

CITY OF PROVIDENCE, RHODE ISLAND • MAYOR JORGE O. ELORZA



Lori L. Hagen  
City Clerk

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Clerk of Council

DEPARTMENT OF CITY CLERK  
CITY HALL

**IN CITY COUNCIL  
FEBRUARY 19, 2015**

**ELECTION OF VOLUNTEER JUDGE  
OF THE PROVIDENCE MUNICIPAL COURT**

**COUNCIL PRESIDENT APONTE** calls for Nominations for the Office of Volunteer Judge of Providence Municipal Court for the Term 2015-2019.

**COUNCILMAN JACKSON** nominates **LISA BORTOLOTTI** and this nomination is Seconded by **COUNCILMAN IGLIOZZI** and the **ENTIRE CITY COUNCIL**

**COUNCIL PRESIDENT APONTE** calls for further Nominations and there being none, on motion of **COUNCILMAN JACKSON**, Seconded by **COUNCILMAN IGLIOZZI** and the **ENTIRE CITY COUNCIL**, it is voted that Nominations be closed and the Clerk is directed to cast One Ballot for **LISA BORTOLOTTI**.

The Clerk casts one ballot as directed.

**COUNCIL PRESIDENT APONTE** thereupon declares **LISA BORTOLOTTI** duly Elected Volunteer Judge of Providence Municipal Court for the ensuing term of Four Years ending on the first Monday in January, 2019.

**LISA F. BORTOLOTTI**  
37 Luzon Avenue • Providence, RI 02906  
1335 Blue Hill Avenue F220 • Milton, MA 02186  
401-633-5302 •

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Talented leader and focused professional dedicated to meeting the needs of internal and external clients through tax planning, estate planning and trust administration while providing sound business judgment to solve difficult problems with effective solutions through teamwork and collaboration.

## **EXPERIENCE**

**RINET, Boston, MA**  
**Director, Trust Management Group**

**Current**

Trust administration for ultra high net worth clients and preparation of fiduciary income tax returns. Assist clients through family office services.

**First Republic Trust Company, Boston, MA**  
**Senior Trust Officer, Vice President**

**Summer 2014**

Performed trust administration for ultra high net worth clients;  
Participated in business growth and planning meetings with investment managers, sales professionals and trust prospects.

**RBS Citizens N.A., Private Bank and Trust, Providence, RI**  
**Personal Trust Manager, Vice President** *"recruited by First Republic Trust"*

**2013 - 2014**

Successfully administered 100 core accounts and participated in non-profit client investment board meetings.

- Appointed Fiduciary Committee Chairperson overseeing trust officer discretionary requests, terminations, special assets and tax calculations
- Appointed to lead segregation of duties project for regulatory risk compliance
- Promoted business growth and favorable visibility of the Bank and its Trust capabilities by hosting seminars for non-profit officer and trustees

**Experis Finance - Morgan Stanley, Purchase, NY**  
**Trust Consultant - Global Wealth Management Group** *"Consulting role"*

**Fall 2012**

Completed a comprehensive review of the governing documents under which the Bank delivers trust and agency services to high net worth and ultra high net worth clients and their families.

- Appointed to supervise the legal team's quality assurance efforts to ensure work product met high standards for the engagement

**U.S. Trust, Bank of America, Private Wealth Management, Providence, RI**  
**Trust Officer II, Vice President**

**2005 - 2012**

Fiduciary administration of approximately 350 core client accounts in a timely and professional manner.

- Invited to attend a 40-hour consultative selling course to promote growth
- Developed business as a result of successful liaison with centers of influence
- Collaborated with business partners to resolve fiduciary and tax issues, determine investment objectives and fees for service

**Law Office of Audette, Bazar, Berren & Gonzalez, East Providence, RI** 2003 - 2004  
**Law Office of Neal M. Bobruff, Mystic, CT** 2001 - 2003  
Attorney at Law practicing in the fields of Estate Planning, Probate Administration,  
Tax Preparation and Real Estate as well as networking for business growth.

**Seagull Motel, Misquamicut Beach, RI** 1985 - 2000  
**Owner - General Manager**

Transformed a seasonal hotel into a year round business. Performed financial analysis for future capital improvements and business growth as well as budget analysis of income and expense for daily operations. Created marketing materials, managed personnel, scheduled office staff and cleaning crews.

**General Dynamics Corporation, Groton, CT** 1984 - 1986  
**Research and Development Engineer**

Participated in roundtable discussions and wrote code to develop unique database software to store critical plans for the Trident Submarines.

### **RHODE ISLAND PUBLIC SERVICE EMPLOYMENT**

**City of Providence, Providence, RI** Current  
**Associate Judge, Providence Municipal Court**

The City of Providence's Municipal Court is responsible for the collection and adjudication of fines and fees resulting from the issuance of parking/traffic tickets and environmental violations.

**Legal Counsel to Director of the Rhode Island Department of Labor** 1993 - 1998

Advised and represented the Director in negotiations regarding Workers Compensation Administrative Fund including negotiations with the budget office relating to personnel, costs, capital improvements and equipment purchasing. Drafted legislation and represented the Director in meetings with legislative leaders regarding Workers' Compensation law.

- Appointed Hearing Officer on Department labor and employment disputes
- Appointed Counsel for Medical Advisory Board to ensure all rules were APA compliant and that meetings were held in accordance with Open Meetings Act
- Tasked to draft revisions of the Medical Advisory Board Rules of Procedure regarding physician discipline and approval of Preferred Provider Network to meet constitutional due process mandate

**Judicial Law Clerk, Rhode Island Supreme Court** 1992 - 1993  
Served with Chief Law Clerk, Carol Bourcier and Superior Court Law Clerks

**Judicial Law Clerk, Rhode Island Workers' Compensation Court** 1992 - 1993  
Served under the direction of Honorable Chief Justice George E. Healy

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## EDUCATION

**Boston University School of Law** Masters of Law in Taxation L.L.M. 2000

**New England School of Law** J.D. 1991  
Law Review, *New England Journal Criminal and Civil Confinement*  
President, *New England School of Law Computer Law Society*

**Central Michigan University, Computer Science** B.S. 1984  
Minor in Business Administration and Minor in Mathematics

**Attorney License:** State of Rhode Island 1991, State of Connecticut 1992

## Community Service Volunteer

**RBS Citizens Bank N.A. Community Service Volunteer Award 2013**

**National & Community Service - U.S. President's Volunteer Service Award 2010, 2011**  
Presented by the President's Council on Service and Civic Participation

**LEAD – Leadership, Education, Advocacy and Development** - Rhode Island Chapter  
**Chairwoman 2011; Co-Chairwoman; 2009 & 2010; Treasurer 2008**  
An associate affinity group dedicated to promoting professional development to help grow, attract and retain successful women throughout Bank of America.

**BACV - Bank of America Community Volunteers** – Rhode Island Board Member  
Outstanding Contribution and Leadership Award in 2009, 2010, 2011



GEORGE E. HEALY, JR.  
CHIEF JUDGE

Workers' Compensation Court of Rhode Island  
Garrahy Judicial Complex  
One Dorrance Plaza  
Providence, RI 02903

February 4, 2015

Luis A. Aponte  
Council President  
Providence City Council  
25 Dorrance Street  
Room 310  
Providence, Rhode Island

Dear Mr. Aponte:

It is my understanding that Lisa Bortolotti is under consideration for reappointment as an Associate Judge of the Providence Municipal Court. I have known Ms. Bortolotti for more than twenty years and I feel very comfortable recommending her for this important position.

Lisa Bortolotti began her legal career as a law clerk in the Workers' Compensation Court. She was actually here at the Court while the 1992 workers' compensation reform legislation was drafted. Thereafter, she was employed with the Rhode Island Department of Labor and Training as legal counsel and was a valuable asset in crafting administrative procedures to respond to the provisions of the new law. In particular, Lisa was actively involved with drafting the rules to address appeals from the Department of Labor and Training to the Workers' Compensation Court and, similarly, from the Medical Advisory Board to the Court. In each task, she demonstrated a remarkable understanding of the Administrative Procedures Act and the requirements the department had to meet to ensure a full due process hearing to all appellants. While there have been some minor revisions to the rules Lisa created, the Court continues to rely upon them as they were originally crafted by her.

As legal counsel, Lisa also represented the Director in proceedings before the Court. She was always well prepared and respectful of the Court processes. It is also important to note that the Workers' Compensation Court has an Appellate Division and Ms. Bortolotti routinely appeared before the Appellate Division as well as the Rhode Island Supreme Court. She is an effective legal writer and always presents logical, well-crafted and eloquent arguments in support of her position. She consistently demonstrated creativity and legal acumen and served as a diligent representative for the Department at every stage of litigation. In addition, she represented the Department at the General Assembly to explain their legislative package and to answer questions from interested senators and representatives.

*Luis A. Aponte*

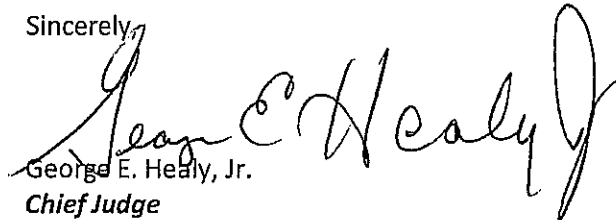
*Page 2*

*February 4, 2015*

Although Lisa left state service to obtain a Master's Degree in taxation, we have remained in contact and I know that she has continued to express an interest in state service and to "return to her roots" at some point. I am pleased that she is under consideration for this most important position. It has been my experience that our citizens shape their opinions regarding government based upon their personal dealings with it. In many cases, the only contact a person has with municipal or state government is when they register a motor vehicle or appear in court to respond to a traffic summons. Thus, it is essential that we endeavor to present the best possible image to people during these stressful moments.

Although Lisa Bortolotti has served for only a brief time on the Municipal Court, I am sure that her efficiency, intelligence has already been noted. More significantly, I am positive that her demeanor and the respectful way she has treated the respondents who appear before her has already won her praise. She remains an excellent candidate for this most important position. I am very comfortable recommending Lisa Bortolotti for this appointment. She is intelligent, creative and thorough. She has been an effective litigator and has demonstrated a thorough knowledge of the Administrative Procedures Act. She will be an excellent judge. I would urge you and your colleagues to act favorably upon her nomination.

Sincerely,

A handwritten signature in black ink, appearing to read "George E. Healy, Jr.", written in a cursive style.

George E. Healy, Jr.  
Chief Judge