CLE programs at a more affordable price that is specifically geared to meeting the needs and issues of in-house counsel.


## Job Openings?

Is your company looking to fill an in-house position? Do you know about a current in-house job opening? If so, please let us know so that we can advertise the position to our membership. Send an email to our Chapter Executive Director at [accasouthcentral@yahoo.com](mailto:accasouthcentral@yahoo.com).

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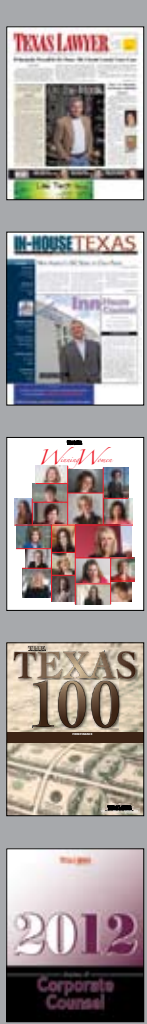
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Lifetime Achievement: **Seagal Wheatley**, Jackson Walker LLP

Rising Star: **Stephanie Chandler**, Jackson Walker LLP

### New to In-House

**Len Briley** is an attorney with AT&T handling litigation matters for the company in Central and South Texas. He is a former shareholder with Cox Smith Matthews, and recently played Rick Wrangler in the Ethics Follies.

USAA Real Estate Co. has named **Steven A. Waters** general counsel and chief legal officer. Steve joins USAA from one of our sponsoring law firms, Haynes and Boone LLP, where he served as department chair for the real estate practice.

### On the Move:

**Nicole Chamberlain** has joined the legal team at Rackspace Hosting as a staff attorney. Nicole was previously serving as Senior Contracts Attorney at Sirius Computer Solutions, Inc.

## Welcome New Members!

**Douglas Becker**, Chicago Title of Texas, LLC

**Megan Bluntzer**, Valero Energy Corporation

**Virginia Coyle**, Consert Inc.

**Justin Freeman**, Rackspace US, Inc.

**Joe Garza**, CCC Group, Inc.

**Danielle Hargrove**, Harland Clarke

**Ethan Jones**, Valero Energy Corporation

**Christina Market-Balleza**, South Texas Money Management, Ltd.

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**Carlos Pena**, Pioneer Drilling Company

**Danielle Reyes**, USAA

**Bryce Seki**, Pioneer Drilling Company

**Beth Sherfy**, Rackspace US, Inc.

**Mark Tattoli**, NuStar Energy L.P.

**Bradley Wilder**, Harland Clarke

**Matt Wilcox**, NuStar Energy L.P.

# Financial Planning: Back to the Basics (Part 2 of 2)

By Bennett Allison, CPA, CFP™, [cba@ssacpa.com](mailto:cba@ssacpa.com)

In Part 1, we covered maintaining adequate cash, disability insurance, life insurance, estate planning documents, and bank fees. Picking up from where we left off, here are some additional ideas to help you continue the financial planning process:

**1. Credit card debt** – 56% of American credit card consumers carried an unpaid balance in the past 12 months. With an average credit card debt per household of \$15,800 and a national average interest rate of 15%, it's easy to see how problems can develop. If you happen to fall within the 56% carrying a credit card balance, carefully review your charges over the last several months. Look for charges that could have been avoided and make a commitment to eliminate these charges going forward.

**TIP:** Consider eliminating your credit card and instead using a debit card tied to a bank account receiving a set amount each week (e.g. \$350). Having a set “allowance” may help maintain financial discipline.

**2. Taxes** – Many of you with W-2 wages and interest from a savings account will choose to self-prepare your return using a service such as Turbo Tax. When your tax situation begins to get more complex, it may be time to consult a CPA. This complexity can come in the form of a 100-page tax statement from a new brokerage account or through an investment in a partnership or corporation. Failure to report completely and correctly or to take advantage of allowable deductions can result in additional taxes, penalties, and interest. Is your tax situation becoming too complex?

**3. Employee benefits** – Every year employees go through the ritual of completing their benefit election forms. When you receive your election form, how carefully do you consider your options? Many

employers offer benefits such as a medical flexible spending account (or FSA) or a dependent care FSA. These accounts present a great opportunity to use pre-tax dollars to pay for medical and child care costs. Employers may also offer to match your 401(k) contributions. In essence, your employer is giving you “free” money just for making contributions towards your own retirement. Are you taking full advantage of your employee benefits?

**4. Retirement savings** – I have been asked numerous times to calculate the minimum amount of savings needed for retirement. In these situations, all it takes is a slight deviation such as a recessionary stock market or unexpected medical expenses to knock the retirement plan off course. A better question may be: What is the range of savings I will need to retire? Then, aim for the upper under end of this range.

To maximize the growth of your retirement dollars, take advantage of employer provided retirement plans such as a 401(k). Also, look to supplement your retirement savings by making contributions each year to an individual retirement account (IRA). Roth accounts, where after-tax dollars instead of pre-tax dollars are used for retirement savings, have become all the rage in recent years. With Roth accounts (since you received no tax savings going into the plan), there is no tax liability when you withdraw funds from the account. In speaking with numerous taxpayers, there



seems to be almost universal optimism that they will be at the same or even a higher income level in the future. This makes the Roth option very attractive. In most cases, however, once a taxpayer retires his or her income drops substantially along with the associated income tax rate. This makes the traditional pre-tax retirement plans more attractive. Before choosing a Roth option, consider very thoroughly whether your income level in retirement will be the same or greater than it is now

**5. Liability insurance** – Are you maintaining more than the minimum required automobile insurance? Would your homeowners insurance allow you to fully replace your home considering today's costs? Do you have umbrella coverage to supplement losses over and above your basic insurance coverage? A “No” answer to any of these questions may require a visit with your insurance agent to bolster your coverage. Otherwise, a car wreck, a fire at your home, or another claim could have a devastating effect on your finances.

This article highlights some of the basic areas you will need to address in your personal finances. Remember that financial planning is a life long process involving many complex decisions against a backdrop of changing internal and external factors. Consider your options carefully and look for expert advice in the various fields when you are unsure. Best wishes on a bright financial future!

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## Chapter Event Photos

### 2011 In-house Counsel Compensation Survey Happy Hour



### Members, Ingrid Etienne & Kelli Cubeta, run with their kids in the St. PJ's Great Pumpkin Run



# Ethics Follies 2012







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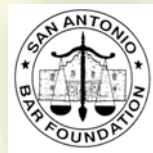
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### Get Back to Basics at Corporate Counsel University®

Are you new to in-house or looking for ways to sharpen your basic in-house practice skills? Attend ACC's Corporate Counsel University® (May 20–22, 2012, Los Angeles, CA) to jumpstart your career. At this program, you will learn practical tips that can be applied to your work immediately and earn up to 12 CLE/CPD credits. Topics range from law department management to finance and accounting. To learn more, visit [ccu.acc.com](http://ccu.acc.com).

### Show the C-Suite You Know Value

Develop techniques to effectively structure value-based fees and drive efficiency at ACC's Legal Service Management Workshop (February 28–29, 2012, Dallas, TX; or May 2–3, 2012, Minneapolis, MN). At this two-day, intensive executive workshop, through a blend of instruction and business school style case analysis, you will learn to improve value in legal spending and develop skills to thrive professionally. Space is limited to 50 law department and law firm leaders in each workshop. Learn more and register at [www.acc.com/legalservicemanagement](http://www.acc.com/legalservicemanagement).

### Save time. Save money. Save your weekend.

We've done the homework for you. ACC has assembled a select set of Alliance partners to help you get your job done faster, easier, and within budget. Exclusive savings for ACC members are available from leading service providers, including:

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## Board Members and Contacts

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#### **Kelli Cubeta**

BSG Clearing Solutions North America  
210.949.7105  
kelli.cubeta@bsgclearing.com

### Vice President

#### **Timothy Alcott**

San Antonio Housing Authority  
210.477.6633  
timothy\_alcott@saha.org

### Vice President

#### **Michael Gibbs**

Whataburger Restaurants, LP  
210.476.6793  
mgibbs@wbhq.com

### Vice President

#### **Daniel Lopez**

Sea Island Development Company  
210.342.2800 x15  
dlopez@shrimphouse.com

### Vice President

#### **Michael Shearn**

Genzyme Corporation  
210.949.8489  
michael.shearn@genzyme.com

### Vice President

#### **Monica Trollinger**

Southwest Research Institute  
210.522.6024  
mtrollinger@swri.org

### Vice President

#### **Katherine Yates**

CPS Energy  
210.353.2069  
ksyates@cpsenergy.com

### Secretary

#### **Abel Martinez**

H.E. Butt Grocery Co.  
210.938.8232  
martinez.abel@heb.com

### Treasurer

#### **Robert Leckie**

Attorney  
210.860.7254  
rbleckie@gmail.com

### Immediate Past President

#### **Ingrid Etienne**

NuStar Energy L.P.  
210.918.2458  
ingrid.etienne@nustarenergy.com

### Executive Director

#### **Amber Clark**

830.336.2049  
accasouthcentral@yahoo.com



## ACC AMERICA

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