

Frederic W. Knaak\*  
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Craig J. Beuning  
cbeuning@klaw.us



Received 7-8-21 AL  
Interview at 7:05 p.  
Of Counsel  
Thomas M. Dailey, P.A.  
(1943-2015)  
Wayne B. Holstad\*\*

Paralegal  
BethAnn Hanson  
bhanson@klaw.us

*\*Also Licensed in  
Wisconsin & Colorado  
\*Qualified Neutral under Rule 114  
\*\*Also Licensed in Iowa,  
Federal Court of Claims,  
& US Court of Appeals  
Washington, D.C.*

July 8, 2021

Mr. Kurt Ulrich, City Administrator  
City of Ramsey  
7550 Sunwood Drive NW  
Ramsey MN 55303

**VIA ELECTRONIC MAIL  
AND PERSONAL DELIVERY**  
kulrich@ci.ramsey.mn.us

**Re: Request for Proposal for City Legal Services**

Dear Mr. Ulrich:

Enclosed herewith please find our firm's proposal to provide the City of Ramsey with civil legal services. We believe that our strong commitment in providing exceptional, customized representation for our public sector clients sets us apart from the firms that are unable to dedicate their time in the same way. Our focus over the years has been this approach with the cities we represent, and it has been successful and appreciated by our clients.

We appreciate the opportunity to offer our services to the City of Ramsey and hope to be able to discuss how we can be of service with you.

Best regards,

A handwritten signature in cursive script, appearing to read 'Frederic W. Knaak', is written over the typed name.

Frederic W. Knaak, Esq.

Enclosures

(9 copies delivered via personal service)

**PROPOSAL**

**OF**

**HOLSTAD & KNAAK, PLC,**

**TO PROVIDE LEGAL SERVICES**

**FOR**

**THE CITY OF**

**RAMSEY, MINNESOTA**

**Submitted on June 28, 2021**

**By: Frederic W. Knaak, Esq., for**

Holstad & Knaak, PLC.  
4501 Allendale Drive  
St. Paul, MN 55127  
Office: (651) 490-9078  
Facsimile: (651) 490-1580  
Email: [fknaak@klaw.us](mailto:fknaak@klaw.us)

## Introduction and Proposal Summary

The law firm of Holstad & Knaak, PLC, is very pleased for the opportunity to respond to the request for proposals offered by the City of Ramsey, Minnesota, for legal services. We firmly believe that our firm possesses unique qualities with its mix of qualified attorneys and considerable experience in handling challenging municipal issues for small cities in Minnesota over its forty-year history; its aggressive use of new technology, and its emphasis on its Minneapolis - St. Paul suburban roots and community experiences – all of which would make the firm an exceptionally good fit to serve the City of Ramsey as its legal counsel

Using principally the talents of attorney Frederic W. ("Fritz") Knaak, we are proposing a **monthly flat fee** of **\$4,250.00** for all civil matters, or a base hourly rate of \$150.00 per hour for all work performed, excluding major litigation, as specified in more detail below. As a practical matter, the City of Ramsey could expect to remain a priority client of Mr. Knaak and the required work would be done almost entirely by him and his legal assistant. He would be assisted, as needed, in this service by two other experienced attorneys currently working with the firm. Annualized, this contract would be **\$51,000.00 per year**. The use of a fixed amount in the agreement avoids "fee creep", or slow, imbedded increases and requires any future increases to be with the express agreement of the City.

## Firm Background and Qualifications

### General Background:

Holstad & Knaak PLC is a suburban, Twin Cities metropolitan area law firm, with nearly forty years of experience in dealing with the unique problems of cities and other forms of local government. In addition to the practices of principal, Frederic Knaak, are the practices of Donald Kohler, Craig Beuning and Bryce Holstad. Wayne Holstad remains actively of-counsel to the firm.

The lawyers practicing in the firm take care in assuring the firm retains its status as a full-service, suburban law practice. Its smaller size and selective client base assure the availability of lawyers when needed by staff or council members, yet it is not so large as to suffer from the inflexibility of assignments and methods that can create problems with larger firms, as well as add to high overhead costs. We are proud of the excellent relationship we have had over many years with our municipal clients, and would be singularly proud to serve as legal counsel for the City of Ramsey. The Firm's municipal practice consisted of approximately 45% of its billings in the past year. It has been and remains fully compliant with all federal and state requirements regarding civil rights, both as to its employment practices and its handling of public matters for its clients.

### Attorneys:

As a practical matter, the attorneys in this practice have developed extensive experience in specific venues - particularly municipal and land use law. Mr. Knaak, for example, had been the City Attorney for the City of Newport, Minnesota, since 1982, providing both civil and prosecutorial legal services. In that capacity, he was directly involved in the financial and bonding matters involved in the creation of the tax increment financing district in that City related to the construction of the RDF plant and the ongoing industrial redevelopment of that City. He had represented the City of Newport in the full range of services that relate to municipal practice. He is also currently the City Attorney for Afton, Minnesota, having represented that City in all civil matters and prosecutions for more than ten (10) years.

Mr. Knaak was the City Attorney of Fridley, Minnesota, a suburban community of about 30,000 residents in Anoka County, Minnesota, where he served for sixteen years on civil matters and prosecution of zoning code enforcement. He has also served as City Attorney for the City of Lake Elmo from 1985 to 1990 on civil matters, where he was involved in a wide range of matters related to development and represented that City in a particularly difficult period in its development history. He has also served as City Attorney for Maplewood, Minnesota, as well as the White Bear Lake Conservation District.

Mr. Knaak and our other attorneys in the firm have been involved in all levels and areas of municipal practice, from arbitration of labor disputes to zoning matters, including civil litigation practice (involving trials and appeals in both State and Federal courts), ordinance drafting, as well as code and criminal prosecutions. Mr. Knaak, specifically, has been involved in labor negotiations with employees, large and small project tax increment financing and development issues, assessments and assessment hearings, as well as fielding everyday inquiries and complaints from citizens. The strength of the firm's experience in these areas lie in the fact that its municipal clients have been smaller cities and other local units of government who are dependent on a high level of service from their legal counsel, and Mr. Knaak and the firm are well aware of the difficulties and pressures that cities of this size, as well as their councils and staff, can face.

In addition, Mr. Knaak's ten-year tenure in the Minnesota legislature, including a major leadership role, has given him a considerable background in many areas of law, including municipal finance and data privacy - two areas of particular legislative and statutory expertise acquired by him in that period. His familiarity with the legislative process has come into play for municipal clients on several occasions when he has been called upon to assist in lobbying specific proposals on their behalf. Mr. Knaak is the former Chairman of the Minnesota Bar Association Technology Committee and Co-Chair of the Minnesota Electronic Real Estate Recording Task Force. He is currently a board member for LCL, Lawyers Concerned for Lawyers, a nationally recognized organization of support for lawyers and judges in Minnesota. He is a frequent lecturer on matters of municipal law for attorneys in Minnesota and Wisconsin.

Mr. Donald Kohler currently assists on matters for the Cities of Newport and Afton, Minnesota. Mr. Kohler has extensive experience in district court, as well as extensive appellate experience. He has argued cases before the Minnesota Court of Appeals, Minnesota Supreme Court, and the Workers' Compensation Court of Appeals. He is

particularly knowledgeable in the areas of labor law and employer liability.

Mr. Kohler is the former chairman and a board member of the City of White Bear Lake Planning Commission, from 2005 – 2010. Previously, Mr. Kohler was a member of the White Bear Lake Conservation District Board for over 3 years. Mr. Kohler has been practicing law since 1999 and is a well-regarded general practitioner with experience in a wide range of areas. In the summer of 2009, he was mentioned in the local publication “Law and Politics” under the “Who’s Who” section of workers’ compensation practitioners.

Craig J. Beuning has been an active attorney with the firm for nearly 20 years. His deep experience is primarily in the real estate and criminal appellate areas of law.

Bryce Martin Holstad joined the firm in July of 2020. Prior to becoming an associate at HKB, Mr. Holstad earned his J.D., *cum laude* from Michigan State University College of Law in 2019 and Bachelor of Science from the University of Minnesota in 2014. Mr. Holstad started his legal career at Iowa’s largest law firm, serving the North Central Lakes region of Iowa Legal Aid as a staff attorney. At Iowa Legal Aid, Mr. Holstad represented low-income clients in pro-bono cases primarily in real-estate takings, municipal, landlord-tenant, and family law. Prior to entering law school, Mr. Holstad started a title company with a local law firm in the Twin Cities, Arden Title, and continues to serve as their Chief Counsel. With ten years of title experience prior to becoming an attorney, his extensive real estate knowledge offers a wide array of insight to legal issues facing participants in real estate matters.

The resumes of Messrs. Knaak, Beuning, Kohler and Holstad are attached, and we ask that they be considered included in this proposal by reference. It is expected that Mr. Knaak would continue to serve as the attorney principally responsible on all Ramsey matters.

#### Support Personnel & Infrastructure

The support staff for the firm consists primarily of Paralegal BethAnn Hanson, who can be expected to be the principal non-attorney staff person designated to work on the City of Ramsey matters. Ms. Hanson has come to our firm with a high level of experience in litigation and general practice management. She has over 30 years of legal experience including, but not limited to, extensive real estate, corporate document drafting, banking and class action suits. She echoes our belief that providing exceptional service and being accessible to our clients is of primary importance. Ms. Hanson takes pride in building and maintaining outstanding relationships with clients and professional personnel alike, and ensures that our clients have the most up-to-date information on their cases. Ms. Hanson employs a high level of skill in drafting documents, trial preparation, general research and office management, and takes great pride in ensuring the best outcome for our respective clients. The firm also hires experienced contract support personnel on an as-needed basis.

The office is organized as a highly efficient, fully networked, computer-intensive practice

utilizing numerous online research services, such as Lexis®. The firm also has a large, more traditional law library. We would welcome an inspection or tour of our office for a further review of these resources. It is our assessment that these assets are currently being used at nowhere near their full capacity. Our expectation would be that the City's needs and requests would continue to receive our highest priority in utilization of our resources.

### Municipal "Flowchart"

Two types of work currently arrive at the firm from its public body clients, criminal and civil, and each is handled differently. All matters related to civil issues, either in terms of requests for work or matters that arise through the course of the representation of the client, are handled through Mr. Knaak, who is directed by the City Administrator. All work done for the City is supervised by Mr. Knaak. Although some contact does occur normally between other City personnel and other attorneys in the firm, all such contacts requiring work are reported and memorialized. Any work done by the lawyers in the firm in cooperation with City personnel is directed through the Administrator. We find this practice reduces possible conflict and redundancy. We expect Mr. Holstad will be Mr. Knaak's principal backup in this area.

Throughout the nearly 40 years of representing cities, Mr. Knaak has developed an excellent working relationship with the League of Minnesota Cities, its staff, the League's insurance trust, and the various firms the LMC has used in representing cities on insured litigation issues in the past. Mr. Knaak is very actively involved in teaching and training activities done under the auspices of the League and State Bar Association for city attorneys and law firm personnel, and within the past two years has conducted continuing legal education seminars for City Attorneys in the area of subdivision law, the use of development agreements, open meeting laws, data practices and legal ethics.

### Bond and Finance Experience

Although attorneys in this practice have extensive experience in representing municipalities in dealing with bond issues on a variety of matters, none could be considered a "bond counsel" as that term is generally understood in the legal community. It is generally not accepted practice for bond counsel and a city attorney representing a municipality issuing bonds to be of the same firm because of ethical conflict considerations. This firm also has extensive experience on issues of private sector banking, securities and financing issues, and a growing practice in that area, but we do not expect to become bond counsel or a securities-related practice at this time or in the foreseeable future.

## **Fixed Monthly Fee Proposal:**

## Civil

Experience has shown us that a **fixed-fee** arrangement is preferable over traditional retainer arrangements, where feasible, for cost-conscious municipal clients. Over the past several decades, we have been a leader among municipal law firms in advancing this concept and are pleased to see it becoming a more common practice. We are proposing such an arrangement here. While it imposes some risk on the part of the firm for increased and unanticipated needs and demands for services by the City, particularly over time, it has the benefit, from our perspective, of a predictable and consistent revenue stream.

From the City's perspective, it has the benefit of a fixed, budgeted amount for services that eliminates the risk of an unpleasant "surprise" during a month in which legal counsel's presence is required more often than usual. Moreover, a fixed fee tends to be a good preventative measure, eliminating the disincentive that exists in an hourly fee arrangement to consult an attorney early in the process, when a lot of problems can be more easily solved with timely advice and help.

We propose to represent the City of Ramsey on all civil matters, except individual civil litigation files requiring more than ten hours of attorney time in any month, as part of a flat monthly fee of \$4,250.00. We have reviewed, assessed and included in that amount those items listed in the Request for Proposal, as stated and qualified as follows:

- A. Attend City Council meetings and other City Board, Authority, Commissioner or Committee meetings as requested by the City Council or City Clerk/Administrator.
- B. Draft and/or review ordinances, resolutions, and correspondence, as requested. Review City Council agendas and meeting minutes as requested.
- C. Advise the Mayor, Council Members, City Clerk/Administrator, Department Heads and other staff on city legal matters.
- D. Prepare and/or review municipal contracts, such as contracts for public improvements, joint powers agreements, construction, and purchase of equipment.
- E. Review of the Municipal Code on a regular basis and provide assistance in the drafting of any needed modifications or amendments.
- F. Represent City in matters related to the enforcement of City building and zoning codes.
- G. Research and submit legal opinions on municipal or other legal matters, as requested by City Council or City Clerk/Administrator.

- H. Meet with the City Council, Economic Development Authority, City Administrator, Department Heads and City Staff as needed to review Council agenda items, and the status of all legal matters before the City.
- I. Provide legal briefings regarding new or proposed legislation affecting municipal operations and activities.
- J. Provide advice and training on open meeting law, data practice, parliamentary procedure, records retention and privacy issues, including HIPPA.
- K. Provide advice and training on open meeting law, data practice, parliamentary procedure, records retention and privacy issues, including HIPPA.
- L. Represent, as needed, the City in employment related issues, labor negotiations, arbitration, administrative hearings and in litigation involving same.
- M. Interpret and advise with respect to municipal employment matters including, but not limited to PERA, labor agreements, personnel policy, FMLA, Veterans' Preference.
- N. Defend City in litigation (except in those cases where insurance companies are required to provide defense) including, but not limited to, 1) human rights claims; 2) condemnation; 3) permits and administrative actions; and 4) labor and employment matters.
- O. Defend City in uninsured claims and other insurance matters.
- P. In coordination with Bond Counsel, review of financing, special assessments, bonds and insurance requirements required by or for City contracts or activities.
- Q. Represent City in the acquisition of properties for public improvements, easements, and parks.
- R. Represent City in condemnation proceedings for public improvement projects.
- S. Represent City in workers' compensation matters.
- T. Initiate litigation on behalf of City as requested by City Council.
- U. Interpret and advise regarding zoning and/or land use questions.

- V. Interpret and advise regarding impact fees and legal uses.
- W. Advise and represent the City on environmental matters.
- X. Prepare and/or review the following:
  - a. Conditional Use Permits and Documentation
  - b. Vacation of Rights-of-way
  - c. Special Assessments
  - d. Planned Unit Developments
  - e. Development Agreements
  - f. Subdivision and Zoning Requests
- Y. The firm shall not subcontract out or assign any interest in the contract and shall not transfer any interest in the same without prior written consent of the City.

In addition, we would impose the additional requirement of meeting from time to time with the City Administrator and the staff to review the status of all legal matters before the City and providing a written status report on all current litigation and unresolved matters.

***In instances where cumulative litigation time on any given file exceeds ten hours in a single month for that individual file, time spent on that file beyond ten hours would be billed at the hourly rate of \$150.00 per hour for attorneys, with no distinction between them as to rate, and \$80.00 per hour for paralegal or clerk time. Our review of the City's circumstances, as well as our experience with municipalities in the past, leads us to believe this sort of occurrence would be a very infrequent occurrence.***

To the extent possible, all hourly billed services that could be performed by a paralegal or law clerk will be billed at the paralegal rate irrespective of whether they are performed by a paralegal or an attorney. The minimum increment of time billed by the firm is the tenth (1/10) of an hour, or six minutes. Long distance calls totaling under \$25.00 per month, and copying costs up to 2000 copies per month, would be included in the fee. Time and copies in excess of those figures would be billed at cost. The production of trial exhibits and any disbursements related to securing a witnesses' testimony through a subpoena would be billed at nominal cost. Ordinarily, where witness fees have been less than \$200, we have not billed them.

Our firm would expect to provide monthly statements and summaries that would fully itemize all time spent, as well as a detailed accounting of expenditures, to the City. We have the capacity to modify this report to provide such additional information as the City of Ramsey might require.

***Notwithstanding the foregoing proposal, this firm is willing to be engaged for civil legal services with the City, under a traditional hourly billing rate, if that would be the approach preferred by the City.***

## **Assurances, Insurance and Conflict Disclosures**

The signatory of this proposal made on behalf of the firm of Holstad & Knaak, PLC, is Frederic W. Knaak, who represents by this Proposal that he has full and complete authority to make all representations made herein on behalf of himself and the Firm, and to bind the Firm in any contract made with the City of Ramsey as the result of this proposal.

While we have been fortunate in originating no claims for any errors caused by our representation over the past forty years, we believe that the protection of an ample insurance coverage for clients is part of responsible municipal legal practice. The Firm's professional liability coverage is provided by the Berkley Insurance Group for \$2,000,000 for any individual claim related to its professional services, with a \$2,000,000 aggregate cap for any single occurrence, and a \$5000 deductible per claim. The firm also maintains similar coverages on its Error and Omission policy related to any work in the real estate and title insurance areas of its practice. A copy of the Declarations Page of the policy is attached, included and incorporated by reference.

After a complete review of our current and former clients, we represent that we are unaware of any current or likely potential conflict of interest with the City or that would in any way conflict with our ability to serve as the City's attorney. Our representations as to possible conflicts involve currently known matters to Mr. Knaak and the law firm. All members of the Firm review, on regular basis, a summary of all new clients of the Firm with the express purpose of determining whether any conflicts may exist with existing clients. It is our policy to both advise clients when a conflict occurs and withdraw from representation. We have never experienced a situation in which the policy has had to be implemented. If a conflict were to arise, our priority would be the continuing servicing of the City's needs and we would decline any representation that would conflict with it.

***[the remainder of this page intentionally left blank]***

## Municipal References

The following individuals have agreed to serve as references for the firm and in particular, Mr. Knaak, with respect to legal representation:

Mr. Ronald Moorse  
City Administrator, City of Afton  
3033 Saint Croix Trail  
Afton, MN 55001  
(651) 436-5090

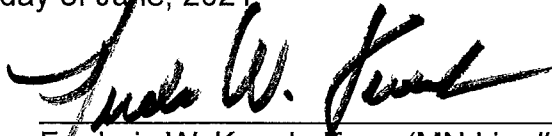
The Hon. Bill Palmquist  
Mayor of Afton  
3033 Saint Croix Trail  
Afton, MN 55001  
(651) 436-5090

Mr. Richard Pribyl  
Former City Finance Director  
City of Fridley  
14952 Central Avenue  
Ham Lake, MN 55304  
(612) 701-2769

Mr. Timothy Geraghty  
Newport Mayor of 33 years  
120 17<sup>th</sup> Street  
Newport, MN 55055  
(651) 459-6790

Additional references and information supplementing and clarifying this proposal will gladly be furnished by Mr. Knaak upon request.

Signed and submitted this 30<sup>th</sup> day of June, 2021



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Frederic W. Knaak, Esq., (MN Lic. #56777)  
for Holstad & Knaak, PLC



# INSURANCE BINDER

DATE (MM/DD/YYYY)  
06/15/2021**THIS BINDER IS A TEMPORARY INSURANCE CONTRACT, SUBJECT TO THE CONDITIONS SHOWN ON THE REVERSE SIDE OF THIS FORM.**

PRODUCER Mercer Consumer, a service of Mercer Health & Benefits Administration LLC PO Box 310179 Des Moines, IA 50331-0179		COMPANY Berkley Insurance Company		BINDER # 1	
		EFFECTIVE DATE 06/14/2021		EXPIRATION DATE 07/14/2021	
		EFFECTIVE TIME 12:01		TIME <input checked="" type="checkbox"/> 12:01 AM <input type="checkbox"/> NOON	
PHONE (A/C, No, Ext): 800-435-7904		FAX (A/C, No):		<input type="checkbox"/> THIS BINDER IS ISSUED TO EXTEND COVERAGE IN THE ABOVE NAMED COMPANY PER EXPIRING POLICY #: PLP-1382855-P6	
CODE:		SUB CODE:		DESCRIPTION OF OPERATIONS/VEHICLES/PROPERTY (Including Location)	
AGENCY CUSTOMER ID KN109593		INSURED Holstad & Knaak, PLC Attorneys at Law			

TYPE OF INSURANCE	COVERAGE/FORMS	LIMITS		
		DEDUCTIBLE	COINS %	AMOUNT
PROPERTY CAUSES OF LOSS <input type="checkbox"/> BASIC <input type="checkbox"/> BROAD <input type="checkbox"/> SPEC <input type="checkbox"/> _____ <input type="checkbox"/> _____				
GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR <input type="checkbox"/> _____ <input type="checkbox"/> _____ RETRO DATE FOR CLAIMS MADE:		EACH OCCURRENCE		\$
		DAMAGE TO RENTED PREMISES		\$
		MED EXP (Any one person)		\$
		PERSONAL & ADV INJURY		\$
		GENERAL AGGREGATE		\$
		PRODUCTS - COMP/OP AGG		\$
		COMBINED SINGLE LIMIT		\$
VEHICLE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS <input type="checkbox"/> _____ <input type="checkbox"/> _____		BODILY INJURY (Per person)		\$
		BODILY INJURY (Per accident)		\$
		PROPERTY DAMAGE		\$
		MEDICAL PAYMENTS		\$
		PERSONAL INJURY PROT		\$
		UNINSURED MOTORIST		\$
				\$
VEHICLE PHYSICAL DAMAGE DED <input type="checkbox"/> ALL VEHICLES <input type="checkbox"/> SCHEDULED VEHICLES <input type="checkbox"/> COLLISION: _____ <input type="checkbox"/> OTHER THAN COL.: _____		<input type="checkbox"/> ACTUAL CASH VALUE <input type="checkbox"/> STATED AMOUNT <input type="checkbox"/> _____		\$
GARAGE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> _____ <input type="checkbox"/> _____		AUTO ONLY - EA ACCIDENT		\$
		OTHER THAN AUTO ONLY:		\$
		EACH ACCIDENT		\$
EXCESS LIABILITY <input type="checkbox"/> UMBRELLA FORM <input type="checkbox"/> OTHER THAN UMBRELLA FORM RETRO DATE FOR CLAIMS MADE:		AGGREGATE		\$
		SELF-INSURED RETENTION		\$
		<input type="checkbox"/> WC STATUTORY LIMITS		\$
WORKER'S COMPENSATION AND EMPLOYER'S LIABILITY		E.L. EACH ACCIDENT		\$
		E.L. DISEASE - EA EMPLOYEE		\$
		E.L. DISEASE - POLICY LIMIT		\$
SPECIAL CONDITIONS/ OTHER COVERAGES  Lawyers' Professional Liability Claims Made Retro Date Full Prior Acts Policy # PLP-1382855-P7 Per Incident \$2,000,000 Aggregate Limit \$2,000,000 Deductible PC \$5,000  Includes forms and endorsements as listed on the quotation accepted on 06/11/2021. This binder is subject to receipt of premium in full by 07/14/2021 or within 30 days, otherwise this binder is null and void.		FEES		\$
		TAXES		\$
		ESTIMATED TOTAL PREMIUM	\$	12,495.00

NAME & ADDRESS  Holstad & Knaak, PLC Attorneys at Law  4501 Allendale Drive  Saint Paul, MN 55127	MORTGAGEE LOSS PAYEE <input type="checkbox"/>	ADDITIONAL INSURED
	LOAN #	
	AUTHORIZED REPRESENTATIVE <i>Anita G. Brown</i>	

## CONDITIONS

This Company binds the kind(s) of insurance stipulated on the reverse side. The Insurance is subject to the terms, conditions and limitations of the policy(ies) in current use by the Company.

This binder may be cancelled by the Insured by surrender of this binder or by written notice to the Company stating when cancellation will be effective. This binder may be cancelled by the Company by notice to the Insured in accordance with the policy conditions. This binder is cancelled when replaced by a policy. If this binder is not replaced by a policy, the Company is entitled to charge a premium for the binder according to the Rule and Rates in use by the Company.

### Applicable in California

When this form is used to provide insurance in the amount of one million dollars (\$1,000,000) or more, the title of the form is changed from "Insurance Binder" to "Cover Note".

### Applicable in Delaware

The mortgagee or Obligee of any mortgage or other instrument given for the purpose of creating a lien on real property shall accept as evidence of insurance a written binder issued by an authorized insurer or its agent if the binder includes or is accompanied by: the name and address of the borrower; the name and address of the lender as loss payee; a description of the insured real property; a provision that the binder may not be canceled within the term of the binder unless the lender and the insured borrower receive written notice of the cancellation at least ten (10) days prior to the cancellation; except in the case of a renewal of a policy subsequent to the closing of the loan, a paid receipt of the full amount of the applicable premium, and the amount of insurance coverage.

Chapter 21 Title 25 Paragraph 2119

### Applicable in Florida

Except for Auto Insurance coverage, no notice of cancellation or nonrenewal of a binder is required unless the duration of the binder exceeds 60 days. For auto insurance, the insurer must give 5 days prior notice, unless the binder is replaced by a policy or another binder in the same company.

### Applicable in Maryland

The insurer has 45 business days, commencing from the effective date of coverage to confirm eligibility for coverage under the insurance policy.

### Applicable in Michigan

The policy may be cancelled at any time at the request of the insured.

### Applicable in Nevada

Any person who refuses to accept a binder which provides coverage of less than \$1,000,000.00 when proof is required: (A) Shall be fined not more than \$500.00, and (B) is liable to the party presenting the binder as proof of insurance for actual damages sustained therefrom.

### Applicable in the Virgin Islands

This binder is effective for only ninety (90) days. Within thirty (30) days of receipt of this binder, you should request an insurance policy or certificate (if applicable) from your agent and/or insurance company.

## Lawyers Professional Liability Insurance

NOTICE: THIS POLICY PROVIDES COVERAGE ON A CLAIMS MADE AND REPORTED BASIS SUBJECT TO ITS TERMS. THIS POLICY APPLIES ONLY TO ANY CLAIM FIRST MADE AGAINST THE INSUREDS AND REPORTED TO THE INSURER DURING THE POLICY PERIOD OR ANY EXTENDED REPORTING PERIOD THAT MAY APPLY.

PLEASE READ AND REVIEW THE POLICY CAREFULLY AND DISCUSS THE COVERAGE WITH YOUR INSURANCE AGENT OR BROKER.

IF INDICATED IN ITEM 5. A. BELOW, THE LIMIT OF LIABILITY AVAILABLE TO PAY DAMAGES OR SETTLEMENTS SHALL BE REDUCED AND MAY BE COMPLETELY EXHAUSTED BY AMOUNTS INCURRED AS LEGAL DEFENSE COSTS. THE INSURER SHALL NOT BE LIABLE FOR LEGAL DEFENSE COSTS OR FOR THE AMOUNT OF ANY JUDGMENT OR SETTLEMENT AFTER EXHAUSTION OF THE LIMIT OF LIABILITY.

Whenever printed in this Declarations Page, the boldface type terms shall have the same meanings as indicated in the Policy.

- Item 1. Name and Address of Named Insured:** **Policy Number: PLP-1382855-P6**  
Holstad & Knaak, PLC Attorneys at Law  
4501 Allendale Drive  
Saint Paul, MN 55127
- Item 2. Policy Period:** From June 14, 2020 (inception date) to June 14, 2021 (expiration date)  
(Both dates at 12:01 a.m. Standard Time at the address of the **Named Insured**)
- Item 3. Limits of Liability for the Policy Period:**  
A. \$2,000,000 each **Claim**, but in no event exceeding  
B. \$2,000,000 in the aggregate for all **Claims**
- Item 4. Supplemental Coverages Limit of Liability:**  
\$100,000 in the aggregate for all Supplemental Coverages during the **Policy Period**
- Item 5. Claim Expenses for the Policy Period:**  
 A. **Claim Expenses** Reduce the Limit of Liability in Item 3. above  
 B. **Claim Expenses** in Addition to the Limit of Liability in Item 3. above  
**Claim Expense Limit:** \$2,000,000 in the aggregate for all **Claims** during the **Policy Period**
- Item 6. Deductible:**  
 A. **Aggregate Deductible - All Claims** \$5,000  
 B. **Each Claim Deductible** N/A  
 i. The Deductible applies to **Damages and Claim Expenses**  
 ii. The Deductible applies only to **Damages**
- Item 7. Death or Disability and Non-Practicing Extended Reporting Period Limit of Liability (inclusive of Damages and Claim Expenses):**  
A. \$2,000,000 each **Claim**, but in no event exceeding  
B. \$2,000,000 in the aggregate for all **Claims**
- Item 8. Premium:** \$12,186

**BERKLEY INSURANCE COMPANY**

**Item 9. Forms and Endorsements attached at inception: LPL 39400 (rev. 12-14)**

1	701-CR-	0419	CLAIM REPORTING PROCEDURES
2	LPL 205201	(05-14)	Disciplinary Proceeding Supplemental Coverage for Privacy Breach Claims
3	LPL 306901	(05-14)	Prior Acts Date for Listed Insured
4	LPL 306902-CW	(02-15)	Addition of Insured
5	LPL 400907	(09-14)	Specific Entity Exclusion
6	LPL 504901	(07-14)	Addition to Section V. D. Other Insurance
7	LPL 604101	(05-14)	Mercer Consumer Modification to Non-Practicing Extended Reporting Period
8	LPL-MN-PAE	(05-14)	Minnesota Policy Amendatory Endorsement
9	LPL-MN-PHN	(05-14)	Minnesota Policyholder Notice

**Item 10. Notice to the Insurer as provided in section V. A. shall be sent to: All other notices to be given to the Insurer shall be sent to:**

Berkley Select Claims Department on behalf of  
Berkley Insurance Company  
550 W. Jackson Blvd, Suite 500, Chicago, IL 60661  
Toll Free: (844) 465-6256 Fax: (312) 207-1933  
Email: [newclaim@berkleysselect.com](mailto:newclaim@berkleysselect.com)

Berkley Select on behalf of  
Berkley Insurance Company  
550 W. Jackson Blvd, Suite 500, Chicago, IL 60661  
Toll Free: (800) 446-2100

These Declarations along with the completed and signed Application and the Lawyers Professional Liability Insurance Policy shall constitute the contract between the Named Insured and the Insurer.

Authorized Representative:



Date Issued: June 15, 2020

## CURRICULUM VITAE

**Frederic W. ("Fritz") Knaak**  
**Attorney at Law**

**HOLSTAD & KNAAK, PLC**  
**4501 Allendale Drive**  
**St. Paul, Minnesota 55127**  
[fknaak@klaw.us](mailto:fknaak@klaw.us)  
**651-490-9078 – telephone**  
**651-490-1580 - facsimile**

### **EMPLOYMENT =====**

2013 – Present, **President, HOLSTAD & KNAAK, PLC**

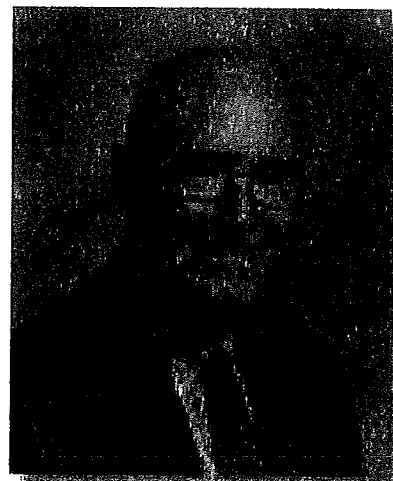
2009 - 2013, **Partner, HOLSTAD & KNAAK, PLC**  
St. Paul, Minnesota

1998 - 2001, **Partner, HOLSTAD & KNAAK, PLC.**  
Vadnais Heights, Minnesota

2002 – 2007, **KNAAK & KANTRUD, P.A.**  
Vadnais Heights, Minnesota

1995 - 1997 **Of Counsel, HOLSTAD & LARSON, P.L.C.,**  
Vadnais Heights, Minnesota

1985 - 1995 **RAUENHORST & KNAAK,**  
Roseville, Minnesota  
(Formerly Rauenhorst, Carlson & Knaak)



In private general practice of law with rapidly-expanding law firms in northeast suburban Twin Cities area. Broad background includes substantial trial and appellate litigation experience in state and federal courts over approximately 38 years of private law practice; legal counsel and former City Attorney for cities of Fridley, Maplewood and Lake Elmo (including criminal prosecution), current legal counsel (civil and prosecution for the cities of Afton and Newport, Minnesota, Legal Counsel, Independent School District 833. Forest Lake, Minnesota, the White Bear Lake Conservation District, and a variety of medium-sized and smaller private, corporate, other business and individual clients, American located primarily in the Twin Cities Metropolitan Area. The client base also includes a number of European businesses. Served as counsel, officer and member on the boards of directors of several corporate clients, including one "Inc. 500" national business concern, and charitable organizations, including as legal counsel for the White Bear Lake Area Lions Club. Principal areas of practice are general litigation, administrative and public law, criminal law, business law and litigation, local government, zoning, municipal law and probate. From 1996 through 2000, practice also included responsibilities as an appointed Contract Administrative Law Judge for the State of Minnesota.

Knaak has served as local counsel on a number of major constitutional cases before the Federal Courts, recently serving as legal counsel to the Minnesota Secretary of State in the recent Redistricting litigation. He was also lead counsel for the Minnesota Senate Republican Caucus and for the Senator Norman Coleman Recount.

**1983 - 1993: MINNESOTA STATE SENATE, St. Paul, Minnesota**

**Elected: State Senator** in 1982; re-elected 1986 and 1990. Served as Senator from District 53 including parts of Ramsey and Washington Counties in the northeastern suburban metropolitan area. Elected: Floor Leader and Assistant Minority Leader.

**Committees:** Judiciary, Education, Education Funding Subcommittee, Metropolitan Affairs, Rules and Administration; Member, Legislative Commission to Review Administrative Rules; Member,

State Council on Black Minnesotans; Member, Legislative Commission of Children, Youth and Family Members; 1992 Legislator of the Year, Minnesota Association of Treatment Programs.

**1978 - 1985: PETERSON, POPOVICH, KNUTSON & FLYNN,**  
St. Paul, Minnesota (Currently Knutson, Flynn, Hetland & Deans)

Private practice as Associate Attorney for law firm representing Minnesota School Board Association and over 100 school districts and other public employers in Minnesota and neighboring states. Experience includes advising large organization on employment and labor-related matters, including: work stoppages, employee benefits, contract management and interpretation; appearances in trial and administrative tribunals.

**PROFESSIONAL ASSOCIATIONS & ACTIVITIES =====**

**Member, Anoka, Ramsey and Washington County Bar Associations**

**Member, Minnesota, Wisconsin, Colorado**

**Member, American Bar Association and Association of Trial Lawyers of America**

**Member, Gamma Eta Gamma Law Fraternity**

**Member, Minnesota City Attorney's Association**

**Qualified Neutral under Rule 114**

**Member Representing Attorneys, Minnesota Electronic Real Estate Recording Task Force (Appointed 2005, reappointed by Governor Pawlenty in 2006)**

**Minnesota Lawyers Concerned for Lawyers Member, (a private, non-bar affiliated organization of Minnesota attorneys dedicated to assisting chemically dependent lawyers and their families), 1984 - Present; (Board of Directors, 1986 - 1993; Secretary, 1987)**

**Administrative Law Judge, State of Minnesota (1996 - 2000)**

**COURTS =====**

**Admitted:** to the Courts of the State of Minnesota, October, 1979  
**Admitted:** the Courts of the States of Colorado and Wisconsin, 1994  
**Admitted:** as Attorney and Counselor to United States Court District of Minnesota, March, 1980  
**Admitted:** as Attorney and Counselor to United States Supreme Court and the Court of Appeals, Eighth Circuit  
**Admitted:** Pro Hoc Vice, Superior Court, Maricopa County, Phoenix, Arizona, 1994

**EDUCATION =====**

University of Minnesota Law School, Juris Doctor, December, 1978  
St. John's University, Bachelor of Arts, Summa Cum Laude, 1975  
State University of Florence, Italy  
University of Foreigners, Perugia, Italy  
Rutgers College  
White Bear Lake Senior High School, Honors, 1971

**PERSONAL =====**

**Children:** Benjamin, 29; Andrew, 28; Joseph, 25; Paul, 23; and Mary, 21 years old

**Member,** American Land Title Association (ALTA), Vadnais Heights Economic Development Corporation; White Bear Lake Area Chamber of Commerce

**Hobbies and Pastimes:** Reading (history, law & poetry); Internet and computers; running & exercise; poetry; gardening; Italy & things Italian; Regular Political Analyst, KTCA TV (Almanac), Minnesota; Political Commentator WLKX, Forest Lake, Minnesota.

**FOREIGN LANGUAGES =====**

**Italian:** (fluent)  
**Spanish:** (reading knowledge and some speaking ability)  
**French:** (reading knowledge and some speaking ability)

**REFERENCES =====**

Mr. Ronald Moorse  
City Administrator  
City of Afton  
3033 Saint Croix Trail  
Afton, MN 55001  
651-436-5090

Mr. Richard Pribyl  
Former City Finance Director, City of Fridley  
14952 Central Avenue  
Ham Lake, MN 55304  
612-701-2769

Ms. Deb Hill  
City Administrator  
City of Newport  
596 Seventh Avenue  
Newport, MN 55055  
651-459-5677

Further references will be furnished on request.

**Donald W. Kohler, Attorney at Law**  
4525 Allendale Drive  
White Bear Lake, MN 55127  
(651) 426-1869  
Email: dkohler@kohlerlaw.com

**EDUCATION**

**Hamline University School of Law, Saint Paul, MN**  
December 1998 Graduate; Admitted to the Minnesota Bar 1999

**Metropolitan State University, Saint Paul, MN**  
Bachelor of Arts, Communications, 1991

**WORK  
EXPERIENCE**

**Donald W. Kohler, Attorney at Law**  
(December 1999 - Present)

- Represent clients throughout the legal process
- Practicing mainly in the areas of personal injury and workers' compensation, insurance law, and estate planning

**Knaak & Associates, P.A., Vadnais Heights, MN**  
Of Counsel

(June 2002 - Present)

- Cover city prosecution, council meetings, and associate on municipal client files

**Schroeder & Mandel, P.A., Minneapolis, MN**  
Contract Attorney

(December 1999 - May 2000)

- Write and prepare settlement demands
- Contact clients regarding settlement issues
- Review medical records and write medical summaries

Of Counsel

(February 2009 - Present)

- Associate on workers' compensation files

**Thomas W. Krauel & Assoc., White Bear Lake, MN**  
Law Clerk

(March 1997 - December 1999)

- Write and prepare settlement demands for presentation to insurers
- Draft pleadings, motions, memorandum and appellate briefs
- Assist with trial proceedings

Of Counsel

(December 1999 - Present)

- Associate on personal injury and workers' compensation files

**Federal Public Defender's Office, Minneapolis, MN**

Law Clerk

(May 1997 - October 1997)

- Wrote appeals to Federal District Court, 8th Circuit, and U.S. Supreme Court
- Performed legal research on Westlaw and hardcover
- Assisted and observed trial proceedings

**Ramsey County Public Defender's Office, Maplewood, MN**

Certified Student Attorney - Minnesota Justice Foundation Volunteer

(September 1996 - May 1997)

- Interviewed and represented defendants at arraignment
- Represented defendants at omnibus hearings
- Performed legal research and background investigations on clients

**Legal Assistance of Washington County, Stillwater, MN**

Law Clerk - Minnesota Justice Foundation Volunteer

(May 1996 - September 1996)

- Performed legal research
- Wrote pleadings and judgment decrees for marriage dissolutions
- Assisted with client intake

**University Affiliated Family Physicians, Saint Paul, MN**

Medical Records Representative

(September 1994 - September 1995)

- Wrote clinic policy manual for medical records department
- Supervised coding and filing departments
- Maintained and updated over 10,000 patient records
- Arranged for records to be transferred to other clinics
- Responded to request for release of patient records

**Hennepin County Medical Center, Minneapolis, MN**

Medical Records Clerk

(April 1994 - September 1994)

- Planned and implemented delivery of patient records to in-house clinics
- Updated records and correspondence

**Cardiac Pacemakers, Inc., Arden Hills, MN**

Library Assistant and Customer Service Representative/ Contract

Employee

(September 1992 - April 1994)

- Performed literature searches for physicians, sales representatives & engineers
- Processed orders, entered orders and arranged for shipments

**Freelance Correspondent, Saint Paul, MN**

Correspondent for community newspapers

St. Croix Valley Press, White Bear Press, The Monitor, and The Voice  
(May 1991 - September 1992)

- Covered city council meetings for three local communities
- Interviewed community members for articles
- Researched and wrote community interest articles
- Assisted with editing and layout of newspapers.

**United Parcel Service, Minneapolis, MN**

Delivery Driver

(February 1980 - September 1991)

- Dealt with customer concerns about shipping policies
- Provided delivery services to businesses and private residences

**OTHER**

**Memberships, Community Service, Misc.**

- Volunteer Attorney Legal Assistance of Washington County
- Chair of Fee Dispute Panel 19<sup>th</sup> District Bar Association
- Member of Minnesota State Bar Association, Ramsey County Bar Association, and 19<sup>th</sup> District Bar Association
- Member of Minnesota Association for Justice
- Former Chairman and Board Member, City of White Bear Lake Planning and Zoning Commission (2005 -2010)
- Former Member White Bear Lake Conservation District Board Member (2002 - 2005)
- Mentioned in Law & Politics "Who's Who", Summer 2009

# CRAIG J. BEUNING, JD

cbeuning@klaw.us

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## PROFESSIONAL PROFILE

As summarily identified herein, my professional profile includes extensive hands-on experience in numerous fields of business development and venture capital procurement (both nationally and internationally) including, but not limited to, healthcare industry legal/regulatory compliance, complex business litigation, contract negotiations and drafting, land acquisition and human resources.

## WORK HISTORY

### Holstad & Knaak, P.L.C.

- Conducted litigation under the supervision of Mr. Knaak and Mr. Holstad including, but not limited to, contract disputes, criminal prosecution, business law, real estate law, insurance litigation and municipal land-use projects. Acquired National Title Insurance licensing for entities seeking to conduct title insurance business in multiple states.

### Beuning Consulting

- Financial consulting and venture capital procurement for entities and/or individuals involved in the fields of healthcare, clean energy, land acquisition and development, “green” building products and various IT/Wi-Fi based endeavors.

### Green Deconstruction of the United States

- Company owner who worked with MS and LA state officials to implement a business model in which dilapidated housing in Mississippi and Louisiana was de-constructed by utilizing state-of-the-art technology to create an 80% landfill reduction by re-use of reclaimed materials.

### ProTech Records

- Company owner in charge of, among other things, regulatory compliance and oversight with newly enacted Hippa/Hitech laws and pending healthcare legislation (Affordable Care Act) at its infancy enactment stages in 2010

### Rankin County School District, Brandon, MS

- Engaged as a substitute teacher for the Rankin County School District. I teach and have taught nearly every high school subject area and have successfully completed all Praxis Teaching Exams necessary for licensure with a concentration in business.

## EDUCATION

Hamline University, Bachelor of Arts

Hamline University School of Law, Deans List, Juris Doctor, 2000

# BRYCE MARTIN HOLSTAD

115 Linden St. E ♦ Stillwater, MN 55082 ♦ 651-398-0162 ♦ holstad1@msu.edu

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## PROFESSIONAL PROFILE

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Innovative, analytical and results-driven Staff Attorney & Legal Advocate with over five years of proven experience in project management, legal analysis, research, compliance and negotiation and ten years of real estate title examination experience. Leverages documented expertise in cross-functionality, bolstering performance among staff and providing essential legal expertise. Cultivates excellence among workforce, providing exceptional public policy advice and assisting with practice recommendations. Collaborates and communicates on essential legal topics, devising effective methodologies for court presentation. Demonstrates unparalleled dedication to client interests through representation in legal and title proceedings.

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## AREAS OF EXPERTISE

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- ♦ Specialized Knowledge
- ♦ Critical Thinking
- ♦ Client Interviewing
- ♦ Training & Mentoring
- ♦ Profit & Loss Analysis
- ♦ Legal Research & Writing
- ♦ Negotiation & Consulting
- ♦ Business Administration
- ♦ Project Management
- ♦ Strategic Planning
- ♦ Community Networking
- ♦ Trial & Litigation Experience

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## PROFESSIONAL EXPERIENCE

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**HKB LAW, P.A.**

**WHITE BEAR LAKE, MN**

**JULY 2020 – PRESENT**

### Attorney

- ♦ Demonstrated continued commitment to representation of low-income individuals continuing experience at Iowa Legal Aid in Landlord/Tenant disputes. Perform client intake conferences and conduct appropriate referrals to community agencies as necessary. Coordinate with firm attorneys to facilitate delivery of wide range of legal services. Established trust and rapport with clients.
- ♦ Assessed legal needs of clients and determined best methods to promote legal positioning in real estate, trust, estate and litigation. Coordinated cases with managing attorney and collaborated on cases with other attorneys. Negotiated ethical and beneficial solutions to legal matters.
- ♦ Develop strategy, arguments and testimony to present cases in court and other forums. Perform complex legal research on topics of constitutional law, real estate litigation and family matters. Prepare memorandums, briefs and documentation for court consideration. Maintain broad knowledge of changes in legislation and state statutes.

**ARDEN TITLE, LLC**

**VADNAIS HEIGHTS, MN**

**2015 – PRESENT**

### Chief Council

- ♦ Examined and issued title insurance, quiet titles and probate procedures. Reviewed commitment requirements to properly convey title. Increased revenue from \$700K to \$3M in one year. Developed marketing strategy to maximize file intake volume and complex file acquisition. Established remote closing office in the Twin Cities area serving Minnesota, Wisconsin, Iowa and Michigan area. Reviewed work quality and performance, inserting

# Bryce Martin Holstad

Résumé ♦ Page Two

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## PROFESSIONAL EXPERIENCE (Continued)

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corrections as necessary to ensure adherence to customer requests, company procedures, regulatory compliance and accuracy.

- ◆ Resolved customer complaints by expediting orders and explaining procedures and legal compliance. Acted as consumer complaint manager by interacting directly with customers.
- ◆ Established new web system by customizing software, ensuring adherence to business directives. Crafted an automatic reporting system, displaying file deadlines and process completion. Researched case management systems to facilitate relationships with development companies and underwriters.
- ◆ Developed and implemented company operations policy. Participated in business development and community customer relations activities and seminars. Collaborated with a network of individual closers and conducted corporate and staff meetings. Nominated as Young Title Professional of the Year by Missouri Land Association.

IOWA LEGAL AID

MASON CITY, IA

2019 – JULY 2020

### Staff Attorney

- ◆ Demonstrated commitment to representation of low-income individuals. Performed client intake conferences and conducted appropriate referrals to community agencies as necessary. Coordinated with private attorneys to facilitate delivery of wide range of legal services. Established trust and rapport with clients.
- ◆ Assessed legal needs of clients and determined best methods to promote client safety and stability. Communicated appropriate legal advice to clients. Provided civil legal representation to eligible clients consistent with professional standards and procedures. Coordinated cases with managing attorney and collaborated on cases with other staff attorneys. Negotiated ethical and beneficial solutions to legal matters.
- ◆ Developed strategy, arguments and testimony to present cases in court and other forums. Participated in client outreach and community networking events. Performed complex legal research on topics of tax, divorce, custody, benefits and evictions. Prepared memorandums, briefs and documentation for court consideration. Maintained broad knowledge of changes in legislation and state statutes.
- ◆ Maintained accurate records in case management system and performed administrative tasks. Participated in staff meetings and traveled to attend additional training seminars. Selected by senior management for recognition as tax advocate after participating in daily training on IRS client representation and tax law research.

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## LICENSES

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### Law Licenses

State of Minnesota

State of Iowa

### Resident Title Producers License

Minnesota

# Bryce Martin Holstad

Résumé ■ Page Three

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## Professional Experience (continued)

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## EDUCATION & ADDITIONAL TRAINING

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**Juris Doctor, *Cum Laude***

*Great Lakes First Amendment Legal Clinic, Jurisprudence Award in Constitutional Law, Dean's List*  
Michigan State University College of Law, East Lansing, MI

**Bachelor of Science in Political Science, Law & Government & Applied Business**

University of Minnesota, Minneapolis, MN

**Consumer Debt Disputes, Difficult Clients, Public Assistance & Benefits, Landlord Tenant, Exonerations,  
Divorce, Custody, & Protective Order Training**

Iowa Legal Aid

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## AFFILIATIONS

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**Member**

Cerro Gordo County Bar Association, Minnesota State Bar Association & Iowa State Bar Association

**Managing Member**

Holstad Farms, LLC

**Education Committee Member**

American Land Title Association

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651-398-0162 • [holstad1@msu.edu](mailto:holstad1@msu.edu)

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# BethAnn M. Hanson

1833 100<sup>th</sup> Street  
New Richmond, WI 54017  
(612) 242-0214  
AlphaBN1@hotmail.com

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## Experience

**Paralegal/Office Manager – City Attorney’s Office, General Practice** 05/2017 to Present  
Holstad & Knaak, PLC – St. Paul, MN

- Answer and direct incoming telephone inquiries, e-mails;
- Responsible for and draft initial court filings and case management;
- Draft correspondence, discovery, pleadings;
- Monitor case status and proactively prepare for upcoming court dates;
- Initiate and maintain client contact for all matters;
- Maintain and manage court calendar;
- Manage and oversee all criminal proceedings for various cities; track and maintain criminal files; correspondence with court and deputies; request and review criminal records; prepare subpoenas; trial preparation;
- Prepare and present research; maintain filing; billing; miscellaneous office duties.

**Paralegal/Office Manager – Criminal Defense, Personal Injury** 11/2015 to 05/2017  
Sand Law, LLC – St. Paul, MN

- Answer and direct incoming telephone inquiries, e-mails;
- Responsible for and draft initial court filings and case management;
- Draft correspondence, discovery, pleadings;
- Monitor case status and proactively prepare for upcoming court dates;
- Maintain client contact, provide case status updates to clients, follow up with clients to obtain documents necessary for future court dates;
- Manage calendars;
- Implement online postage system and office supply accounts;
- Update and maintain all filing systems;
- Miscellaneous office duties including scanning, e-filing, copying.

**Paralegal/Office Manager – General Practice** 06/2015 to 11/2015  
Carl Ranum, Esq. – Stillwater, MN

- Answer and direct incoming telephone inquiries, e-mails;
- Responsible for and draft initial court filings and case management;
- Draft correspondence, discovery, pleadings;
- Accounts Receivable/Accounts Payable;
- Oversee and manage all areas of solo practitioner.

**Paralegal – Family Law, Estate Planning, Foreclosure** 11/2012 to 6/2013  
Heywood, Cari & Anderson, S.C. – Hudson, WI

- Draft correspondence, discovery, pleadings, financial disclosure statements;
- Monitor case status and proactively prepare for upcoming court dates;
- Schedule and prepare for depositions, trial prep, pretrial submissions;
- Correspond with clients regarding changes, status, preparation for hearings;
- Draft and revise estate planning documents; witness;

**Paralegal/Billing Manager – Family Law**

08/2011 to 11/2012

Huson Law Firm, PLLC – Maplewood, MN

- Initiate new client contact, open new files in both billing and database;
- Prepare correspondence, discovery, pleadings as case progresses and initial case filings;
- Rectify previous billing system problems and maintain proper billing procedures;
- Track and clarify previous trust fund issues, maintain trust account, prepare monthly billing statements;
- Extensive client contact via e-mail and telephone to aid in the process of cases;
- Coordinate meetings, CLE information, filing information, deadlines;
- Review medical records and prepare medical summaries for expert review;
- Manage case files, deadlines, court filing, trial preparation, depositions;
- Maintain office supplies and bank deposits.

**Legal Assistant – Workers' Compensation and Personal Injury**

09/2010 to 08/2011

Thill Law Firm, P.A. – St. Louis Park, MN (*temporary position*)

- Review workers' compensation files, determine status of case and advise attorney of where matter is at and either perform next step or request how to proceed;
- Organize existing files and implement new process of organization for new files;
- Initial file work-up, including sending out client questionnaires and initial contact with DOLI, medical providers, Workers' Compensation Division and employers;
- Perform review of workers' compensation claim and summarize same;
- Review medical records and prepare medical summaries for furtherance of claim;
- Initiate and maintain client contact for status of ongoing treatment and providers; obtain authorizations to obtain records or same;
- Follow-up with insurance providers regarding wage loss checks;
- Manage files and perform customary/standard process follow-up;
- Draft general correspondence, memoranda, discovery; answer discovery and serve and file same;

**Other Experience**

I have been employed in the legal field since 1987. I have worked as a word processor, a legal secretary, a legal assistant, and a paralegal. I have experience in corporate, family, real estate, transactional, insurance defense, estate planning, banking, employment law, personal injury, immigration, and litigation areas of law. I am proficient with all office equipment, Microsoft Office, TABS, Clio, RingCentral, PC DOCS), Time Matters, Excel, ECF Filing, transcription machines, facsimile machines, telephones and scanning. I am familiar with court filing procedures and all related items thereto. I type at approximately 110 wpm and am extremely diligent in my work. I believe in working together as a team towards a shared goal, and am extremely skilled in soliciting important information and utilizing the same to be successful in my work. I enjoy my career, and it is reflected both in my work product and how I conduct myself while performing the same.

**Education**

Inver Hills Community College – Inver Grove Heights, MN (1987)

Legal Secretarial Science Program – Legal Secretary Certificate

[REDACTED]

Holstad & Knaak, PLC  
4501 Allendale Drive  
St. Paul, MN 55127  
651- 490-9078

February 27, 2017

[REDACTED]

**STATEMENT OF SERVICES RENDERED**  
Monthly Fee for General Legal Services  
Flat Fee of [REDACTED] + Costs

<u>Date</u>	<u>Civil</u>	<u>Time</u>
1-30-17	Telephone conference with staff, review correspondence, research	1.50
2-2-17	Prepare for and attend City Council meeting	5.00
2-6-17	Telephone conferences, research	1.00
2-10-17	Review miscellaneous correspondence, research	1.75
2-13-17	Miscellaneous correspondence review and research	1.25
2-16-17	Prepare for and attend City Council Meeting, miscellaneous research	5.75
2-17-17	Miscellaneous correspondence review and research	1.00
2-20-17	Miscellaneous file review	1.00
2-23-17	Research, draft ordinance	1.50
2-24-17	Correspondence review, research	<u>1.00</u>
	HOURS	20.75

<u>Date</u>	<u>Criminal</u>	<u>Time</u>
1-26-17	Prepare for and attend omnibus/court trial calendar	2.50
1-31-17	Review for upcoming prosecution calendar	.75
2-1-17	Attend pretrials and arraignments	4.00
2-8-17	Attend pretrials and arraignments	4.00
2-9-17	Prepare for and attend omnibus/court trial calendar	3.00
2-15-17	Attend pretrials and arraignments	4.00
2-22-17	Prepare for and attend pretrials	2.50
2-23-17	Prepare for and attend omnibus hearings	<u>2.00</u>
	HOURS	22.75

Paralegal:

Review court notices, emails, requests for records and respond to same, correspondence to court, State Patrol, Washington County Sheriff's Department and defense attorneys regarding reports, files and court appearances; telephone conferences with victims, witnesses, defendants, draft complaints, compile records, reports and draft new case file sheet for court, miscellaneous correspondence, research regarding complaints, discuss prosecution files with attorney Knaak, review files in MNCIS and update files regarding same, prepare files for prosecutor, record dispositions, review reports, and draft complaints, investigation and jury trial preparation for jury trials, miscellaneous paralegal duties, etc.

Criminal 27.00

Assist with various civil files, correspondence, documents, ordinance matters, research, miscellaneous, personnel issues and drafting documents, correspondence and telephone conferences regarding same, miscellaneous civil matters

Civil 10.00

PARALEGAL HOURS: 37.00

COSTS: \$0 **SUMMARY**

TOTAL HOURS:	Civil:	30.75 hrs. (attorney and paralegal hours)
	Criminal	49.75 hrs. (attorney and paralegal hours)
	Litigation	<u>0</u>
	<b>Total hours:</b>	<b>80.50</b>
	<b>Monthly amount</b>	\$ [REDACTED]
	<b>Costs</b>	\$ 0
	<b>TOTAL</b>	\$ [REDACTED]

I certify this bill is accurate and correct.

*s/s Frederic W. Knaak*

\_\_\_\_\_  
Frederic W. Knaak  
Attorney at Law

**PLEASE MAKE YOUR CHECK PAYABLE TO: HOLSTAD & KNAAK, PLC**

**THANK YOU!**