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Jeremy G. Thane
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Chris A. Johnson (MT, WA)
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Erika D. Colstad
Noah P. Hill
Emily Bruner
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September 6, 2024

Mr. John Mudd
Executive Director & General Counsel
State Bar of Montana
33 S. Last Chance Gulch
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Via Email: jmudd@montanabar.org; jdiveley@montanabar.org.

Re: State Bar of Montana Technology Committee Annual Report

Dear John:

The following is the Technology Committee's annual report regarding its activities this last year. The Committee held the following meetings:

- **December Zoom Meeting:** Technology Committee Member Larry Ziler arranged for iManage to provide the Committee with a demonstration of its document management platform. iManage provides document and email management solutions for mid-sized law firms.
- **July Zoom Meeting:** The Committee participated in a presentation by Frank Ramos, a Florida attorney, regarding AI and the legal field. Mr. Ramos provided an overview of various AI software products and what attorneys should be considering when using them. The Committee also had a short business meeting and discussed its participation in the State Bar Annual Meeting.
- **September In-Person Meeting:** The Committee decided to hold its in-person meeting this year to coincide with the State Bar's Annual Meeting. The September meeting is scheduled for Thursday, September 12th. Mark Bowan from Elevatus will be presenting at the meeting. Elevatus is a managed service provider based in Florida that provides services specifically to law firms. Elevatus provides services Nationwide. The Committee will also have a short business meeting to discuss upcoming activities for the next year.

- **Fall/Winter Zoom Meeting:** I anticipate the Committee will have another meeting prior to the end of this calendar year.

Attached for the Bar's records is an updated list of Committee members with their contact information.

Finally, Ben Burns will be taking over as the Chair of this committee effective September 13, 2024. Please let Ben or me know if there is anything else we need to formalize this transition and/or if the Board or you have any questions. Thank you for the opportunity to Chair this Committee.

Sincerely,

/s/ Dana L. Hupp

Attachments

c: Ben Burns

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