

IN THE SUPREME COURT OF PENNSYLVANIA

OFFICE OF DISCIPLINARY COUNSEL,	:	No. 3185 Disciplinary Docket No. 3
	:	
Petitioner	:	No. 110 DB 2024
	:	
v.	:	Attorney Registration No. 203302
	:	(York County)
	:	
MEREDITH RAND ALLIE,	:	
	:	
Respondent	:	

ORDER

PER CURIAM

AND NOW, this 30th day of June, 2026, upon consideration of the Report and Recommendations of the Disciplinary Board, Meredith Rand Allie is suspended from the Bar of this Commonwealth for a period of one year and one day. Respondent shall comply with the provisions of Pa.R.D.E. 217 and pay costs to the Disciplinary Board. See Pa.R.D.E. 208(g).

A True Copy Nicole Traini
As Of 06/30/2026

Attest: 
Chief Clerk
Supreme Court of Pennsylvania

BEFORE THE DISCIPLINARY BOARD OF THE
SUPREME COURT OF PENNSYLVANIA

OFFICE OF DISCIPLINARY COUNSEL,	:	No. 110 DB 2024
Petitioner	:	
	:	
v.	:	Attorney Registration No. 203302
	:	
MEREDITH RAND ALLIE,	:	
Respondent	:	(York County)

REPORT AND RECOMMENDATIONS OF
THE DISCIPLINARY BOARD OF THE
SUPREME COURT OF PENNSYLVANIA

TO THE HONORABLE CHIEF JUSTICE AND JUSTICES
OF THE SUPREME COURT OF PENNSYLVANIA:

Pursuant to Rule 208(d)(2)(iii) of the Pennsylvania Rules of Disciplinary Enforcement, the Disciplinary Board of the Supreme Court of Pennsylvania (“Board”) herewith submits its findings and recommendations to your Honorable Court with respect to the above-captioned Petition for Discipline.

I. FINDINGS OF FACT

The Board makes the following factual findings:

1. Petitioner, Office of Disciplinary Counsel (“ODC”), whose principal office is located at Pennsylvania Judicial Center, Suite 2700, 601 Commonwealth Avenue, Harrisburg, PA 17106-2485, is invested, pursuant to Pa.R.D.E. 207, with the power and duty to investigate all matters involving alleged misconduct of any attorney admitted to practice law in the Commonwealth of Pennsylvania and to prosecute all disciplinary

proceedings brought in accordance with the various provisions of said Enforcement Rules.

2. Respondent, Meredith Rand Allie (“Allie”), was born in 1978 and was admitted to practice law in the Commonwealth of Pennsylvania in 2006. Allie is currently on active status. Allie is subject to the disciplinary jurisdiction of the Disciplinary Board of the Supreme Court of Pennsylvania.

3. Allie began the private practice of law in July 2009. She has her own firm located in York County and has concentrated her practice in family law matters since about 2011. N.T. 65, 311. Allie had a law partner for a short time until about 2014 or 2015, practiced on her own for a period, and currently has a law partner. N.T. 66, 311. Allie handled much of the day-to-day running of the office with some part-time administrative help until she hired Jessica Macek as a full-time senior paralegal in 2016. N.T. 66, 67. Ms. Macek then took over office management and was in charge of other administrative employees. N.T. 67. Ms. Macek left Allie’s employment in August 2022. N.T. 99.

The 5238 IOLTA Trust Account

4. From 2018 through September 2022, Allie allowed Ms. Macek to manage her BB&T/Truist Bank IOLTA Trust Account ending in 5238 (“5238 IOLTA Trust Account”). N.T. 160.

5. Allie did not provide Ms. Macek with any training concerning proper accounting practices or recordkeeping required by RPC 1.15(c) for the 5238 IOLTA Trust Account. N.T. 160.

6. Between at least June 2021 and September 2022, Allie:

- a. held a Simple Business Checking Account with BB&T/Truist Bank ending in 5653 (“5653 Operating Account”); and
- b. utilized the 5653 Operating Account for her business and personal expenses.

7. On May 17, 2021, Tara Krout retained Allie for representation in her divorce and support matters. ODC-5, Bates 1746-1748.

8. On June 1, 2021:

- a. Allie’s records show she was entrusted with \$272,701.19 in client funds, which should have been maintained in her 5238 IOLTA Trust Account; (ODC-17, Bates 5492)
- b. the balance in Allie’s 5238 IOLTA Trust Account was \$11,821.35; (ODC-6, Bates 4450) and
- c. Allie’s 5238 IOLTA Trust Account balance was \$260,879.84 less than the sum of her individual client trust balances.

9. Between June 2021 and August 2022, funds from Allie’s 5238 IOLTA Trust Account were transferred into her various business accounts to cover overdrafts in those accounts. N.T. 25-26.

10. On December 21, 2021, \$41,775.34 was deposited into Allie’s 5238 IOLTA Trust Account for Ms. Krout. ODC-6, Bates 4570; N.T. 21-22, 24.

11. The Krout escrow funds constituted proceeds from the sale of Ms. Krout’s marital home, which funds were given to Allie to be held in trust by Allie pending completion of Ms. Krout’s divorce matter. Pet. for Disc., ¶ 8; Answer, ¶ 8; ODC-24; ODC-25; N.T. 24.

12. On December 31, 2021:

- a. the balance in Allie's 5238 IOLTA Trust Account was \$34,687.00; (ODC-6, Bates 4576) and
- b. Allie's 5238 IOLTA Trust Account balance was \$7,088.34 less than the amount Allie should have been holding in escrow for Ms. Krout.

Pet. for Disc., ¶ 9; Answer, ¶ 9.

13. On January 31, 2022:

- a. the balance in Allie's 5238 IOLTA Trust Account was \$3,950.00; (ODC-6, Bates 4592) and
- b. Allie's 5238 IOLTA Trust Account balance was \$37,825.34 less than the amount Allie should have been holding in escrow for Ms. Krout.

Pet. for Disc., ¶ 10; Answer, ¶ 10.

14. Between December 2021 and July 2022, Allie was unaware she had received and was entrusted with the Krout escrow funds. N.T. 176, 223, 234.

15. Allie failed to hold the Krout escrow funds inviolate. Pet. for Disc., ¶ 11; Answer, ¶ 11.

16. On the following dates and in the following amounts, Allie's own funds were transferred into the 5238 IOLTA Trust Account:

- a. May 2, 2022 – \$1,400.00 from Allie's checking account ending in 5661 ("5661 Payroll Account"); (ODC-6, Bates 4639)
- b. May 9, 2022 – \$600.00 from Allie's checking account ending in 1084 ("1084 Business Checking Account"); (ODC-6, Bates 4639)
- c. May 16, 2022 – \$140.00 from 1084 Business Checking Account; (ODC-6, Bates 4639)

- d. May 19, 2022 – \$1,000.00 from Allie’s checking account ending in 5653 (“5653 Operating Account”); (ODC-6, Bates 4639)
- e. June 3, 2022 – \$2,900.00 from 1084 Business Checking Account; (ODC-6, Bates 4649) and
- f. June 16, 2022 – \$3,000.00 from 5661 Payroll Account. ODC-6, Bates 4649.

17. Allie did not know the purpose of these transfers or the client(s) matter(s) to which they related. N.T. 94-95.

18. There were no contemporaneous service charges on the 5238 IOLTA Trust Account which correlated to Allie’s transfers of personal funds into the account. ODC-6, Bates 4639, 4649.

19. On the following dates and in the following amounts, funds from Allie’s 5238 IOLTA Trust Account were transferred through her PayPal account:

- a. April 6, 2022 – \$517.92 PayPal payment to “BML”; (ODC-15, Bates 5474)
- b. May 6, 2022 – \$671.77 PayPal payment to “BML”; (ODC-15, Bates 5477)
- c. June 6, 2022 – \$168.88 PayPal payment to “BML”; (ODC-15, Bates 5480) and
- d. July 6, 2022 - \$1,178.35 PayPal payment to “BML” ODC-15, Bates 5484.

Pet. for Disc., ¶ 30; Answer, ¶ 30; N.T. 145.

20. “BML” is an acronym for “Bill Me Later.” N.T. 145.

21. The “BML” transfers from Allie’s 5238 IOLTA Trust Account through her PayPal account were not directly related to fees for services Allie provided nor costs she incurred in her clients’ matters. N.T. 146.

22. Allie testified that she was unaware of the “BML” payments until in or about September 2022. N.T. 145 -149.

23. On June 3, 2022:

- a. a check in the amount of \$1,716.83 was presented against Allie’s 5238 IOLTA Trust Account; (ODC-6, Bates 4652)
- b. the balance in Allie’s 5238 IOLTA Trust Account was less than \$1,716.83; (ODC-6, Bates 4648) and
- c. Allie’s 5238 IOLTA Trust Account was overdrawn. ODC-3, Bates 59-60.

24. On June 15, 2022, June 30, 2022, and July 8, 2022, Kathryn Morgan, Esquire, Executive Director of the Pennsylvania Lawyers Fund for Client Security (“Client Security”), wrote to Allie requesting an explanation for the June 3, 2022, overdraft and bank statements for Allie’s 5238 IOLTA Trust Account for the most recent three months. ODC-3, Bates 57-61, 64-65.

25. Allie failed to respond to the June 15, 2022 letter from Client Security. Pet. for Disc., ¶ 14; Answer, ¶ 14.

26. Allie failed to respond to the June 30, 2022 letter from Client Security. Pet. for Disc., ¶ 15; Answer, ¶ 15; ODC-3, Bates 62-63.

27. On July 14, 2022:

- a. a check in the amount of \$317.00 was presented against Allie’s 5238 IOLTA Trust Account; (ODC-6, Bates 4685)

b. the balance in Allie's 5238 IOLTA Trust Account was less than \$317.00; (ODC-6, Bates 4672) and

c. Allie's 5238 IOLTA Trust Account was overdrawn. ODC-4;

Pet. for Disc., ¶ 16; Answer, ¶ 16.

28. On July 18, 2022, Allie replied to Client Security's July 8, 2022 letter and provided bank statements for her 5238 IOLTA Trust Account for the period of April 2022 through June 2022. ODC-3, Bates 66-77.

29. On July 19, 2022, Client Security sent a letter to Allie requesting additional explanation and documentation concerning several transfers into the 5238 IOLTA Trust Account from other accounts. Pet. for Disc., ¶ 18; Answer, ¶ 18; ODC-3, Bates 78-79.

30. Allie failed to respond to Client Security's July 19, 2022, letter. N.T. 193-195.

31. On August 4, 2022, Client Security referred Allie's conduct to ODC for additional investigation. Pet. for Disc., ¶ 20; Answer, ¶ 20.

32. Since November 30, 2022, the balance in Allie's 5238 IOLTA Trust Account has remained unchanged, at \$504.94. Pet. for Disc., ¶ 23; Answer, ¶ 23; ODC-6, Bates 4722-4733.

33. Allie cannot identify the client(s) to whom the \$504.94 remaining in her 5238 IOLTA Trust Account belongs. Pet. for Disc., ¶ 24; Answer, ¶ 24; N.T. 97-98.

34. Allie claims that the violative transactions concerning her 5238 IOLTA account were all done by Jessica Macek, without Allie's knowledge or authorization. Answer, ¶ 8.

35. Allie admitted that while she and Ms. Macek talked about "money, in general, often" she did not review monthly reconciliations to make sure her 5238 IOLTA

account balanced. N.T. 162-165. She testified that she was “so busy” and delegated the responsibility to others. N.T. 104, 105.

36. Allie acknowledged that from at least April 2022 to August 2022, she did not look at any of her banking accounts. N.T. 164.

37. Allie was unaware that Ms. Macek allegedly removed her access to her bank accounts, beginning in April 2022. N.T. 89.

38. Allie did not realize she no longer had access to her banking accounts because she is an “out of sight, out of mind person.” N.T. 179.

39. Allie was also unaware that Ms. Macek allegedly terminated Allie’s accountant, Summerson and Alleman, from payroll responsibilities and started doing payroll internally, beginning April 2022. N.T. 75-77.

40. Allie claims she only became aware of Ms. Macek’s actions after receiving letters from Client Security in July 2022. Answer, ¶ 24.

The 3117 IOLTA Trust Account

41. Following Ms. Macek’s departure in August 2022, Allie opened:

- a. a second IOLTA Trust Account with Truist Bank ending in 3117 (“3117 IOLTA Trust Account”); and
- b. a checking account with Truist Bank ending in 3079 (“3079 Operating Account”).

Pet. for Disc., ¶ 21; Answer, ¶ 21; ODC-8, Bates 4736; ODC-13, Bates 5346; N.T. 42.

42. Allie continued to utilize her 5238 IOLTA Trust Account, in addition to her 3117 IOLTA Trust Account, through November 2022. Pet. for Disc., ¶ 22; Answer, ¶ 22; ODC-6, Bates 4696-4721.

43. Between January 2023 and March 2023, Allie issued retainer refunds to seven clients from her 3079 Operating Account, as follows:

- a. January 18, 2023 –
 - i. \$959.50 check payable to Shannon Collins for “Retainer balance”; (ODC-13, Bates 5398) and
 - ii. \$1,145.50 check payable to Meredith Buck for “Retainer balance”; (ODC-13, Bates 5402)
- b. January 20, 2023 – \$1,040.50 check payable to Patrice Collins for “Jessica Collins 2nd Refund”; (ODC-13, Bates 5399)
- c. January 23, 2023 –
 - i. \$1,000.00 check payable to Zane Donnelly for “Retainer balance refund”; (ODC-13, Bates 5400) and
 - ii. \$1,500.00 check payable to Zane Donnelly for “truist retainer balance”; (ODC-13, Bates 5401)
- d. February 1, 2023 – \$500.00 check payable to Jenna Manning for “Retainer refund”; (ODC-13, Bates 5413)
- e. March 15, 2023 –
 - i. \$537.00 check payable to Marjorie Beyer for “Devon Shilling retainer refund”; (ODC-13, Bates 5437); and
 - ii. \$97.50 check payable to Nadege Saint Fleur for “Remainder of retainer balance”; (ODC-13, Bates 5438); and
- f. April 4, 2023 – \$500.00 check payable to Jokaire Miller for “Partial retainer refund.” ODC-13, Bates 5455.

44. Allie failed to obtain Mr. Donnelly's and Ms. Miller's informed consent, confirmed in writing, to her maintenance of their retainer fees in a non-trust account. ODC-5, Bates 1636 (Donnelly), 1849 (Miller).

45. Allie did not offer any evidence that she obtained informed consent, confirmed in writing, from Ms. Collins, Ms. Buck, Ms. Manning, Ms. Beyer, and Mr. Saint Fleur, to deposit their unused retainer fees in a non-trust account.

46. On May 10, 2023:

- a. Allie's records reflect she was entrusted with \$20,946.10 in client funds which should have been maintained in her 3117 IOLTA Trust Account; (ODC-18)
- b. the balance in Allie's 3117 IOLTA Trust Account was \$9,412.30; (ODC-8, Bates 4790-4791) and
- c. Allie's 3117 IOLTA Trust Account balance was \$11,533.80 less than the sum of her individual client balances.

47. Throughout August 2023, the balance in Allie's 3117 IOLTA Trust Account was \$1,381.20 less than her records reflected that she should have been holding in trust on behalf of her clients. ODC-20, Bates 5516.

48. On August 28, 2023, Allie transferred \$1,070.50 from the 3117 IOLTA Trust Account to a non-trust account containing her own funds. Pet. for Disc., ¶ 38; Answer ¶ 38; ODC-8, Bates 4810.

49. According to Allie's records, the \$1,070.50 transfer correlated to Invoice #03015, addressed to Allie's client Casey Fogle ("Fogle Invoice #03015"). ODC-20, Bates 5516.

50. Fogle Invoice #03015 reflects that as of August 28, 2023, Allie had earned \$985.00 for services provided to Ms. Fogle. ODC-21, Bates 5653.

51. By her \$1,070.50 transfer to herself on August 28, 2023, Allie converted \$85.50 of Ms. Fogle's funds.

52. On September 29, 2023:

- a. Allie transferred \$1,199.32 into her 3117 IOLTA Trust Account from her 5653 Operating Account; and
- b. Allie transferred \$1,199.23 into her 5653 Operating Account from her 3117 IOLTA Trust Account.

ODC-8, Bates 4816-4817.

53. The September 29, 2023 transfers created a \$0.09 surplus in Allie's 3117 IOLTA Trust Account.

54. Allie failed to realize the \$0.09 surplus until almost two years later in May 2025, when she was preparing for the disciplinary hearing in this matter. N.T. 138, 170.

55. On November 2, 2023, Allie deposited \$40,000.00 of her own funds into her 3117 IOLTA Trust Account. ODC-8, Bates 4829; N.T. 21.

56. Allie's \$40,000.00 deposit of her personal funds into her 3117 IOLTA Trust Account was to replace the Krout escrow funds that Allie failed to hold inviolate. Pet. for Disc., ¶ 42; Answer, ¶ 42; N.T., 21-25.

57. On November 7, 2023, Michael Smith retained Allie for representation at his Protection from Abuse hearing scheduled for that same day. ODC-5, Bates 3163.

58. On November 10, 2023, Allie received \$1,750.00 in cash from Mr. Smith ("Smith Cash Payment"). ODC-20, Bates 5523 Note E.

59. Allie deposited the Smith Cash Payment directly into her “firm account.”

Answer, ¶ 45.

60. Allie’s client records erroneously reflect the Smith Cash Payment was deposited into Respondent’s 3117 IOLTA Trust Account. ODC-20, Bates 5523 Note E.

61. On November 27, 2023, Allie transferred \$1,148.00 from her 3117 IOLTA Trust Account to a non-trust account containing her own funds. ODC-8, Bates 4828.

62. According to Allie’s records, the \$1,148.00 transfer correlated to Invoice #03147, addressed to Mr. Smith (“Smith Invoice #03147”). ODC-20, Bates 5523; ODC-21, Bates 5996.

63. On November 27, 2023, Allie was not holding any funds in her 3117 IOLTA Trust Account for Mr. Smith. ODC-20, Bates 5523 Note E.

64. By her November 27, 2023, transfer of \$1,148.00 to her personal account for Smith Invoice #03147, Allie converted \$1,148.00 of other clients’ funds in her 3117 IOLTA Trust Account.

65. On December 11, 2023, Allie transferred \$1,744.50 from her 3117 IOLTA Trust Account to a non-trust account containing her own funds. ODC-8, Bates 4834.

66. According to Allie’s records, the \$1,744.50 transfer correlated to Invoice #03172, addressed to Allie’s client Jacqueline Cuff (“Cuff Invoice #03172”). ODC-20, Bates 5525.

67. On December 11, 2023, Allie was holding \$1,679.50 in her 3117 IOLTA Trust Account for Ms. Cuff. ODC-20, Bates 5526.

68. By her transfer of \$1,744.50 from her 3117 IOLTA Trust Account for Cuff Invoice #03172, Allie converted \$65.00 of other clients’ funds in her 3117 IOLTA Trust Account.

69. On December 15, 2023, Allie transferred \$1,250.00 from her 3117 IOLTA Trust Account to a non-trust account containing her own funds. Pet. for Disc., ¶ 58; Answer, ¶ 58; ODC-8, Bates 4834.

70. According to Allie's records, the \$1,250.00 transfer correlated to Invoice #03178 addressed to Allie's client Ryan Spradlin ("Spradlin Invoice #03178"). Pet. for Disc., ¶ 59; Answer, ¶ 59; ODC-20, Bates 5525.

71. Spradlin Invoice #03178 reflects Allie earned \$765.50 in Mr. Spradlin's matter during the relevant period. Pet. for Disc., ¶ 60; Answer, ¶ 60; ODC-21, Bates 6006.

72. By her transfer of \$1,250.00 to her personal account, Allie converted \$484.50 of Mr. Spradlin's funds.

73. On December 27, 2023, Allie transferred \$1,500.00 from her 3117 IOLTA Trust Account to a non-trust account containing her own funds. Pet. for Disc., ¶ 62; Answer, ¶ 62; ODC-8, Bates 4834.

74. According to Allie's records, the \$1,500.00 transfer correlated to Invoice #03189 addressed to Allie's client Tammy Sue English ("English Invoice #03189"). ODC-20, Bates 5525.

75. English Invoice #03189 reflects Allie earned \$785.00 in Ms. English's matter during the relevant period. ODC-21, Bates 5640.

76. By her transfer of \$1,500.00 to her personal account, Allie converted \$715.00 of Ms. English's funds.

77. On December 27, 2023, Allie transferred \$1,935.00 from her 3117 IOLTA Trust Account to a non-trust account containing her own funds. Pet. for Disc., ¶ 66; Answer, ¶ 66; ODC-8, Bates 4834.

78. According to Allie's records, the \$1,935.00 transfer correlated to Invoice #03192 addressed to Allie's client Concetta Young ("Young Invoice #03192"). Pet. for Disc., ¶ 67; Answer, ¶ 67; ODC-20, Bates 5525.

79. Young Invoice #03192 reflects that Allie earned \$1,060.00 in Ms. Young's matter during the relevant period. Pet. for Disc., ¶ 68; Answer, ¶ 68; ODC-21, Bates 6069.

80. By her transfer of \$1,935.00 to her personal account, Allie converted \$875.00 of Ms. Young's funds.

81. On December 27, 2023, Allie transferred \$603.00 from her 3117 IOLTA Trust Account to a non-trust account containing Allie's own funds. Pet. for Disc., ¶ 70; Answer, ¶ 70; ODC-8, Bates 4834.

82. According to Allie's records, the \$603.00 transfer correlated to Invoice #03150 addressed to client Frank Serruto ("Serruto Invoice #03150"). Pet. for Disc., ¶ 71; Answer, ¶ 71; ODC-20, Bates 5525.

83. On December 27, 2023, Allie was only holding \$597.50 in her 3117 IOLTA Trust Account for Mr. Serruto. ODC-20, Bates 5526.

84. By her transfer of \$603.00 to her personal account, Allie converted \$5.50 of other clients' funds in her 3117 IOLTA Trust Account.

85. On January 1, 2024:

- a. Allie's records reflect that she was entrusted with \$129,448.85 of client funds that she should have been holding in her 3117 IOLTA Trust Account; (ODC-19, Bates 5506)
- b. the balance in Allie's 3117 IOLTA Trust Account was \$95,257.66; (ODC-8, Bates 4840) and

- c. Allie's 3117 IOLTA Trust Account balance was \$34,191.19 less than the sum of her individual client balances.

86. On the following dates, Allie deposited her own personal funds into her 3117 IOLTA Trust Account in the following amounts, totaling \$3,830.00:

- a. January 26, 2024 – \$875.00 to replenish the amount she improperly transferred for the Young matter;
- b. January 30, 2024 – \$484.50 to replenish the amount she improperly transferred for the Spradlin matter;
- c. February 1, 2024 – \$715.00 to replenish the amount she improperly transferred in the English matter;
- d. February 6, 2024 – \$5.50 to replenish the amount she improperly transferred for the Serruto matter; and
- e. February 6, 2024 – \$1,750.00 to reconcile Mr. Smith's matter and replenish the \$1,148.00 she improperly withdrew from her 3117 IOLTA Trust Account when she was not holding any funds in the account for Mr. Smith.

Pet. for Disc., ¶ 75; Answer, ¶ 75; ODC-20, Bates 5525 Notes B-F.

87. On February 2, 2024, Allie disbursed \$40,000.00 from her 3117 IOLTA Trust Account to Ms. Krout. Pet. for Disc., ¶ 76; Answer, ¶ 76; ODC-8, Bates 4853; N.T. 25.

88. Allie admitted that she and her paralegal "Bree" made the errors and violative transfers concerning the 3117 IOLTA account in the 2023-2024 time period. Answer, ¶ 45-49; N.T. 137.

Disciplinary investigation and proceedings

89. Between September 2022 and May 2024, ODC made requests to Allie for the production of complete records required to be maintained by RPC 1.15(c), on the following dates and in the following manner (“ODC’s requests”):

- a. September 22, 2022 letter pursuant to Pa.R.D.E. 221(g);
- b. November 17, 2022 email;
- c. November 20, 2022 email;
- d. December 8, 2022 email;
- e. December 20, 2022 email;
- f. January 5, 2023 email;
- g. March 9, 2023 letter and email;
- h. March 29, 2023 letter and email;
- i. May 4, 2023 DB-7 Request for Statement of Respondent’s Position letter;
- j. May 4, 2023 subpoena *duces tecum*;
- k. September 27, 2023 email;
- l. December 27, 2023 email; and
- m. May 30, 2024 DB-7A Supplemental Request for Statement of Respondent’s Position letter.

Pet. for Disc., ¶¶ 25; Answer, ¶¶ 25; ODC-5.

90. Allie failed to produce complete records required by RPC 1.15(c) in response to ODC’s requests, including:

- a. any monthly reconciliations for her 5238 IOLTA Trust Account;

- b. monthly reconciliations for her 3117 IOLTA Trust Account for the periods September 2022 through August 2023, and January 2024 through May 2024;
- c. accurate individual/general client ledgers.

Pet. for Disc., ¶¶ 26; Answer, ¶¶ 26; ODC-5; ODC-17 through ODC-20; N.T. 19-20,166 - 170.

91. In February 2024, Allie started doing her monthly reconciliations “on paper” but did not turn them over to ODC because she could not verify if they were correct. N.T. 168-170.

92. On October 22, 2024, ODC filed a Petition for Discipline charging Allie with multiple violations of RPC 1.15(b), RPC 1.15(c)(2), RPC 1.15(c)(4), RPC 1.15(h), RPC 1.15(i).

93. On December 5, 2024, Allie filed an Answer to the Petition for Discipline.

94. On January 6, 2025, the Board appointed a Hearing Committee.

95. On March 12, 2025, Committee Chair Brent W. Landau held a prehearing conference.

96. The Prehearing Conference Order set a deadline of April 29, 2025, for the parties to exchange exhibits and witness lists.

97. On May 20 and 21, 2025, the Hearing Committee convened the disciplinary hearing. ODC presented the testimony of ODC Auditor Suzanne Kreider and exhibits ODC-1 through ODC-25. Allie appeared pro se and presented her own testimony. Allie introduced exhibits R-1 through R-27, over ODC’s objection that Allie failed to exchange and identify her exhibits in accordance with the Prehearing Order. The Committee found that while the exhibits were not exchanged and identified in accordance with the order,

they were of little probative value and there was little prejudice in their admission, and admitted Allie's exhibits. During the dispositional phase of the hearing, ODC presented exhibits ODC-28 through ODC-36 and Allie's testimony as on cross-examination. Allie did not present any character witnesses or additional testimony on her own behalf.

Aggravation and Mitigation

Aggravation – Lack of Evidence of Remediation

98. In or about August 2023, Allie retained the accounting firm of Boyer & Ritter to review records related to her 3117 IOLTA Trust Account during the ODC investigation. N.T. 296.

99. Allie does not currently provide monthly reconciliations to Boyer & Ritter for review. N.T. 298.

100. Allie could not recall the last time she had Boyer & Ritter review her IOLTA Trust Account records. N.T. 294.

101. At the time of the hearing, Allie had not communicated with Boyer & Ritter for at least 60 days. N.T. 298.

102. Allie admitted numerous times that she is "terrified of money" and has her current practice partner sign most of her checks. N.T. 88, 89, 107, 133, 137-138, 287-288.

103. Allie claimed that she has changed "everything" about her billing practices, but she did not offer any corroborating documentary evidence or witness testimony in support. N.T. 281.

104. Allie claimed that she does her own accounting and monthly reconciliations. N.T. 289-290, 298.

105. In response to the Committee Chair's question as to Allie's understanding of why a number of errors would have been occurring in the 3117 IOLTA, which was opened after Ms. Macek left, Allie explained that she was "overwhelmed." N.T. 141. She also testified that "[s]o clearly what I've been doing or had been doing or not doing isn't right. And I didn't even know how to do them right again, I guess." N.T. 107.

Aggravation - Tax Issues

106. Between 2010 and 2014, Allie had the following state and federal tax liens entered against her:

- a. 2010 – \$5,303.22 federal tax lien (ODC-26, Bates 6263);
- b. 2011 – \$4,009.59 state personal income tax lien (ODC-27, Bates 6264);
- c. 2012 – \$5,174.35 state personal income tax lien (ODC-27, Bates 6264);
- d. 2013 – \$344.16 federal tax lien (ODC-26, Bates 6263); and
- e. 2014 – \$23,678.75 federal tax lien and \$1,824.50 state personal income tax lien. ODC-26, Bates 6263; ODC-27, Bates 6264.

107. Allie has not fully paid the balance owed for the \$23,678.75 federal tax lien entered for the 2014 tax year. N.T. 261.

108. Allie has not paid the 2011 and 2012 state tax liens. N.T. 262.

109. Between 2015 and 2022, Allie failed to file properly completed local income tax returns. ODC-30, Bates 6269.

110. On April 4, 2023, Allie pled guilty to a tax violation, 1 LO § 32(5), in the matter captioned and docketed at *Commonwealth v. Meredith Allie*, MJ-19205-NT-0000109-2023 (York Co.). ODC-29, Bates 6266-6267.

111. On September 19, 2023, following a summary trial, Allie was found guilty of a tax violation, 1 LO § 32(5), in the matter captioned and docketed at *Commonwealth v. Meredith Allie*, MJ-19205-NT-0000820-2023 (York Co.). ODC-31, Bates 6270-6272.

112. On February 14, 2024, following a summary trial, Allie was found guilty of a tax violation, 1 LO § 32(5), in the matter captioned and docketed at *Commonwealth v. Meredith Allie*, MJ-19205-NT-0001664-2023 (York Co.). ODC-33, Bates 6274-6276.

113. On March 21, 2024, Allie refused the Adams County Tax Bureau's request to examine her books and records to determine the accuracy of her local tax returns and/or determine the tax due for the years 2015 through 2022. ODC-33, Bates 6277-6278.

114. On October 30, 2024, following a summary trial, Allie was found guilty of failure to appear for an audit, 1 LO § 300-8(e), in the matter captioned and docketed at *Commonwealth v. Meredith Allie*, MJ-19205-NT-0001033-2024 (York Co.). ODC-34, Bates 6279-6281.

115. On January 15, 2025, Allie again refused the Adams County Tax Bureau's request to examine her books and records to determine the accuracy of her local tax returns and/or determine the tax due for the years 2015 through 2023. ODC-35, Bates 6282-6283.

116. On March 12, 2025, Allie was charged with failure to appear for an audit, 1 LO § 300-8(e), in the matter captioned and docketed at *Commonwealth v. Meredith Allie*, MJ-19205-NT-0000555-2025 (York Co.). ODC-36, Bates 6284.

Aggravation - Conduct During Disciplinary Process

117. At the outset of the hearing, it was established that Allie did not respond to ODC's proposed Joint Stipulations until the night before the hearing. N.T. 36. As a result,

the parties did not submit a Joint Stipulation of Law and Fact. N.T. 37. With respect to witnesses, Allie indicated that she would be calling one witness in-person on the second day. N.T. 12.

118. At the end of the first day of hearing, Allie stated that she intended to call two witnesses on the second day of hearing. N.T. 197-198. At the beginning of the second day, Allie stated she was not going to present any witnesses as she was unable to coordinate their appearances, either in-person or virtually. N.T. 209.

119. Allie testified on her own behalf. N.T. 37-151.

120. Allie's testimony was often unclear, rambling and confusing. N.T. 123-126, 128, 130-136.

121. Allie appeared unprepared and disorganized. N.T. 52, 72, 124, 261.

122. Allie failed to exchange and identify her exhibits in accordance with the Prehearing Conference Order. N.T. 46.

123. Allie argued that her exhibits were documents that were provided to ODC during its investigation. However, some of the Allie's exhibits included numerous screenshots of text messages between her and Jessica Macek, which had not been produced to ODC previously. N.T. 46-47, 216-218.

124. When Allie introduced her exhibits, she handed the Committee unmarked loose papers. N.T. 52, 119, 130.

Mitigation

125. Allie testified extensively regarding Jessica Macek's role in the office and the 5238 IOLTA issues. Allie accepted responsibility for her failures and holds herself accountable. "I should have known and I accept full responsibility ... That's my job. I'm [sic] the buck stops with me. I know that." N.T. 90. Allie's testimony is credible.

126. Allie has no record of prior discipline.

127. Allie refunded the Tara Krout escrow funds to her IOLTA using funds she borrowed from her parents. N.T. 279.

128. ODC has not asserted that any of Allie's clients are owed any funds. N.T. 332.

129. There is no evidence establishing that Allie intentionally misappropriated client funds.

The Proceedings Below

130. ODC filed a timely post-hearing brief on July 25, 2025, and requested that the Committee conclude Allie violated the rules charged in the Petition for Discipline and recommend to the Board that Allie be suspended for one year and one day.

131. Allie's post-hearing brief was due on September 3, 2025; she filed an untimely brief on September 22, 2025. Allie emphasized that she takes responsibility for her misconduct and has taken remedial steps to address her practice issues. She did not suggest a specific sanction but requested a lesser discipline than a one year and one day suspension as recommended by ODC and stated that she "welcomes oversight and the opportunity to continue to show her efforts." Allie Brief in Response/Argument, p. 48.

132. The Committee accepted Allie's untimely brief on September 23, 2025.

133. By Report filed on October 29, 2025, the Committee concluded that Respondent violated the rules as charged in the Petition for Discipline and recommended that she be suspended for a period of one year and one day. The Committee found that despite Allie's claims that she has remedied her recordkeeping deficiencies, she failed to produce evidence that she keeps her records in compliance with RPC 1.15. The Committee expressed concern as to Allie's lack of preparedness and organization during

the hearing and found that her tax problems showed a propensity for financial carelessness. In mitigation, Allie expressed some remorse and accountability for her recordkeeping failures and has no record of discipline. The Committee examined Allie's request for "supervision" and found she is not a candidate for supervised probation as her violations were extensive and spanned many years, and her conduct at the hearing did not instill confidence that she can abide by the strict requirements of probation.

134. The parties did not file exceptions to the Committee's Report and recommendation.

135. The Board adjudicated this matter at the meeting on January 22, 2026.

II. CONCLUSIONS OF LAW

By her conduct as set forth above, Allie violated the following Rules of Professional Conduct:

1. RPC 1.15(b), which requires attorneys to segregate and appropriately safeguard client funds.

2. RPC 1.15(c)(2), which requires attorneys to maintain a ledger of their IOLTA containing the payor/payee, date, purpose, amount, and client matter for each transaction and, when the IOLTA contains funds of more than one client, an individual ledger containing this information for each client matter.

3. RPC 1.15(c)(4), which requires attorneys to reconcile their IOLTA balance with their trial balance of the individual client trust ledgers on a monthly basis.

4. RPC 1.15(h), which prohibits attorneys from depositing their own funds into a trust account except for the sole purpose of paying service charges on that account, and only in the amount necessary for that purpose.

5. RPC 1.15(i), which requires attorneys to deposit all advanced legal fees and expenses into a trust account, to be drawn upon as those fees are earned or expenses incurred, unless the client gives informed consent, confirmed in writing, to the handling of the fees and expenses in a different manner.

III. DISCUSSION

This matter is before the Board on review of the Committee's Report and unanimous recommendation to suspend Allie for a period of one year and one day for multiple violations of RPC 1.15(b), 1.15(c)(2), 1.15(c)(4), 1.15(h), and 1.15(i) relating to the safeguarding of client funds in IOLTA accounts and proper recordkeeping.

In attorney discipline matters, ODC bears the burden of proving professional misconduct by clear and convincing evidence. *Office of Disciplinary Counsel v. Anonymous Attorney*, 331 A.3d 523 (Pa. 2025). Upon our independent review of this matter pursuant to Pa.R.D.E. 208(d)(2), we conclude that ODC met its burden and established by clear and convincing evidence that Allie violated the charged rules. For the reasons that follow, we recommend that Allie be suspended for a period of one year and one day.

Allie's violation of each of the charged Rules of Professional Conduct is clearly established by her own admissions, both in her Answer to the Petition for Discipline and in her testimony at the disciplinary hearing, and by the evidence offered at the hearing consisting of ODC's exhibits and the testimony of ODC Auditor Suzanne Kreider and Allie.

The record evidence demonstrated that Allie violated RPC 1.15(b) by failing to segregate and appropriately safeguard client funds. On December 21, 2021,

\$41,775.34 was deposited into Allie's 5238 IOLTA on behalf of her client, Tara Krout. Allie failed to hold the Krout funds inviolate, in that by January 31, 2022, the balance in the 5238 IOLTA was \$37,825.34 less than she should have been holding for Ms. Krout.

Allie also failed to hold funds of additional clients inviolate. Between August 2023 and December 2023, Allie withdrew from her 3117 IOLTA a total of \$2,080 more than she had earned in four client matters. Likewise, on November 27, 2023, Allie withdrew \$1,148 from her 3117 IOLTA for services rendered to a client, despite that Allie was not holding any funds attributable to that client in the account. In doing so, Allie improperly took other entrusted funds in the IOLTA for herself.

Allie violated RPC 1.15(c)(2) by failing to maintain individual client ledgers. From at least June 2021 through September 2022, Allie failed to create and preserve a general ledger and individual ledgers containing the payor/payee, date, purpose, amount and client matter for each transaction in her 5238 IOLTA. Further, between at least June 2021 and January 2024, Allie failed to maintain an accurate general ledger of the IOLTA accounts, in that the balance reflected on her general account ledger as of June 1, 2021 (5238 IOLTA), May 10, 2023 (3117 IOLTA), and January 1, 2024 (3117 IOLTA) exceeded the balance in Allie's IOLTA accounts on those dates.

Allie violated RPC 1.15(c)(4) by failing to perform reconciliations of her 5238 or 3117 IOLTA accounts. The monthly reconciliations Allie provided to ODC for August 2023 through October 2023 were inaccurate, as they failed to account for the \$41,775.34 that Allie should have been holding since December 2021 for Ms. Krout. Allie later testified at the disciplinary hearing that she had been maintaining records fully compliant with RPC 1.15(c) since January 2024. However, she failed to provide any records to demonstrate her compliance and in fact responded to ODC's request for monthly reconciliations for the

period of January 1, 2024 through May 31, 2024 by stating, “No responsive documents.” ODC-5, Bates 3427.

Allie violated RPC 1.15(h) by depositing personal funds into her IOLTA. Between May 2022 and June 2022, Allie improperly deposited \$9,040 of her own funds into the 5238 IOLTA. She failed to maintain any records concerning the purpose of these deposits.

Finally, Allie violated RPC 1.15(i) by failing to maintain client retainer funds in an IOLTA. Between January and March 2023, Allie disbursed “retainer funds” for several clients from her 3079 operating account. During ODC’s investigation of this matter, Allie provided fee agreements for clients, which stated that she was to hold the clients’ retainer fees in trust, to be drawn upon only as services were completed or fees were incurred. Allie produced no evidence that certain clients gave informed consent, confirmed in writing, for Allie not to hold their retainer fees in trust.

With respect to the 5238 IOLTA, Allie acknowledged that her account did not meet the requirements imposed by the rules. Ans. ¶¶ 7-24. However, she maintained these deficiencies were due to the actions of her paralegal, Jessica Macek. Ans. ¶¶ 7-24. Allie testified extensively concerning Ms. Macek’s employment in Allie’s law office and events that occurred during that employment. We emphasize that it is not Ms. Macek’s actions that are under scrutiny here; rather, it is Allie’s conduct as a licensed lawyer that is the focus of our attention. The record established that Allie ignored her responsibilities to safeguard client funds and, at best, recklessly disregarded her duty to maintain proper financial records. Allie did not provide Ms. Macek with any specific training regarding the management of her IOLTA. They did not meet regularly to review monthly reconciliations, and, significantly, Allie did not review her own accounts. Thus, Allie was not aware until

July 2022 that the Krout escrow funds of \$41,775.34 had been deposited into her 5238 IOLTA account some eight months earlier, in December 2021. Allie also was not aware that Ms. Macek was writing payroll checks and making payments to “Bill Me Later” from the IOLTA account. Inexplicably, Allie’s personal PayPal account was also connected to the IOLTA account. Allie had no knowledge of any of these problematic transactions due to her failure to comply with RPC 1.15 and review her accounts and ledgers. Allie’s lengthy, convoluted explanations of these matters only served to underscore her complete ignorance of what was transpiring in her own office with her accounts that held entrusted funds of others.

Ms. Macek’s departure from Allie’s employment in August 2022 did not resolve Allie’s law practice management problems; the problems continued. Allie failed to reconcile the new 3117 IOLTA account regularly. Allie also repeatedly withdrew funds that exceeded her own invoices. While Allie disputed that the 3117 IOLTA was mismanaged, claimed the account imbalances were the result of draft billing practices, and argued that if any improper transfers occurred, corrections were made soon thereafter, her testimony in this regard is not convincing. Again, Allie’s explanations were unclear and difficult to follow. Allie’s cumulative testimony regarding her actions to address account problems after Ms. Macek’s departure and her current account management procedures emphasized her fundamental lack of knowledge on the mechanisms required to conform to the financial recordkeeping and accounting requirements imposed by the rules with respect to handling client funds and safekeeping property.

Having concluded that Allie engaged in professional misconduct, this matter is ripe for the determination of discipline. Disciplinary sanctions serve the dual role of

protecting the interests of the public while maintaining the integrity of the bar. *Office of Disciplinary Counsel v. John Keller*, 506 A.2d 872, 875 (Pa. 1986). In assessing the appropriate quantum of discipline, the Board must weigh any aggravating and mitigating circumstances. *Office of Disciplinary Counsel v. Brian J. Preski*, 134 A.3d 1027, 1031 (Pa. 2016).

Considering this record, we find aggravating factors. Significantly, Allie failed to demonstrate that she has remedied her recordkeeping deficiencies. See *Office of Disciplinary Counsel v. John A. Gallagher*, No. 65 DB 2019 (D. Bd. Rpt. 9/29/2020) (S. Ct. Order 1/22/2021) (the Board found in aggravation a lack of compelling evidence demonstrating the attorney had remediated his practice problems). On January 1, 2024, Allie's client ledger balance exceeded her 3117 IOLTA account balance. She did not produce any reconciliations for January 2024 to May 2024 in response to ODC's investigation, claiming that they could not be produced because they were not accurate. Allie testified at length about recordkeeping problems she has with her "MyCase" software, which she contended contributed to her inability to produce accurate reconciliations. However, Allie continues to use "MyCase" but now claims she does not use the software's accounting program and instead does her reconciliations "by hand" and with QuickBooks. N.T. 108, 293-294. Alarming, Allie testified numerous times that she is "terrified of money" and does not sign many checks. N.T. 133, 137-138, 287-288. She stated that she does "not do a lot of transferring" and relies on her law practice partner to do bank transfers and write checks. N.T.137-138.

Allie explained that she uses an accounting firm to help her with her reconciliations but admitted she does not have them review her accounts regularly and as of the date of the disciplinary hearing had not been in contact with her accountant for

at least 60 days. On this record, we find Allie did not clearly demonstrate the specific remedial steps she has taken to address her long-standing account irregularities and educate herself on how to operate trust accounts in compliance with RPC 1.15 and manage the business side of a law practice.

Moreover, Allie's history of tax issues demonstrates a propensity for financial carelessness, which serves as an aggravating factor here. See *Office of Disciplinary Counsel v. Joseph Q. Mirarchi*, No. 56 DB 2016, (D. Bd. Rpt. 5/21/2018) (S. Ct. Order 3/18/19) (aggravating factors included a history of fiscal irresponsibility). Allie's tax problems date back to 2010 and are in part the result of Allie using her firm operating account for personal expenses without proper accounting. Similarly troubling are the charges stemming from Allie's failure to appear for audits in October 2024 and January 2025. These violations occurred while Allie was being investigated by ODC for poor recordkeeping practices. Allie's inability to manage her personal and professional affairs, in the face of disciplinary proceedings, raises concern for her current ability to safeguard client funds.

Allie's conduct during ODC's investigation and the disciplinary process is another factor that we accord some weight in aggravation. See *Office of Disciplinary Counsel v. Erik Benjamin Cherdak*, No. 50 DB 2021 (D. Bd. Rpt. 8/29/2022) (S. Ct. Order 10/28/2022) (Cherdak's inability to competently represent himself at his disciplinary hearing was an aggravating factor); *Office of Disciplinary Counsel v. Mark D. Lancaster*, 78 DB 2010 (D. Bd. Rpt. 7/29/2011) (S. Ct. Order 11/22/2011) (Lancaster showed disregard and inattention to the disciplinary proceedings, which served to aggravate his discipline). Allie did not promptly respond to ODC's requests for information and records. Allie did not exchange exhibits with ODC in accordance with the Pre-Hearing Conference

Order. Instead, she brought unmarked loose papers to the hearing, which included screenshot text messages with Ms. Macek that were not previously produced to ODC. Allie did not coordinate ahead of time with her witnesses to testify on her behalf and ultimately did not present any witnesses. Allie also claimed she did not know her tax issues would be brought up during the dispositional phase of the hearing even though ODC previously provided its proposed exhibits to Allie, which included the liens. During the hearing, she was unprepared and disorganized, her testimony was rambling and confusing, and she often did not directly answer the questions posed to her by the Committee and ODC. And, Allie did not comply with the post-hearing briefing deadline and submitted her brief twenty days late.

In mitigation, we find that Allie credibly expressed remorse and acknowledged failures with respect to her responsibilities for the 5238 IOLTA Account. She reimbursed the Tara Krout funds with personal moneys. We confer weight in mitigation to these factors. *See Office of Disciplinary Counsel v. Tancredi William Calabrese*, Nos.121 DB 2019 & 32 DB 2020 (D. Bd. Rpt. 12/29/2024) (S. Ct. Order 2/5/2025) (credible expressions of remorse and accountability for misconduct and reimbursement of funds are mitigating factors). However, Allie did not take much, if any, accountability with respect to her 3117 IOLTA account failures after Ms. Macek's departure and does not appear to understand that her handling of that account was in violation of Rule 1.15. Instead, when asked to explain about errors in that account, Allie explained how "overwhelmed" she has been during these disciplinary proceedings and that certain mistakes were caught "the very next day," as if that excused them. N.T. 141.

In other mitigation, we observe that Allie has been admitted to the bar in Pennsylvania since 2006 and has no record of prior discipline. *See Office of Disciplinary*

Counsel v. Philip A. Valentino, 730 A.2d 479, 483 (Pa. 1999) (lack of prior discipline is a factor which may be accorded weight in mitigation).

As a guide to our assessment of appropriate discipline, we turn to the precedent. In reviewing prior cases, we find that attorneys who disregarded fiduciary responsibilities under RPC 1.15 and misused their IOLTA accounts faced public discipline, which included suspension. In matters that resulted in public reprimand, the lowest form of public discipline, the attorney offered evidence that demonstrated recognition of the fiduciary irresponsibility and remedial action that satisfied the Board that the public would not be harmed by the attorney's continued practice of law. See *Office of Disciplinary Counsel v. Richard Patrick Gainey*, No. 210 DB 2018 (D. Bd. Order 4/15/2020) (Gainey fully admitted his IOLTA misconduct and acknowledged that the misconduct was solely his fault; the Board found he offered evidence of concrete remedial steps to avoid misconduct in the future, including consulting other attorneys for advice, purchasing and learning QuickBooks, and arranging to refer all of his personal injury cases and estate matters to other attorneys and focusing his practice on bankruptcy matters, where he was knowledgeable). In contrast, a suspension has been imposed where the misconduct was more serious, the IOLTA irregularities more extensive, and the attorney's continued practice would harm the public. See *Office of Disciplinary Counsel v. Valerie Andrine Hibbert*, No. 215 DB 2019 (D. Bd. Rpt. 2/17/2021) (S. Ct. Order 4/27/2021) (one year and one day suspension imposed for IOLTA deficiencies and other misconduct; Hibbert's testimony was "underwhelming and did little to establish that she has a full understanding of how to comply with RPC 1.15"); *Office of Disciplinary Counsel v. John A. Gallagher*, No. 65 DB 2019 (D. Bd. Rpt. 9/29/2020) (S. Ct. Order 1/22/2021) (one year and one day suspension for, *inter alia*, IOLTA misuse and failure to

promptly refund client moneys; the Board found no evidence that Gallagher at the time of the disciplinary hearing was in compliance with the rules regarding fiduciary duties).

Here, Allie's fiduciary misconduct relating to her IOLTA accounts was lengthy and extensive, beginning in at least June 2021, and demonstrated her willful ignorance of transactions in her various accounts. Due to her lack of oversight of her firm accounts, Allie only became aware of problems in or around the summer of 2022. Allie blamed the IOLTA irregularities and other widespread office management problems on her paralegal, yet even after Ms. Macek's departure from Allie's employment in August 2022, Allie's IOLTA problems persisted. Allie offered no coherent explanation for why the issues continued. Allie's testimony was disjointed, confusing, and revealed her lack of knowledge on how to operate her accounts and run the business side of her law practice.

As of the disciplinary hearing in May 2025, it was unclear whether Allie's accounts were balanced and she was handling them in accordance with RPC 1.15. This evidence is crucial to our determination that Allie's suggestion for "supervision," i.e., probation with a monitor, must be rejected. Probation allows an attorney to continue practicing law and holding herself out to the public for the provision of legal services, while adhering to specific conditions set forth in the probation order. See Disciplinary Board Rules § 89.291. Before recommending probation, the Board must be satisfied that a respondent-attorney will comply with the terms and conditions of probation; otherwise, the public may be at risk of harm through deficient representation. Given the dearth of evidence that Allie's current trust accounts comply with the rules and that she fully comprehends how to comply with RPC 1.15, we conclude probation is not appropriate.

Considering the totality of the instant facts and the precedent and tailoring our recommendation to the aggravating and mitigating circumstances, we conclude that

a suspension for one year and one day is warranted to address Allie's prolonged inability to meet RPC 1.15 standards. This sanction will protect the public by requiring that Allie undergo the reinstatement process to prove her competence and fitness before resuming practice.

IV. RECOMMENDATION

The Disciplinary Board of the Supreme Court of Pennsylvania unanimously recommends that the Respondent, Meredith Rand Allie, be Suspended for one year and one day from the practice of law in this Commonwealth.

It is further recommended that the expenses incurred in the investigation and prosecution of this matter are to be paid by the Respondent.

Respectfully submitted,

THE DISCIPLINARY BOARD OF THE
SUPREME COURT OF PENNSYLVANIA

By: /s/ Robert J. Mongeluzzi
Robert J. Mongeluzzi, Member

Date: 04/27/2026