PENNSYLVANIA BAR ASSOCIATION  
JUDICIAL EVALUATION COMMISSION  
PERSONAL DATA QUESTIONNAIRE FOR LAWYER APPLICANTS  

ACKNOWLEDGMENT AND AUTHORIZATION

As a candidate for the Pennsylvania Appellate Courts, I hereby acknowledge and authorize the procedures of the Pennsylvania Bar Association Judicial Evaluation Commission, including the following:

1. The Pennsylvania Bar Association Judicial Evaluation Commission will make available to the public the Questionnaire and my responses to it, except for the questions and responses which are acknowledged to be confidential, which information shall remain available only to the Commission and an investigative panel.

2. The rating assigned to me by the Commission will be publicly announced and will be accompanied by an explanation of reasons for the rating.

3. Should I receive a Not Recommended rating, the Commission will endeavor to notify me prior to a public announcement. If I withdraw from the race, the unfavorable recommendation will not be announced during this current election cycle.

4. I hereby authorize the Pennsylvania Judicial Conduct Board, the Disciplinary Board of the Supreme Court of Pennsylvania, and the Pennsylvania Board of Law Examiners to transmit my entire file and record, including confidential information contained therein, to the Pennsylvania Bar Association Judicial Evaluation Commission. I hereby specifically waive any confidentiality rights I may have in those records.

5. I hereby authorize the Judicial Conduct Board, the Disciplinary Board, and the Board of Law Examiners, or the equivalent, in any jurisdiction where I have practiced, been admitted to practice or have applied to either take a bar examination or for admission to the bar to transmit my entire file and record, including confidential information contained therein, to the Pennsylvania Bar Association Judicial Evaluation Commission. I hereby specifically waive any confidentiality rights I may have in those records.

6. The Pennsylvania Bar Association Judicial Evaluation Commission may change, during the course of my campaign for office, the original rating assigned to me for cause. Cause shall include a violation of the Judicial Campaign Advertising Guidelines. I acknowledge receipt of a copy of the Guidelines.

Stacy Wallace  
Type or print name

Signature

1/21/2021  
Date
PERSONAL DATA QUESTIONNAIRE

1. State your full name: Stacy Sorokes Wallace

Have you ever been known by any other name? If so, please list. Stacy Marie Sorokes

2. Office address (include zip code): 31 Boylston Street, Bradford, PA 16701

Office telephone (include area code): 814-558-4590

Name of law firm, if associated: Stacy Wallace Law, LLC

3. Date and place of birth: 1979 (month and day removed by PBA JEC), Rochester, PA

4. Are you a naturalized citizen? If so, give date and place of naturalization: N/A

5. Family status:
   a) Are you married? If so, state the date of marriage and your spouse’s full name, including maiden name, if applicable: Yes, 3/26/2005; Curtis James Wallace

   b) Have you been divorced? If so, state the date, the number of the case and the court: No

6. Have you had any military service? If so,
   a) Give dates, branch of service, rank of rate, and present status: N/A

   b) Have you ever been rejected or released from any of the armed services for reasons other than honorable? If so, give details: No
7. List each college and law school you attended, including dates of attendance, and the degrees awarded and, if you left any institution without receiving a degree, the reason for leaving. List scholastic honors: University of Pittsburgh at Bradford 1997-2001, BA Cum Laude; Duquesne University School of Law 2001-2004, JD. I received award(s) for the highest grade point average in my major at UPB and also received academic scholarships.

8. List all jurisdictions in which you have applied to take a bar examination, have applied for admission or have been admitted to practice. Include dates of admissions and if not admitted, give application dates and explain the outcome.
   - Commonwealth of Pennsylvania 2004
   - United States District Court: Western District of PA 2007
   - United States District Court: Bankruptcy, 2007
   - United States Supreme Court 2020

9. Describe chronologically your law practice and experience after your graduation from law school, including:
   
   a) Whether you served as clerk to a judge and, if so, the name of the judge, the court, and the dates of the period you were a clerk: See attached resume please.

   b) Whether you practiced alone and, if so, the addresses and the dates: 2012-present

   c) The dates, names and addresses of law firms or offices, companies or governmental agencies with which you have been connected and the nature of your connection with each:

   d) Any other relevant particulars:
10. With respect to your practice:
   a) What has been the general character of your practice, dividing it into periods with dates if
      its character has changed over the years?
      Please See Resume.
      From 2010-2012, I handled more criminal and family
      From 2012-2015, I handled a wide variety of areas as listed on my resume.
      From 2016-2019, I primarily handled trust administration and financial institution
      matters such as policy drafting and regulation compliance. I continued to provide discounted and pro
      bono work to non-profit entities.
   b) Describe your typical clients and mention the areas, if any, in which you have
      concentrated your practice:
      Recent years, estate planning and trust administration clients. In 2020, I primarily
      consulted with other law firms (brief writing). I also provided legal services to
      companies.

11. With respect to the last five years:
   a) Did you appear in court regularly, occasionally, or not at all? If the frequency of
      your appearances in court has varied during this period, describe each
      such variance, giving the dates thereof: Occasionally
   b) What percentage of these appearances was in:
      1. Federal courts:
      
      2. State courts of record: 98%
      
      3. Other courts: Unemployment Compensation & Social Security
   c) What percentage of your litigation was:
      1. Civil: 100%
      
      2. Criminal:
      
      d) State the number of cases in courts of record you tried to verdict or judgment
         (rather than settled), indicating whether you were sole counsel, chief counsel or
         associate counsel: N/A
      
   e) What percentage of these trials were:
      1. Jury:
      
      2. Non-jury:
12. Summarize your experience in court prior to the last five years, indicating as to that period:
   a) Whether your appearances in court were more or less frequent: From 2007-2008, 2010-2015, I was in court regularly. I was often in court three to five days per week.
   b) Any significant changes in the percentages stated in your answers to question 11(b), (c) and (e): Please see #14 below.
   c) Any significant changes in the number of cases per year in courts of record you tried to verdict or judgment (rather than settled), as sole counsel, chief counsel or associate counsel.

      As associate counsel, we tried one personal injury to verdict with a jury trial. I also tried an oil and gas case to verdict by bench trial.

13. Describe five of the most significant litigated matters which you personally handled and give the citations thereto, if the cases were reported. Give a capsule summary of the substance of each case and a succinct statement of what you believe to be the particular significance of the case. Identify the party or parties whom you represented and describe in detail the nature of your participation in the litigation and the final disposition of the case. Also state as to each case a) the dates of the trial periods; b) the name of the court and the judge before whom the case was tried; and c) the individual name, address and telephone numbers of co-counsel for each of the other parties;

      Please see attached.

14. If a substantial period of your practice has been before administrative boards, commissions or agencies during the past five years, identify the boards, commissions or agencies before which you have practiced and estimate percentages of practice time devoted thereto:

      From 2007-2008 and again from 2010-2015, I regularly handled Social Security Disability hearings and Unemployment Compensation Hearings. My estimate is they were around 20% of my work.
15. If a substantial portion of your practice has been before Appellate courts during the past five years, identify the Appellate Courts before which you have practiced and estimate percentages of practice time devoted thereto: N/A

16. a) Have you ever held judicial office? If so, give dates and details, including the courts involved, whether elected or appointed, periods of service, and a description of the jurisdiction of each of such courts with any limitations upon the jurisdiction of each court: No

b) Have you ever held public office other than judicial office? If so, give details, including the office involved, whether elected or appointed, and the length of your service, giving details: No

17. Have you ever been an unsuccessful candidate for elective, judicial, or other public office? If so, give details, including dates: No

18. Have you ever been engaged in any occupation, business or profession other than the practice of law or the holding of judicial or other public office? If so, give details, including dates: Mediation beginning in 2014; Trust Officer from 2016-2019 which included but was not limited to the practice of law.
19. Are you now an officer or director or otherwise engaged in the management of any business enterprise?
   a) If so, give details, including the name of your enterprise, the nature of the business, the title or other description of your position, the nature of your duties and the term of your service. No

   b) Is it your intention to resign such positions and withdraw from any participation in the management of any such enterprises if you are elected and confirmed? If not, give reasons: N/A

20. Have you ever been arrested, charged with or convicted of violating any federal law or regulation, state law or regulation, or county or municipal law, regulation or ordinance? If so, give details. Do not include summary traffic offenses: No

21. Are you under any ongoing federal, state or local investigation or indictment for possible violation of a criminal statute? If so, give particulars: No

22. Has a tax lien or other collection procedure been instituted against you by federal, state or local authorities? If so, give particulars: No
23. Have you ever been sued by a client? If so, give particulars: In 2015, I was joined in a dispute over escrowed funds in a real estate matter. I promptly submitted the matter to my insurance and the matter was settled.

24. Have you ever been a party or otherwise involved in any other legal proceedings? If so, give the particulars. Do not list proceedings in which you were merely a guardian ad litem or stakeholder. Include all legal proceedings in which you were a party in interest, a material witness, were named as co-conspirator or a co-respondent and any grand jury investigation in which you figured as a subject or in which you appeared as a witness:

My husband and I were joined in a lawsuit in a mortgage foreclosure case, but it was the prior owner's mortgage. We were released from the lawsuit.

25. Have you ever been disciplined or cited for a breach of ethics or unprofessional conduct by, or been the subject of a complaint to, any court, administrative agency, bar association, disciplinary committee, or other professional group? If so, give the particulars: No

26. What is the present state of your health? (If any medical condition or issue exists, you may be requested to execute a medical record authorization form as part of the interview process.) Excellent

27. Do any circumstances exist that would affect your ability to perform the function of the position you seek or fulfill the term of office? If so, please explain. No
28. Furnish at least five examples of legal articles, law review articles, briefs, or other legal writings which reflect your personal work. If briefs are submitted, indicate the degree to which they represent your personal work: Attached.

29. List all bar associations and professional societies of which you are a member and give the titles and dates of any offices which you have held in such groups. List chairmanships of any committees in bar associations and professional societies and memberships on any committees which you believe to be of particular significance (e.g., judicial selection committee, disciplinary committee, grievance committee).

- American Inn of Courts, believed 2004 to 2012
- Pennsylvania Bar Association 2004-present
- McKean County Bar Association, Past Treasurer, Past Vice President, Currently President

30. List your experiences in teaching and lecturing, including law school, continuing legal education and to non-legal audiences.

- Adjunct Instructor, University of Pittsburgh-Bradford Course called "Law & The Courts," from 2005-2008 Spring semesters.

31. List all organizations other than bar associations, professional associations or societies of which you are or have been a member, including civic, charitable, religious, educational, social and fraternal organizations: Please see resume.
32. List any honors, prizes, awards or other forms of recognition which you have received (including any indication of academic distinction in college or law school) other than those mentioned in answers to the foregoing questions.

In or around 2013, I received a Zonta award for being a female business leader in the community.

33. State any other information which may reflect positively or adversely on you or which you believe should be disclosed in connection with consideration of you for an election to an Appellate Court of Pennsylvania.

In the time preceding the last five years, I spent much time in court. Hearings, albeit, not called "trials" could last multiple days. My colleagues often asked me about the rules of procedure and rules of evidence.

34. Why do you wish to become a Justice or Judge? What special strengths do you feel you possess that would particularly well qualify you for the position of Justice or Judge?

My father raised me to believe the primary purpose in life is to improve the lives of others.

35. Did you sign the PBA Judicial Campaign Advertising Guidelines? (Please return signed pledge with completed questionnaire.) Yes
CERTIFICATION STATEMENT

The undersigned certifies that all of the statements made in this questionnaire are true, complete and correct to the best of his/her knowledge and belief and are made in good faith.

Stacy Wallace
Type or print name

Signature

01/21/2021
Date