



State Bar
of Georgia

BOG BOARD BOOK

2025 Annual Meeting
Ponte Vedra Beach, FL

*This book serves as the agenda and
materials for the State Bar of Georgia's
2025 Annual Meeting.*



307th BOARD OF GOVERNORS MEETING
&
MEMBERS MEETING AND PLENARY SESSION

Friday, June 6, 2025
9:00 a.m. – 12:00 p.m.

Sawgrass Marriott Golf Resort & Spa
Ponte Vedra Beach, Florida

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	Ivy N. Cadle President	1
b) Pledge of Allegiance	Gillian B. Fierer Atlanta Circuit, Post 38	
c) Invocation	Tedra L. Cannella DeKalb Circuit, Post 8	
d) Security Update	Sgt. Dexter Harden	
e) Recognition of Past Presidents, Judges, and Special Guests	Ivy Cadle	
f) Recognition of Retiring Executive Committee Members and Retiring Board Members.....	Ivy Cadle.....	17
<ul style="list-style-type: none">• Hon. J. Antonio “Tony” DelCampo, Immediate Past President, 19 years on the Board• Brittanie D. Browning, YLD Immediate Past President, 3 years on the Board• Michael G. Geoffroy, Alcovy Circuit, Post 1, 7 years on the Board• Graham Elliott McDonald, Atlanta Circuit, Post 36, 5 years on the Board• Donna Stanaland Hix, Chattahoochee Circuit, Post 4, 14 years on the Board• Hon. Kathryn Lauranne “Katie” Powers, Clayton Circuit, Post 1, 5 years on the Board• Ronald Arthur Lowry, Cobb Circuit, Post 2, 18 years on the Board• Laura Joan Murphree, Cobb Circuit, Post 6, 12 years on the Board• Danny L. Durham, Columbia Circuit, 4 years on the Board• Rotsen Dara Diya “Chinny” Law, Member-at-Large, Post 2, 4 years on the Board• Edward R. Collier, Pataula Circuit, 12 years on the Board• Vernon L. Chambless, Waycross Circuit, Post 2, 2 years on the Board• Jason W. Swindle Sr., West Georgia Circuit, 8 years on the Board		
g) Resolution for G. “Pete” Donaldson III	Ivy Cadle Hon. Kenneth Hodges Thomas “Tommy” Duck	

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h) Roll Call	R. Javoyne Hicks..... Secretary	18
i) Future Meetings Schedule.....	Christopher P. Twyman President-Elect	23

2) PRESIDENT’S ADDRESS

- a) State Bar of Georgia President’s Address..... Ivy Cadle

3) SPECIAL REPORTS

- a) Supreme Court of Georgia.....Hon. Nels S.D. Peterson
Chief Justice
Supreme Court of Georgia
- b) Court of Appeals of GeorgiaHon. Amanda H. Mercier
Chief Judge
Court of Appeals of Georgia
- c) Office of Governor Brian KempSam Hatcher
Executive Counsel
- d) Georgia General Assembly
 (1) House Judiciary CommitteeRep. Rob Leverett
 (2) Senate Judiciary CommitteeSen. Brian Strickland, Chair

4) INFORMATIONAL REPORTS

- a) Young Lawyers DivisionKenneth Mitchell, Jr..... 25
YLD President, 2024-2025
- b) Memorials.....Ivy Cadle
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5) ACTION

- a) Minutes of the 306th Meeting of theJavoyne Hicks..... 31
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- b) Proposed Amendment to Bar Rule 1-202.....Bill NeSmith 37
Membership Status. Deputy General Counsel
- c) Establishment of the Senior Lawyers Division.....William “Bill” Gentry..... 51
Treasurer
Bill NeSmith

6) AWARDS AND PRESENTATIONS

- a) Marshall-Tuttle Award.....Ivy Cadle
Jay Elmore

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b) Judge Willie Lovett Jr. Advancing the Field of Juvenile Law Award	Ivy Cadle Hon. Charles J. Bethel Justice, Supreme Court of Georgia	
c) Chief Justice Harris Hines Outstanding Advocacy for Children in Dependency Award	Ivy Cadle Hon. Charles J. Bethel	
d) Chief Justice Thomas O. Marshall Professionalism Awards	Ivy Cadle	
e) Georgia Legal Services Program Check Presentation	Ivy Cadle	
f) Presentation of Other Awards..... (As listed in the Annual Meeting Program.)	Ivy Cadle	

7) ADJOURNMENT

The Board of Governors will meet again at 9:00 a.m. on Saturday, June 7, 2025.



308th BOARD OF GOVERNORS MEETING

Saturday, June 7, 2025

9:00 a.m. – 12:00 p.m.

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Ponte Vedra Beach, Florida

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AGENDA

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1) ADMINISTRATION

- | | | |
|--|-----------------------------|----|
| a) Welcome and Call to Order | Christopher P. Twyman | 1 |
| | President, 2025-2026 | |
| b) Pledge of Allegiance | Dawn M. Jones | |
| | Past President | |
| c) Invocation | Patrise M. Perkins-Hooker | |
| | Past President | |
| d) Recognition of Past Presidents, Judges, and | Chris Twyman | |
| | Special Guests | |
| e) Welcome to New Officers & Board Members..... | Chris Twyman | 17 |

New Officers

Christopher P. Twyman, President	Ivy N. Cadle, Immediate Past President
William C. Gentry, President-Elect	Veronica R. Cox, YLD President
R. Javoyne Hicks, Treasurer	Virginia C. Josey, YLD President-Elect
Shiriki C. Jones, Secretary	Kenneth Mitchell Jr., YLD Immediate Past President

New Board Members

- Eric C. Crawford, Alcovy Circuit, Post 1
- Amanda Kay Seals, Atlanta Circuit, Post 30
- Hon. Robert Charles McBurney, Atlanta Circuit, Post 36
- Neal Joseph Callahan, Chattahoochee Circuit, Post 4
- Betrice A. Scott, Clayton Circuit, Post 1
- Carlos Javier Rodriguez, Cobb Circuit, Post 2
- Adam Joshua Rozen, Cobb Circuit, Post 6
- Samantha Marie Mullis, Columbia Circuit
- Catherine Harris Helms, Member-at-Large, Post 2
- William Murray Shingler Jr., Pataula Circuit
- Adam Ferrell, Waycross Circuit, Post 2
- David Jared Parrish, West Georgia Circuit

- | | | |
|--------------------|------------------------|----|
| f) Roll Call | Shiriki C. Jones | 18 |
| | Secretary, 2025-2026 | |

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g) Future Meetings Schedule	Chris Twyman	23
2) PRESIDENT’S REPORT	Chris Twyman	
a) 2025-2026 Proposed Program of Activities		
3) ACTION		
a) Approval of the Members of the State	Chris Twyman	
Disciplinary Boards		
State Disciplinary Board		
(1) Robert H. Smalley III, Dalton		
(2) Christine Koehler, Lawrenceville		
Formal Advisory Opinion Board		
(1) Member-at-Large: Edward B. Krugman, Atlanta (2027)		
(2) Member-at-Large: Martin A. Levinson, Atlanta (2027)		
(3) Young Lawyers Division: Emily C. Long, Alpharetta (2027)		
(4) Georgia Trial Lawyers Association: Christy C. Childers, Macon (2027)		
(5) Georgia Defense Lawyers Association: Jacob E. Daly, Atlanta (2027)		
(6) Atlanta’s John Marshall Law School: Jeffrey A. Van Detta, Atlanta (2027)		
(7) Mercer University School of Law: Patrick E. Longan, Macon (2027)		
(8) University of Georgia School of Law: David N. Lefkowitz, Athens (2027)		
(9) State Disciplinary Board: Marcella C. Ducca, Atlanta (2026)		
(10) State Disciplinary Review Board: John R. B. Long, Augusta (2026)		
b) Approval of 2025-2026 Committees (action)		
(1) Standing Committees		
(2) Special Committees		
(3) Program Committees and Boards		
c) Nominations to the Judicial	Chris Twyman	
Qualifications Commission		
d) Proposed Rules Changes	Bill NeSmith	74
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f) Election Schedule 2025-2026	Chris Twyman	120
g) Executive Committee Election	Chris Twyman	
(Please keep nominations to under 5 minutes. Please keep seconds to under 2 minutes.)		
<u>Two-Year Term 2025-2027</u>		
(1) Expired term of Joyce Gist Lewis		
(2) Expired term of David S. Lipscomb		
(3) Expired term of Shiriki C. Jones		

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(1) Tamara S. Caldas, Atlanta		
(2) Ronald E. Daniels, Eastman		
(3) Elisa S. Kodish, Atlanta		
i) Chief Justice’s Commission on Professionalism	Chris Twyman	
Appointments (action)		
(1) David M. Paule (2028)		
j) Executive Director’s Election	Chris Twyman	

4) INFORMATIONAL REPORTS

a) Executive Director’s Report	Damon E. Elmore	
	Executive Director	
b) Young Lawyers Division Report	Veronica R. Cox	
	YLD President, 2025-2026	
a) Legislative Report	Jennifer McNeely	
	Director of Governmental Affairs	
b) Special Committee on Artificial Intelligence and	Darrell Sutton	122
Technology Report	Committee Chair	
c) Suicide Prevention and Awareness Committee Report	Hon. Shondeana Morris	
	Committee Chair	
d) Chief Justice’s Commission on Professionalism Report	Karlise Y. Grier	127
	Executive Director, CJCP	

5) WRITTEN REPORTS

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(2) Alternative Dispute Resolution Section	
(3) Construction Law Section	
(4) Creditor’s Rights Section	
(5) Elder Law Section	
(6) Eminent Domain Section	
(7) Energy Law Section	

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- (8) Entertainment and Sports Law Section
- (9) Environmental Law Section
- (10) Family Law Section
- (11) Franchise and Distribution Law Section
- (12) Health Law Section
- (13) Intellectual Property Law Section
- (14) Nonprofit Law Section
- (15) Privacy & Technology Law Section
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(1) Coastal Office	
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6) CLOSING

- a) Old Business..... Chris Twyman
- b) New Business Chris Twyman
- c) Executive Session..... Chris Twyman
- d) Remarks / Q&A / Comments / Suggestions Chris Twyman
- e) Adjournment Chris Twyman
- f) Pictures (Very Important)

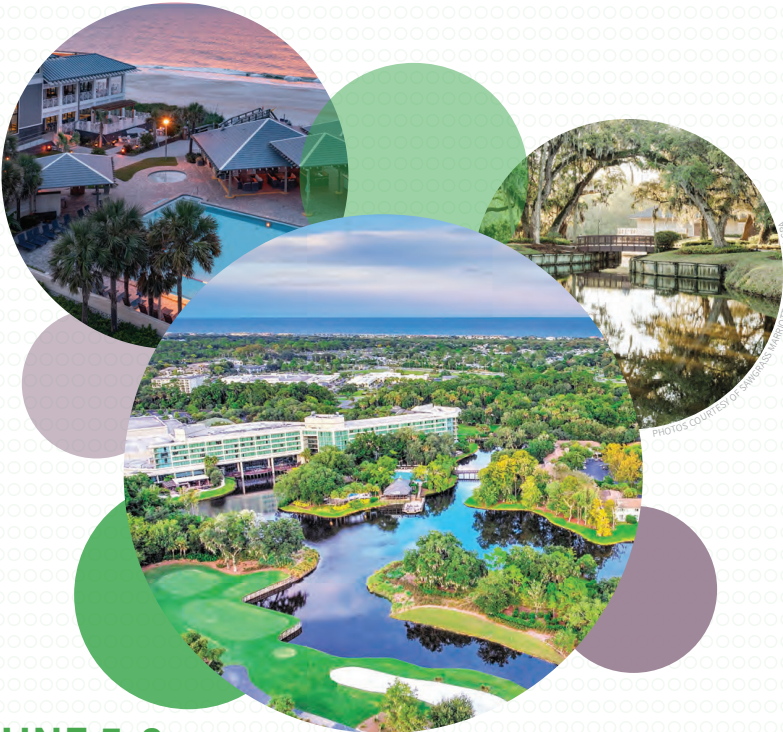
Immediately following the meeting, photos will be made of:

- (1) Headshots for new Board of Governors Members*
- (2) Headshots for all Returning Board of Governors Members who want updated photos*
- (3) 2025-2026 Officers and Executive Committee

*These photos will be used for the supplemental directory. If you have a headshot that you would like to provide instead, please email it to jenniferm@gabar.org.

2025 STATE BAR OF GEORGIA ANNUAL MEETING

Registration Cut-off | Friday, May 30



JUNE 5-8

Sawgrass Marriott Golf Resort & Spa
Ponte Vedra Beach, Florida



State Bar
of Georgia

Register at www.gabar.org

FROM THE PRESIDENT



JOIN US AT PONTE VEDRA BEACH!

On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2025 Annual Meeting of the State Bar of Georgia to be held June 5-8 at the Sawgrass Marriott Golf Resort & Spa in Ponte Vedra Beach, Florida.

I hope you and your family will make plans to join us for a weekend that promises ample opportunity to rest and relax all while reflecting upon the successes and achievements of the past year as we prepare for the future as an organization. It is important to acknowledge what has been accomplished in order to move forward to continue to grow and improve our Bar and the legal profession.

The festivities will begin with Thursday evening's Opening Night Festival and culminate with Saturday night's Presidential Inaugural Gala, where Christopher P. Twyman will be sworn in as the 2025-26 State Bar president. I encourage you to take advantage of the CLE opportunities that have been planned, in addition to the section events, business meetings, alumni receptions and other social functions.

We are looking forward to a fun, casual offsite experience at The Yards for the Opening Night Festival that will feature lots of family-oriented entertainment and golf games for the adults. I am also excited to announce the return of the golf tournament to Annual Meeting. See page 11 of this brochure for more details about the President's Cup Scramble at the Ponte Vedra Inn & Club. Special thanks to Hansell Roddenbery for his hard work in hammering out the details and arrangements so that we can have a successful tournament experience.

Be sure to check out the Legal Exposition open daily in the Conference Center—you never know what kind of opportunities await until you speak with our vendors.

Sawgrass Marriott Golf Resort & Spa will meet our every need for an outstanding program, as well as provide you and your family with a wonderful vacation experience. There will be plenty of time for you to focus on your family and recharge while at Ponte Vedra Beach with the number of recreational opportunities available—including golf, biking or simply relaxing with your family and friends in a beautiful setting.

It has been an honor and a privilege to serve as your 2024-25 State Bar president. I am grateful for the opportunity. Thank you for your support and your trust.

See you in Ponte Vedra Beach!

A handwritten signature in green ink that reads "Ivy N. Cadle".

IVY N. CADLE

President, State Bar of Georgia

HIGHLIGHTED EVENTS

OPENING NIGHT FESTIVAL

Thursday, June 5 | 6:30 - 9:30 p.m.

Casual Summer Attire

We are changing things up and taking the party offsite to The Yards, a one-of-a-kind sports entertainment venue, located at 254 Alta Mar Drive, only two miles from the hotel! Shuttle service will be provided, or if you choose to drive, there is ample onsite parking.

The Opening Night Festival will be catered by Southern Slice, featuring wood-fired meat stations and gaucho-style demonstrations displaying the food that will be served; the Southern Slice Pizza food truck will dish out delicious wood-fired pizzas from a beautifully restored vintage truck; the TacoLu food truck will feature Baja-Mexicana cuisine; and be sure to stop for a scoop—or two—from Millie's ice cream truck.

Join your colleagues, their families and guests for a relaxing, fun-filled evening dedicated to good food, great music and a chance to catch up with old friends and make new ones. Festival activities include golf-themed games, and a gaming truck provided by Extreme Game Truck.

Many thanks to the State Bar's Sections and other organizations whose support ensures the success of the Opening Night Festival.



PRESIDENTIAL INAUGURAL GALA

Saturday, June 7 | 6 - 11:30 p.m.

Black Tie Formal Attire

The evening begins with a reception honoring the Supreme Court justices and Court of Appeals judges, followed by the Awards and Inauguration Ceremony where Christopher P. Twyman will be sworn in as the 2025-26 State Bar president.

Following the inauguration and the presentation of the Distinguished Service and Employee of the Year awards, enjoy a plated dinner after which you are invited to spend the remainder of your evening grooving in the Dance Club with music provided by I Love This Band!; enjoying the Bourbon, Scotch and Cigar Lounge; and trying your luck in the Monte Carlo Casino, featuring games such as blackjack, craps, roulette and Texas hold'em.

Stick around to rock the house down with our special guest DJ and grab a treat from the midnight snack bar.





SCHEDULE OF EVENTS

THURSDAY, JUNE 5

8 a.m. – 7:30 p.m.

Registration

10 – 11:30 a.m.

ICLE Board Meeting

(By invitation only)

10 a.m. – 3 p.m.

State Disciplinary Board Meeting

12:45 – 1:45 p.m.

Bench and Bar Committee Meeting

1 – 6 p.m.

Legal Exposition Open

2 – 3 p.m.

CLE | Torts in Real Estate: More Than Just Land

2 – 5:15 p.m.

CLE | Center for Lawyer Wellbeing Inaugural CLE

2 – 5:15 p.m.

CLE | War Stories and Georgia Evidence Update

3 – 4 p.m.

Budget Hearing

3 – 4 p.m.

CLE | vLex Fastcase: Empowering Georgia Lawyers

4 – 5:30 p.m.

Military Legal Assistance Program Committee and
Military/Veterans Law Section Meeting

6:30 – 9:30 p.m.

Opening Night Festival

FRIDAY, JUNE 6

6 a.m. – 8 p.m.

Registration

7 a.m. – 7 p.m.

Legal Exposition Open

7 – 8 a.m.

 YLD/Pro Bono Fitness Hour

9 a.m. – 12 p.m.

Plenary Session: Awards Presentations, Annual Members
Meeting and the 2024-25 Board of Governors Meeting

12 – 2 p.m.

Judicial Section Luncheon

12 – 3 p.m.

State Disciplinary Review Board Meeting

12:30 – 2:30 p.m.

Commission on Continuing Lawyer Competency Meeting

1 – 2 p.m.

YLD General Session

2 – 3 p.m.

CLE | What's New in Ethics?

2 – 4 p.m.

Criminal Law Section CLE

2 – 5 p.m.

CLE | Committee to Promote Inclusion in the Profession
2025 Annual CLE: The Fight for Inclusion

3 – 5 p.m.

Member Benefits Committee Meeting

 Wellness Event

SCHEDULE OF EVENTS

SATURDAY, JUNE 7

3 – 6:30 p.m.
Elder Law Section CLE and Reception

3:30 – 5 p.m.
YLD Leadership Academy Alumni Mixer

4 – 6:30 p.m.
General Practice & Trial Law Section
Tradition of Excellence Awards and Reception

4:30 – 6:30 p.m.
Senior Lawyers Section Ethics CLE and Reception

5:30 – 6:30 p.m.
Construction Law and Energy Law Sections
Annual Meeting and Reception

5:30 – 7 p.m.
Atlanta's John Marshall Law School Alumni Reception

5:30 – 7 p.m.
Charleston School of Law Alumni Reception

5:30 – 7 p.m.
Mercer University Walter F. George School of Law
Alumni Reception

5:30 – 7 p.m.
University of Georgia School of Law Alumni Reception
Honoring Christopher P. Twyman

5:30 – 7:30 p.m.
Emory University School of Law Alumni Reception

5:30 – 7:30 p.m.
Georgia State University College of Law Alumni Reception

7 – 9:30 p.m.
YLD Dinner and Swearing-In Ceremony

7 a.m. – 1 p.m.
Registration

7:30 a.m. – 1 p.m.
Legal Exposition Open

7:30 – 8:30 a.m.
New Board Members Breakfast With the President

8 – 8:45 a.m.
SOLACE Committee Meeting

9 a.m. – 12 p.m.
2025-26 Board of Governors Meeting

12:30 – 2 p.m.
Annual Diversity of Bars Meeting

1 p.m. Shotgun Start
President's Cup Scramble

6 – 11:30 p.m.
Reception honoring the Supreme Court justices and Court of Appeals judges; Presidential Inaugural Gala: Installation of Christopher P. Twyman; Dinner; Entertainment: Bourbon, Cigar and Scotch Lounge; Casino Night; Dance Club with I Love This Band!



2025 ANNUAL MEETING

5



CONTINUING LEGAL EDUCATION

TORTS IN REAL ESTATE: MORE THAN JUST LAND

Thursday, June 5 | 2 – 3 p.m.

🕒 1 CLE hour

Hosted by the YLD Real Estate Law Committee

Registration | Free

Speakers

Tim Guilmette
Guilmette Pulver, LLC
Atlanta, Georgia

Bryan Henderson
Guilmette Pulver, LLC
Atlanta, Georgia

Virginia C. Josey
YLD Treasurer, State Bar of Georgia
Virginia Josey Law
Macon, Georgia

Practitioners in real estate law deal with a number of issues, from fraud to premises liability and even racketeering. Hear from three practicing real estate lawyers about their work with torts in real estate, to include stories of actual cases and experiences.



PHOTO COURTESY OF THE SAVANNAH MARINOTT GOLF RESORT, USA

CENTER FOR LAWYER WELLBEING INAUGURAL CLE

Thursday, June 5 | 2 – 5:15 p.m.

🕒 2 CLE hours

Hosted by the Attorney Wellness Committee, the Center for Lawyer Wellbeing and the Institute of Continuing Legal Education

General Registration | \$145
Audit (no CLE credit) | \$90

Program Chairs

R. Javoyne Hicks
Secretary, State Bar of Georgia
Chair, State Bar of Georgia Attorney Wellness Committee
Founder/CEO, Magnifying Synergy, LLC
Atlanta, Georgia

Paul E. Knowlton
Partner, Stanton Law, LLC
Decatur, Georgia

Slow Death by Normal Crazy: Our Firm Cultures Are Killing Us

Murray Gottheil
Retired Partner, Pallett Valo LLP
Founder, Law & Disorder, Inc.
Buckhorn, Ontario, Canada

Gottheil will discuss attorney wellness and the seemingly relentless pressure of the legal profession and its impact on family life and physical and mental health. He will provide his insights into life in the legal profession in an attempt to encourage lawyers to plan their careers with their eyes wide open and a view to their families and health.

Green Light Your Best Life Today: How to Practice at Your Peak as a Legal Athlete

Jess Sargus
CEO and Founder, The Legal Athlete
Austin, Texas

Too many lawyers are running on empty—surviving their careers instead of thriving in them. But what if your highest level of performance, fulfillment and freedom isn't some distant goal? What if the green light to create your best life—today—is already yours to give?

In this high-impact, science-fueled session, high-performance coach, undefeated MMA fighter and 22-year veteran attorney Jess Sargus brings the mindset and tools of elite athletes straight into the legal arena. You'll learn

CONTINUING LEGAL EDUCATION

how to train your brain and body for resilience, grit, focus and purpose—so you can lead yourself with the same intensity and intention you bring to your clients, and reclaim your agency over your energy, focus and future—starting right now.

Through this talk, you'll discover the key framework, tools and strategies high achievers need to close the gap between their potential and their performance—without sacrificing their health or joy. From the neuroscience of mental toughness to powerful routines that protect and restore your energy, this session delivers a game plan for lawyers who want to win in the courtroom and in life.

Whether you're a litigator, managing partner or rising star, this session is your first intentional step to stop grinding and start training for a practice—and a life—that actually lights you up. Peak performance isn't about doing more. It's about doing what matters, with more clarity, capacity and joy.

Green light. Let's get it.

Bonus Workshop

In the 30-minute interactive workshop following this talk, participants will complete their own MVP process to define their personal mission, vision and core principles. They will leave with a simple, clear action plan and a set of core habits and routines to help them live and work in alignment with their boldest and most meaningful goals—starting today.

WAR STORIES AND GEORGIA EVIDENCE UPDATE

Thursday, June 5 | 2 – 5:15 p.m.

🕒 3 CLE hours, including 1 ethics hour, 1 professionalism hour and 1 trial practice hour

Hosted by the Bench and Bar Committee and the Institute of Continuing Legal Education

General Registration | \$145
Audit (no CLE credit) | \$90

Program Chairs

Hon. C. Michael Johnson

Co-Chair, Bench and Bar Committee
Judge, Superior Court, Oconee Judicial Circuit
Eastman, Georgia

David B. Bell

Co-Chair, Bench and Bar Committee
Founder and Principal, David Bell Law Firm
Augusta, Georgia

Georgia Evidence Update

William V. "Bill" Custer IV

Senior Trial Counsel, Bryan Cave Leighton Paisner LLP
Atlanta, Georgia

War Stories and Thoughts on a Lawyer's Creed and the Aspirational Statement on Professionalism

Moderator

Hon. C. Michael Johnson

Panelists

Hon. Kevin M. Farmer

Judge, Superior Court, Atlanta Judicial Circuit
Atlanta, Georgia

Hon. Amanda N. Heath

Judge, Superior Court, Augusta Judicial Circuit
Augusta, Georgia

Hon. Julie Adams Jacobs

Judge, Superior Court, Cobb Judicial Circuit
Marietta, Georgia

Hon. J. Wade Padgett

Judge, Court of Appeals of Georgia
Atlanta, Georgia

War Stories and Thoughts on the Rules of Professional Conduct

Moderator

David B. Bell

Panelists

Robin Frazer Clark

Partner, Robin Frazer Clark, P.C.
Atlanta, Georgia

Anne D. Gower

Partner, Gower Wooten & Darneille LLC
Atlanta, Georgia

Jeffrey R. "Jeff" Harris

Partner, Harris Lowry Manton
Savannah, Georgia

Brandon L. Peak

Partner, Peak Wooten McDaniel & Colwell LLP
Columbus, Georgia



CONTINUING LEGAL EDUCATION

VLEX FASTCASE: EMPOWERING GEORGIA LAWYERS

Thursday, June 5 | 3 – 4 p.m.

🕒 1 CLE hour

Hosted by the Member Benefits Committee and the Law Practice Management Program

Registration | Free

Speakers

Sheila Baldwin

Member Benefits Coordinator, State Bar of Georgia
Atlanta, Georgia

T. J. Diggins

Customer Success Representative, vLex
Atlanta, Georgia

Join us for an engaging and informative session designed to help you make the most of your legal research benefit—vLex Fastcase, provided at no additional cost with your State Bar of Georgia membership. Learn how to effectively use the platform's powerful tools and discover new, time-saving features—including AI-powered Case Analysis with Headnotes and the Vincent AI research assistant. Whether you're new to vLex Fastcase or looking to refine your skills, this training will give you the tips and techniques you need to streamline your legal research.

WHAT'S NEW IN ETHICS?

Friday, June 6 | 2 – 3 p.m.

🕒 1 CLE hour, including 1 ethics hour

Hosted by the Office of the General Counsel

Registration | Free

Come get your ethics hour and catch up on recent changes to the Georgia Rules and Professional Conduct, new Formal Advisory Opinions and other hot topics in ethics. Lawyers from the Office of the General Counsel, the Formal Advisory Opinion Board and the Disciplinary Rules and Procedures Committee will update you on the latest hot topics in the world of professional regulation.

COMMITTEE TO PROMOTE INCLUSION IN THE PROFESSION 2025 ANNUAL CLE: THE FIGHT FOR INCLUSION

Friday, June 6 | 2 – 5 p.m.

🕒 3 CLE hours

Hosted by the Committee to Promote Inclusion in the Profession and the Georgia Association of Black Women Attorneys

Registration | \$145

Program Chair

Terri N. Gordon

Assistant Tax Commissioner, DeKalb County
Decatur, Georgia

This seminar will discuss the seminal Supreme Court case *Brown v. Board of Education* 70 years after its decision and go over a historical retrospective of the litigation and the lawsuit. Panelists will also discuss the implications of the litigation and how it impacts this committee and its efforts to promote inclusion in the profession. In addition, this seminar will discuss three cases that have impacted how bar associations administer services to a diverse legal community.

Part 1 | Revisiting *Brown v. Board of Education*

One year after the 70th anniversary of this seminal Supreme Court case, panelists will discuss a historical retrospective of the lawsuit and explore the litigation strategies employed by both parties and the far-reaching implications of the case and how it impacts our efforts to promote inclusion in the legal profession.

Part 2 | Inclusion in the Profession: Obstacles, Challenges and Victories after *Keller*, *Boudreaux* and *McDonald*

Panel discussion about how these cases concerning freedom of association and freedom of speech could impact how the Bar administers services to a diverse legal community.

Thank you to the Seeking Equal Justice and Addressing Racism & Racial Bias Committee for their partnership in planning this CLE seminar.



YOUNG LAWYERS DIVISION

CLE | TORTS IN REAL ESTATE: MORE THAN JUST LAND

Thursday, June 5 | 2 – 3 p.m.

Practitioners in real estate law deal with a number of issues, from fraud to premises liability and even racketeering. Hear from three practicing real estate lawyers about their work with torts in real estate, to include stories of actual cases and experiences.

YLD GENERAL SESSION

Friday, June 6 | 1 – 2 p.m.

The YLD General Session is open to all members. YLD officers and members of the YLD Executive Council will give reports and share updates on events and projects. The 2025 YLD Leadership Academy will receive their graduation plaques.

CLE | WHAT'S NEW IN ETHICS?

Friday, June 6 | 2 – 3 p.m.

Come get your ethics hour and catch up on recent changes to the Georgia Rules and Professional Conduct, new Formal Advisory Opinions and other hot topics in ethics. Lawyers from the Office of the General Counsel, the Formal Advisory Opinion Board and the Disciplinary Rules and Procedures Committee will update you on the latest hot topics in the world of professional regulation.

YLD LEADERSHIP ACADEMY ALUMNI MIXER

Friday, June 6 | 3:30 – 5 p.m.

Don't miss this networking opportunity complete with food, fun and friends. Meet the newest Leadership Academy class and catch up with other alumni. If you are new to YLD activities, this is your chance to introduce yourself to the 2025-26 YLD officers and learn about getting involved.

YLD DINNER AND SWEARING-IN CEREMONY

Friday, June 6 | 7 – 9:30 p.m.

Please join the Young Lawyers Division for its annual dinner and swearing-in ceremony. The awards ceremony will spotlight the accomplishments of the YLD's many outstanding members as 2024-25 YLD President Kenneth Mitchell Jr. presents the Awards of Achievement, as well as the Ross Adams Award, which honors a past YLD president, and the 21st Annual YLD Ethics and Professionalism Award. The evening culminates with the swearing-in of the 2025-26 YLD officers. Incoming YLD President Veronica R. Cox will then highlight her plans for the YLD during the upcoming Bar year.

This event is open to all lawyers—members of the YLD and otherwise.



PHOTO COURTESY OF THE NEWPORTS MARLBOROUGH GOLF RESORT & SPA



RECREATION AND WELLNESS

Highlighting the crucial link between prioritizing lawyer wellbeing and achieving a successful legal practice aligns with the State Bar's mission to enhance the quality of legal services.

YLD/PRO BONO FITNESS HOUR

Friday, June 6 | 7 – 8 a.m.

Choose from one of three fitness activities suitable for all levels: a Zumba class, a bicycle ride or a walk/run around the resort. All activities are free and T-shirts will be available for all participants. Additional information regarding logistics will be provided after registration closes on May 30. The fitness hour is sponsored by Georgia Capitol Partners.



PHOTO COURTESY OF THE SAWGRASS MARRIOTT GOLF RESORT & SPA



PHOTO COURTESY OF THE SAWGRASS MARRIOTT GOLF RESORT & SPA

SAWGRASS SPA AT MARRIOTT

The Sawgrass Spa at Marriott is an oasis nestled along mature oaks and palm trees. With countless treatment options, the spa is your complete relaxation destination. From massages, body wraps and facials, to manicures, pedicures, reflexology and more, this haven of serenity has it all, including a steam room, outdoor pool and whirlpool. The spa is open daily from 9 a.m. to 6 p.m. Appointments are required. Please call 904-285-7777.

FITNESS CENTER

Adjacent to the spa, guests can keep up with their fitness journey at any time in the 24-hour fitness center. Including cardiovascular equipment, free weights, strength equipment and more, this elevated fitness experience is sure to motivate. As part of the resort experience, guests can also enjoy daily fitness classes.



RECREATION AND WELLNESS

PRESIDENT'S CUP SCRAMBLE

Saturday, June 7 | 1 p.m. Shotgun Start

Thanks to the hard work of Hansell Roddenbery, the golf tournament is returning to the Annual Meeting! An afternoon on the golf course is time to enjoy being with friends new and old—no matter if you play golf weekly or once a year. What better place to have the tournament than Ponte Vedra Beach, the PGA Tour's global headquarters.

The President's Cup Scramble Golf Tournament will be held at the Ponte Vedra Inn & Club Ocean Course, which is only 15 minutes north of the Sawgrass Marriott Golf Resort & Spa. Additional information will be provided prior to the tournament. Enjoy hitting a few balls on the range before the 1 p.m. shotgun start. In a 1938 *Golf Magazine* article, Ponte Vedra's Ocean Course, Pebble Beach, Oakmont and Pine Valley are featured as the "hardest courses in America." In 1942, after completing a match on the Ocean Course, golf legend Bobby Jones commented, "it's a course to challenge professionals." The course was redesigned in 1947 by Robert Trent Jones "in an attempt to reduce some of the course's severity."



PHOTO COURTESY OF THE PONTE VEDRA INN & CLUB



PHOTO COURTESY OF THE PONTE VEDRA INN & CLUB

Thank you to Avalon for sponsoring the President's Cup Golf Tournament.

The format will be a scramble match that will accommodate all levels of experience. We will make sure each team has an A, B, C and D player. All four golfers will hit off the tee, then the four golfers will hit from the ball with the best position and keep this format until the ball is in the cup. Each player is not required to hit every shot, so everyone can enjoy a relaxing round of golf. You might be the last one to sink a 6-foot putt for a birdie. It's at a true "TEAM" format. When you register, please include your handicap index, along with whom you would like to be paired during the golf tournament.

The registration fee includes all charges associated with golf, including a boxed lunch and shuttle service. The shuttle will depart at 12:15 p.m. on a first come, first served basis, or if you drive yourself, parking at the Ponte Vedra Inn & Club is free. A donation will be made to a charity for the 1st and 2nd place teams. In addition, the 1st place team will have their names engraved on a plaque that will be placed on the "President's Trophy," which will be housed at the Bar Center in Atlanta. Prizes will also be awarded for closest to the pin and longest drive.

Please direct questions about the golf tournament to Hansell Roddenbery at hroddenbery@cresa.com.

SECTION EVENTS

MILITARY LEGAL ASSISTANCE PROGRAM COMMITTEE AND MILITARY/VETERANS LAW SECTION MEETING

Thursday, June 5 | 4 – 5:30 p.m.

Join the members of the Military Legal Assistance Program Committee and the Military/Veterans Law Section for their annual meeting.

JUDICIAL SECTION LUNCHEON

Friday, June 6 | 12 – 2 p.m.

Join the members of the Judicial Section for their annual luncheon.

CRIMINAL LAW SECTION CLE

Friday, June 6 | 2 – 4 p.m.

A View from the Clerk's Office

Robert Meek

Emergency Applications Clerk, U.S. Supreme Court
Washington, D.C.

Don't miss this opportunity to hear valuable insights from Robert Meek on the handling of emergency petitions at the nation's highest court.



PHOTO COURTESY OF THE SAVANNAH MARSHWORTH COAST RESERVE, GA.

ELDER LAW SECTION CLE AND RECEPTION

Friday, June 6 | 3 – 6:30 p.m.

Join the Elder Law Section for an engaging CLE program, which includes 1 hour of professionalism credit, followed by a networking reception.

GENERAL PRACTICE & TRIAL LAW SECTION TRADITION OF EXCELLENCE AWARDS AND RECEPTION

Friday, June 6 | 4 – 6:30 p.m.

Each year, the General Practice & Trial Law Section recognizes a plaintiff's attorney, defense attorney, general practitioner and judge who have achieved a career of excellence. Please join the section in celebrating the 2025 recipients, followed by a reception in their honor.

SENIOR LAWYERS SECTION ETHICS CLE AND RECEPTION

Friday, June 6 | 4:30 – 6:30 p.m.

Join the members of the Senior Lawyers Section for a one-hour ethics CLE followed by a reception.

CONSTRUCTION LAW AND ENERGY LAW SECTIONS ANNUAL MEETING AND RECEPTION

Friday, June 6 | 5:30 – 6:30 p.m.

Join the Construction Law and Energy Law Sections for their annual members' meeting and stick around to network with fellow section members at a reception.

Thank you to the State Bar's Sections whose continuous support ensures the success of the Opening Night Festival.

HOTEL INFORMATION

SAWGRASS MARRIOTT GOLF RESORT & SPA

1000 Tournament Players Club Blvd.
Ponte Vedra Beach, Florida 32082
904-285-7777

Cut off date is Wednesday, May 14

Sawgrass Marriott Golf Resort & Spa will be the Bar's host hotel offering discounted room rates. A block of rooms has been reserved for the meeting. Room rates range from \$269 to \$309 single/double. Rooms are subject to a \$20 resort fee per night, plus approximately 12% sales tax. To make reservations online, visit bit.ly/AM25_reservations. Please note that you can only book online rooms from June 5-8. If you are arriving earlier or staying later than the meeting, you will have to contact our group housing coordinator Christy Grant at christy.grant@marriott.com. Reservations must be made by Wednesday, May 14, as rooms will be on a space and rate availability after this date.

Check-in time is 4 p.m. | Check-out time is 11 a.m.

Parking Information

- Discounted daily self-parking rate is \$15.
- Daily valet parking rate is \$28.

Resort Fee

The Sawgrass Marriott Golf Resort & Spa created a resort fee to bundle resort services to make your stay more enjoyable. Room rates will be subject to a non-commissionable daily resort fee discounted to \$20 per room, per night, plus 11.5% tax. The fee covers several amenities, including:

- Enhanced guestroom high-speed internet access
- Spa fitness classes daily
- Miniature golf daily
- One-hour bicycle rental, based on availability, for up to four bicycles.
- Private access to the Cabana Beach Club, including exclusive beach shuttle service
- One-year *Golf Digest* subscription

Covered amenities, prices, service charge and taxes are subject to change.



HILTON GARDEN INN JACKSONVILLE PONTE VEDRA SAWGRASS

45 Tournament Players Club Blvd.
Ponte Vedra Beach, FL 32082
904-280-1661

Cut off date is Thursday, May 22

Hilton Garden Inn Jacksonville Ponte Vedra Sawgrass will be the Bar's overflow hotel offering discounted room rates. A block of rooms has been reserved for the meeting. The room rate is \$259 single/double. To make reservations online, visit bit.ly/AM25_hilton. Reservations must be made by Thursday, May 22, as rooms will be on a space and rate availability after this date.

Check-in time is 3 p.m. | Check-out time is 11 a.m.

Parking Information

- Daily self-parking rate is \$5.

Amenities

- Business center
- Fitness center
- Free WiFi
- Onsite restaurant
- Outdoor pool
- Pet-friendly rooms
- Room service



ADDITIONAL INFORMATION

WHAT TO PACK

Opening Night Festival
Casual summer attire

Daytime meetings and events
Casual attire

Plenary Session and Board of Governors Meetings
Business casual attire

Young Lawyers Division Dinner and Swearing-In Ceremony
Business casual attire

Supreme Court/Court of Appeals Reception and Inaugural Gala
Black tie formal attire



EXHIBITORS*

- ABA Retirement Funds Program
- Atlanta Custom Tailors
- Attorney Wellness Committee, State Bar of Georgia
- Avalon
- Bookkeeping Done Virtually LLC
- Fee Arbitration Program, State Bar of Georgia
- Filevine
- Hive
- i3 Verticals
- Lawyer Assistance Program, State Bar of Georgia
- Member Benefits Program, State Bar of Georgia
- Milestone Reporting Company
- Noy Media Group
- PeachCourt
- Pearl Insurance
- SouthernFirst
- Tabs3 Software
- Veritext

**At time of publication.*

2025 ANNUAL MEETING REGISTRATION FORM

Please use this form to register by checking events you plan to attend. Registration is required for all events, including "no charge" functions. Registrations are due May 30. "No charge" functions are limited to two tickets per attendee. One form per registrant. **You may also register online at www.gabar.org.**

ATTENDEE INFORMATION

(Please print and use one form per registrant.)

BAR NUMBER

NAME

NICKNAME

EMAIL

GUEST 1 NAME

GUEST 2 NAME

GUEST 3 NAME

GUEST 4 NAME

PHONE/FAX

SPECIAL NEEDS/DIETARY RESTRICTIONS

ADA: If you qualify for assistance under the Americans with Disabilities Act, please email meetings@gabar.org.

REGISTRATION OPTIONS

Registrations are processed on a first-come, first-served basis. Checks and credit cards (VISA/MC/AMEX) are accepted. Make checks payable to the State Bar of Georgia and mail to: State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations are due May 30.

REFUND/CANCELLATION POLICY

Cancellation of registration must be received in writing no later than May 30. Registrations will receive a full refund. Absolutely no refunds will be made after May 30. Requests should be mailed to the State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; faxed to 404-527-8717 or emailed to meetings@gabar.org.

PACKAGES

Package for Two (registrant and spouse/guest)

Quantity
☐ Lawyer\$680
☐ Full-Time Judge\$580

Package includes: two Opening Night Festival tickets, two Supreme Court/Court of Appeals Reception tickets, two Presidential Inaugural Gala tickets.

Individual Package (registrant)

☐ Lawyer\$340
☐ Full-Time Judge\$290

Package includes: one Opening Night Festival ticket, one Supreme Court/Court of Appeals Reception ticket, one Presidential Inaugural Gala ticket.

YLD Package (registrant)

☐ YLD Member\$290

Package includes: one YLD Leadership Academy Alumni Mixer ticket, one YLD Dinner and Swearing-In Ceremony ticket, one Presidential Inaugural Gala ticket.

*YLD Member applies only to Bar members who are 36 years of age or younger or within their first five years of practice in their first bar.

A LA CARTE EVENTS

☐ Plenary Session/Board of Governors Meeting (Fri.)N/C
☐ Board of Governors Meeting (Sat.)N/C
☐ Opening Night Festival (Lawyer or Guest)\$150
☐ Opening Night Festival (Judge)\$120
☐ Opening Night Festival (ages 5 and under)N/C
☐ Opening Night Festival (ages 6-20)\$60

Please specify age(s)

☐ Supreme Court/Court of Appeals Reception/Inaugural Gala (Lawyer or Guest)\$240

☐ Supreme Court/Court of Appeals Reception/Inaugural Gala (Judge)\$200

☐ Supreme Court/Court of Appeals Reception/Inaugural Gala (YLD Member*)\$150

*YLD Member applies only to Bar members who are 36 years of age or younger or within their first five years of practice in their first bar.

ALUMNI FUNCTIONS

Quantity
☐ Atlanta's John Marshall Law School ReceptionN/C
☐ Charleston School of Law ReceptionN/C
☐ Emory University School of Law ReceptionN/C
☐ Georgia State College of Law ReceptionN/C
☐ Mercer University Walter F. George School of Law ReceptionN/C
☐ University of Georgia School of Law Reception
Honoring Christopher P. TwymanN/C

COMMITTEE EVENTS

☐ Budget HearingN/C
☐ SOLACE MeetingN/C

CLE SEMINARS

☐ Center for Lawyer Wellbeing Inaugural CLE (with CLE credit)\$145
☐ Center for Lawyer Wellbeing Inaugural CLE (no CLE credit)\$90
☐ Committee to Promote Inclusion in the Profession
2025 Annual CLE (with CLE credit)\$145
☐ Committee to Promote Inclusion in the Profession
2025 Annual CLE (no CLE credit)\$90
☐ vLex Fastcase: Empowering Georgia LawyersN/C
☐ Torts in Real Estate: More Than Just LandN/C
☐ War Stories and Georgia Evidence Update (with CLE credit)\$145
☐ War Stories and Georgia Evidence Update (no CLE credit)\$90
☐ What's New in Ethics?N/C

RECREATION AND WELLNESS

Highlighting the crucial link between prioritizing lawyer wellbeing and achieving a successful legal practice aligns with the State Bar's mission to enhance the quality of legal services.

☐ President's Cup Scramble\$325

Registration fee includes shuttle service on a first come, first served basis and a boxed lunch.

My handicap index is _____. I would like to be paired with _____.

☐ YLD/Pro Bono Fitness HourN/C

SECTION FUNCTIONS

☐ Construction Law and Energy Law Annual Meeting and Reception\$10
☐ Criminal Law CLEN/C
☐ Elder Law CLE and ReceptionN/C
☐ General Practice & Trial Law Awards Ceremony and Reception\$40
☐ Judicial Section Luncheon\$50
☐ MLAP Committee and Military/Veterans Law MeetingN/C
☐ Senior Lawyers Ethics CLE and ReceptionN/C

YLD EVENTS

☐ YLD Dinner and Swearing-In Ceremony\$110
☐ YLD General SessionN/C
☐ YLD Leadership Academy Alumni Mixer\$50

OTHER

☐ Annual Diversity of Bars MeetingN/C

PAYMENT INFORMATION

☐ I enclose a check in the amount of \$_____.

☐ Please bill my ☐ Visa ☐ MC ☐ AMEX \$_____.

ACCOUNT NUMBER

EXP. DATE (MM/YY)

CSC

ZIP CODE

NAME (AS IT APPEARS ON CARD, PLEASE PRINT)

SIGNATURE

Credit card and "no charge" registrations may be faxed to 404-527-8717. Return with payment to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743, or register online at www.gabar.org.



State Bar
of Georgia



State Bar of Georgia

2025 Annual Meeting
104 Marietta St. NW, Suite 100
Atlanta, GA 30303-2743

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**MILESTONE
REPORTING**
YOUR PATH THROUGH LITIGATION

Many thanks to the State Bar's Sections and others that have contributed to the success of the 2025 Annual Meeting.

Platinum
Criminal Law Section

360° Photo Booth
Planet Depos

Annual Meeting Bag
Criminal Law Section

Breakfast
Filevine

Hotel Key Card
Cox Byington Twyman LLP

President's Cup Scramble
Avalon

Roaming Photo Booth
Neuroscience Specialty
Centers

Retiring Executive Committee Members (term ends June 6, 2025)

J. Antonio "Tony" DelCampo

Brittanie Browning

Retiring Board of Governors Members (term ends June 6, 2025)**Years of Service**

Alcovy Circuit, Post 1	Michael G. Geoffroy	7
Atlanta Circuit, Post 36	Graham Elliott McDonald	5
Chattahoochee Circuit, Post 4	Donna Stanaland Hix	14
Clayton Circuit, Post 1	Kathryn Lauranne Powers	5
Cobb Circuit, Post 2	Ronald Arthur Lowry	18
Cobb Circuit, Post 6	Laura Joan Murphree	12
Columbia Circuit	Danny L. Durham	4
Member-at-Large, Post 2	Rotsen Dara Diya "Chinny" Law	4
Pataula Circuit	Edward R. Collier	12
Waycross Circuit, Post 2	Vernon L. Chambless	2
West Georgia Circuit	Jason W. Swindle Sr.	8

2025-2026 Officers (term begins June 7, 2025)

President	Christopher Paul Twyman
President-elect	William C. Gentry
Immediate Past President	Ivy Neal Cadle
Treasurer	R. Jayvone Hicks
Secretary	Shiriki Cavitt Jones
YLD President	Veronica Rogusky Cox
YLD President-elect	Virginia C. Josey
YLD Immediate Past President	Kenneth Mitchell Jr.

2025-2026 New Board of Governors Members (term begins June 7, 2025)

Alcovy Circuit, Post 1	Eric C. Crawford
Atlanta Circuit, Post 30	Amanda Kay Seals
Atlanta Circuit, Post 36	Robert Charles McBurney
Chattahoochee Circuit, Post 4	Neal Joseph Callahan
Clayton Circuit, Post 1	Betrice A. Scott
Cobb Circuit, Post 2	Carlos Javier Rodriguez
Cobb Circuit, Post 6	Adam Joshua Rozen
Columbia Circuit	Samantha Marie Mullis
Member-at-Large, Post 2	Catherine Harris Helms
Pataula Circuit	William Murray Shingler Jr.
Waycross Circuit, Post 2	Adam Ferrell
West Georgia Circuit	David Jared Parrish

Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25	
	Annelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
Jonathan Lang Adams	•	e	•	•		Jonathan Lang Adams
Keith E. Adams	•		•	u		Keith E. Adams
Mark W. Alexander	•	•	•	•		Mark W. Alexander
JaDawnya Cintelle Baker	•	e	•	•		JaDawnya Cintelle Baker
Nina M. Baker	•	e	•	e		Nina M. Baker
Eric A. Ballinger	•	•	•	•		Eric A. Ballinger
Thua G. Barlay	•	•	•	e		Thua G. Barlay
Donna G. Barwick	•	e	•	•		Donna G. Barwick
John C. Bell Jr.	•	•	•	•		John C. Bell Jr.
Tracee R. Benzo	•	e	•	•		Tracee Ready Benzo
N. John Bey	•	e	•	u		N. John Bey
James D. Blitch IV	u	u	•	•		James D. Blitch IV
Sherry Boston	•	•	•	e		Sherry Boston
Charity Reneatha Bridgewater	•	•	•	•		Charity Reneatha Bridgewater
Ashley Mackin Brodile	•	u	•	u		Ashley Mackin Brodile
Brittanie Browning	•	•	e	•		Brittanie Browning
Stephanie D. Burton	•	u	•	•		Stephanie D. Burton
Ivy Neal Cadle	•	•	•	•		Ivy Neal Cadle
Jerry Neal Cadle	•	•	•	•		Jerry Neal Cadle
Stacey McSwine Cameron	•	•	•	•		Stacey McSwine Cameron
Richard D. Campbell	•	•	•	•		Richard D. Campbell
Tedra L. Cannella	•	u	•	u		Tedra L. Cannella
David L. Cannon	•	u	•	•		David L. Cannon
Carl S. Cansino	u	•	e	u		Carl S. Cansino
Chris M. Carr	u	u	e	u		Chris M. Carr
Vernon L. Chambliss	•	•	•	u		Vernon L. Chambliss
Kimberly A. Childs	•	e	•	•		Kimberly A. Childs
Amanda Rourk Clark Palmer	•	u	•	•		Amanda Rourk Clark Palmer
Edward R. Collier	u	e	u	u		Edward R. Collier
Daniel Jackson Connell III	•	•	u	u		Daniel Jackson Connell III
Susan P. Coppedge	•	•	•	•		Susan P. Coppedge
John Craig Cotton	•	•	•	u		John Craig Cotton
Martin L. Cowen III	•	•	•	•		Martin L. Cowen III
Veronica Rogusky Cox	•	•	•	•		Veronica Rogusky Cox
Gerald Davidson Jr.	•	e	•	•		Gerald Davidson Jr.

To request an excused absence, please email Secretary Javoyne Hicks (javoyne@statebarofga@gmail.com)

Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
J. Anderson Davis	u	•	•	•		J. Anderson Davis
William T. Davis	•	u	u	u		William T. Davis
Howard Mark Delashmit	•	•	•	•		Howard Mark Delashmit
J. Antonio DelCampo	•	•	•	•		J. Antonio DelCampo
Joseph W. Dent	•	•	•	•		Joseph W. Dent
Miguel Angel Dominguez	•	•	•	•		Miguel Angel Dominguez
Thomas V. Duck III	n/a	n/a	n/a	•		Thomas V. Duck III
Danny L. Durham	•	•	e	u		Danny L. Durham
Susan E. Edlein	•	•	•	•		Susan E. Edlein
Oto bong Ukpong "Oto" Ekpo	•	e	•	•		Oto bong Ukpong "Oto" Ekpo
Ryan Welton English	•	•	•	•		Ryan Welton English
Archibald A. Farrar	•	e	•	•		Archibald A. Farrar
Gillian Brooke Flier	•	•	•	•		Gillian Brooke Flier
Amanda Renee Flora	•	•	•	•		Amanda Renee Flora
Harold Eugene Franklin Jr.	•	e	e	e		Harold Eugene Franklin Jr.
Keith E. Gammage	•	•	•	•		Keith E. Gammage
William C. Gentry	•	•	•	•		William C. Gentry
Michael G. Geoffroy	•	u	u	•		Michael G. Geoffroy
Patricia A. Gorham	•	•	•	e		Patricia A. Gorham
Rebecca Holmes Liles Grist	•	•	•	•		Rebecca Holmes Liles Grist
Paul William Hamilton	u	•	•	•		Paul William Hamilton
Thomas B. "Britt" Hammond	•	•	•	•		Thomas B. "Britt" Hammond
Roger Brent Hatcher Jr.	•	•	u	•		Roger Brent Hatcher Jr.
John Haubenreich	•	•	•	•		John Haubenreich
Patrick H. Head	•	e	•	•		Patrick H. Head
Render M. Heard Jr.	•	•	•	u		Render M. Heard Jr.
Amanda Nichole Heath	•	e	•	•		Amanda Nichole Heath
Matthew J. Hennessy	•	•	•	•		Matthew J. Hennessy
Thomas W. Herman	u	•	•	•		Thomas W. Herman
R. Javoyne Hicks	•	•	•	•		R. Javoyne Hicks
Kimberly Wilkerson Higginbotham	u	•	•	•		Kimberly Wilkerson Higginbotham
Donna S. Hix	u	•	•	e		Donna S. Hix
Norbert D. "Bert" Hummel IV	•	•	•	•		Norbert D. "Bert" Hummel IV
Stacey K. Hydrick	•	•	•	e		Stacey K. Hydrick
Shukura L. Ingram	•	u	•	•		Shukura L. Ingram

To request an excused absence, please email Secretary Javoyne Hicks (javoyne@statebar.org@gmail.com)

Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
James T. Irvin	•	•	•	e		James T. Irvin
Christopher Ross Jackson	•	•	•	•		Christopher Ross Jackson
Charles Michael Johnson	•	•	•	e		Charles Michael Johnson
Lester B. Johnson, III	•	•	•	•		Lester B. Johnson, III
Shiriki L. Cavitt Jones	•	•	•	•		Shiriki L. Cavitt Jones
Maria Christene Mekras Justus	•	•	•	•		Maria Christene Mekras Justus
Zahra S. Karinshak	•	e	e	•		Zahra S. Karinshak
John F. Kennedy	u	u	•	u		John F. Kennedy
Barry E. King	•	•	•	•		Barry E. King
Judy C. King	•	•	•	•		Judy C. King
Catherine Koura	•	•	•	u		Catherine Koura
Rachel R. Krause	•	•	•	•		Rachel R. Krause
Rhonda Bender Kreuziger	•	u	•	•		Rhonda Bender Kreuziger
Edward B. Krugman	•	e	•	e		Edward B. Krugman
Jeffrey R. Kuester	•	•	•	e		Jeffrey R. Kuester
Anne Templeton LaMalva	•	•	•	•		Anne Templeton LaMalva
Rosten Dara Diya "Chinny" Law	•	e	•	•		Rosten Dara Diya "Chinny" Law
Allegra Lawrence-Hardy	u	u	•	u		Allegra Lawrence-Hardy
Nicole C. Leet	•	e	•	•		Nicole C. Leet
Katie K. Leonard	•	•	•	•		Katie K. Leonard
Dawn Renee Levine	•	•	•	•		Dawn Renee Levine
Joyce Gist Lewis	•	•	•	•		Joyce Gist Lewis
Lisa Katsuko Liang	•	•	•	•		Lisa Katsuko Liang
Thomas Fredrick Lindsay	•	•	•	•		Thomas Fredrick Lindsay
David S. Lipscomb	•	•	•	•		David S. Lipscomb
John R. B. Long	•	•	•	u		John R. B. Long
Dax Eric Lopez	•	e	•	e		Dax Eric Lopez
Ronald A. Lowry	•	u	u	•		Ronald A. Lowry
Lindsey Stephens Macon	•	u	•	e		Lindsey Stephens Macon
John Bell Manly	•	•	•	u		John Bell Manly
Troy Windel Marsh Jr.	•	•	•	u		Troy Windel Marsh Jr.
Edward T. McAfee	•	•	•	e		Edward T. McAfee
Hugh J. McCullough	•	•	•	•		Hugh J. McCullough
Graham Elliott McDonald	•	u	•	u		Graham Elliott McDonald
Letitia A. McDonald	•	e	•	e		Letitia A. McDonald

To request an excused absence, please email Secretary Javoyne Hicks (javoynestatebar@ga@gmail.com)
Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass
Brad J. McFall	e	e	y	u	
Michael D. McRae	u	u	u		Brad J. McFall
Terry L. Miller	*	*	*	*	Michael D. McRae
Kenneth Mitchell Jr.	*	*	*	*	Terry L. Miller
William J. Monahan	*	*	e	*	Kenneth Mitchell Jr.
Shondeana Crews Morris	*	e	y	*	William J. Monahan
Stephen Russell Morris	*	*	*	*	Shondeana Crews Morris
Joseph Kenneth Mulholland	*	*	e	*	Stephen Russell Morris
Laura J. Murphree	*	e	y	*	Joseph Kenneth Mulholland
Katrell Nash	*	u	y	*	Laura J. Murphree
Paul Wain Painter III	*	*	*	*	Katrell Nash
Joy Renea Parks	y	e	y	u	Paul Wain Painter III
Kathryn Drew Parrish Bennett	e	*	y	*	Joy Renea Parks
Kevin Charles Patrick	*	*	y	*	Kathryn Drew Parrish Bennett
Tabitha Edwina Payne	y	*	*	u	Kevin Charles Patrick
Brandon Lee Peak	*	*	y	*	Tabitha Edwina Payne
Edward Piasta	*	*	y	*	Brandon Lee Peak
Kathryn Lauranne Powers	*	e	y	u	Edward Piasta
Michael Prieto	*	u	u	u	Kathryn Lauranne Powers
Philip Zachary Pritchard	*	*	y	u	Michael Prieto
Jill Pryor	y	e	e	e	Philip Zachary Pritchard
Elizabeth Dalia Racine	*	e	*	*	Jill Pryor
William M. Ragland	y	e	y	*	Elizabeth Dalia Racine
Tina S. Roddenberry	*	e	*	e	William M. Ragland
Kevin W. Roper	*	e	y	*	Tina S. Roddenberry
Joseph Roseborough	*	u	u	u	Kevin W. Roper
Wesley Charles Ross	*	*	y	*	Joseph Roseborough
Claudia S. Saari	*	*	y	*	Wesley Charles Ross
Alex Musole Shalishali	*	u	e	*	Claudia S. Saari
H. Burke Sherwood	*	*	*	*	Alex Musole Shalishali
Mitchell McKinley Shook	y	u	y	*	H. Burke Sherwood
Robert H. Smalley, III	y	*	y	*	Mitchell McKinley Shook
Philip C. Smith	*	*	e	*	Robert H. Smalley, III
R. Rucker Smith	*	*	*	*	Philip C. Smith
Daniel B. Snipes	*	e	y	*	R. Rucker Smith

To request an excused absence, please email Secretary Javoyne Hicks (javoyne@statebarofga@gmail.com)

Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
R. Gary Spencer	•	•	•	e		R. Gary Spencer
H. Craig Stafford	u	•	•	•		H. Craig Stafford
Lawton E. Stephens	•	e	•	•		Lawton E. Stephens
Donna Coleman Stribling	•	e	•	•		Donna Coleman Stribling
Joseph G. Sumner, Jr.	•	u	u	u		Joseph G. Sumner, Jr.
Jason W. Swindle	•	u	u	u		Jason W. Swindle
Anita W. Thomas	•	e	u	•		Anita W. Thomas
Stephen Elliot Tillman	•	•	•	•		Stephen Elliot Tillman
Edward D. Tolley	e	u	e	•		Edward D. Tolley
Clayton Tomlinson	•	•	•	•		Clayton Tomlinson
Chris P. Twyman	•	•	•	•		Christopher Paul Twyman
Martin E. Valbuena	•	•	•	e		Martin E. Valbuena
J. Henry Walker	•	u	•	e		J. Henry Walker
Janice M. Wallace	•	•	•	•		Janice M. Wallace
Amy Carol Walters	•	•	•	•		Amy Carol Walters
Andrew Jackson Welch, III	•	e	•	u		Andrew Jackson Welch, III
Nancy J. Whaley	•	•	e	•		Nancy J. Whaley
Paige Reese Whitaker	•	e	•	•		Paige Reese Whitaker
Martha Wilson Williams	•	•	e	•		Martha Wilson Williams
Robert D. Wolf	•	e	•	•		Robert D. Wolf
Douglas Woodruff	•	•	e	e		Douglas Woodruff
• - attended meeting						
•* - attended virtually						
e - excused absence						
u - unexcused absence						

To request an excused absence, please email Secretary Javoyne Hicks (javoyne@statebarofga@gmail.com)
Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.



State Bar of Georgia

Future Meetings Schedule

Executive Committee

August 20-22, 2025	Supreme Court/Executive Committee Joint Meeting Cloudland at McLemore Resort, Rising Fawn, GA
September 26, 2025	Executive Committee Meeting Local Affinity Bar Association Reception Bar Center, Atlanta, GA
December 5, 2025	Executive Committee Meeting Local Bar Association Presidents' Reception Dec. 4, 2025 Four Seasons Hotel, Atlanta, GA <i>(*Contract Pending)</i>
February 6, 2026	Executive Committee Meeting Local Affinity Bar Association Luncheon or Reception The Partridge Inn, Augusta, GA <i>(*Contract Tentative)</i>
April 17, 2026	Executive Committee Meeting Local Affinity Bar Association Reception Apr. 16, 2026 Fox Hall Resort, Douglasville, GA <i>(*Contract Tentative)</i>

Board of Governors

Fall 2025	October 10-12, 2025	Cloudland at McLemore Resort, Rising Fawn, GA
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta Atlanta, GA <i>(*Contract Pending)</i>
Spring 2026	March 27-29, 2026	The Ritz-Carlton Reynolds, Lake Oconee Greensboro, GA <i>(*Contract Pending)</i>
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL
Midyear 2027	January 14-17, 2027	Omni Hotel at the Battery Atlanta Atlanta, GA <i>(*Contract Tentative)</i>

(Updated 4/29/25)

***Contract Tentative** – Initial stage where terms are being discussed but nothing is confirmed / ***Pending** – Agreement is in progress, awaiting final approvals or signatures.



State Bar of Georgia

Future Meetings Schedule

Young Lawyers Division

YLD EC 2025	August 1-3, 2025	Officer's & Director's Meeting Hyatt Place Athens Athens, GA
Fall 2025	October 10-12, 2025	Cloudland at McLemore Resort In conjunction with the State Bar Fall Meeting Rising Fawn, GA
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA (*Contract Pending)
Spring 2026	April 23-25, 2026	Kimpton Hotel Arras Asheville, GA
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort In conjunction with the State Bar Annual Meeting Fernandina Beach, FL
Midyear 2027	January 14-17, 2027	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA (*Contract Tentative)

American Bar Association Meetings

Annual 2025	August 6-12, 2025	Toronto, Canada
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Southern Conference of Bar Presidents Annual Meetings

2025	South Carolina	October 5-7, 2025	Charleston, South Carolina Mills House Charleston, SC
2026	Alabama		
2027	Maryland		

(Updated 4/29/25)

***Contract Tentative** – Initial stage where terms are being discussed but nothing is confirmed | ***Pending** – Agreement is in progress, awaiting final approvals or signatures.



June 6, 2025

Dear Board of Governors,

It is my honor to share my final report as the 78th President of the YLD. This year, we made service our top priority, increased engagement, and empowered young lawyers to develop their professional brand. The YLD's leaders and members hosted a variety of programs to meet the goals. I am thrilled to share the year in review for the YLD.

The YLD held its Fall meeting in conjunction with the State Bar in Jekyll Island. At the Fall meeting, the YLD hosted a CLE entitled "Social Media Smarts: Ethical Hacks, Bar Rules, and How to Stay Off the Disciplinary Radar." This was a free CLE that provided one ethics hour and we explored essential strategies for maintaining professionalism online. We also donated personal hygiene and cleaning supplies to Hand in Hand of Glynn, which is a community of homes for adults experiencing chronic homelessness. Additionally, the YLD networked with fellow Georgia lawyers at the Georgia-Florida tailgate in Jacksonville.

The YLD began 2025 at the Midyear meeting in Savannah, which was held in conjunction with the State Bar. During the Midyear meeting, the YLD placed an emphasis on branding which was displayed by our YLD Headshot Studio by Rikki Brew of Envisioning Freedom Photography, where YLD members were able to take headshots to update their professional profile. We also held a CLE entitled "Branding with Integrity" which featured panelists Lester Johnson, Shiriki Jones, and Tony Del Campo, who discussed how to market yourself with professionalism and integrity. In addition, the YLD volunteered with Renegade Paws Rescue, a shelter dedicated to saving lives and providing care to unwanted, abused, and injured dogs.

On February 11, 2025, the YLD Leadership Academy participated in YLD Legislative Day at the Georgia State Capitol. During this session, the Leadership Academy was able to speak with State legislators about the legislative session and had a group photo with Governor Kemp. The Leadership Academy also went to the Nathan Deal Judicial Center to visit the Georgia Statewide Business Court, Georgia Court of Appeals, and Supreme Court of Georgia. Following the discussion with each court, Leadership Academy participants were able to get sworn in to the Georgia Court of Appeals and the Supreme Court of Georgia.

On March 8, 2025, the YLD hosted the 2025 YLD Signature Fundraiser at Truist Park in the Hank Aaron Terrace. The 2025 Signature Fundraiser beneficiary was the YLD Public Interest Internship Program, which supports law students with funding for unpaid internships in public interest law. We also recognized the service Paula Frederick, outgoing General Counsel of the State Bar of Georgia with the YLD Lifetime Achievement Award; and Ashley Akins, partner at Parker Poe Adams & Bernstein with the YLD Signature Service Award. The event was well attended, and we raised over \$90,000.

The YLD Spring Meeting was held in Nashville, Tennessee from March 27-29, 2025. This meeting was our only standalone session. During the Spring Meeting, we had a CLE on the ELVIS (Ensuring Likeness Voice

and Image Security) Act, which is the first enacted legislation in the US specifically designed to protect musicians from the unauthorized use of their voices through Artificial Intelligence technologies. The ELVIS Act CLE was moderated by Attorney Darius Walker, who led the discussion with panelists Anthony Adewumi, BMI and Professor Kristi Wilcox Arth, Belmont University. We also donated hygiene products to Cycling For Good, a non-profit dedicated to assisting people in the city who are experiencing homelessness. Additionally, we participated in a Kickball Game with over 70 people playing or watching the game. We wrapped up the evening with a dinner and a live band.

In April, we wrapped up the 14th Legal Food Frenzy competition, which ran from April 15-25. The Legal Food Frenzy supports our food banks around the state as they approach the summer months when students that would otherwise receive free or reduced lunch at school, which is no longer available to them over the summer break. I especially thank Ashley Akins and Caroline Scalf for their leading this year's efforts. This year the Legal Food Frenzy raised \$615,317. Since its inception, Georgia's legal community has raised \$5.9 million dollars, which equals more than 23 million meals for our state.

Our YLD Leadership Academy Class concludes during the Annual Meeting. I thank our Leadership Academy Co-Chairs James Banter, Samantha Mullis, and Kelsie Speight. Our class has 33 members who have met monthly since January. The Leadership Academy had six sessions around the state allowing for networking and professional development.

As we wrap up this year, I just want to say that it has been an honor to lead the Young Lawyers Division. I am grateful for our YLD Officers, Board of Directors, District Representatives, and Committee Chairs who made this year a success. I also want to say thanks to our staff, Jessica Oglesby and Jamie Goss, for all of their hard work this year.

YLD COMMITTEES

The YLD has more than 30 committees working to support our motto of service to the community and profession. Each committee works diligently to provide substantive programming in their respective focus areas. Below are some of the events, activities, and accomplishments of our YLD committees this year:

YLD Business Law Subcommittee

Nathan Miles, Chair

The YLD Business Law Subcommittee co-hosted a CLE panel with the Corporate Counsel Committee regarding Generative AI and how it may impact young lawyers' careers. The panel was even covered by Law360!

YLD Child Protection and Advocacy Committee

Ashley Horton, Danielle Simpson, and Zipporah Tillman, Co-Chairs

The YLD Child Protection and Advocacy Committee is working on rescheduling the event that was postponed due to the inclement weather. The CPA committee is hopeful that we will be able to plan this final event to take place this spring.

YLD Community Service Projects Committee

Lyddy O'Brien and Taylor Wilson, Co-Chairs

The YLD Community Service Projects Committee is still planning additional service day events after our

food bank day. We are in talks with the WIP committee and the child advocacy committee about a joint event in May.

YLD Estate and Elder Law Committee

Chelsey B. Haun and Markus L. Russell, Co-Chairs

The YLD Estate and Elder Law Committee held a Wills Clinic on April 5, 2025, in Atlanta, in conjunction with Atlanta Legal Aid. In total, we were able to provide twenty Legal Aid clients with estate planning documents and had a tremendous amount of volunteer support from the State Bar and community partners.

YLD Ethics and Professionalism Committee

Katie-Rose Martin, Chair

The YLD Ethics and Professionalism Committee's newest members got to meet each other in person at the YLD Spring Meeting in Nashville. The Committee has been putting out a Rule of the Month on social media on the third Wednesday of each month. April's was Rule 3.4 Fairness to Opposing Party and Counsel. Look out for May's Rule of the Month, Rule 1.5 Fees, and June's Rule of the Month, Rule 1.3 Diligence. The Committee will meet in May for a final Standing Committee Meeting. Finally, the 21st Annual Ethics and Professionalism Award will be given a well-deserving YLD member at the YLD Dinner on Friday, June 6.

YLD Family Law Committee

Emily Long, Ashley O'Neil and Jonathan Stoye, Co-Chairs

The YLD Family Law Committee recently held a CLE on Jury Trials in Family Law with Judge Christopher Edwards; We are working on coordinating Supreme Court.

YLD Federal Law Subcommittee

Charles Duvall, Chair

In February, the YLD Federal Law Subcommittee partnered with the Judicial Law Clerk Committee to host a virtual CLE on the fundamentals and practice of bankruptcy law. The program featured insightful information from Judge Lisa Ritchey-Craig and Megan Glimmerveen, who shared practical guidance and foundational knowledge to help attorneys better navigate bankruptcy law.

YLD Inclusion in the Profession Committee

Shannon Schoultz, Demarius Newsome, Kier Prince, and Shannon Schoultz, Co-Chairs

The committee met with the big Inclusion in Profession Committee earlier this month. They expressed interest in working with this committee on how we can retain those that age out of YLD. We also expressed our concerns with the programmatic issues this committee was confronted with this year. We have been tasked to come up with resolutions to the issues.

YLD Intellectual Property Law Committee

Bianca Webb and Christopher Williams-Lopez, Co-Chairs

The YLD Intellectual Property Law Committee hosted our first happy hour and we have requested IP committee members to let us know if their firms are interested in sponsoring a CLE. We are also looking into a partnership/collab event with Atlanta Lawyers for the Arts.

YLD Intrastate Moot Court Committee
Chelsea Harris and Megan McKown, Co-Chairs

The YLD Intrastate Moot Court Committee had our 2025 competition on April 4th and 5th. We thank all of the volunteers, YLD Staff, and Bar staff that made this competition possible.

YLD Labor and Employment Law Committee
Deitra Jones and Iriel Jones, Co-Chairs

The YLD Labor & Employment Committee recently held a litigation CLE where the speakers discussed best practices for both plaintiff and defense lawyers in the pre-litigation stage, including drafting complaints, answering the complaint, discovery techniques, and drafting and responding to summary judgment motions.

YLD Law School Outreach Committee
Chelsea Dease, Farheen "Lina" Khan, and Emily Walker, Co-Chairs

The YLD Law School Outreach Committee held several events this year. They are listed below.

October 9th, 2024: Meet the YLD Tabling at Georgia State Law School.

October 24th: Spooktacular Strategies: Navigating the Law without Fear Panel at Mercer Law featuring Supreme Court Justice Carla Wong-McMillian, Judge Kristy Harris, Chief Assistant District Attorney Eric Edwards, Kevin Hicks, Esq.

March 25th, 2025: Ethics and Professionalism Across Careers Panel at John Marshall Law featuring Supreme Court Justice Verda Colvin, Atlanta Hawks VP and Executive Legal Officer Scott Wilkinson, Ben Sessions, Esq., and Shelby Burnam, Esq.

April 3rd, 2025: Ice Cream Networking Social at UGA Law.

April 4th, 2025: Virtual CLE featuring Attorney Mental Health with State Bar of Georgia Secretary Javoyne Hicks.

YLD Leadership Academy Committee
James Banter, Samantha Mullis, and Kelsie Speight, Co-Chairs

The 2025 YLD Leadership Academy is coming to a close but is not done yet. In March we held a joint session with the YLD at large for a trip to Nashville, Tennessee. There, we attended an ELVIS Act CLE with the Tennessee Bar YLD and assisted the Disaster Relief Crisis Line in reaching out to clients who needed help with FEMA appeals. In April, we held a session in Columbus where we held a CLE panel with U.S. District Judge Clay Land and U.S. Magistrate Judge Amelia "Amy" Helmick. Also, while in Columbus, we served the local community by assisting with a non-conviction record restriction clinic, sponsored by Georgia Legal Services. In May, we visited Augusta for a weekend full of networking, service, and fun. We, in connection with the U.S. District Court for the State of Georgia for the Southern District of Georgia, held a specially set mass swearing in for the Leadership Academy. We also held a government attorneys' panel and volunteered to prepare breakfast meals at the Augusta area Ronald McDonald House. We will end the 2025 Leadership Academy with our class graduation during the State Bar's Annual Meeting in Florida. We look forward to celebrating another great year and great class!

YLD National Moot Court Competition Committee
Jamie Christy and Douglas Comin, Co-Chairs

The YLD National Moot Court Competition Committee held the National Moot Court Competition on Nov. 16, 2024, at the Federal Courthouse in Atlanta. It was a fun and successful competition where we had multiple committee members as judges for early rounds.

YLD Public Interest Internship Program Committee
Arthur Bailin and Keona Blunt, Co-Chairs

PIIP is in the process of reviewing applicants for its scholarship grants submitted by current law students. We're hoping to have answers to those who applied by the end of April.

YLD Real Estate Law Committee
Morgan Boulineau and Erika Harris Fritz, Co-Chairs

The YLD Real Estate Committee is planning a CLE on Torts in Real Estate: Insight of Litigation Attorneys at the Annual Meeting on Thursday, June 5. It will be a panel discussion with practicing litigation attorneys on the effects of torts in the real estate practice, including stories of their particular encounters.

YLD Solo Practice and Small Firm Committee
Colin Adebayo, Angie Holloway and Michael Thompson, Co-Chairs

The YLD Solo Practice and Small Firm Committee hosted Scaling Your Law Firm through Automation Virtual CLE Event on April 17, 2025. This virtual CLE had two guest speakers to discuss automation strategies and AI tools available to law firm owners.

YLD Sports Law Committee
Joy Bonner and Caleb Ratliff, Co-Chairs

This bar year has not been short of amazing. This year we as a committee were not only able to plan wonderful events, we have had the opportunity to encourage committee members to lean into their interests of sports and the practice of law. This included varying attendance at sport and entertainment events and CLE. As a committee we were able to host a successful "YLD Sports Law | A Night with the Hawks," on March 4, 2025. This event included an opportunity for committee members to meet in person and network prior to attendance at State Farm Arena as the Hawks competed in its regular season. The event was a success and the committee was encouraged by members to continue its efforts in engaging young lawyers in the practice of sports law.

YLD Women in the Profession Committee
Cayton Chrisman, Olivia Mercer and Megan McCulloch, Co-Chairs

The Women in the Profession Committee hosted a Financial Literacy for Younger Lawyers event on 2/4. We hosted a GAWL/WIP "Breaking Barriers: Empowering the Next Generation" panel on 3/19. We are having our service project on 4/24 at Ronald McDonald where we will cook dinner for the families staying at the home. We have our Atlanta United game event on 5/25.

YLD Workers' Compensation Committee

Akash Alpeshkumar Patel and Michael Brandon Rosenstein, Co-Chairs

The YLD Workers' Compensation Committee is preparing to host a joint CLE Panel with the Georgia Bar Alternative Dispute Resolution Section to offer attorneys in both sections in opportunity to hear from seasoned mediators and practitioners regarding preparing for and engaging in successful negotiations.

YLD AFFILIATES

The YLD currently has seven recognized active affiliates around the state: Young Lawyers of Augusta, Cobb County Younger Lawyers Division, Columbus YLD, Glynn County YLD, Houston County YLD, Macon YLD and Savannah YLD. If you know anyone interested in joining the affiliates, please let us know.

YLD MEETINGS

Annual Meeting | Jun. 5-8

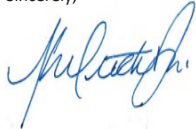
Sawgrass Marriott Golf Resort & Spa

Ponte Vedra Beach, Florida

Held in conjunction with the State Bar of Georgia Board of Governors.

I am honored and humbled to have served as the 78th President of the YLD. I appreciate the ongoing support from the Bar leadership and Board of Governors to make this year a success. I look forward to continuing my service as Immediate Past President.

Sincerely,



Kenneth Mitchell Jr.
2024-25 YLD President

DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, March 22, 2025, 9:00 a.m.
Hyatt Place Athens Hotel & The Classic Center
Athens, Georgia

The 306th meeting of the Board of Governors of the State Bar of Georgia was held at the date and time shown above. President Ivy N. Cadle presided and called the meeting to order at 9 a.m.

Pledge of Allegiance

Kevin Patrick, Atlanta Circuit, Post 22, led the pledge of allegiance.

Invocation

Maria Justus, Eastern Circuit, Post 3, gave the invocation.

Special Recognition

President Ivy Cadle recognized the members of the judiciary, the past presidents of the State Bar and other special guests in attendance.

Roll Call

Secretary R. Javoyne Hicks circulated the roll for signature. The list of those in attendance is attached as Exhibit A.

Future Meetings Schedule

President Ivy Cadle reviewed the Future Meetings Schedule. He reminded everyone that the Annual Meeting will be held at the Sawgrass Marriott Golf Resort & Spa at Ponte Vedra Beach, Florida. He announced that the Opening Night Festival will be held offsite at The Yards and to please dress comfortably. President-Elect Christopher P. Twyman discussed his upcoming meetings: 2025 Fall Meeting at Cloudland at McLemore Resort in Rising Fawn in Northeast Georgia; 2026 Midyear Meeting at the Omni Hotel at the Battery Atlanta; 2026 Spring Meeting at the Ritz-Carlton Reynolds at Lake Oconee; and 2026 Annual Meeting at the Omni Amelia Island Resort at Fernandina Beach, Florida.

President's Report

President Ivy Cadle began his remarks by thanking the Board of Governors for everything they have done to make sure the Bar is governed in the way that is needed, and for passing multiple rules and bylaws throughout the year. He said that he strategically changed the format of the meeting agenda in order to remove some duplicative efforts. Instead of working through the action first, he moved the reports to the beginning of the agenda to remove content that would be found in reports and action items. President Cadle also thanked the Bar's committee members for their efforts. He reminded everyone to let President-Elect Chris Twyman know if they are not able to serve and leave room for those who have more bandwidth for committee work.

Treasurer's Report

Treasurer Bill Gentry reported on the financials of the Bar and said that everything was in good financial order. The Board was provided with the January 2025 financial statements for Bar Operations and the Bar Center. Based on the financials through January 2025, the budget is tracking with where it should be at this point in the fiscal year.

Young Lawyers Division Report

YLD President Kenneth Mitchell Jr. reported on the recent activities of the Young Lawyers Division. Some of the highlights included the Leadership Academy's second session, "Lawyers as Leaders in State Government;" a CLE on Deposition Etiquette, hosted by the YLD Ethics and Professionalism Committee; and "Jury Trials in Family Law," a lunch and learn CLE hosted by the YLD Family Law Committee. He announced that the YLD Signature Fundraiser raised \$90,000, and honored Paula Frederick and Ashley Akins with awards for their dedication to the YLD. The YLD Spring Meeting is March 27-30 in Nashville, Tennessee, including the third session of the Leadership Academy, YLD General Session, a CLE on the ELVIS Act, and a kickball game with the Tennessee Bar YLD. The Board of Governors also received a written report from the YLD.

Office of the General Counsel Report

General Counsel Russ Willard thanked Paula Frederick for leaving everything in order to allow for his successful transition. The department has received 1,642 grievances from the start of this Bar year through the end of January. After screening by Grievance Counsel, 141 were determined to merit consideration by the State Disciplinary Board and were forwarded to the State Disciplinary Board for additional investigation. An additional nine grievances were administratively mooted after the Supreme Court of Georgia entered an order of disbarment. From Bar Counsel, he reminded the BOG of the amendments to a number of rules and bylaws. This Bar year, the Supreme Court has entered public orders in 33 cases and the board has imposed confidential discipline in an additional 30 cases. The Board of Governors also received a written report from the Office of the General Counsel. He ended by saying that he looks forward to serving as the Bar's general counsel.

Legislative Report

Director of Governmental Affairs Jenn McNeely reported the following on the Bar's 2025 legislative package:

1. HB327, Amendments to Title 53 and Related Code Sections (Fiduciary Law Section), unanimously passed out of both the Senate and House Judiciary committees, and now we are waiting on them to get on the rules calendar.
2. HB85, Superior Court Judicial Compensation Reform Act, SUPPORT, passed out of both the Senate and House Judiciary committees, and now we are waiting on them to get on the rules calendar.
3. HB86, Public officers and employees; calculating and setting the salaries of certain state officials; revise provisions, passed out of both the Senate and House Judiciary committees, and now we are waiting on them to get on the rules calendar.
4. Budget Request for FY 2026 – Funding for Civil Legal Services Grants for Victims of Domestic Violence (Committee to Promote Inclusion in the Profession). Included in current budget and don't foresee any changes.
5. Support for the Judicial Counsel's Budget Request for FY 2026 – Continued Funding for the Georgia Resource Center (Indigent Defense Committee). Included in current budget and don't foresee any changes.
6. Support for a Resolution of the General Assembly Recognizing April 2025 as Legal Professionalism Month (Professionalism Committee).

In other legislative news of interest to the Bar:

- HB530, which allows for electronic filing in probate courts, passed out of both the Senate and House Judiciary committees, and now we are waiting on them to get on the rules calendar.

- HB426, nonpartisan elections for magistrate court, has also moved and it's going to be on the governor's desk for signature.
- HB406, which increases the retirement age for superior court judges from 60 to 65, has also passed both chambers and is heading to the governor's desk for signature.
- SB215, state bar reorganization bill, State Bar of Georgia; responsibilities of the administrative arm of the Supreme Court relative to the practice of law in this state, not going to move this session.

Unallocated Cash Report

State Bar of Georgia Executive Director Damon Elmore provided an update related to unallocated cash. The report included a brief background and history related to the work in the area. It was also a review of how the unallocated cash has been invested and how it interplays with the remaining balance of the budget.

The report reminded that any potential projects are analyzed through a lens with seven areas of focus, including: technology upgrades; investments that are specifically for the State Bar Conference Center, investments for the main office and our State Bar Satellite offices, investments for current and prospective tenant improvements, investments in the building's infrastructure, a long-term recommendation for an increase in our cash reserve, and minor, miscellaneous investments. In addition to those areas, the report reminded that with its recommendations, staff is regularly thorough in its scrutiny, prudent in its application, and detailed in its analysis.

The background walked through work on the project since 2021, where the Bar had roughly \$10 million that was not otherwise designated as a result of COVID savings, a transfer of ICLE cash from Athens, profitable revenue from the ICLE programming, savings in our budget on salaries, and other positive events.

In 2022, an initial report was presented to the Board of Governors at the Fall Meeting. It was a summary of the study conducted, evaluating 5-6 equivalent Bar associations and their policy for cash reserves and spend. As further background, in 2022 the Bar also commissioned an engineering study for 104 Marietta St., focused on the mechanical, electrical, plumbing, and systems needs of the Bar Center. No such evaluation had been carried out since the initial analysis that was a part of the purchase around 1996 of a building built in 1960.

The report referenced the State Bar of Georgia Unallocated Cash chart that has been a part of the three most recent financial reports and will be a supplement to all future reports. That also includes changes to the Summary of Use and Cash Report, which has been updated with tracking on spend.

The report reminded that detailed updates are provided to the Executive Committee on a regular basis, and analysis of the 4+ year plan is conducted with the president, president-elect, treasurer and Executive Committee at necessary intervals. Additionally, Chief Financial Officer Ron Turner manages detailed tracking sheets, and they provide specifics on use and recommendations, including status and notes, the budgeted amount for the investment, the progress on the spend at certain intervals, and any remaining balance of the budget at the completion of the project.

The report turned to details on the spend, highlighting investments made from July 1, 2023, through December 31, 2024, in each category (Infrastructure – 25%, Technology – 25%, HQ and Satellite Offices – 20%, Tenant Improvements 0.18%, Conference Center – 12% and Misc. – 0%). In the 2023-2024 Bar year, a grand total of \$1.26 million was spent on the identified projects and from July 1, 2023, through December 31, 2024, a total of \$2,307,556 was invested in completed projects.

The report then identified what a planned or potential investment would be by category for future investments through June 30, 2030, with detailed dollars. It was also reminded that all planned or projected

investments were forward-looking and actual results may vary. He reminded the Board of Governors that all long-term projects are approached with caution, as the rapid evaporation of these resources could put the Bar in a truly complicated financial position, even though we are aware some members encourage a more aggressive bleed of the unallocated cash.

Additional assumptions were provided when assessing recommendations for investment and future budgets. If we made all the recommended investments and operations manages to budget 96-97% each year and the Bar budgets to a loss with expenses rising 4-8% on average and revenue being limited to a 2-3% increase, it is possible that there will be no unallocated cash in or around the 2026-2027 Bar year. The report concluded by addressing questions related to interplay with the current/proposed budget, specific details for spending in 2025-2026, as well as support for the report and plan, and a recommendation for an aggressive use of the cash.

Proposed Changes to the Rules

President Ivy Cadle presented background information on how the proposed changes to Rule 1-202, Membership Status, came about. Betsy Griswold and Rachel Spears – Pro Bono Partnership of Atlanta – contacted him to discuss expanding the pool of potential pro bono volunteers by lowering the emeritus age from 70 to 65. After reflection and discussion with the Supreme Court of Georgia, these proposed changes go in a different but complementary direction. President Cadle explained that the goal was to do something consistent with addressing the problem and complementing the Georgia Lawyer Competency Task Force.

Deputy General Counsel Bill NeSmith reported on proposed changes to Rule 1-202, Membership Status. This proposed rule would expand the universe of non-active members eligible to provide pro bono services beyond emeritus status members to also include inactive members with at least seven years of active service. The revised rule vests determination of which pro bono organizations are eligible to supervise the provision of such services by non-active members with the Supreme Court. The inactive members can only represent clients referred by an approved pro bono organization. Finally, the revised rule requires that an emeritus status member must take an hour-long CLE (in each CLE renewal period) to be eligible for the provision of such services. The Board of Governors will vote on the proposed changes at the Annual Meeting in June.

Minutes of the 305th Meeting of the Board of Governors

Secretary Javoyne Hicks presented the minutes of the Board of Governors meeting held on January 11, 2025, which were approved as presented by majority vote.

Approval of Formal Advisory Opinion Board Appointment

The Board of Governors approved by majority vote the appointment of Prof. Tia Gibbs to the Formal Advisory Opinion Board for a term ending in 2026.

License Fee Approval 2025-2026

After a report from Treasurer Bill Gentry, the Board of Governors, by majority vote, approved active license fees at \$270 (\$6 increase from fiscal year 2024-2025) and inactive license fees at \$135 (\$3 increase from fiscal year 2024-2025) for fiscal year 2025-2026.

Approval of Other Items to Appear on the License Fee Statement

The Board of Governors, by majority vote, approved the following items to appear on the license fee statement:

- 1) Center for Lawyer Wellbeing and Section Dues (\$10 to \$50).
- 2) Clients' Security Fund (\$15 per member per Rule 1-506).

- 3) Professionalism Fee (\$11/year).
- 4) Legislative and Public Education Fund Contribution (\$100 optional contribution).
- 5) Georgia Legal Services Program (\$400 suggested individual contribution/\$100 suggested contribution for young lawyers).

2025-2026 State Bar Budget

Treasurer Bill Gentry presented the Fiscal Year 2025-2026 Proposed Consolidated Budget (Exhibit E), which the Board of Governors approved by majority vote.

Financial Resolutions

The Board of Governors approved the following financial resolutions by majority vote:

- 1) That the President be authorized to secure a blanket fidelity bond to cover all officers, employees and other persons handling State Bar funds as is required by Article V, Section 8 of the Bylaws.
- 2) That the State Bar of Georgia and related entities open appropriate accounts with such banks in Georgia, but excluding any bank that does not participate in the IOLTA Program, and other such depositories as may be recommended by the Finance Committee and/or Investment Committee, and designated by the Executive Committee of the Board of Governors of the State Bar of Georgia, and that the persons whose titles are listed below are authorized to sign an agreement to be provided by such banks and customary signature cards, and that the said banks are hereby authorized to pay or otherwise honor any check drafts, or other orders issued from time to time for debit to said accounts when signed by two of the following: the Treasurer, the President, the President Elect, the Immediate Past President, the Executive Director, the Office Manager and the General Counsel, provided either the President or the Treasurer shall sign all checks or vouchers and that said accounts can be reconciled from time to time by said persons or their designees. The authority herein given is to remain irrevocable so as said banks are concerned until they are notified in writing of such revocation of authority and in writing, acknowledge receipt thereof.
- 3) That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2024-2025.

Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on December 5, 2024, and February 5, 2025.

Law Practice Management Program

The Board of Governors received a written report on the activities of the Law Practice Management Program.

Sections Report

The Board of Governors received a written report on the activities of the Sections of the Bar.

Institute of Continuing Legal Education Report

The Board of Governors received a written report from the Institute of Continuing Legal Education.

Chief Justice's Commission on Professionalism Report

The Board of Governors received a written report on the activities of Chief Justice's Commission on Professionalism.

Media Report

The Board of Governors received a media report from the Communications Department.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

Board of Governors Member and Executive Director of the Georgia Legal Services Program, Susan Coppedge, asked those in attendance to please complete the Regulatory Reform Committee Survey that was emailed on March 19 from President Ivy Cadle and posted on the Bar's website.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

President Ivy Cadle opened the floor to remarks, questions, comments and suggestions.

Adjournment

There being no additional business, the meeting was adjourned at 10:50 a.m.

Approved:

R.. Javoyne Hicks, Secretary

Ivy N. Cadle, President



EXECUTIVE SUMMARY

To: Board of Governors

From: Bill NeSmith

Date: June 6, 2025

Re: Proposed Changes to the Rules and Regulations of the
State Bar of Georgia

Below is a brief explanation of a proposed Bar Rule amendment on the agenda for the June 6, 2025, Board of Governors meeting.

1. Bar Rule 1-202. Membership Status

This proposed change permits Non-Active Status members with at least five years of legal experience to provide pro bono legal services under specified conditions. The proposal also imposes new requirements on Emeritus Status members seeking to perform pro bono services. These requirements are set forth in a new subsection (g) and include:

- A minimum of five years of legal experience; and
- Completion of a minimum of one hour of continuing legal education (CLE) relevant to the area of representation during each CLE renewal period.

Inactive and Emeritus Status members may only represent clients referred through an approved pro bono organization. The revised rule vests in the Supreme Court the authority to approve pro bono organizations that Inactive and Emeritus Status members may provide pro bono services. Approved pro bono entities must supervise the services provided by Non-Active and Emeritus Status members to ensure the pro bono client receives legal services that are up to the standards imposed by these rules.

1 Part I - Creation & Organization

2 Chapter 2 Membership

3 Rule 1-202. Membership Status

4 Membership in the State Bar of Georgia shall consist of six categories:

5 active, inactive, foreign law consultant, emeritus, members unable to

6 practice law due to a disability, and retired status members. The

7 bylaws shall make provision for the registration of each active member

8 and the location of his or her principal office for the practice of law, the

9 registration of each foreign law consultant and the location of his or

10 her principal office, and the registration of emeritus and inactive

11 members and their mailing addresses. Only Active Status members

12 and Emeritus Status members may vote on any State Bar of Georgia

13 matter or election or nominate an active member for office. Emeritus

14 Status members can vote only in person or electronically.

15 (a) Inactive Status Members . Any member of the State Bar of

16 Georgia may contact the Membership Department and elect to be

17 transferred to Inactive Status membership provided that the member:

18 (1) is not engaged in the practice of law;

19 (2) does not hold himself or herself out as a practicing lawyer or

20 attorney;

21 (3) does not occupy any public or private position in which
22 the member may be called upon to give legal advice or
23 counsel; and

24 (4) does not examine the law or pass upon the legal effect of
25 any act, document, or law for the benefit of another person,
26 company, or corporation.

27 Members who are in active military service may choose inactive status
28 if they so elect.

29 Members who elect inactive status may only practice law for the limited
30 purpose of providing pro bono legal services as authorized by subsection
31 (g).

32 (b) Active Status Members . Active Status members shall be all
33 other lawyers, including judges but excluding foreign law consultants.
34 Only Active Status members of The State Bar of Georgia in good
35 standing may hold office in the State Bar of Georgia.

36 (c) Foreign Law Consultant Status . Foreign Law Consultants
37 shall be those persons, who are licensed under the Rules Governing
38 Admission to the Practice of Law as adopted by the Supreme Court

39 of Georgia.

40 (d) Emeritus Status Members . Any member in good standing of
41 the State Bar of Georgia who will attain the age of 70 years in a Bar
42 year and who shall have been admitted to the practice of law for at
43 least 25 years, five years of which must be as a member in good
44 standing of the State Bar of Georgia, may request Emeritus Status
45 from the State Bar of Georgia upon petition to and approval by the
46 Membership Department. When approved, the member shall be
47 transferred to Emeritus Status. An Emeritus Status member of the
48 State Bar of Georgia shall not be required to pay license fees or other
49 fees, ~~and~~ may not hold office in the State Bar of Georgia, and may not
50 practice law except as authorized in subsection (g). ~~An Emeritus Status~~
51 ~~member of the State Bar of Georgia shall not be privileged to practice~~
52 ~~law except that an Emeritus Status member may handle pro bono~~
53 ~~cases referred by either an organized pro bono program recognized by~~
54 ~~the Pro Bono Project of the State Bar of Georgia or a non-profit~~
55 ~~corporation that delivers legal services to the poor.~~ An Emeritus Status
56 member may be reinstated to active or inactive membership upon
57 application to the Membership Department and payment of non-

58 prorated license fees for the year in which the Emeritus Status
59 member returns to Active Status or Inactive Status membership.

60 (e) Members Unable to Practice Law Due to Disability . Any
61 member of the State Bar of Georgia who is temporarily or
62 permanently disabled may submit to the Executive Committee of the
63 State Bar of Georgia a written request to be transferred to Disabled
64 Status. Members who elect this status must submit adequate medical
65 and/or psychological documentation of their disability with the
66 written request. Adequate documentation includes:

67 (1) documentation from the Social Security Administration of
68 approval of disability;

69 (2) documentation from an insurance company of receipt of
70 benefits based upon disability; or

71 (3) Documentation from a medical doctor that the member
72 is disabled.

73 Any request by a member to be transferred to Disabled Status
74 must comply with all of the provisions contained in Article I,
75 Section 10 of the Bylaws of the State Bar of Georgia.

76 (f) Retired Status Members .

(1) Any member of the State Bar of Georgia who is not engaged in the active practice of law in any state, district, or territory of the United States may transfer to Retired Status by submitting a request in writing to the Executive Director and General Counsel of the State Bar of Georgia. Upon approval by the Executive Director and General Counsel, the Membership Department shall transfer the member to Retired Status. A member in Retired Status shall not be entitled to practice law in this state and may not practice law in any other jurisdiction. Further, such member shall not be eligible to vote or hold office in the State Bar of Georgia. Any member transferred to Retired Status shall be relieved of his or her membership fees and CLE obligations.

(2) A request for Retired Status must be unqualified, is irrevocable, and permanent. A member in Retired Status will appear in the State Bar of Georgia member directory as “Retired.”

(3) A member of the State Bar of Georgia with a pending disciplinary matter may transfer to Retired Status with the

consent of the Office of the General Counsel. Grievances received after a member has transferred to Retired Status may be investigated and prosecuted through the disciplinary process at the option of the Office of the General Counsel.

(4) A member suspended from the practice of law because of failure to meet CLE requirements or failure to pay Bar membership fees is not eligible for Retired Status.

(g) Pro Bono Service for Non-Active Status Members. Any Inactive Status member with at least five years of legal experience prior to electing Inactive Status or any Emeritus Status member may represent clients in pro bono cases so long as each of the following requirements are met:

(1) The pro bono matter must be referred to the member by an active pro bono entity;

(2) The referring pro bono entity must be approved by the Supreme Court of Georgia;

(3) Prior to providing pro bono services, the member must complete a minimum of one hour of CLE relevant to the representation in each renewal period for which the member

115 provides pro bono services; and

116 (4) The approved pro bono entity and the member must

117 work cooperatively to ensure that the pro bono client receives

118 legal services that are up to the standards otherwise specified

119 in these rules.

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23 counsel; and

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46 Membership Department. When approved, the member shall be
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48 State Bar of Georgia shall not be required to pay license fees or other
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50 practice law except as authorized in subsection (g). An Emeritus
51 Status member may be reinstated to active or inactive membership
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53 prorated license fees for the year in which the Emeritus Status
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65 benefits based upon disability; or
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67 is disabled.

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69 must comply with all of the provisions contained in Article I,
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106 Supreme Court of Georgia;
- 107 (3) Prior to providing pro bono services, the member must
108 complete a minimum of one hour of CLE relevant to the
109 representation in each renewal period for which the member
110 provides pro bono services; and
- 111 (4) The approved pro bono entity and the member must
112 work cooperatively to ensure that the pro bono client receives
113 legal services that are up to the standards otherwise specified
114 in these rules.

**BUSINESS PLAN FOR THE CREATION AND OPERATION
OF A SENIOR LAWYER DIVISION OF THE STATE BAR OF GEORGIA**
(rev. 4-11-25)

Goal: To create and operate a Senior Lawyers Division of the State Bar of Georgia.

1. Executive Summary

Mission Statement: Establish a division for senior lawyers aged 55 and older to support continued professional engagement, address cognitive decline, promote pro bono work, provide mentorship to younger lawyers, and foster social connection.

Vision: To create a community of experienced legal professionals who contribute to society and the legal system while maintaining their cognitive and professional abilities through engagement and collaboration.

Goals:

- Support lawyers experiencing cognitive decline.
- Increase pro bono legal work by senior lawyers.
- Provide mentorship to younger lawyers and collaboration with peers.
- Foster a sense of community through social engagement.
- Assist with succession planning.

2. Market Analysis

Target Audience: Lawyers aged 55 and older who are members of the State Bar of Georgia.

Current Demographics: See attached Georgia lawyer demographic information (estimate 12,573 active Georgia lawyers at or above 55 years old).

Needs Analysis:

- Cognitive health support.
- Opportunities for continued legal practice without full-time commitment.
- Increase pro bono opportunities for all senior lawyers.
- A desire for social connections and networking in the later stages of their careers.
- Ensure clients and lawyers' families and staff are protected in the event the lawyer suffers a sudden health crisis.

3. Services & Offerings

Cognitive Health Initiatives:

- Workshops, seminars, and resources on mental wellness and cognitive decline.
- Continuing legal education (CLE) focused on staying mentally sharp, how to recognize symptoms in yourself and others, and what to do if/when that happens.
- Access to professional assessments or counseling for lawyers concerned about their cognitive abilities.

Pro Bono Opportunities:

- Organize pro bono legal services programs targeting underserved populations.
- Partner with legal aid organizations (GLSP, Atlanta Legal Aid) to offer reduced-hour commitments for senior lawyers.

Social Engagement:

- Regular social gatherings, retreats, and networking events.
- A mentoring program for younger attorneys.
- A quarterly newsletter highlighting members' achievements and activities.

Succession Planning:

- Ensure Georgia lawyers are aware of State Bar's sudden health crisis website portal.
- Encourage retirement planning, especially for SLD members.
- Coordinate with Younger Lawyer Division for mentoring and employment opportunities with members of Senior Lawyer Division.

4. Operational Plan

Leadership and Governance:

- Establish a governing board made up of senior lawyers.
- Executive officers: President, Vice President, Treasurer, Secretary
- Create committees focused on key areas like cognitive health, pro bono services, and social events.
- See proposed rules and bylaws (attached).

Membership Structure:

- Free membership for senior lawyers in the State Bar but suggested/requested voluntary contribution of \$175 per year (any amount is gladly accepted).
- Tiered membership options possible (e.g., basic membership, pro bono active, social membership, inactive membership).

Key Partnerships:

- Partner with health professionals specializing in cognitive decline.
- Collaborate with Georgia legal aid and nonprofit organizations.
- Coordinate with Lawyers Living Well.
- Work with Law Practice Management Program.
- Team with Local and Voluntary Bar Associations.

Coordination:

- Office or administrative support from the State Bar.
- Online platforms for member engagement (website, virtual events, etc.).

5. Marketing and Outreach

Recruitment:

- Use existing Bar communication channels to recruit senior lawyers.
- Email campaigns and social media targeted at lawyers approaching retirement age.
- Socials around the State at Bar offices, lawyers' offices.

Retention:

- Highlight success stories of members.
- Offer exclusive benefits, such as early access to CLEs and invitations to special events.

6. Financial Plan

Revenue Sources:

- Membership fees/dues/contributions (see above).
- Sponsorship from law firms, banks, investment groups, health organizations, cruise/travel operators, etc.
- Grants or funding for pro bono initiatives.

Expenses:

- Administrative costs (staff, technology, materials).
- Event costs (venue rentals, food and beverages).
- Marketing and outreach expenses.

Budget Projection: Create a 3- to 5-year financial forecast, estimating revenues and expenses. (Year 1 budget is expected to be virtually nothing other than use of meeting space at State Bar offices and staff assistance.)

7. Risk Management

Cognitive Decline Management: Establish protocols for addressing cognitive issues in senior lawyers while maintaining professional integrity.

Sustainability: Ensure the division remains financially viable by attracting sponsorships, partnerships, and new members.

Member Engagement: Avoid disengagement by regularly surveying members and adapting programs to meet their needs.

This framework provides a comprehensive approach to developing the Senior Lawyers Division, focusing on cognitive health, professional involvement, and social engagement. Let me know if you'd like to expand on any section.

SLD YEAR ONE EVENT PLAN (TENTATIVE)

7/1/25	SLD takes effect
7/15/25	Initial email to all eligible SLD members sent out notifying them of creation of SLD and requesting their attendance at initial organizational meeting
8/15/25	Initial SLD organizational meeting -Initial officers and directors/governors elected -Initial committees created and chairs appointed -SLD members requested to choose a committee to serve on
9/1/25	Committee chairs select meeting dates and locations and notification emails sent out*
9/15/25	Initial SLD committee meetings held
11/15/25	Initial SLD social event (paid for by contributions/sponsorships)
1/15/26	Election schedule for officers, directors/governors posted
4/1/26	Election meeting

*Most SLD work will be accomplished at committee level, and committees will set their timelines and agendas.

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PROPOSED BYLAWS

Senior Lawyers Division Bylaws

By action of the Board of Governors for the State Bar of Georgia,
and pursuant to Chapter 7, Rule 1-707 of the Rules of Governance of the
State Bar of Georgia, the Senior Lawyers Division is established.

ARTICLE I

Purpose

The Senior Lawyers Division (“the Division”) shall be a division of
the State Bar of Georgia that includes all members in good standing
who have reached their 55th birthday before the preceding annual
meeting. The purpose of the Division is to advance the science of law,
encourage better access to the legal system in our state, foster
discussion about issues germane to older lawyers, create an interchange
of ideas with other Divisions, committees, the Division for Lawyer Well-
Being, and the Young Lawyers Division by providing mentoring
opportunities to younger lawyers and fostering camaraderie among the
older members of the State Bar. The Division will provide opportunities
to help older lawyers excel personally and professionally by working

19 with the Division for Lawyer Well-Being, recognizing the connection
20 between well-being, competence, and professionalism.

21 **ARTICLE II**

22 **Leadership**

23 **Section 1. Officers.**

24 The Division will be overseen by its officers and a Division
25 Executive Committee. The officers of the Division shall be a President, a
26 President-Elect, a Secretary, and a Treasurer, all of whom shall be
27 active members in good standing of the State Bar of Georgia. The initial
28 officers will be selected by the President of the State Bar of Georgia
29 and, thereafter, by election within the Division members. All officers
30 must be voting members of the Division.

31 **Section 2. Terms of Office.**

32 Each Officer shall hold office for a one-year term beginning at the
33 close of the Annual Meeting of the State Bar of Georgia at which the
34 Officer is elected and ending at the close of the next succeeding Annual
35 Meeting of the State Bar of Georgia, and until his or her successor shall
36 have been appointed. If a vacancy arises in the office of the President-
37 Elect, Secretary, or Treasurer, the Division President shall appoint a

38 successor for the unexpired term(s). If a vacancy arises in the
39 President's office, the President-Elect shall become President for the
40 unexpired term and fulfill the term for which the President-Elect was
41 elected to hold. If a vacancy shall arise in the office of the President and
42 there shall, at the same time, exist a vacancy in the office of the
43 President-Elect, the President of the State Bar of Georgia, in
44 consultation with the Division Executive Committee, shall appoint a
45 successor President and President-Elect for the unexpired terms.

46 **Section 3. Duties of the President.**

47 The President shall preside at all meetings of the Division and all
48 meetings of the Division Executive Committee, appoint appropriate
49 committees and subcommittees to serve during the President's term,
50 plan and supervise the programs of the Division at its annual meeting,
51 and perform all other executive and administrative duties necessary or
52 proper to the organization and functioning of the Division, including
53 any duty as from time to time may be prescribed by the members of the
54 Division or by the State Bar of Georgia.

55 **Section 4. Duties of the President-Elect.**

56 The President-Elect shall assist the President and, in the absence
57 or disability of the President, shall perform the duties of the President.

58 **Section 5. Duties of the Secretary.**

59 The Secretary shall keep minutes of all meetings of the Division,
60 maintain the permanent records of the Division, give notices of
61 meetings, and perform such other duties as may be prescribed by the
62 President.

63 **Section 6. Duties of the Treasurer.**

64 The Treasurer shall maintain the Division's budget, update its
65 income and expenses, ensure that the Division's bills are timely
66 submitted to the Finance Department of the State Bar for payment,
67 maintain contact with the Finance Department of the State Bar of
68 Georgia for budget maintenance, and report on the budget at the
69 annual meeting or when otherwise requested by the President or
70 Division Executive Committee.

71 **ARTICLE III**

72 **Division Executive Committee**

73 **Section 1. Composition of the Division Executive Committee.**

74 Composition. The Division Executive Committee shall consist of
75 the Officers of the Division and three other voting members appointed
76 by the President of the State Bar, the President of the Division, and the
77 President-Elect of the Division, respectively as well as a liaison member
78 from the Executive Committee of the State Bar of Georgia and a liaison
79 member from the Young Lawyers Division. Liaison members will have
80 full voting rights and count toward quorum.

81 Terms of Office. Division officers shall serve for one Bar year.
82 Other members of the Division Executive Committee shall serve two-
83 year terms that coincide with the Bar year. The initial appointments
84 shall be staggered so that the terms of the non-officer members do not
85 all expire in the same year. The initial appointment by the President of
86 the State Bar shall be for one year, and the other two shall be for two
87 full-year terms.

88 **Section 2. Authority.**

89 Except for actions requiring a vote from the Division members, the
90 Executive Committee shall have full authority to act for the Division in
91 any way the Division membership would be authorized to act. Any
92 action taken by the Executive Committee under this provision shall be

93 reported to the division members at its next meeting, by email, or
94 by publication of a newsletter.

95

96 **Section 3. Other Committees.**

97 The President shall appoint voting members to all other
98 committees as needed. Members of the Executive Committee, other
99 than the Officers, and any other voting members of the Division may
100 serve as President of appointed committees.

101 **ARTICLE IV**

102 **Membership and Fees**

103 **Section 1. Requirement for Membership.**

104 Every member in good standing of the State Bar of Georgia who
105 has reached their 55th birthday before the preceding Annual Meeting of
106 the State Bar of Georgia will automatically be a member of the Senior
107 Lawyers Division. If any member of the State Bar does not want to be a
108 member of the Division, the member may request to be removed from
109 the rolls of the Senior Lawyers Division by contacting the President of
110 the Division and request to be removed from the rolls of the Division.

111 The Division will have a voluntary annual membership fee due
112 July 1 of each Bar year. Members whose membership fees are paid shall
113 constitute the voting membership of the Division. Any Division member
114 whose voluntary annual membership fees are not paid by July 1 of any
115 Bar year shall cease to be a voting member of the Division, but will
116 remain a nonvoting member of the Division. A nonvoting member may
117 become a voting member at any time upon the payment of fees for the
118 current year.

119 **Section 2. Membership Fees. How Established.**

120 The Division Executive Committee shall establish the annual
121 Membership fees from time to time and submit them to the Board of
122 Governors of the State Bar of Georgia for approval at the Spring
123 Meeting of the Board of Governors.

124 **ARTICLE V**

125 **Actions and Meetings of the Division**

126 **Section 1. Division Annual Meeting.**

127 The Division shall hold an annual meeting of its leadership and
128 membership at or about the time and place of the Annual Meeting of

129 the State Bar of Georgia, at a date, time, and location to be fixed by the
130 President of the Division.

131 **Section 2. Special Meetings.**

132 Subject to the provisions of Division 5 of this Article, the President
133 may call for a Special or Called Meeting of the Division to be convened
134 at such time and place and with such agenda and order of business as
135 may be fixed by the President.

136 **Section 3. Requirements for a Special or Called Meeting.**

137 Twenty-five members of the Division present at any Annual,
138 Special, or Called meeting shall constitute a quorum for the transaction
139 of business. Only voting members physically or virtually present at an
140 Annual, Special, or Called meeting of the Division count towards a
141 quorum.

142 **Section 4. Actions of the Division.**

143 All actions of the Division shall be by a majority vote of the
144 members present and voting at any regular, special, or called meeting.
145 Only members physically or virtually present may vote on Division
146 business at any Annual or Special meetings of the Division. If a regular
147 meeting is not scheduled or conducting a special or called meeting is not

148 practical, the Division Executive Committee may make decisions in the
149 absence of the membership. A super-majority vote of the members may
150 reverse decisions of the Division Executive Committee. A super-
151 majority vote shall be defined as a vote of yea or nay by 3/4 of the
152 membership present and voting where a quorum exists.

153 **Section 5. Notice of Meetings.**

154 Notice of the date, time, and place of each Annual or Special
155 meeting of the Division shall be given to each member in good standing
156 of the Division. Notice of a meeting shall be transmitted to the
157 membership no less than ten days in advance of such scheduled
158 meeting and sent to the member's e-mail address on record in the office
159 of the State Bar of Georgia and posted on the official website of the
160 State Bar of Georgia. Emailing notice and posting notice on the official
161 website of the State Bar of Georgia shall constitute due, adequate, and
162 sufficient notice of such meeting of the Division. Further, any such
163 notice may, but is not required to be included with other written or
164 printed material mailed or e-mailed to all the members of the State Bar
165 of Georgia or any part thereof which includes all members of the

185 Funds of the Division shall be deposited in the treasury of the
186 State Bar of Georgia and shall be disbursed to pay the financial
187 obligations of the Division after approval by the President and
188 Treasurer of the Division. The Finance Department of the State Bar of
189 Georgia shall, from time to time, make financial accounting available to
190 the Treasurer for the Division so the Division Treasurer can provide a
191 report of the financial condition of the Division to its members.

192

193 **Section 3. Use of Funds.**

194 Funds of the Division shall be expended for such purposes related
195 to the stated activities of the Division as from time to time shall be
196 authorized by the Division's Executive Committee. All expenditures of
197 the Division are subject to review and approval by the Treasurer and
198 the Executive Director of the State Bar of Georgia.

199 **Section 4. No Compensation. Reimbursable Expenses.**

200 Officers and members of the Division shall not be compensated for
201 services rendered to the Division. However, officers and members may
202 be reimbursed for out-of-pocket expenses in the furtherance of Division
203 business upon submission of receipts of any reimbursable expenditure

204 to the Division Treasurer and subsequent approval by the Division
205 Executive Committee. All approved reimbursements shall be submitted
206 to the Finance Department of the State Bar of Georgia for payment.

207 **Section 5. Annual Financial Report.**

208 A financial report of the funds of the Division shall be transmitted
209 to the members at the annual meeting of the Division and shall be
210 included in the Division's annual report to the Board of Governors. The
211 Division shall have the same fiscal year as the State Bar of Georgia.

212 **Section 6. Tax Status.**

213 As a duly organized Division serving the State Bar of Georgia and
214 its members, the Division shall enjoy the same tax status as the State
215 Bar of Georgia.

216 **ARTICLE VII**

217 **Miscellaneous**

218 **Section 1. Education.**

219 The Division shall, from time to time, conduct programs for
220 continuing education through the Institute for Continuing Education of
221 the State Bar of Georgia that are of interest to its members and may

222 coordinate its efforts in this regard with other programs and Divisions
223 of the State Bar of Georgia.

224 **Section 2. Legislative Activity. Limitations.**

225 The Division may, from time to time, as limited by the Rules,
226 Bylaws, and Standing Board policies of the State Bar of Georgia, study
227 or review proposed legislation of interest to the Division and its
228 members. The Division will take no action on its own behalf or on behalf
229 of the State Bar of Georgia to promote any legislative activities except
230 as authorized by Bar Rules, Standing Policies, and Bylaws.

231 **Section 3. Scope and Purpose.**

232 The Senior Lawyers Division will not engage in any activity,
233 program, event, or take a position contrary to Rule 1-103 of the Rules of
234 Governance of the State Bar of Georgia or any of the Bar's other rules
235 and bylaws. Specifically, the Division will endeavor to foster the
236 principles of duty and service to the public among the members of the
237 Bar of this State and the Division, improve the administration of
238 justice, and advance the science of law.

239 **Section 4. Collaborating with Other Programs.**

259 These Bylaws shall become effective upon approval by the Board
260 of Governors of the State Bar of Georgia.

261 **Section 2. Amendments.**

262 These Bylaws may be amended by a majority vote of the members
263 of the Division present and voting at any properly called meeting at
264 which a quorum is present and subsequent approval thereof by the
265 Board of Governors of the State Bar of Georgia.

266

Article IX. Section 2. Senior Lawyers ~~Section Division.~~

There shall be a ~~section~~ division of the State Bar ~~to be~~ known as the Senior Lawyers ~~Section~~ Division composed of all members of the State Bar in good standing who have reached their ~~65th~~ 55th birthday prior to the close of the preceding Annual Meeting of the State Bar ~~provided, however, that all those members of the State Bar who are between 60 and 65 years of age and are members in good standing of the Senior Section (sometimes called the Senior Law Section) at the time this amendment is adopted shall become members of the Senior Lawyers Section.~~ This ~~Section~~ Division is formed to advance the science of law, encourage better access to the legal system in this state, for the purpose of fostering to foster discussion about issues germane to older lawyers, create an interchange of ideas with other sections, committees, and the Younger Lawyers Division, providing mentoring opportunities to younger lawyers, and fostering camaraderie among the older members of the State Bar. ~~The Senior Lawyers Division and to will~~ promote professionalism, ~~CLE, CJE, continuing education and other professional and social other~~ activities of the State Bar as ~~shall be~~ determined by the ~~Section~~ Division officers, Executive Committee, and members. The Senior Lawyers ~~Section~~ Division shall have such officers, committees ~~and government as shall be determined by its Bylaws, and government as provided by its bylaws,~~ subject to the Rules and Bylaws of the State Bar of Georgia.

The State Bar shall furnish reasonable postage and mailing ~~expense and staff liaison assistance for the Section. All other items of Section expense~~ expenses and staff liaison assistance for the Section. All other Division expenses shall be the responsibility of the ~~Section~~ Division unless specifically authorized and approved by ~~both~~ the Executive Committee and the Board of Governors as a separate budget item.

The ~~Section~~ Division shall be authorized to accept voluntary contributions ~~and conduct fundraising events to raise funds for the Division and its mission. All Division funds which~~ shall be held by the State Bar for use by the ~~Section~~ Division. Any funds of ~~the old Senior Section (which Section is abolished by this amendment) the Senior Lawyers Section (which Section is abolished by this amendment)~~ in existence at the time of this amendment shall be held by the State Bar for the use of the new Senior Lawyers ~~Section~~ Division.

Section 2. Senior Lawyers Division.

There shall be a division of the State Bar, known as the Senior Lawyers Division, composed of all members of the State Bar in good standing who have reached their 55th birthday prior to the close of the preceding Annual Meeting of the State Bar. This Division is formed to advance the science of law, encourage better access to the legal system in our state, foster discussion about issues germane to older lawyers, create an interchange of ideas with other sections, committees, and the Younger Lawyers Division, providing mentoring opportunities to younger lawyers, and fostering camaraderie among the older members of the State Bar. The Senior Lawyers Division will promote professionalism, continuing education, and other professional and social activities of the State Bar as determined by the Division officers, Executive Committee, and members. The Senior Lawyers Division shall have such officers, committees, and government as provided by its bylaws, subject to the Rules and Bylaws of the State Bar of Georgia.

The State Bar shall furnish reasonable postage and mailing expenses and staff liaison assistance for the Section. All other Division expenses shall be the responsibility of the Division unless specifically authorized and approved by the Executive Committee and the Board of Governors as a separate budget item.

The Division shall be authorized to accept voluntary contributions and conduct fundraising events to raise funds for the Division and its mission. All Division funds shall be held by the State Bar for use by the Division. Any funds of the Senior Lawyers Section (which Section is abolished by this amendment) in existence at the time of this amendment shall be held by the State Bar for the use of the new Senior Lawyers Division.

Rule 1-707. Senior Lawyers Division

There shall be a division of the State Bar of Georgia composed of (1) all members of the State Bar in good standing who have reached their 55th birthday prior to the close of the preceding Annual Meeting of the State Bar of Georgia.

The Senior Lawyers Division shall have such organization, powers, and duties as may be prescribed by the Bylaws of the State Bar of Georgia and the division bylaws.

Rule 1-707. Senior Lawyers Division

There shall be a division of the State Bar of Georgia composed of (1) all members of the State Bar in good standing who have reached their 55th birthday prior to the close of the preceding Annual Meeting of the State Bar of Georgia.

The Senior Lawyers Division shall have such organization, powers, and duties as may be prescribed by the Bylaws of the State Bar of Georgia and the division bylaws.



EXECUTIVE SUMMARY

To: Board of Governors

From: Bill NeSmith, Deputy General Counsel

Date: June 7, 2025

Re: Proposed Changes to the Georgia Rules of Professional Conduct

Below is a brief explanation of the proposed Rule amendments on the agenda for the June 7, 2025, Board of Governors meeting.

Georgia Rules of Professional Conduct

1. Rule 1.15(II). Safekeeping Property-Trust Account and IOLTA.

This proposed change, originating from the Disciplinary Rules and Procedures Committee, includes non-substantive housekeeping and grammatical updates. It also incorporates revisions prompted by a recent Supreme Court opinion on paymaster cases. Under the proposed changes, a lawyer holding or managing funds in a fiduciary capacity without representing any party must notify all parties in writing that neither the funds nor the lawyer is subject to the Georgia Rules of Professional Conduct. Additionally, lawyers may not use their law firm trust or IOLTA accounts to hold fiduciary funds unless they are representing a client in a specific matter.

2. Rule 4-203.1. Uniform Service Rule.

This proposed change, originating from the Disciplinary Rules and Procedures Committee, clarifies the service process in disciplinary matters. It defines a lawyer’s “official address” for serving documents and authorizes State Bar Investigators or individuals approved by the State Disciplinary Board to serve Petitions for the Appointment of a Special Master and Formal Complaints. The changes also specify acceptable methods of service and introduce the use of an affidavit to document unsuccessful service attempts.

3. Rule 4-220. Notice of Punishment or Acquittal; Administration of Reprimands.

This proposed change, originating from the Disciplinary Rules and Procedures Committee, addresses concerns raised by the Supreme Court regarding Disciplinary Review Board Reprimands. It replaces the term “issued” with “read in the presence of the respondent” and requires the reprimand to be administered during the portion of the Review Board meeting open to the public. Additional changes clarify notice requirements for both the public and the respondent.

1 RULE 1.15(II) SAFEKEEPING PROPERTY - TRUST ACCOUNT AND

2 IOLTA

3 (a) Every lawyer who practices law in Georgia, whether said lawyer
4 practices as a sole practitioner, or as a member of a firm, association,
5 or professional corporation, and who receives money or property on
6 behalf of a client or in any other fiduciary capacity, shall maintain or
7 have available one or more trust accounts as required by these rules.

8 All funds held by a lawyer for or related to the representation of a
9 client and all funds held by a lawyer in any other fiduciary capacity _
10 related to the practice of law shall be deposited in and administered
11 from a trust account.

12 (b) No personal funds shall ever be deposited in a lawyer's trust
13 account, except as specifically set forth in this sub-paragraph. A lawyer
14 may not use a lawyer's trust account to hold funds in a fiduciary, trust,
15 or other capacity unrelated to the representation of a party involved in
16 the transaction for which such funds are held. If a financial account of
17 a lawyer has ever been used to hold client funds, it may not be used to
18 hold funds unrelated to the representation of a client. A lawyer may
19 keep that unearned attorney's fees in a lawyer's trust account ~~may be~~

20 ~~so held~~ until the same are earned. Sufficient personal funds of the
21 lawyer may be kept in the trust account to cover maintenance fees
22 such as service charges on the account. Records on ~~such~~ trust accounts
23 shall be ~~so~~ kept and maintained ~~as~~ to reflect at all times the exact
24 balance held for each client or third person. No funds shall be
25 withdrawn from such trust accounts for the personal use of the lawyer
26 maintaining the account except earned lawyer's fees debited against
27 the account of a specific client and recorded as such.

28 (c) All client's funds shall be placed in either an interest-bearing
29 account at an approved institution with the interest being paid to the
30 client or an interest-bearing (IOLTA) account at an approved
31 institution with the interest being paid to the Georgia Bar Foundation
32 as hereinafter provided.

33 (1) With respect to funds ~~which that~~ are not nominal in
34 amount, or are not to be held for a short period of time, a lawyer
35 shall, with notice to the client or clients, create and maintain an
36 interest-bearing trust account in an approved institution as
37 defined in Rule 1.15 (III) (c) (1), with the interest to be paid to
38 the client.

(i) No earnings from such an interest-bearing account shall be made available to ~~a~~the lawyer or the lawyer's law firm.

(ii) Funds in such an interest-bearing account shall be available for withdrawal upon request and without delay, subject only to any notice period which the institution is required to reserve by law or regulation.

(2) If a lawyer is handling funds in a fiduciary or trust capacity and not in the representation of any party involved in the transaction:

(i) The lawyer must inform all parties in writing that the funds are not being held in a lawyer-client relationship and the protections of the lawyer-client relationship do not apply.

(ii) The lawyer must, in writing, inform the bank or financial institution where the trust account is to be created and maintained that the funds are not being held in a lawyer-client relationship and the protections of the lawyer-client relationship do not apply.

(23) With respect to funds ~~which that~~ are nominal in amount or

are to be held for a short period of time, such that there can be no reasonable expectation of a positive net return to the client or third person, a lawyer shall, with or without notice to the client, create and maintain an interest-bearing, government--insured trust account (IOLTA) at an approved institution as defined by Rule 1.15 (III) (c) (1) in compliance with the following provisions:

- (i) No earnings from such an IOLTA Account shall be made available to a lawyer or law firm.
- (ii) Funds in each IOLTA Account shall be available for withdrawal upon request and without delay, subject only to any notice period which the institution is required to reserve by law or regulation.
- (iii) As required by Bar Rule 15-103, the rate of interest payable on any IOLTA Account shall not be less than the rate paid by the depositor institution to regular, non-lawyer depositors. Higher rates offered by the institution to customers whose deposits exceed certain time periods or quantity minimums, such as

those offered in the form of certificates of deposit,
may be obtained by a lawyer or law firm on some or
all of the deposited funds so long as there is no
impairment of the right to withdraw or transfer
principal immediately.

(iv) Lawyers or law firms shall direct the depository
institution:

(A) to remit to the Georgia Bar Foundation interest
or dividends, net of any allowable reasonable fees as
defined in Bar Rule 15-102 (c), on the average
monthly balance in that account, at least quarterly.
Any allowable reasonable fees in excess of interest
earned on that account for any month, and any
charges or fees that are not allowable reasonable fees,
shall be charged to the lawyer or law firm in whose
names such account appears, if not waived by the
approved institution;

(B) to transmit with each remittance to the Georgia
Bar Foundation a statement showing the name of the

96 lawyer or law firm for whom the remittance is sent,
97 the applicable IOLTA Account number, the rate of
98 interest applied, the average monthly account balance
99 against which the interest rate is being applied, the
100 gross interest earned, the types and amounts of service
101 charges of fees applied, and the amount of the net
102 interest remittance;

103 (C) to transmit to the depositing lawyer or law
104 firm periodic reports or statements in accordance
105 with the approved institution's normal procedures
106 for reporting to depositors.

107 (3) No charge of ethical impropriety or other breach of
108 professional conduct shall attend the determination that such
109 funds are nominal in amount or to be held for a short period of
110 time, or to the decision to invest clients' funds in a pooled
111 interest-bearing account.

112 (4) Whether the funds are designated short-term or nominal
113 or not, a lawyer or law firm may, at the request of the client,
114 deposit funds into a separate interest-bearing account and remit

115 all interest earned, or interest earned net of charges, to the
116 client or clients.

117 The maximum penalty for a violation of Rule 1.15 (II) (a) and Rule
118 1.15 (II) (b) is disbarment. The maximum penalty for a violation of Rule
119 1.15 (II) (c) is a public reprimand.

120 Comment

121 [1] The personal money permitted to be kept in the lawyer's trust
122 account by this rule shall not be used for any purpose other than to
123 cover the bank fees, and if used for any other purpose the lawyer
124 shall have violated this rule. If the lawyer wishes to reduce the
125 amount of personal money in the trust account, the change must be
126 properly noted in the lawyer's financial records and the monies
127 transferred to the lawyer's business account.

128 [2] Nothing in this rule shall prohibit a lawyer from removing from
129 the trust account fees which have been earned on a regular basis
130 which coincides with the lawyer's billing cycles rather than removing
131 the fees earned on an hour-by-hour basis.

132 [3] In determining whether funds of a client or other beneficiary
133 can earn income in excess of costs, the lawyer may consider the

134 following factors:

- 135 (a) the amount of funds to be deposited;
- 136 (b) the expected duration of the deposit, including the
137 likelihood of delay in the matter with respect to which the funds
138 are held;
- 139 (c) the rates of interest or yield at financial institutions where
140 the funds are to be deposited;
- 141 (d) the cost of establishing and administering a non-IOLTA
142 trust account for the benefit of the client or other beneficiary,
143 including service charges, the costs of the lawyer's services and
144 the costs of preparing any tax reports that may be required;
- 145 (e) the capability of financial institutions, lawyers, or law
146 firms to calculate and pay earnings to individual clients; and
- 147 (f) any other circumstances that affect the ability of the funds
148 to earn a net return for the client or other beneficiary.

149 [4] The lawyer or law firm should review the IOLTA Account at
150 reasonable intervals to determine whether changed circumstances
151 require further action with respect to the funds of any client or third
152 party.

1 RULE 1.15(II) SAFEKEEPING PROPERTY - TRUST ACCOUNT AND

2 IOLTA

3 (a) Every lawyer who practices law in Georgia, whether said lawyer
4 practices as a sole practitioner, or as a member of a firm, association,
5 or professional corporation, and who receives money or property on
6 behalf of a client or in any other fiduciary capacity, shall maintain or
7 have available one or more trust accounts as required by these rules.

8 All funds held by a lawyer for, or related to the representation of, a
9 client and all funds held by a lawyer in any other fiduciary capacity
10 related to the practice of law shall be deposited in and administered
11 from a trust account.

12 (b) No personal funds shall ever be deposited in a lawyer's trust
13 account, except as specifically set forth in this sub-paragraph. A lawyer
14 may not use a lawyer's trust account to hold funds in a fiduciary, trust,
15 or other capacity unrelated to the representation of a party involved in
16 the transaction for which such funds are held. If a financial account of
17 a lawyer has ever been used to hold client funds, it may not be used to
18 hold funds unrelated to the representation of a client. A lawyer may
19 keep unearned attorney's fees in a lawyer's trust account until the

20 same are earned. Sufficient personal funds of the lawyer may be kept
21 in the trust account to cover maintenance fees such as service charges
22 on the account. Records on trust accounts shall be kept and maintained
23 to reflect at all times the exact balance held for each client or third
24 person. No funds shall be withdrawn from such trust accounts for the
25 personal use of the lawyer maintaining the account except earned
26 lawyer's fees debited against the account of a specific client and
27 recorded as such.

28 (c) All client's funds shall be placed in either an interest-bearing
29 account at an approved institution with the interest being paid to the
30 client or an interest-bearing (IOLTA) account at an approved
31 institution with the interest being paid to the Georgia Bar Foundation
32 as hereinafter provided.

33 (1) With respect to funds that are not nominal in amount, or
34 are not to be held for a short period of time, a lawyer shall, with
35 notice to the client or clients, create and maintain an interest-
36 bearing trust account in an approved institution as defined in
37 Rule 1.15 (III) (c) (1), with the interest to be paid to the client.

38 (i) No earnings from such an interest-bearing account

39 shall be made available to the lawyer or the lawyer's law
40 firm.

41 (ii) Funds in such an interest-bearing account shall be
42 available for withdrawal upon request and without delay,
43 subject only to any notice period which the institution is
44 required to reserve by law or regulation.

45 (2) If a lawyer is handling funds in a fiduciary or trust capacity
46 and not in the representation of any party involved in the
47 transaction:

48 (i) The lawyer must inform all parties in writing that the
49 funds are not being held in a lawyer-client relationship and,
50 therefore, are not regulated by the Georgia Rules of
51 Professional Conduct.

52 (ii) The lawyer must, in writing, inform the bank or
53 financial institution where the trust account is to be created
54 and maintained that the funds are not being held in a lawyer-
55 client relationship and the protections of the lawyer-client
56 relationship do not apply.

57 (3) With respect to funds that are nominal in amount or are to

58 be held for a short period of time, such that there can be no
59 reasonable expectation of a positive net return to the client or
60 third person, a lawyer shall, with or without notice to the client,
61 create and maintain an interest-bearing, government-insured
62 trust account (IOLTA) at an approved institution as defined by
63 Rule 1.15 (III) (c) (1) in compliance with the following
64 provisions:

- 65 (i) No earnings from such an IOLTA Account shall
66 be made available to a lawyer or law firm.
- 67 (ii) Funds in each IOLTA Account shall be available
68 for withdrawal upon request and without delay,
69 subject only to any notice period which the institution
70 is required to reserve by law or regulation.
- 71 (iii) As required by Bar Rule 15-103, the rate of
72 interest payable on any IOLTA Account shall not be
73 less than the rate paid by the depositor institution to
74 regular, non-lawyer depositors. Higher rates offered
75 by the institution to customers whose deposits exceed
76 certain time periods or quantity minimums, such as

those offered in the form of certificates of deposit,
may be obtained by a lawyer or law firm on some or
all of the deposited funds so long as there is no
impairment of the right to withdraw or transfer
principal immediately.

(iv) Lawyers or law firms shall direct the depository
institution:

(A) to remit to the Georgia Bar Foundation interest
or dividends, net of any allowable reasonable fees as
defined in Bar Rule 15-102 (c), on the average
monthly balance in that account, at least quarterly.
Any allowable reasonable fees in excess of interest
earned on that account for any month, and any
charges or fees that are not allowable reasonable fees,
shall be charged to the lawyer or law firm in whose
names such account appears, if not waived by the
approved institution;

(B) to transmit with each remittance to the Georgia
Bar Foundation a statement showing the name of the

96 lawyer or law firm for whom the remittance is sent,
97 the applicable IOLTA Account number, the rate of
98 interest applied, the average monthly account balance
99 against which the interest rate is being applied, the
100 gross interest earned, the types and amounts of service
101 charges of fees applied, and the amount of the net
102 interest remittance;

103 (C) to transmit to the depositing lawyer or law
104 firm periodic reports or statements in accordance
105 with the approved institution's normal procedures
106 for reporting to depositors.

107 (3) No charge of ethical impropriety or other breach of
108 professional conduct shall attend the determination that such
109 funds are nominal in amount or to be held for a short period of
110 time, or to the decision to invest clients' funds in a pooled
111 interest- bearing account.

112 (4) Whether the funds are designated short-term or nominal
113 or not, a lawyer or law firm may, at the request of the client,
114 deposit funds into a separate interest-bearing account and remit

115 all interest earned, or interest earned net of charges, to the
116 client or clients.

117 The maximum penalty for a violation of Rule 1.15 (II) (a) and Rule
118 1.15 (II) (b) is disbarment. The maximum penalty for a violation of Rule
119 1.15 (II) (c) is a public reprimand.

120 Comment

121 [1] The personal money permitted to be kept in the lawyer's trust
122 account by this rule shall not be used for any purpose other than to
123 cover the bank fees, and if used for any other purpose the lawyer
124 shall have violated this rule. If the lawyer wishes to reduce the
125 amount of personal money in the trust account, the change must be
126 properly noted in the lawyer's financial records and the monies
127 transferred to the lawyer's business account.

128 [2] Nothing in this rule shall prohibit a lawyer from removing from
129 the trust account fees which have been earned on a regular basis
130 which coincides with the lawyer's billing cycles rather than removing
131 the fees earned on an hour-by-hour basis.

132 [3] In determining whether funds of a client or other beneficiary
133 can earn income in excess of costs, the lawyer may consider the

134 following factors:

- 135 (a) the amount of funds to be deposited;
- 136 (b) the expected duration of the deposit, including the
137 likelihood of delay in the matter with respect to which the funds
138 are held;
- 139 (c) the rates of interest or yield at financial institutions where
140 the funds are to be deposited;
- 141 (d) the cost of establishing and administering a non-IOLTA
142 trust account for the benefit of the client or other beneficiary,
143 including service charges, the costs of the lawyer's services and
144 the costs of preparing any tax reports that may be required;
- 145 (e) the capability of financial institutions, lawyers, or law
146 firms to calculate and pay earnings to individual clients; and
- 147 (f) any other circumstances that affect the ability of the funds
148 to earn a net return for the client or other beneficiary.

149 [4] The lawyer or law firm should review the IOLTA Account at
150 reasonable intervals to determine whether changed circumstances
151 require further action with respect to the funds of any client or third
152 party.

1 **Rule 4-203.1. Uniform Service Rule**

2 (a) Lawyers shall inform the Membership Department of the State Bar of
3 Georgia, in writing, of their current name, official address and telephone number,
4 “Official Address”). The Supreme Court of Georgia and the State Bar of Georgia
5 may rely on the ~~official address~~Official Address on file with the Membership
6 ~~Department~~ in all efforts to contact, communicate with, and perfect service upon
7 a lawyer. The choice of a lawyer to provide only a post office box or commercial
8 equivalent address to the Membership Department of the State Bar of Georgia
9 shall constitute an election to waive personal service. Notification of a change of
10 address given to any department of the State Bar of Georgia other than the
11 Membership Department shall not satisfy the requirement herein.

12 (b) In all matters requiring personal service under Part IV of the Bar Rules,
13 service may be perfected in the following manner:

14 (1) Acknowledgment of Service: An acknowledgment of service from the
15 respondent shall constitute conclusive proof of service and shall eliminate
16 the need to utilize any other form of service.

17 (2) Written Response from Respondent: A written response from the
18 respondent or respondent’s counsel shall constitute conclusive proof of
19 service and shall eliminate the need to utilize any other form of service.

20 (3) In the absence of an acknowledgment of service or a written response
21 from the respondent or respondent’s counsel, and subject to the provisions
22 of subparagraph (b) (4) below, the respondent shall be served in the

following manner:

- (i) Personal Service: Service may be accomplished by the Sheriff, ~~or~~ any other person authorized to serve a summons under the provisions of the Georgia Civil Practice Act, or an Investigator employed by the State Bar of Georgia as who has been approved by the Chair of the State Disciplinary Board or the Chair's designee to serve Petitions for Appointment of Special Master and Formal Complaints.
- (ii) Personal service shall be made by hand delivery upon the respondent or by leaving it at the respondent's Official Address with a person of suitable age and discretion who resides therein or who is employed by Respondent or Respondent's law firm.
- (iii) An affidavit showing an unsuccessful attempt at service at the respondent's Official Address ~~Receipt of a Return of Service Non Est Inventus~~ shall constitute conclusive proof that service cannot be perfected by personal service.
- (~~iii~~iv) Service by Publication: If personal service cannot be perfected, or when the respondent has only provided a post office box or commercial equivalent address to the Membership Department and the respondent has not acknowledged service within 10 days of a mailing to respondent's post office box or commercial equivalent address, service may be accomplished by publication once a week for

two weeks in the legal organ of the county of respondent's address, as shown on the records of the Membership Department of the State Bar of Georgia, and, contemporaneously with the publication, mailing a copy of the service documents by first class mail to respondent's address as shown on the records of the Membership Department of the State Bar of Georgia.

(4) When it appears from an affidavit made by the Office of the General Counsel that the respondent has departed from the State, or cannot, after due diligence, be found within the State, or seeks to avoid the service, the Chair of the State Disciplinary Board, or the Chair's designee, may authorize service by publication without the necessity of first attempting personal service. The affidavit made by the Office of the General Counsel must demonstrate recent unsuccessful attempts at personal service upon the respondent regarding other or related disciplinary matters and that such personal service was attempted at respondent's address as shown on the records of the Membership Department of the State Bar of Georgia.

(c) Whenever service of pleadings or other documents subsequent to the original complaint is required or permitted to be made upon a respondent represented by a lawyer, the service shall be made upon the respondent's lawyer. Service upon the respondent's lawyer or upon an unrepresented respondent shall be made by hand- delivery or by delivering a copy or mailing a copy to the respondent's lawyer or to the respondent's official address on file with the

67 Membership Department, unless the respondent's lawyer specifies a different
68 address for the lawyer in a filed pleading. As used in this Rule, the term
69 "delivering a copy" means handing it to the respondent's lawyer or to the
70 respondent, or leaving it at the lawyer's or respondent's office with a person of
71 suitable age or, if the office is closed or the person to be served has no office,
72 leaving it at the person's dwelling house or usual place of abode with some
73 person of suitable age and discretion. Service by mail is complete upon mailing
74 and includes transmission by U.S. Mail, or by a third-party commercial carrier
75 for delivery within three business days, shown by the official postmark or by the
76 commercial carrier's transmittal form. Proof of service may be made by certificate
77 of a lawyer or of his employee, written admission, affidavit, or other satisfactory
78 proof. Failure to make proof of service shall not affect the validity of service.

1 **Rule 4-203.1. Uniform Service Rule**

- 2 (a) Lawyers shall inform the Membership Department of the State Bar of
3 Georgia, in writing, of their current name, official address and telephone number
4 ("Official Address"). The Supreme Court of Georgia and the State Bar of Georgia
5 may rely on the Official Address in all efforts to contact, communicate with, and
6 perfect service upon a lawyer. The choice of a lawyer to provide only a post office
7 box or commercial equivalent address to the Membership Department of the
8 State Bar of Georgia shall constitute an election to waive personal service.
9 Notification of a change of address given to any department of the State Bar of
10 Georgia other than the Membership Department shall not satisfy the
11 requirement herein.
- 12 (b) In all matters requiring personal service under Part IV of the Bar Rules,
13 service may be perfected in the following manner:
- 14 (1) Acknowledgment of Service: An acknowledgment of service from the
15 respondent shall constitute conclusive proof of service and shall eliminate
16 the need to utilize any other form of service.
- 17 (2) Written Response from Respondent: A written response from the
18 respondent or respondent's counsel shall constitute conclusive proof of
19 service and shall eliminate the need to utilize any other form of service.
- 20 (3) In the absence of an acknowledgment of service or a written response
21 from the respondent or respondent's counsel, and subject to the provisions
22 of subparagraph (b) (4) below, the respondent shall be served in the

following manner:

(i) Personal Service: Service may be accomplished by the Sheriff, any other person authorized to serve a summons under the provisions of the Georgia Civil Practice Act, or an Investigator employed by the State Bar of Georgia who has been approved by the Chair of the State Disciplinary Board or the Chair's designee to serve Petitions for Appointment of Special Master and Formal Complaints.

(ii) Personal service shall be made by hand delivery upon the respondent or by leaving it at the respondent's Official Address with a person of suitable age and discretion who resides therein or who is employed by Respondent or Respondent's law firm.

(iii) An affidavit showing an unsuccessful attempt at service at the respondent's Official Address shall constitute conclusive proof that service cannot be perfected by personal service.

(iv) Service by Publication: If personal service cannot be perfected, or when the respondent has only provided a post office box or commercial equivalent address to the Membership Department and the respondent has not acknowledged service within 10 days of a mailing to respondent's post office box or commercial equivalent address, service may be accomplished by publication once a week for two weeks in the legal organ of the county of respondent's address, as shown on the records of the Membership Department of the State Bar

of Georgia, and, contemporaneously with the publication, mailing a copy of the service documents by first class mail to respondent's address as shown on the records of the Membership Department of the State Bar of Georgia.

(4) When it appears from an affidavit made by the Office of the General Counsel that the respondent has departed from the State, or cannot, after due diligence, be found within the State, or seeks to avoid the service, the Chair of the State Disciplinary Board, or the Chair's designee, may authorize service by publication without the necessity of first attempting personal service. The affidavit made by the Office of the General Counsel must demonstrate recent unsuccessful attempts at personal service upon the respondent regarding other or related disciplinary matters and that such personal service was attempted at respondent's address as shown on the records of the Membership Department of the State Bar of Georgia.

(c) Whenever service of pleadings or other documents subsequent to the original complaint is required or permitted to be made upon a respondent represented by a lawyer, the service shall be made upon the respondent's lawyer. Service upon the respondent's lawyer or upon an unrepresented respondent shall be made by hand- delivery or by delivering a copy or mailing a copy to the respondent's lawyer or to the respondent's official address on file with the Membership Department, unless the respondent's lawyer specifies a different address for the lawyer in a filed pleading. As used in this Rule, the term

67 “delivering a copy” means handing it to the respondent’s lawyer or to the
68 respondent, or leaving it at the lawyer’s or respondent’s office with a person of
69 suitable age or, if the office is closed or the person to be served has no office,
70 leaving it at the person’s dwelling house or usual place of abode with some
71 person of suitable age and discretion. Service by mail is complete upon mailing
72 and includes transmission by U.S. Mail, or by a third-party commercial carrier
73 for delivery within three business days, shown by the official postmark or by the
74 commercial carrier’s transmittal form. Proof of service may be made by certificate
75 of a lawyer or of his employee, written admission, affidavit, or other satisfactory
76 proof. Failure to make proof of service shall not affect the validity of service.

Rule 4-220. Notice of Punishment or Acquittal; Administration of Reprimands

(a) Upon a final judgment of disbarment or suspension, notice of the action taken shall be given by the Office of the General Counsel of the State Bar of Georgia to the clerks of all courts of record in this State and to the Membership Department of the State Bar of Georgia, and the name of the respondent in question shall be stricken from the rolls of said courts and from the rolls of the State Bar of Georgia for the prescribed period.

(b) State Disciplinary Review Board Reprimands shall be prepared by the Office of the General Counsel based upon the record. State Disciplinary Review Board Reprimands shall be ~~issued~~ read in the presence of the respondent by the Chair of the State Disciplinary Review Board, or his designee, at a regular meeting of the Board, and the portion of the meeting at which State Disciplinary Review Board Reprimands are issued shall be open to the public. Notice of issuance of the State Disciplinary Review Board Reprimand shall be published in advance in the legal organ of the county of the respondent's address as shown on the Membership Records of the State Bar of Georgia and shall be provided to the complainant in the underlying case.

(c) Public Reprimands shall be prepared by the Office of the General Counsel based upon the record in the case. They shall be read in open court in the presence of the respondent by the judge of a Superior Court in the county of the respondent's address as shown on the Membership Records of the State Bar of Georgia or as otherwise ordered by the Supreme Court of Georgia. Notice of issuance of the

25 reprimand shall be published in advance in the legal organ of the county of the
26 respondent's address as shown on the Membership Records of the State Bar of
27 Georgia; and shall be provided to the complainant in the underlying case.

28 (d) After a Public Reprimand has been administered, a certificate reciting the
29 fact of the administration of the reprimand and the date of its administration shall
30 be filed with the Supreme Court of Georgia. There shall be attached to such
31 certificate a copy of the reprimand. Both the certificate and the copy of the
32 reprimand shall become a part of the record in the disciplinary proceeding.

33 (e) In the event of a final judgment in favor of the respondent, the State Bar of
34 Georgia shall, if directed by the respondent, give notice thereof to the clerk of the
35 Superior Court in the county in which the respondent resides.

Rule 4-220. Notice of Punishment or Acquittal; Administration of Reprimands

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34 Georgia shall, if directed by the respondent, give notice thereof to the clerk of the
35 Superior Court in the county in which the respondent resides.

36



State Bar of Georgia

To: Bar Officers/Finance Committee

From: Ron Turner *rut*

Date: May 1, 2025

Re: March 2025 Financial Statements-Bar Operations and Bar Center

Attached please find the March 2025 financial statements. These financial statements are presented at a summary level for clarity and to convey overall trends. Full departmental details are attached at year-end (6/30) and upon request.

Line-item variance explanations follow. Department managers are expected to incur savings elsewhere in their budgets when exceeding a line item, unless there was a budgeting error. Line-item variances < **\$2,500** are not explained to conserve your time.

New and revised items are highlighted in bold. Savings will be realized in each department to offset these overages.

Administration

Miscellaneous costs have exceeded the budget by approximately **\$16,500** due to those costs associated with the retirement of Paula Frederick. A budgeted amount was intentionally not included in the operating budget of the Bar as monies from sponsorships and unallocated cash were designated for this expense.

Office of General Counsel

Computer hardware is in excess of the budget by \$3,438 due to the purchase of a computer, two monitors, a printer and two scanners by the department that were not budgeted for.

Contract labor is more than the budget because of the use of a contract attorney for OGC to assist with caseload/grievance-screening due to extended federally protected leave of OGC attorney.

Communications

The Bar has incurred \$168,835 in charges associated with the redesign of the Bar's website. A budgeted amount was intentionally not included in the operating budget of the Bar as monies from unallocated cash were used to fund this investment. This new website became operational in September 2024.

Tifton

The Bar incurred \$42,027 in costs associated with new furniture for the Tifton office. This furniture includes 12 tables with integrated power units, 2 tables without power units and 28 chairs for the main conference room. A budgeted amount was intentionally not included in the operating budget of the Bar as monies from unallocated cash were used to fund this investment.

Institute of Continuing Legal Education (ICLE)

Computer hardware has exceeded the budget primarily due to the purchase of six laptop computers that are being used as travel laptops for use in registrations for continuing education classes primarily outside of the office, the purchase of additional computer monitors along with the purchase of a laptop computer and docking station for a new employee.

Executive Committee Meetings

Costs associated with the Executive Committee meetings are in excess of the budgeted amounts primarily due to the following reasons: (1) hotel and food costs are higher than what was originally anticipated/budgeted (2) more meetings for the Executive Committee were held outside of the State Bar of Georgia building and (3) there were receptions held with local bars. These joint receptions incurred additional costs that were not originally anticipated and the attendance at these receptions was better than anticipated. Because the costs of hotels and meetings are increasing at a more significant rate than general expenses, we are encouraging the Meetings Department Director along with the appropriate Bar officers to design meetings further in advance of the event and examine opportunities to reduce costs and expenses around events.

Fastcase

Fastcase costs have exceeded the budget due to an increase in the costs from the vendor that was greater than the budgeted increase.

Membership Database Project

Similar to the Bar's website project, the Bar elected to update the membership database which was originally installed approximately 14 years ago. With this update, it is the intention to strengthen security to have this database in the cloud. A budget was not established intentionally as monies from unallocated cash were also used to fund this investment. This project also was operational in September 2024.

Conference Center

The Bar has incurred \$7,518 for the purchase of a new ice machine for the Conference Center. The machine was not able to be repaired and as such, a new machine was purchased. This purchase was not budgeted for.

Other Bar Center Operations

Audio and video equipment for the Bar is in excess of the budget by approximately **\$56,200** primarily because (1) the Bar incurred charges associated with the installation of new poke thru devices in meeting rooms 3 and 5 to provide additional electrical capabilities in these rooms along with a remote clicker and (2) installation of computer, monitor and scanner for use by individuals who are at the Bar and want to scan and provide information to employees. These upgrades were intentionally not included in the operating budget of the Bar Center as monies from unallocated cash were used to fund this investment.

Other Bar Center Operations - continued

The Bar incurred unbudgeted building rehab costs of approximately **\$1,006,300** for the following items: (1) lease buildout costs for a tenant to enter into a lease renewal for the occupation of space on the 6th floor in the amount of approximately \$35,000 (2) approximately **\$370,700** in costs paid for work done on electrical panels in order to replace the old electrical panels (3) approximately \$334,100 for flooring for the 1st and 3rd floors along with the sub-basement (4) approximately \$18,000 in costs associated with a potential move of the Office of General Counsel within the building (5) approximately **\$14,300** of other costs for additional wi-fi access and additional electrical installation costs (6) approximately \$9,800 of costs associated with security cameras in the parking deck (7) electrical costs for the parking deck associated with the intended installation of EV chargers and the installation of the EV chargers themselves. These amounts total approximately \$99,900; however, we do anticipate receiving a credit of \$18,000. (8) architectural costs of approximately **\$23,300** for a tenant to enter into a lease renewal for space on the 4th floor and (9) approximately \$115,800 in costs associated with the purchase of replacement windows for the building. The resources in unallocated cash are being used to fund these costs.

Rental

Repairs and maintenance for the general building is in excess of the budget by approximately **\$3,300** primarily due to unbudgeted repairs in the amount of \$2,366 for the replacement of a circuit board to operate a door that malfunctioned.

Parking

Repairs and maintenance costs for the parking deck are over budget by **\$6,411** primarily due to the incurrence of \$6,000 in repair costs for re-concreting and caulking certain areas. These costs were not originally budgeted for.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately **\$28,400**. This is a positive variance. This number will fluctuate throughout the year.

Please give me a call at (404) 527-8748 or my cell number at 678-761-5889 if you have any questions regarding the attached financial statements.

cc: Damon Elmore
Russ Willard
Sarah Coole

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2025

	Year Ending 06/30/2024	Year To Date March 31, 2025	Year Ending 06/30/2025
	Actual	Actual	Annual Budget
Membership Numbers			
Active Members	42,194	42,814	42,695
Inactive Members	8,017	7,901	7,845
Provisional Members	18	14	20
Associates/Affiliates	14	18	10
Foreign Legal Consultants	10	10	9
Students	520	491	470
Emeritus	4,617	4,728	4,585
Total Membership Numbers	55,390	55,976	55,634
Revenue			
Dues Active	10,957,918	11,266,668	11,271,480
Dues Inactive	1,067,188	1,057,234	1,035,540
Dues Provisional	16,932	9,900	11,880
Dues Associates	1,750	800	1,000
Dues Foreign Legal Consultant	2,448	2,464	2,376
Dues Late Fees	256,000	233,475	265,000
Dues NSF Check Fee	120	100	200
Dues Prior Years	5,705	7,678	6,000
Total License and Dues	12,308,061	12,578,319	12,593,476
Program Registration Income	4,790,586	4,059,155	4,400,000
Section Expense Reimbursement	301,039	320,694	320,694
CSF Expense Reimbursement	73,000	54,750	73,000
Advertising and Sales	45,389	44,209	26,225
Membership Income	165,617	156,143	176,800
Credit Card Processing Fees	107,601	47,013	107,000
Interest Income	454,907	497,640	275,000
Miscellaneous Revenues	21,581	212	22,000
Total Bar Revenue	18,267,781	17,758,135	17,994,195
Total Bar Expenses	17,723,696	13,878,852	19,282,420
SBG Net Gain (Loss)	\$ 544,085	\$ 3,879,283	\$ (1,288,225)

Note: Non-Cash depreciation expenses are excluded from this schedule.

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2025

	Year Ending 06/30/2024	Year To Date March 31, 2025	% of Budget	Year Ending 06/30/2025
	Actual	Actual		Annual Budget
Total Bar Center Operations Revenue	3,314,107	2,051,555	72.67 %	2,822,960
Total Bar Center Operations Expenses	3,454,316	3,029,511	113.24 %	2,675,204
Total Bar Center Operations Net Gain (Loss)	\$ (140,209) \$	(977,956)	(661.87) %	\$ 147,756
Combined Revenue	21,581,888	19,809,690	95.16 %	20,817,155
Combined Expenses	21,178,012	16,908,364	77.00 %	21,957,624
Total Combined Net Income (Loss)	\$ 403,876 \$	2,901,326	(254.40) %	\$ (1,140,469)

Note: Non-Cash depreciation expenses are excluded from this schedule.

State Bar of Georgia
Total Bar Center Operations
Revenues and Expenditures - Executive Summary
For the Year To Date Period Ending March 31, 2025

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts							
Bar Center Assessments	0	0.00 %	0	0.00 %	200	200	0
Gain/Loss Investment Interest Allocation	19,599	0.00 %	106,826	0.00 %	0	(106,826)	263,476
CCLC Contributions to Bar Center	0	0.00 %	500,000	36.36 %	1,375,000	875,000	1,393,988
Interest and Dividend Income	50,429	49.44 %	124,811	122.36 %	102,000	(22,811)	132,667
Bar Center Income and Cash Receipts	\$ 70,028	4.74 %	\$ 731,637	49.53 %	\$ 1,477,200	\$ 745,563	\$ 1,790,131
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	3,155	18.56 %	8,996	52.92 %	17,000	8,004	17,366
Investment Service Fees	7,597	34.53 %	20,105	91.38 %	22,000	1,895	24,138
Museum and 1st Floor Exhibit	0	0.00 %	0	0.00 %	0	0	6,453
Audio Video, Furniture and Equipment	357	6.27 %	61,938	1,086.64 %	5,700	(56,238)	219,552
Building Rehabilitation	55,986	666.50 %	1,014,651	12,079.18 %	8,400	(1,006,251)	726,161
Bar Center Expenses and Cash Disbursements	67,095	126.36 %	1,105,690	2,082.28 %	53,100	(1,052,590)	993,670
Bar Center Combined Net Cash Flow	\$ 2,933	0.21 %	\$ (374,054)	(26.27) %	\$ 1,424,100	\$ 1,798,154	\$ 796,462
Conference Center Income and Expenses							
Room Rentals and Various Charges	1,464	11.71 %	12,816	102.53 %	12,500	(316)	13,817
Conference Center Operating Expenses	45,786	9.34 %	352,593	71.91 %	490,349	137,756	477,025
Conference Center Combined Net Cash Flow	\$ (44,323)	9.28 %	\$ (339,777)	71.11 %	\$ (477,849)	\$ (138,072)	\$ (463,208)
Rental Income and Expenses							
Rental Income	83,042	10.93 %	734,475	96.64 %	760,000	25,525	926,110
Building Operating Expenses	174,757	9.81 %	1,314,010	73.74 %	1,781,945	467,935	1,692,176
Rental Combined Net Cash Flow	\$ (91,716)	8.97 %	\$ (579,534)	56.71 %	\$ (1,021,945)	\$ (442,411)	\$ (766,066)
Parking Income and Expenses							
Parking Income	80,197	13.99 %	572,626	99.89 %	573,260	634	584,050
Parking Deck Operating Expenses	26,036	7.44 %	257,218	73.53 %	349,810	92,592	291,446
Parking Combined Net Cash Flow	\$ 54,160	24.24 %	\$ 315,409	141.15 %	\$ 223,450	\$ (91,959)	\$ 292,603
Total Bar Center Operations Net Gain (Loss)	\$ (78,945)	(53.43) %	\$ (977,956)	(661.87) %	\$ 147,756	\$ 1,125,712	\$ (140,209)

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule.

Created on 05/01/2025

State Bar of Georgia

Page 6

March 2025 Financial Statements

Page 1

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2025

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 11,266,668	\$ 11,271,480	99.96 %	\$ 10,957,918
Dues - Inactive	1,057,234	1,035,540	102.09 %	1,067,188
Dues - Provisional	9,900	11,880	83.33 %	16,932
Dues - Misc. Types	3,264	3,376	96.68 %	4,198
Dues - Late Fees	241,253	271,200	88.96 %	261,825
Total Dues & Licenses	12,578,319	12,593,476	99.88 %	12,308,061
Program Registration Income	4,059,155	4,400,000	92.25 %	4,790,586
Section Expense Reimbursement	320,694	320,694	100.00 %	301,039
CSF Expense Reimbursement	54,750	73,000	75.00 %	73,000
Advertising and Sales	44,209	26,225	168.58 %	45,389
Membership Income	68,868	82,200	83.78 %	76,992
Pro Hac Vice	451,775	430,000	105.06 %	410,525
Pro Hac Vice Contra	(364,500)	(335,400)	108.68 %	(321,900)
Credit Card Processing Fees	47,013	107,000	43.94 %	107,601
Interest Income	497,640	275,000	180.96 %	454,907
Miscellaneous Revenues	212	22,000	0.97 %	21,581
Total Revenues	17,758,135	17,994,195	98.69 %	18,267,781
Expenses				
Administration	2,040,213	2,924,908	69.75 %	2,772,737
General Counsel	3,842,415	5,094,921	75.42 %	4,688,270
Communications	815,152	920,402	88.56 %	1,176,662
Lawyer's Assistance Program	154,673	155,000	99.79 %	125,000
Fee Arbitration	428,310	594,971	71.99 %	544,647
Law Practice Management	335,075	528,234	63.43 %	455,563
Sections	239,117	320,694	74.56 %	306,746
Savannah Office	231,878	316,729	73.21 %	306,971
Tifton Office	168,302	185,013	90.97 %	164,659
Young Lawyers	318,182	449,090	70.85 %	420,015
Unauthorized Practice of Law	704,556	994,864	70.82 %	942,450
Law Related Education	329,145	448,085	73.46 %	420,300
High School Mock Trial	123,988	182,067	68.10 %	167,484
ICLE	2,951,679	4,393,900	67.18 %	3,848,996

Note: For Total Other Expenses, the details can be found on the next page.

Created on 04/24/2025
State Bar of Georgia

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2025

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	159,162	212,216	75.00 %	212,216
Fastcase	462,428	455,000	101.63 %	297,471
Officers' Expenses	42,958	102,470	41.92 %	79,023
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	504,825	948,690	53.21 %	857,373
Unallocated Services	(28,372)	0	0.00 %	(118,053)
Total Expenses	13,878,852	19,282,420	71.98 %	17,723,696
Net Income	\$ 3,879,283	\$ (1,288,225)	(301.13) %	\$ 544,085

Note: For Total Other Expenses, the details can be found on the next page.
Created on 04/24/2025
State Bar of Georgia

State Bar of Georgia
Supporting Schedule of Other Expenses - YTD
For the Year To Date Period Ending March 31, 2025

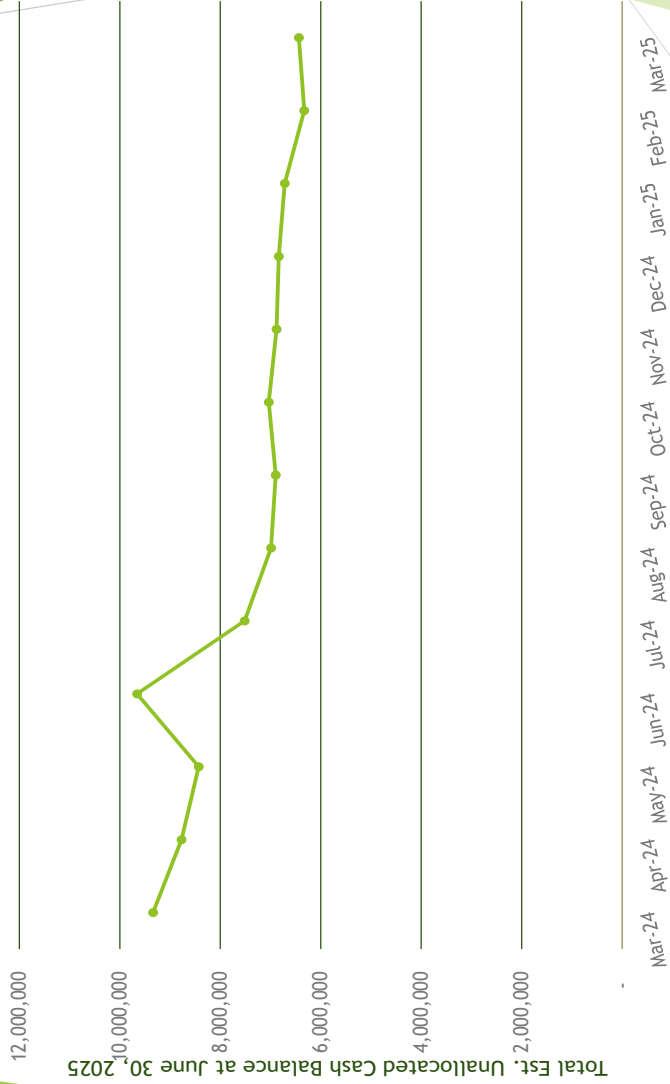
	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Other Expenses				
BOG and Member Meetings	\$ 175,759	\$ 588,200	29.88 %	\$ 530,767
Supreme Court Meetings	64,958	75,000	86.61 %	79,023
Executive Committee Meetings	48,023	42,000	114.34 %	7,681
Court of Appeals Meetings	10,282	20,000	51.41 %	0
State Disciplinary Board Lawyers	23,625	31,500	75.00 %	30,000
Electronic Ballots	11,829	20,000	58.15 %	17,674
Dues Notice	6,545	45,990	14.23 %	34,148
Letters of Good Standing	1,442	2,500	57.66 %	1,713
Bar Membership Cards	9,570	11,000	87.00 %	9,728
50 Year Certificates	3,676	6,000	61.25 %	4,670
Membership Database Project	97,670	0	0.00 %	57,912
State Bar Committees	5,768	20,000	28.84 %	16,070
Georgia Diversity Program	10,000	10,000	100.00 %	10,000
ABA Delegate Breakfast	2,413	2,500	96.54 %	2,116
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	9,675	29,000	33.36 %	22,811
Investment Service Fees	21,290	35,000	60.83 %	29,958
Access to Justice/Pro Bono	0	7,500	0.00 %	601
Total Other Expenses	\$ 504,825	\$ 948,690	53.21 %	\$ 857,372

State Bar of Georgia
Status and Use of Cash and Investments
For the Current Period Ending March 31, 2025

	Current Month (March 2025)	Ending of Prior Fiscal Year (June 2024)	Dollar Change	% Increase/ Decrease
Cash and Investments - Bar	\$ 37,334,100			
Less:				
Georgia Bar Foundation Cash Included in Above Amount	(2,200)			
CCLC Cash and Investments Included in Above Amount	(6,216,645)			
Unrealized (Gain)/Loss in Investments	<u>(709,652)</u>			
Net Cash Available for State Bar	<u>30,405,603</u>			
Use of Cash:				
Less:				
Board Designated - See Separate Schedule Attached	(9,165,326)			
Donor Temporarily Restricted - See Separate Schedule Attached	<u>(3,565,663)</u>			
Total Board Designated and Temporarily Restricted	<u>(12,730,989)</u>			
Other - Cash Allocated:				
Collection of Outstanding Accounts Receivable	161,664			
Payment of Accounts Payable	(284,659)			
Payment of Accrued Vacation	(593,724)			
Deferred Income	(10,545)			
Payment of Credit Card Bill	(308,363)			
Payment of Accrued Salary	(579,692)			
Payment of Accrued Taxes	(44,346)			
Payment of Other Accrued Expenses (primarily pension)	(489,453)			
Payment to Client Security Fund	(2,932,495)			
Operational Expenses for Remaining Bar Year	(5,251,885)			
Additional Revenue for Bar Operations (Excluding Bar Center)	236,060			
Net Amount to be paid to Related Entities	<u>(544,201)</u>			
Total Other - Cash Allocated	<u>(10,641,639)</u>			
Anticipated Use of Unallocated Cash - Bar Operations	<u>(6,061)</u>			
Estimated Cash and Investments - June 30, 2025 - Bar	<u>7,026,914</u>	9,818,381	(2,791,467)	-28%
Cash and Investments - Bar Center	176,912			
Other Cash Allocated - Bar Center:				
Collection of Outstanding Accounts Receivable	128,500			
Payment of Accounts Payable	(9,077)			
Payment of Other Accrued Expenses	(107,893)			
Additional Revenue for Bar Center Operations	<u>55,739</u>			
Total Other - Cash Allocated - Bar Center	<u>67,269</u>			
Anticipated Use of Unallocated Cash - Bar Center Operations	<u>(834,420)</u>			
Estimated Cash and Investments June 30, 2025 - Bar Center	<u>(590,239)</u>	(160,919)	(429,320)	-267%
Total Estimated Cash Balance at June 30, 2025	\$ 6,436,676	\$ 9,657,462	(3,220,786)	-33%

Note: The above schedule reflects the status of cash and investments as of the month end indicated above. There are no other State Bar funds or investments held in any institution that are not included on this schedule. Also included in the above are the following assumptions: (1) Actual expenses for 2024 - 2025 would be 97.5% of budget. This is for Bar operations only and not Bar Center. (2) Additional revenue for Bar operations is based upon the assumption of achieving additional revenue through June 30, 2025 to equal 100% of the total budgeted revenue. (3) Bar Center would contribute additional cash flow or pay additional expenses through June 30, 2025 to equal their budget.

SBG Unallocated Cash



For the Period Ending

State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Year To Date Period Ending March 31, 2025

	June 30, 2022	June 30, 2023	June 30, 2024	March 31, 2025
Board Designated				
Board Designated - General Operations - Bar	\$ 2,750,000	\$ 2,750,000	\$ 2,750,000	\$ 2,750,000
Board Designated - General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	210,352
Board Designated - Sections	3,677,156	3,664,312	3,745,183	4,172,560
YLD Meetings	88,929	77,999	49,795	32,414
Total Board-Designated excludes ICLE	\$ 8,816,085	\$ 8,792,311	\$ 8,844,978	\$ 9,165,326
Donor Temporarily Restricted				
Legislative	\$ 1,503,629	\$ 1,806,483	\$ 2,423,119	\$ 2,980,198
Law Related Education/Marshall fund	212,684	207,599	192,396	180,863
High School Mock Trial	18,617	15,299	17,481	27,459
Basics Program	115,094	116,951	121,963	124,674
Younger Lawyers	87,006	87,199	126,603	181,286
Lawyers Assistance	33,188	31,863	33,229	34,971
Georgia Diversity Program	46,528	13,555	6,374	2,402
Bar Media Conference	13,037	3,115	1,523	337
Law Day	6,266	6,212	6,317	6,458
Access to Justice	1,435	3,175	19,993	20,438
Promote Inclusion	8,842	8,701	5,924	8,588
Military Vet Pro Bono	14,240	14,481	15,101	15,437
Justice Portraits	1,006	1,022	1,066	1,090
Center for Lawyer Well-Being	0	0	0	1,462
Total Donor Temporarily Restricted	\$ 2,061,572	\$ 2,315,655	\$ 2,971,089	\$ 3,565,663
Net Board Designated and Donor Temporarily Restricted	\$ 10,877,657	\$ 11,107,967	\$ 11,816,068	\$ 12,730,989

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through March 31, 2025

Dues	2024-25 Dues Season	2023-24 Dues Season	2022-23 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	50,114	49,695	49,400
Active - Number Paid	43,317	42,632	42,018
Inactive - Number Paid	8,074	8,237	8,341
Total Number of Members With Dues Paid	51,391	50,869	50,359
Percent of Total Members With Dues Paid	102.5%	102.4%	101.9%
Number of Members Who Made A Contribution	8,649	9,091	8,482
Percent of Members Who Made A Contribution	16.8%	17.9%	16.8%
Total Contribution Amount	\$ 820,248	\$ 862,990	\$ 803,415
Average Amount Paid	\$ 95	\$ 95	\$ 95

Legislative Contribution Amounts by Dues Year

2024 - 2025	<u>\$ 820,248</u>
2023 - 2024	<u>\$ 862,990</u>
2022 - 2023	<u>\$ 803,415</u>
2021 - 2022	<u>\$ 760,350</u>
2020 - 2021	<u>\$ 766,123</u>
2019 - 2020	<u>\$ 322,708</u>
2018 - 2019	<u>\$ 494,906</u>
2017 - 2018	<u>\$ 546,905</u>
2016 - 2017	<u>\$ 557,991</u>
2015 - 2016	<u>\$ 565,004</u>

Purpose: The purpose of the above schedule is to reflect donations to the Legislative Fund for each period shown. The information reflects the total number of members who have made a contribution along with applicable percentages.

The number of members above reflect the members who paid during the dues season indicated above. The dues season does not correspond to the fiscal year but starts in advance of the fiscal year. In addition, if members change status (active, inactive, emeritus, etc), this change will be reflected in the membership counts at month end but will not be reflected in the above schedule.

State Bar of Georgia
Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)
With Contributions Paid Through March 31, 2025

Dues	2024-25 Dues Season	2023-24 Dues Season	2022-23 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	50,114	49,695	49,400
Active - Number Paid	43,317	42,632	42,018
Inactive - Number Paid	8,074	8,237	8,341
Total Number of Members With Dues Paid	51,391	50,869	50,359
Percent of Total Members With Dues Paid	102.5%	102.4%	101.9%
Number of Members Who Made A Contribution	3,460	3,575	3,539
Percent of Members Who Made A Contribution	6.7%	7.0%	7.0%
Total Contribution Amount	\$ 485,947	\$ 490,605	\$ 483,850
Average Contribution Amount	\$ 140	\$ 137	\$ 137

GLSP Contribution Amounts by Dues Year

2024 - 2025	<u>\$ 485,947</u>
2023 - 2024	<u>\$ 490,605</u>
2022 - 2023	<u>\$ 483,850</u>
2021 - 2022	<u>\$ 478,287</u>
2020 - 2021	<u>\$ 436,815</u>
2019 - 2020	<u>\$ 366,674</u>
2018 - 2019	<u>\$ 295,454</u>
2017 - 2018	<u>\$ 312,251</u>
2016 - 2017	<u>\$ 276,487</u>
2015 - 2016	<u>\$ 264,492</u>

Purpose: The purpose of the above schedule is to reflect donations to the Georgia Legal Services Program for each period shown. The information reflects the total number of members who have made a contribution along with applicable percentages.

The number of members shown above is not the same as the number of members at the end of the month. The number of members above reflect the members who paid during the dues season indicated above. The dues season does not correspond to the fiscal year but starts in advance of the fiscal year. In addition, if members change status (active, inactive, emeritus, etc), this change will be reflected in the membership counts at month end but will not be reflected in the above schedule.

State Bar of Georgia
Income Statement
For the Current Period Ending March 31, 2025

Beginning Balance	\$ 2,423,119
Income:	
Interest and Dividend Income	40,966
Gain/Loss Investment Interest Allocation	31,234
Miscellaneous Income	815,768
Total Income	887,968
Expenditures:	
Staff and Contract Lobbyists	284,168
Grassroots Efforts	420
Travel	3,264
Shared Office Allocation	16,254
Computer Hardware	1,266
Miscellaneous	25,518
Total Expenditures	330,890
Net Donor Temporarily Restricted Balance	\$ 2,980,198

State Bar of Georgia
Summary of Client Security Fund Activity
For the Year To Date Period Ending March 31, 2025

	2022 June 30	2023 June 30	2024 June 30	March 31, 2025
Fund Balance, Beginning of Year	\$ 1,798,187	\$ 1,634,260	\$ 2,212,202	\$ 2,782,908
Income:				
Interest and Dividend Income	26,218	33,117	44,364	42,742
Gain/Loss Investment Interest Allocation	(79,620)	19,577	92,242	35,566
Client Security Fund Assessments	77,590	751,680	760,050	764,475
Restitution Income	85,621	18,445	821	5,030
Total Income	\$ 109,809	\$ 822,819	\$ 897,477	\$ 847,813
Expenses:				
Restricted Expenses	73,000	73,000	73,000	54,750
Client Security Fund Claims Payments	186,737	159,879	239,968	633,490
Bond Premium Amortization	8,444	4,288	5,737	3,091
Investment Service Fees	5,555	7,710	8,066	6,895
Total Expenses	\$ 273,736	\$ 244,877	\$ 326,771	\$ 698,226
Net Income	\$ (163,927)	\$ 577,942	\$ 570,706	\$ 149,587
Fund Balance, End of Period	\$ 1,634,260	\$ 2,212,202	\$ 2,782,908	\$ 2,932,496

**State Bar of Georgia
2026 Election Schedule**

2025

June	Deadline for submission of election schedule for publication in August issue <i>Georgia Bar Journal</i>
August	Official Election Notice, August Issue <i>Georgia Bar Journal</i>
December 1	Nominating petition package mailed to incumbent Board of Governors Members and other members who request a package

2026

January 14 - 17	Nomination of Officers at Midyear Board Meeting, Omni Hotel at the Battery Atlanta Atlanta, GA
January 16	Deadline for receipt of nominating petitions for incumbent Board Members including incumbent nonresident (out of state) members
Feb 13	Deadline for receipt of nominating petitions for new Board Members including new non-resident (out of state) members
March 6	Deadline for write-in candidates for Officer to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 1 (c))
March 6	Deadline for write-in candidates for Board of Governors to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 2 (c))
March 16	Ballots mailed
April 17	11:59 p.m. Deadline for ballots to be cast in order to be valid
April 24	Election service submits results to the Elections Committee
May 1	Election results reported and made available



TO: Ivy Cadle, President State Bar of Georgia
FROM: Susan Coppedge, Executive Director Georgia Legal Services Program
CC: Seth Bruckner, President Georgia Legal Services Program Board of Directors; Julia Sullivan, President-Elect
RE: Georgia Legal Services Program Board Appointments by the State Bar of Georgia
DATE: May 8, 2025

Pursuant to the GLSP Bylaws, we are requesting the State Bar of Georgia designate the following representatives to serve as members of the GLSP Board for two-year terms from August 2025 – August 2027:

- Tamara S. Caldas, Kilpatrick Townsend & Stockton, Atlanta, Georgia
- Ronald E. Daniels, Daniels Law, LLC, Eastman, Georgia
- Elisa S. Kodish, Nelson Mullins Riley & Scarborough, Atlanta, Georgia

Respectfully submitted,

Susan Coppedge

GLSP Executive Director

**FINAL REPORT OF
THE SPECIAL COMMITTEE ON ARTIFICIAL INTELLIGENCE & TECHNOLOGY
TO THE STATE BAR OF GEORGIA BOARD OF GOVERNORS
JUNE 7, 2025**

Introduction

The Special Committee on Artificial Intelligence & Technology was created by President Ivy Cadle to explore and make recommendations to the Supreme Court of Georgia and the State Bar of Georgia Board of Governors about how the Georgia Rules of Professional Conduct (GRPC) cover developments in technology, particularly artificial intelligence and the practice of law.

The Committee was charged with examining whether the GRPC and Bar policies are sufficient regarding a lawyer's technology-related actions, omissions, or conduct. The committee was also charged with exploring how the State Bar of Georgia can aid its members as they integrate artificial intelligence and technological advances into their practices. This includes, as appropriate, identifying AI tools for lawyers, as well as examining methods to provide education, communication, resources, and assistance to lawyers about these tools to ensure lawyers understand the utility and convenience of embracing AI and technological advances while maintaining their duty to exercise independent judgment.

Considering this, the Committee was provided three areas of examination:

1. Explore all ethical implications for AI and other technology, as considered by the GRPC.
2. Evaluate the need for revisions to the GRPC.
3. Develop ideas and best practices for the State Bar providing assistance to practitioners implementing AI into their practices.

Committee Members

- | | | |
|--|--|-------------------------------------|
| • Darrell Sutton, Chair | • Jason Loring, Jones Walker | • Ben Luke (AOC), <i>ex officio</i> |
| • Rick Alembik, Richard S. Alembik, PC | • Leah McNeil, Alston & Bird | • Chris Twyman, <i>ex officio</i> |
| • Kurtis Anderson, Kilpatrick Townsend | • Jenny Mittleman, Attorney at Law | • Damon Elmore, Staff Liaison |
| • MJ Blakely, The Blakely Firm | • Vivien Peaden, Baker Donelson | • Nkoyo Effiong, Staff Liaison |
| • James Cox, Wetherington Law Firm | • Heather Peck, Inspire Brands | • Megan Jones, Staff Liaison |
| • Jeff Dickerson, The Dickerson Firm | • Jennifer Romig, Emory University School of Law | • Andreea Morrison, Staff Liaison |
| • Roy Hadley, Jr., Morris Manning & Martin | • Matt Wetherington, Wetherington Law Firm | • Russ Willard, Staff Liaison |
| • Heather Kuhn, Baker Hostetler | • Ivy Cadle, <i>ex officio</i> | |

Timeline

The Committee was given the following timeline for the completion of its work:

- No later than October 30: 1st meeting of committee to occur.
- December 2024: Second meeting to evaluate agenda and prepare report for Midyear meeting.
- January 2025: Initial update and report to Board of Governors.
- February 2025: Third meeting.
- March 2025: Update and report as part of Spring Meeting, with initial findings.
- April 2025: Fourth meeting.
- June 2025: Comprehensive report and recommendations presented to Board of Governors

Meetings

1. October 9, 2024

The first meeting of the committee was held October 9, 2024. After being provided an overview of the committee's mission, the committee performed a general assessment of AI – Generative Artificial Intelligence (GenAI), in particular – and its impact on the practice of law.

The committee also assessed the key issues and risks posed by Georgia lawyers' use of AI. This led to the establishment of a subcommittee to study and recommend options for the committee's deliverables.

In addition, the committee grouped into five categories the GRPC potentially impacted by Georgia lawyers' use of GenAI, with a subcommittee for each established to study and make recommendations about addressing AI's impact upon that category:

1. Technological Competence & AI Integration
2. Confidentiality & Data Protection
3. Unauthorized Practice of Law
4. Client Communication, Consent & Ethical Obligations
5. Advertising, Marketing & Public Communication

2. November 21, 2024

The second meeting of the committee was held November 21, 2024, with a report from the deliverables subcommittee provided, along with its recommendations for the committee's mission:

- Mission No. 1:
 - Promote adoption of proposed comment 6 to GRPC 1.1.
 - Develop and promote amendments to GRPC identified by subcommittees.
 - Develop and promote Formal Advisory Opinions identified by subcommittees.
- Mission No. 2:
 - Develop an AI Toolkit for Georgia lawyers.
 - Produce AI & The Law CLE.
 - Develop and launch webpage devoted to AI & The Law.

3. January 7, 2025

The third meeting of the committee was held January 7, 2025, with reports and preliminary recommendations from each of the other subcommittees provided.

- Technological Competence & AI Integration:
 - Promote adoption of proposed comment 6 to GRPC 1.1.
- Confidentiality & Data Protection:
 - Promote adoption of proposed amendment to GRPC 1.6(c)
 - Develop and promote best practices about
 - Obtaining client consent when inputting data to a GenAI platform.
 - Ensuring that a utilized GenAI platform employs security and confidentiality features compliant with GRPC 1.6 and 1.8.
 - Ensuring client confidential information is anonymized when input to a GenAI platform.
- Unauthorized Practice of Law:
 - Develop and promote adoption of amendment to Rule 5.3 so it encompasses GenAI tools within the definition of “non-lawyer service or tool.”
- Client Communication, Consent & Ethical Obligations
 - No recommended GRPC changes.
 - Develop and promote guidance for Georgia lawyers about the development and use of GenAI within law practice (i.e. CLE (non-mandatory) and AI Toolkit).
- Advertising, Marketing & Public Communication
 - Develop and promote comment to Rule 7.1, recommending disclosure by lawyers employing AI-powered chatbots that a client’s interaction with the chatbot is not interaction with a lawyer.

4. February 10, 2025

The committee conducted its fourth meeting on February 10, 2025, assessing the status of its deliverables:

- AI Toolkit¹

Members discussed the development of the AI toolkit, expressing a preference for a regularly updated body of resources on AI and the practice of law. Law Practice Management Director Nkoyo

¹ The committee opted for the creation of the AI Toolkit in lieu of developing and promoting a formal advisory opinion. The committee determined the ethical use of AI is not nuanced: it is ethical to use AI tools so long as the Georgia lawyer using them understands how the technology works and can apply it within the context of the existing GRPC. The AI Toolkit will provide ongoing guidance to the State Bar’s membership to ensure and promote compliance with the GRPC, particularly in so far as technological advancements present lawyers with questions about whether their use of AI complies with the GRPC.

Effiong Nkoyo provided a rough sketch of the toolkit Andreea Morrison of the Office of the General Counsel was asked to assist with the ethics content. Nkoyo and Jenny Mittelman were appointed to lead the development of the toolkit with support from the members of the Technological Competence Subcommittee.

- CLEs

Members discussed potential CLEs focusing on generative AI and the ethical implications of using it in the practice of law. After determining that both the Privacy and Technology Section and the LPM Department will be hosting relevant CLEs, the committee approved promoting these rather than producing unique CLEs.

- Rules Modifications

Considering action taken by the State Bar Board of Governors during its Midyear Meeting, of the Rules changes recommended by the subcommittees, only one, an amendment of Rule 5.3 (Responsibilities Regarding Nonlawyer Assistants), remains to be developed. The committee recommended updating this Rule to add reference to services, tools, and output to more clearly cover the use of AI, and Jason Loring, Matthew Weatherington, Jenny Mittelman, and Andreea Morrison were assigned to develop this.

5. March 27, 2025 & April 28, 2025

The committee conducted its fifth meeting on March 27, 2025, and its sixth meeting April 28, 2025. At both it conducted an additional assessment of its deliverables.

- AI Toolkit

The committee received an outline for the AI Toolkit. The Toolkit will be housed on the State Bar's website and feature sections devoted to ethical and regulatory considerations, risk mitigation strategies, practical applications of GenAI, education & training, and practical resources.

- Amendment to GRPC 5.3

The Office of the General Counsel presented proposed amendments to Rule 5.3 (Responsibilities Regarding Nonlawyer Assistants) to the Disciplinary Rules and Procedures Committee during its March 21, 2025 meeting. That Committee identified edits to the proposal, which have been made, with a revised proposal to be presented at that Committee's next meeting prior to the State Bar of Georgia Annual meeting.

Recommendations

Promote the completion and launch an AI Toolkit for Georgia lawyers. Viewed by the committee as the most practical and useful guidance for Georgia lawyers utilizing AI tools, the toolkit will be a dynamic reference tool, providing guidance about the ethical application of generative AI in the practice of law. Once completed, it will provide Georgia lawyers utilizing GenAI technologies with recommendations, suggestions, and resources to ensure their use of GenAI (and other emerging technology) is appropriate, ethical, and in compliance with the GRPC.

The AI Toolkit will consider a broad range of ethical and regulatory implications from the use of GenAI and provide core ethical guidelines relevant to the GRPC by way of an easy to reference chart. The AI Toolkit will also match the rapidly developing nature of AI: dynamic and subject to change and improvement as required to address the use of AI by Georgia lawyers. The AI Toolkit will be hosted by the State Bar of Georgia's Law Practice Management Program and accessible by all Georgia lawyers via the State Bar's website.

Promote adoption of an amendment to Rule 5.3 to add reference to services, tools, and output to more clearly cover the use of AI. A revised proposal for this amendment has been provided to the Disciplinary Rules Committee. Its adoption of that proposal will permit this amendment to be considered by the Board of Governors during its Fall 2025 meeting.²

Finally, the committee will continue monitoring emerging technologies, and considering these, perform an ongoing assessment about the need for changes to the GRPC and Bar policies to address them, as well as the need for tools to aid State Bar of Georgia members as they integrate these into their practices.

² This is in addition to the committee's ongoing promotion of the adoption of proposed comment 6 to GRPC 1.1 and amendment to GRPC 1.6(c). The committee finds comment 6 to GRPC 1.1 particularly critical, because it explicitly addresses the relationship between a lawyer's competence and her or his proficiency with prevailing technology. It is the committee's assessment GenAI tools will in short order become ubiquitous. This and the power of these tools make it more important than ever before that lawyer's understand the direct relationship between proficiency with technological tools and competence.



CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

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Chief Justice, Supreme Court of Georgia
Atlanta, Georgia

Mr. M. Lamar Barnett, Jr.
AFLAC
Columbus, Georgia

Associate Dean Michael Scott Boone
Atlanta's John Marshall Law School
Atlanta, Georgia

Mrs. Marie Greene Broder
Griffin Judicial Circuit District Attorney's
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Griffin, Georgia

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Atlanta, Georgia

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Emory University School of Law
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Mr. Francis Johnson
Davis Bozeman Johnson Law
Statesboro, GA

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Federal Government
Atlanta, GA

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State Court of Forsyth County
Cumming, Georgia

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Cobb County Solicitor General's Office
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Bryant & O'Connor Law Firm
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Atlanta Circuit Public Defender's Office
Atlanta, Georgia

Mrs. Cathy Clark Tyler
Atkins Global North America, Inc
Atlanta, Georgia

Ms. LaToya Simone Williams
Georgia Public Defender Council
Atlanta, Georgia

Supreme Court of Georgia Advisor
The Honorable Andrew A. Pinson
Supreme Court of Georgia
Atlanta, Georgia

Staff
Ms. Karlise Y. Grier
Executive Director

TO: Board of Governors of the State Bar of Georgia

FROM: Karlise Yvette Grier
Executive Director, Chief Justice's Commission on Professionalism

DATE: June 7, 2025

RE: Chief Justice's Commission on Professionalism

The Chief Justice's Commission on Professionalism (Commission), the first body of its kind in the nation, was created in 1989 by the Supreme Court of Georgia with the primary charge to enhance professionalism among Georgia's lawyers and judges. **Chief Justice Nels S.D. Peterson** serves as the current Chair of the Commission. Other judges who serve on the Commission are as follows: **Judge Elizabeth Gobeil** for the Court of Appeals of Georgia; **Judge Benjamin S. Richardson** (Chattahoochee Judicial Circuit) for the Council of Superior Court Judges; and **Chief Judge T. Russell McClelland III** (State Court of Forsyth County) for the Council of State Court Judges. **Judge Steven D. Grimberg** serves on the Commission for the federal judiciary. **Justice Andrew A. Pinson** is the Supreme Court of Georgia advisor to the Commission. You may find a complete list of Commission members, advisors, and liaisons at the Commission's website at <https://cjcpga.org/commission-members-2024-2025/>. A brief update of some of the Commission's activities as of May 7, 2025, is as follows.

CONGRATULATIONS TO CHIEF JUSTICE NELS S.D. PETERSON AND TO JUSTICE BOGGS (RETIRED)

The Commission congratulates Chief Justice Nels S.D. Peterson who was sworn in as Chief Justice of the Supreme Court of Georgia on April 1, 2025. In addition, the Commission thanks former Chief Justice, Hon. Michael P. Boggs, for his service to the State, the Court and the Commission.

GRANT AWARDS FOR PROGRAMS OR PROJECTS THAT PROMOTE LEGAL PROFESSIONALISM – THE COMMISSION WANTS TO HEAR FROM YOU!

The Commission's Grants Committee, is chaired by **Ms. Nekia Hackworth Jones**.

For more information regarding the Commission's Grants program and an **article about the grants**, visit the Commission's website at: <http://cjcpga.org/grants/>



As the Commission continues its mission to enhance professionalism among Georgia's lawyers and judges we are asking to hear from you! The Commission's Grants Committee wants to identify the unmet legal professionalism needs in your legal community, practice area, local or voluntary bar association or professional association. A link to share your thoughts is on the Commission's grants webpage, accessible via the QR code and link on the previous page. If the Commission holds a 2025 Grant Cycle, the application period will most likely open on or about June 9, 2025, and end on July 15, 2025. If the Commission does accept grant applications, it will only do so electronically; however a PDF of a previous grant application is on the Commission's website for reference. Applicants eligible for grants are limited to: 1) Charities/nonprofits organized under § 501(c)(3) of the Internal Revenue Code; 2) Law schools and law-related educational programs; 3) Courts; or 4) Local or voluntary bar associations. Two articles describing some of the programs and projects of the Commission's past and present grant recipients, along with more detailed information regarding the Commission's Grant Criteria, is currently available on the Commission's website. The Commission's currently active 2025 Grant Award recipients are as follows: 1) GABWA Foundation for a) Sister to Sister Mentoring program and b) Civil Pro Bono Wills Project, Atlanta, GA; 2) Georgia Justice Project, Atlanta, GA; and 3) Safety Valve Project, Savannah, GA. For more information, please use the link or the QR code on the previous page to access the Commission's Grants webpage. ***The Commission can suspend its grant-making activities at any time for any reason. The Commission has created no vested rights in grants.***

SERVE AS A GROUP LEADER FOR THE 2025 LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), currently chaired by Mr. Michael Herskowitz. Mr. Carlos Vilela is currently the Vice Chair. As staff support for the Committee, the Commission funds in part and supports the Committee's work on the Law School Orientations on Professionalism. The subcommittee that is planning the 2025 law school orientation programs is co-chaired by **Ms. Maria Waters and Ms. Samantha Beskin-Schemer**. The orientations are designed to provide incoming first year law students with their first introduction to professionalism. Georgia judges and lawyers are invited to apply to serve as "Group Leaders" during the orientations to help students learn the meaning of professionalism and why it is important for them as law students. **Please visit the Commission's website to apply to serve as a Group Leader for the 2025 Law School Orientations on Professionalism.** Group Leaders will be notified if they are selected to serve in mid-July 2025. The dates (and APPROXIMATE times, if available) for the 2025 Law School Orientations on Professionalism are as follows:

- | | |
|--|---|
| • Atlanta's John Marshall Law School | Saturday, August 2, 2025, 8:30 am – 12 Noon |
| • Georgia State University School of Law | Tuesday, August 12, 2025, 3:00 pm – 7 pm (with a reception to follow) |
| • Emory University School of Law | Thursday, August 14, 2025, most likely late morning through early afternoon |
| • Mercer University School of Law | Friday, August 8, 2025, 1:30 pm – 4 pm |
| • University of Georgia School of Law | Friday, August 15, 2025, 12:30 pm – 4:30 pm |

For updates and additional information regarding the Law School Orientations on professionalism, or if you are interested in receiving the Group Leader application when it becomes available please visit <http://cjcpga.org/law-school-orientations-on-professionalism-2025/>.



THE 25TH ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Commission, in partnership with the Georgia Legal History Foundation (GLHF), hosted the 25th Annual Justice Robert Benham Awards for Community Service (CSA25) on **Tuesday, April 15, 2025, from 5:30 p.m. – 7:30 p.m.** at the Nathan Deal Judicial Center. **Ms. LaToya S. Williams** chairs the Benham Awards Planning Committee. **Judge Joy Lampley-Fortson** chairs the Benham Awards Selection Committee. The CSA25 District Award Recipients are as follows:

DISTRICT AWARD RECIPIENTS

JUDICIAL DISTRICT 1

Mr. Wade W. Herring II
Partner
Hunter, Maclean, Exley & Dunn, P.C.
Savannah, GA

JUDICIAL DISTRICT 4

Hon. Bryan Ramos
Chief Judge
Municipal Court of Brookhaven
Brookhaven, GA

JUDICIAL DISTRICT 7

Hon. Sonja N. Brown
Judge
Cobb Judicial Circuit Superior Court
Marietta, GA

JUDICIAL DISTRICT 5

Mr. Steve Jay Labovitz
Partner
Dentons US LLP
Atlanta, GA

Hon. William H. McClain
Senior Judge
Superior Courts of Georgia
Douglasville, GA

LIFETIME ACHIEVEMENT AWARD RECIPIENTS

Ms. Cathy Cox
President
Georgia College & State University
Milledgeville, GA
(Judicial District 8)

Mr. Kenneth Dious
Attorney
Kenneth Dious & Associates
Athens, GA
(Judicial District 10)

The Commission is grateful to the 28 sponsors who made the awards ceremony possible since no Commission professionalism fees are ultimately used to fund the awards ceremonies. The Commission also thanks its fundraising partner, the Georgia Legal History Foundation, for its assistance and support. The CSA25 sponsors are as follows:

DIAMOND

Greenberg Traurig, LLP

PLATINUM

Troutman Pepper Hamilton Sanders LLP

SILVER

Dentons

Smith, Gambrell & Russell, LLP

BRONZE

Alston & Bird

Johnson & Freeman, LLC

Akerman LLP

Kilpatrick Townsend & Stockton LLP

The Barnes Law Group

David Long-Daniels

The Finley Firm PC

Stewart Miller Simmons Trial Attorneys

Gentry Law Firm LLC

BRONZE (NON-PROFIT AND GOVERNMENT)

Georgia Association of Black Women Attorneys

Georgia Defense Lawyers Association

PATRON

Ann Baird Bishop

Hope Jamison

Hon. Brenda C. Cole

**Mr. Scott Killingsworth and Mrs. Patricia M.
Killingsworth**

Patrick T. O'Connor

Jena G. Emory

Brad Marsh and Betty Obenshain

Cathy L. Scarver

Anissa D. Floyd

Kevin Patrick Law

Darrell L. Sutton

Karlise Yvette Grier

For more information regarding the 25th Annual Justice
Robert Benham Awards for Community Service (CSA25),
visit: <https://cjcpga.org/benhamcsa25/>.



COMMISSION VIDEO CLE PROJECT WITH THE GEORGIA LEGAL HISTORY FOUNDATION

In November 2023, the Commission partnered with the Georgia Legal History Foundation (GLHF) on an oral history project that GLHF had begun earlier that year. GLHF obtained the oral histories of two of the founding members of Georgia's professionalism movement, Attorney Thomas G. ("Tom") Sampson, Sr. and Dean A. James ("Jim") Elliott. GLHF provided the Commission the raw video footage of the oral histories that GLHF had filmed. From the raw video footage filmed by GLHF, the Commission's Executive Director has been supervising the editing of the videos to create two approximately 1-hour professionalism CLE videos – one for Tom Sampson and one for Jim Elliott. On February 27, 2025, the Commission "premiered" the CLE video of Tom Sampson in a video CLE entitled *Thoughts on Living and Practicing With Professionalism: An Interview with Attorney Thomas G. Sampson, Sr. by Hon. Herbert E. Phipps (Retired)*. A more detailed report regarding that CLE is below. The Commission hopes to "premiere" the CLE video of Jim Elliott on or before June 30, 2025.

Report On Thoughts on Living and Practicing with Professionalism: An Interview with Attorney Thomas G. Sampson, Sr.

On February 27, 2025, from 12:15 pm – 1:30 pm, the Commission held a *FREE* virtual CLE entitled "*Thoughts on Living and Practicing with Professionalism: An Interview with Attorney Thomas G. Sampson, Sr. by Hon. Herbert E. Phipps (Retired)*." During this video CLE, viewers discovered how one attorney's personal life history and legal practice exemplified some of the professionalism aspirations set forth in *A Lawyer's Creed and the Aspirational Statement on Professionalism*. Throughout the video, references to *A Lawyer's Creed and the Aspirational Statement on Professionalism* were shown to provide context to the aspirational tenets, using the experiences that Mr. Sampson reported during his oral history. The oral history was obtained by the Georgia Legal History Foundation and the professionalism CLE video was produced in partnership with the Commission. The CLE was approved for one professionalism CLE hour. According to the Zoom report generated for the CLE, the CLE was attended by 1,293 "Unique Viewers." The Commission has reported attendance for 1,249 Georgia attorneys. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-ZvCs12XioFBeyJQDQ6r6dpOQ_3D_3D/. For more information regarding the CLE, please visit: https://cjcpga.org/sampson_video_cle/.

ADDITIONAL STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM PROJECTS

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), currently chaired by **Mr. Michael Herskowitz**. **Mr. Carlos Vilela** serves as the Committee's Vice-Chair. Some of the Committee's projects during the 23-24 Bar year are summarized below.

Report On JUGGLING LIFE, PROFESSIONALISM AND ETHICS CLE

On March 7, 2025, from 1:30 p.m. – 4:00 p.m., the Commission held a CLE entitled "*Juggling Life, Professionalism, and Ethics*." The planning team for the CLE included the Speakers and Writers Bureau Sub-Committee co-chairs, **Mr. Kevin Patrick** and **Mr. Michael Pérez**, Judge Rhonda Kreuziger, and Karlise Y. Grier. The speakers for the CLE were **Gwendolyn Fortson Waring**, Owner, The Waring Law Firm LLC; **Hon. Wes Tailor**, Judge, State Court of Fulton County; **Russ Willard**, General Counsel, State Bar of Georgia; and **Veronica Rogusky Cox**, Trial Attorney, U.S. Equal Employment Opportunity Commission and President-Elect, Young Lawyers Division, State Bar of

Georgia. **The Honorable Rhonda Kreuziger**, Judge, Griffin Judicial Circuit served as the moderator for the panel. During the CLE, the panelists discussed how to navigate life challenges and attorney ethical requirements and professionalism aspirational ideals. **The CLE was approved for 2 hours of general CLE credit, including 1 hour of professionalism CLE credit and 1 hour of ethics CLE credit.** According to the Zoom report generated for the CLE, the CLE was attended by 1,219 “Unique Viewers.” The Commission has reported attendance for 1,126 Georgia attorneys. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-d5kLwC_2BpgqnWVi9l9GlyFg_3D_3D/. To view the written materials and speaker biographies for the CLE, please visit: https://cjcpga.org/life_professionalism_and_ethics_sbg_cop_cle_03-07-25/.

Report On CLOSING A LAW PRACTICE CLE

On March 28, 2025, from **11:00 a.m. – 1:15 p.m.**, the Commission held a CLE entitled “*Closing A Law Practice and Transitioning To A New Practice or Out of the Practice of Law.*” The planning team for the CLE included the Speakers and Writers Bureau Sub-Committee co-chairs, Mr. Kevin Patrick and Mr. Michael Pérez, Judge Kimberly A. Alexander, and Karlise Y. Grier. The speakers for the CLE were **William C. Gentry**, Attorney at Law, Gentry Law Firm LLC, **Hon. Glenda Hatchett**, Of Counsel, Stewart Miller Simmons Trial Attorneys; **Andreea Morrison**, Deputy General Counsel, Office of General Counsel, State Bar of Georgia; and **Cari King**, Deputy Director of Pro Bono Unit Partnerships & Collaborations at Georgia Legal Services Program. **The Honorable Kimberly A. Alexander**, Judge, State Court of DeKalb County, served as the moderator for the panel. **The CLE was approved for 2 hours of CLE general credit, including 1 hour of professionalism CLE credit and 1 hour of ethics CLE credit.** According to the Zoom report generated for the CLE, the CLE was attended by 546 “Unique Viewers.” The Commission will report attendance for Georgia attorneys by April 11, 2025. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-okKFuBdWZyabFaxl3RgYuA_3D_3D/. To view the written materials and speaker biographies for the CLE, please visit https://cjcpga.org/closing-a-law-practice-cle_03-28-25/.

UPDATE ON LAW DAY 2025 AND CONNECT WITH A COLLEAGUE CONTEST

The Commission will provide updates on the Committee’s Connect With A Colleague Contest, <https://cjcpga.org/cwac/>, and Law Day projects, <https://www.gabar.org/law-day>, during the Fall Board of Governors’ meeting.

PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published four times per year. The February 2025 Georgia Bar Journal Professionalism Page entitled *Diminished Capacity, Ethics and Professionalism* is attached as “Exhibit A.” The May 2025 Georgia Bar Journal Professionalism Page entitled *A Call To Action* is attached as “Exhibit B.” Many of the Commission’s Professionalism Page articles are available on the Commission’s website at the link here: <https://cjcpga.org/georgia-bar-journal-articles/>.

COMMISSION MEMBER RETIREMENTS AS OF JUNE 30, 2025, AND COMMISSION APPOINTMENTS

The Commission thanks the Commission members who are retiring from the Commission on June 30, 2025, after the completion of their terms of service as follows: Judge T. Russell McClelland, III; Cathy Clark Tyler; Molly Barrett Gillis; Ivy N. Cadle; and Kenneth “Kenny” Mitchell, Jr.

Mr. Christopher P. Twyman and Ms. Veronica Rogusky Cox will serve on the Commission ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively. Hon. Jeff Hanson, Chief Judge, State Court of Bibb County, has been designated by the Council of State Court Judges to serve on the Commission for a term from July 1, 2025, through June 30, 2027. Mr. David M. Paule has been nominated to serve on the Commission as a lay person designee of the Board of Governors for a term from July 1, 2025, through June 30, 2028, and will serve if the Board of Governors approves his appointment to the Commission at the Annual Meeting. The Commission may announce additional appointments on or about July 1, 2025, on its website at <https://cjcpga.org/commission-members-2025-2026/>.

COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS

The Commission’s Executive Director is available to assist State Bar of Georgia sections, local and voluntary Bar associations, and other law-related organizations with their professionalism CLE programming to ensure the programming is in compliance with the Commission’s *Revised Professionalism CLE Guidelines*, which became effective July 1, 2019. You may find the *Revised Professionalism CLE Guidelines* on the Commission’s website at the link here: <https://cjcpga.org/professionalism-cle-guidelines/>. Please contact the Commission’s Executive Director, Karlise Y. Grier, via e-mail at kygrier@cjcpga.org if you would like assistance in planning a professionalism CLE program or if you would like to have her to make a professionalism presentation to your organization.

COMMISSION WEBSITE AND SOCIAL MEDIA

The Commission enjoys communicating with lawyers and judges about professionalism on the Commission’s social media platforms and via its website. Tell us what #professionalism means to you and why it matters. Connect with us!

Professionalism 2U: <http://cjcpga.org/2u/>

Twitter (now known as X): <https://x.com/CJCPGA>

LinkedIn: <https://www.linkedin.com/company/cjcpga/>

Instagram: <https://www.instagram.com/CJCPGA/>

Facebook: <https://www.facebook.com/cjcpga2/>

YouTube: <https://www.youtube.com/user/cjcpga/videos>



Diminished Capacity, Ethics and Professionalism

The Chief Justice's Commission on Professionalism held a CLE in September that brought together a multi-practice and multi-disciplinary group of professionals to discuss how the legal profession could better serve individuals with diminished capacity.

BY KARLISE Y. GRIER



On Sept. 6, 2024, the Chief Justice's Commission on Professionalism held a 6-hour hybrid CLE entitled Diminished Capacity, Ethics and Professionalism: How to Effectively Advocate for and Communicate With Individuals With Diminished Capacity.¹ The Diminished Capacity CLE brought together a multi-practice and multi-disciplinary group of professionals to discuss how the legal profession could better serve individuals with diminished capacity. Commission member Lauren Shubow, assistant public defender, Office of the Public Defender, Atlanta Judicial Circuit, and Brenda King Woodard, general counsel/ethics officer, Georgia Department of Behavioral Health and Developmental Disabilities served as the program co-chairs. The day began with opening remarks from Kevin Tanner, commissioner for the Georgia Department of Behavioral Health and Developmental Disabilities (DBHDD). Tanner thanked Georgia attorneys for

Program Co-Chair Lauren Shubow spoke during the plenary session of the CLE.

PHOTO BY DON MORGAN PHOTOGRAPHY

ensuring that the rights of clients with diminished capacity were upheld. He also said that attorneys have the ability to affect change not only in the courtroom but also in the lives of the individuals with diminished capacity. Tanner also assured the audience that DBHDD is working hard every day to improve services in Georgia for individuals with diminished capacity.

Thereafter, Shubow provided an introduction to legal concepts regarding diminished capacity. She said that the issue of diminished capacity impacted every area of law, and to emphasize her point she showed a graphic that listed 28 titles of O.C.G.A. that included the words competency or capacity in its statutory language. Shubow also shared statistics on the categories of individuals in the United States who might potentially meet one of the legal definitions of diminished capacity. Shubow explained that the dictionary definition of diminished capacity reads: "Diminished capacity is a condition where a person may not be capable of making effective decisions about one's life." She also explained that diminished capacity can also manifest as also a loss or lack of competency. She continued that capacity can refer to your ability to decide things (decisional capacity) or your ability to take effective action (executorial capacity). Shubow highlighted one of the most important learning objectives for the CLE when she explained that legal incompetence and legal incapacity are defined *slightly* differently constitutionally, statutorily and through case law, depending on each practice area and the person who might have diminished capacity. Shubow then told the audience that later speakers would give more detailed nuances about diminished capacity but provided a high-



Georgia Department of Behavioral Health and Developmental Disabilities (DBHDD)
Commissioner Kevin Tanner and DBHDD General Counsel/Ethics Officer Brenda King Woodard.

level overview of some of the information the audience would learn throughout the day. Shubow cautioned attorneys that just because a client might make decisions that were eccentric, ill advised and/or against the client's own interests did not necessarily mean that the client had diminished capacity. She also encouraged attendees to remember that attorneys are not doctors and to get help from clinicians when attorneys needed help regarding possible issues of diminished capacity.

After Shubow spoke, Dr. Emile Risby, M.D., J.M., chief medical officer and director, Division of Hospital Services, Georgia Department of Behavioral Health and Developmental Disabilities, and Dr. Alan Williams, Ph.D., psychologist, Mercer Medicine, presented on the topic of

cognitive development/decline and consent. Risby first discussed the role of forensic mental health professionals in legal proceedings. He explained that forensic mental health professionals conduct the appropriate clinical assessments, educate and advise attorneys, help the trier of fact understand the clinical issues. Risby also said that in Georgia, diminished capacity is not a stand-alone legal defense but rather a relevant consideration: 1) in various civil proceedings, including testamentary capacity and contract disputes; and 2) in criminal proceedings, as a possible mitigation factor. He then discussed various issues relating to consent. Risby asked the audience to contemplate issues as follows when considering questions of diminished capacity and consent:



**Serve the Bar.
Earn CLE credit.**

2 Volunteer and complete online training to be a peer in the Georgia Lawyers Helping Lawyers program and earn up to **two** CLE hours during your training. Visit www.georgiaLHLog.org to learn more.

3 Coach a team or judge a trial for the High School Mock Trial program and receive up to **three** hours of CLE credit. Contact richardh@gabar.org for more information and to volunteer.

6 Earn up to **six** CLE credits for having your legal article published in the *Georgia Bar Journal*. Contact jenniferm@gabar.org to learn more.



**State Bar
of Georgia**

Does a person with diminished capacity have enough capacity to *consent to* _____? (e.g., medical treatment or legal counsel or signing documents, etc.)

If the person lacks the capacity to consent, who can?

He concluded that the significance of diminished capacity is based on the severity of the capacity disorder plus the specific legal circumstances.

Next, Williams shared information with the audience regarding cognitive development and cognitive decline. For example, while discussing brain development, he observed that 65% of 11- to 13-year-old individuals would admit to a crime when questioned while only 20% of 18- to 24-year-old individuals would admit to a crime when questioned. Williams then discussed dementia, which he defined as a progressive deterioration of intellect, behavior and personality due to diffuse brain disease. He further clarified that dementia is a *symptom* of disease rather than a single disease entity. He noted that dementia can occur at any age, but noted it is more common among the elderly. For example, he said dementia is prevalent in approximately 1-5% of 50- and 70-year-old individuals; approximately 20% of 80-year-old individuals; and approximately 50% of 90-year-old individuals. Williams shared red flags for which attorneys could look, probing questions attorney could ask and provided guidance on when attorneys might want to seek a consultation regarding a client's capacity.

The audience next heard from a panel on the term diminished capacity as it is used in the Georgia Rules of Professional Conduct (GRPC)—our ethics rules. The panel, which was moderated by Professor Suparna Malempati, Atlanta's John Marshall Law School, discussed GRPC Rule 1.14 using a series of hypothetical problems provided by commission member Professor Patrick Longan, Mercer Uni-

versity Walter F. George School of Law, and Susan Walker Goico, managing attorney, Disability Integration Project, Atlanta Legal Aid Society, Inc. The panel included attorneys from a variety of practice areas from around the state: Stacy E. Reynolds, senior attorney, Senior Citizens Law Project, Atlanta Legal Aid Society, Inc.; Lashawn E. Mikell, CPM®, CWLS, supervising child attorney, Fulton County Office of the Child Attorney; Robert W. Bush, statewide director, Elder Law Project, Georgia Legal Services Program, Inc.; Sandra Satchell, chief assistant public defender, Dougherty Judicial Circuit.

After the ethics panel, Celeste Bates, LCSW, behavioral health court liaison, Office of Adult Mental Health for DBHDD, and Joy Bell, MPA, forensics manager, Office of Adult Mental Health for DBHDD, provided the audience with a "LEAP" demonstration. LEAP is a communication process developed by Dr. Xavier Amador, a psychologist at Columbia University in the City of New York, to assist families and mental health providers in helping someone living with mental illness recognize the signs of their condition and seek treatment.²

Once the ethics panel and the LEAP panel had provided foundational concepts from both legal and clinical perspectives, the next panel discussed professionalism. Hon. Amanda N. Heath, judge, Superior Court, Augusta Judicial Circuit, moderated the professionalism panel. The panel was composed of attorneys from diverse practice areas and included Royce Sago, owner, The Bluit Law Firm, LLC; Dana C. Ashford, The Ashford Law Firm, LLC; Christopher K. Gifford, owner, Gifford Law Firm; Rachel Gordon, Fulton County Public Defender's Office; Daniel A. Hiatt, senior assistant district attorney, Griffin Judicial Circuit. The professionalism panel provided suggested professionalism considerations that are either not addressed or

required by the ethics rules, but that might assist in providing better legal outcomes for clients, or assist attorneys in working with opposing parties and counsels, the court, the profession and the public in cases involving individuals with diminished capacity. For example, Hiatt, the prosecutor on the panel, shared insights regarding professionalism in criminal law cases for prosecutors who do not have clients and who are therefore not bound by GRPC Rule 1.14. The panel also suggested considerations for client interaction during the client intake process and throughout the representation. The panel noted, for example, that an attorney could better identify any diminished capacity/legal incapacitation issues if the attorney had more frequent interactions with a client. In cases with minors, where children are still developing cognitively or in cases of injury where a client may be healing, or in probate cases, where a client may be mentally declining, more frequent contact could potentially improve the ability of the attorney to effectively represent their client. The panel also discussed if, when and how to involve the court if an attorney suspected that a party, witness or a counsel involved in a case had diminished capacity.

The final plenary speaker of the day was Dr. Matthew W. Norman, owner, Matthew W. Norman, MD, LLC, who discussed Diminished Capacities Across Different Contexts: A Psychiatric Perspective. Norman opened his presentation by recognizing one of his mentors and another CLE speaker, Dr. Emile Risby. Norman said Risby had helped to train him until Risby was called to active military duty after the 9/11 attacks on the United States. For his presentation, Norman used the terms "capacity" and "competency." He said physicians are not judges; therefore, physicians only decide "decisional capacity." Norman defined "decisional capacity" as a level of functioning at which society

is willing to accept an individual continuing to make their own decisions. He emphasized that decisional capacity is not a static line. Norman also noted that courts and judges determine the "competency" of an individual. Additionally, Norman provided specific examples of competencies that included the ability to write a will (testamentary capacity); make a contract and/or financial decisions; drive an automobile; make medical and/or healthcare decisions; or get married. He further observed that different transactions and decisions have different requirements regarding capacity and stated that all of the foregoing transactions required different levels of capacity, which were defined in the various Georgia statutes.

After the plenary sessions, the audience (both in person and via Zoom) participated in four breakout sessions by the practice areas of probate law, general civil practice, juvenile dependency/family law and juvenile delinquency/criminal law. The Commission staff could not have planned and presented the CLE without the assistance of the planning team who, in addition to the program chairs, were: Emma Brown-Bernstein, assistant public defender, Fulton County Public Defender's Office; Catherine Ellis, licensed master social worker; Susan Walker Goico; Karlise Y. Grier, executive director, Chief Justice's Commission on Professionalism; Hon. Bedelia C. Hargrove, chief judge, DeKalb County Probate Court; Hon. Sarah S. Harris, judge, Bibb County Probate Court; Dara "Chinny" Law, partner, Ramos & Law; Professor Pat Longan; Professor Suparna Malempati; Hon. Russ McClelland, chief judge, Forsyth County State Court; and Hon. Constance Russell, retired judge, Atlanta Judicial Circuit. In addition, on the day of the program, several law students and one recent law school graduate provided critical staff support for the CLE program: Shinnay

Richards, J.D. '24, Atlanta's John Marshall Law School; Ian Diego Reyes, J.D. candidate '25, Georgia State University College of Law; Elaine Hardwick, J.D. candidate '26, Atlanta's John Marshall Law School; and Andrew Valladares, J.D. candidate '26, Georgia State University College of Law.

Finally, I'd encourage everyone reading this article to consider ideas shared by one of the CLE's speakers and planning team members. In a more light-hearted moment during his presentation, Norman quoted psychotherapist, Dr. Alfred Adler who said: "The only normal people are the ones you don't know very well." Although amusing, the Adler quote that Norman shared emphasized an important issue that the planning team discussed when a team member asked if the legal system was able to accommodate individuals with diminished capacity. In response to the question, Brown-Bernstein shared an insightful challenge, that I'd encourage every lawyer to ponder. She remarked that the legal system has to accommodate individuals with diminished capacity. It is the reality of the system. As we learn new things about mental health and how to think about mental health, lawyers also need to change the court system to better accommodate those who need the court system. Brown-Bernstein concluded: "Our job as lawyers is to help make that change." ●



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Endnotes

1. See, e.g., https://cjcpga.org/09-06-24_cjcp_cle_re_diminished_capacity/.
2. See, e.g., <https://namiga.org/resources/about-mental-illness/leap-assist-someone-accept-help/>.

A Call to Action

The Chief Justice's Commission on Professionalism wants to hear from Georgia lawyers and judges about your unmet professionalism needs.

BY KARLISE Y. GRIER



Almost since its inception in 1989, the Chief Justice's Commission on Professionalism has offered grants to support projects or programs that promote legal professionalism. Over the years, the Commission has revised and strengthened its grants program and in 2020, with the help of then Solicitor-General Andrew A. Pinson (now Justice Pinson), the Commission formalized its grant criteria¹ and the procedures it uses for selecting and awarding grants. As the Commission continues its mission² to enhance professionalism among Georgia's lawyers and judges we are asking to hear from you. One of the things we need your help with is getting ideas and information about what professionalism needs you see as being unmet in your community and suggestions for how the Commission could best help you meet those, possibly in conjunction with the Commission's grants program. Commission member Nekia Hackworth Jones, who chairs the Commission's Grants Committee, observed: "[Former] Chief Justice Michael Boggs has brought unprecedented experience and engagement to the Commission's legal professionalism

grants program. This is another example of his lifelong commitment to justice and unwavering dedication to public service. Chief Justice Boggs' leadership has poised the Commission to continue its years-long tradition of providing financial support to innovative and impactful professionalism training, initiatives and projects across the state of Georgia."

The Commission's Grants Committee wants to identify professionalism needs your legal community, practice area, local or voluntary bar association, or professional association might have that you believe are not currently being met by current CLE courses, other programming or other projects. For example, are there niche areas of practice or legal professionalism needs of Georgia's lawyers or judges that are deserving of more attention or training on a statewide basis but that might be hard to meet within smaller legal communities or organizations without additional assistance and support? The Commission's Grants Committee would like to hear from you about your ideas and thoughts for ways the Commission can support our Georgia lawyers and judges. As a call to action, we invite you to share with us your thoughts on additional ways to enhance and strengthen professionalism among Georgia's lawyers and judges. Please act

now and respond to a survey by visiting https://bit.ly/cjcpga_survey or by using the QR code below and share with the Commission's Grants Committee your ideas regarding the unmet legal professionalism needs that you see in your legal community, practice areas, bar associations, professional associations, courts, tribunals, mediations, transactions, negotiations, deals or other legal endeavors. The Commission's Grants Committee wants to hear from you.³



The Commission is also pleased to announce that the Grants Committee accepted applications electronically for grants to promote legal professionalism from June 7, 2024, until July 15, 2024. On Oct. 29, 2024, the Commission approved four grant applications, and on

Dec. 12, 2024, the Commission offered grant award information to four organization for projects or programs that were scheduled to take place during the 2025 calendar year:

- GABWA Foundation (Atlanta, Georgia) for their Sister to Sister Mentoring Program and their Civil Pro Bono Wills Project;
- Georgia Justice Project (Atlanta, Georgia);
- Safety Valve Project (Savannah, Georgia); and
- Southwest Georgia Legal Self-Help Center (Albany, Georgia).

The Commission sent grant award checks to these four organizations in January 2025. If the Commission holds a 2025 grant cycle, the application period will most likely open on or about June 9, 2025, and end on July 15, 2025.

One of the Commission's 2025 grant award recipients, the Safety Valve Project (SVP), was founded in Savannah, Georgia, by a team of passionate attorneys and teachers who believed that the majority of students in their community, despite the statutory right to counsel, appeared before disciplinary tribunals without counsel. SVP requested a grant to help implement a first-of-its-kind model in Georgia of partnering pro bono volunteer attor-

neys with forensic social workers/mitigation specialists to assist the volunteer attorneys in investigating and preparing for the disciplinary cases in advance of the disciplinary proceedings. The SVP mitigation investigations are rooted in death penalty defense but had not, until SVP developed its model, been applied as a filter to school disciplinary cases.

Attorney Wade W. Herring II, who volunteers for SVP, shared his thoughts about why he chose to volunteer. Herring said:

The Safety Valve Project provides free legal representation for public school students facing expulsion, long-term suspension, or alternative placement. I know that education has the power to transform lives. ...

I graduated from high school in 1976 after 12 years of public education. I am grateful for the many teachers who knew and encouraged me. In those unusual instances when the school system did not treat me fairly (even when our schools were less bureaucratic), my mother, herself a public-school teacher, was an effective advocate on my behalf.

Every child deserves a chance for a real education. Every child needs adults to help them along the way. The Lord did not give me the same talents as my mother—I could never be a classroom teacher. But when a school system chooses to treat a child like a legal problem to be discharged, I can be an advocate for that child, an ally against an unthinking and unfair bureaucracy. That's why I volunteered for the Safety Valve Project.

The SVP narrative is one example of how the Commission has supported lawyers who seek to embody the professionalism aspirations set forth in A Lawyer's

Creed and the Aspirational Statement on Professionalism.⁴ Your idea for professionalism needs may be for a CLE program on civility, or for a Law Day project discussing civics, or for a local program to bring attorneys in your community who do not normally socialize with one another together at a gathering or for any other myriad of programs or projects to enhance professionalism among Georgia's lawyers and judges. Your ideas may differ from those listed above—but that is the point. I provide suggestions not to limit but to ignite your imagination to consider new and different ideas. We want you to share *your* ideas on the unmet legal professionalism needs you see in your spheres of practice or community. The Commission's Grants Committee wants to hear from you and looks forward to reading your responses to the unmet legal professionalism needs survey. ●



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Endnotes

1. See Chief Justice's Commission on Professionalism, Grants, Grant Criteria, v.08-28-20, <https://tj9362.p3cdn1.secureserver.net/wp-content/uploads/2020/09/CJCP-Grant-Criteria-As-Approved-By-Commission-CJCP-on-08-28-20-FINAL-v09-17-20.pdf> (Last visited April 7, 2025).
2. See Chief Justice's Commission on Professionalism, Mission, <https://cjcpga.org/mission/> (Last visited April 7, 2025).
3. For more information regarding the Commission's Grants Program, visit www.cjcpga.org/grants.
4. See Chief Justice's Commission on Professionalism, *A Lawyer's Creed and the Aspirational Statement on Professionalism*, <https://cjcpga.org/>

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Supreme Court of Georgia
Atlanta, Georgia

[wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf](https://www.cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf) (Last visited April 7, 2025).

**STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT**

JUNE 30, 2024



STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2024

STATE BAR OF GEORGIA

COMBINED FINANCIAL REPORT
JUNE 30, 2024

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INDEPENDENT AUDITOR'S REPORT

**To the Board of Governors
State Bar of Georgia
Atlanta, Georgia**

Opinion

We have audited the accompanying combined financial statements of the **State Bar of Georgia** and related entity (collectively the "State Bar") (a nonprofit organization), which comprise the combined statements of financial position as of June 30, 2024 and 2023, and the related combined statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the combined financial statements.

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of State Bar as of June 30, 2024 and 2023, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Combined Financial Statements section of our report. We are required to be independent of the State Bar and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Combined Financial Statements

Management is responsible for the preparation and fair presentation of the combined financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of combined financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the combined financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern within one year after the date that the combined financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Combined Financial Statements

Our objectives are to obtain reasonable assurance about whether the combined financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the combined financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the combined financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the combined financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the State Bar's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the combined financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Report on Supplemental Information

Our audit was conducted for the purpose of forming an opinion on the combined financial statements as a whole. The supplemental information on pages 20 through 23 is presented for purposes of additional analysis and is not a required part of the combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined financial statements or to the combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the combined financial statements as a whole.

Mauldin & Jenkins, LLC

Atlanta, Georgia
October 23, 2024

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2024 AND 2023

	<u>2024</u>	<u>2023</u>
ASSETS		
Cash and cash equivalents	\$ 25,085,480	\$ 25,859,017
Accounts receivable, net	121,100	140,109
Receivable from related parties	696,257	803,959
Receivable from employees	16,450	18,432
Accrued interest receivable	112,008	67,748
Prepaid and other assets	435,786	389,573
Investments, at fair value	19,373,716	17,254,051
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,214,287	6,602,131
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	935,975	708,231
Right-of-use assets - operating	<u>354,796</u>	<u>339,257</u>
Total assets	<u><u>\$ 53,345,855</u></u>	<u><u>\$ 52,182,508</u></u>
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 2,451,045	\$ 1,902,436
Accrued salary and retirement plan expense	938,939	868,102
Payable to Clients' Security Fund	2,782,908	2,217,202
Payable to related parties	238,996	265,327
Accrued vacation	593,724	575,166
Deferred income - dues and sections	9,454,962	10,156,267
Other deferred income	-	23,596
Lease liability - operating	353,219	332,715
Total liabilities	<u><u>16,813,793</u></u>	<u><u>16,340,811</u></u>
Net assets		
Without donor restrictions		
Undesignated	6,576,020	6,065,703
Board-designated	<u>26,984,953</u>	<u>27,460,339</u>
Total without donor restrictions	<u>33,560,973</u>	<u>33,526,042</u>
With donor restrictions	<u>2,971,089</u>	<u>2,315,655</u>
Total net assets	<u><u>36,532,062</u></u>	<u><u>35,841,697</u></u>
Total liabilities and net assets	<u><u>\$ 53,345,855</u></u>	<u><u>\$ 52,182,508</u></u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2024

	Without donor restrictions			
	Undesignated	Board- designated	With donor restrictions	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,308,061	\$ -	\$ -	\$ 12,308,061
Advertising	45,389	-	-	45,389
Membership	273,218	-	-	273,218
Total fees	12,626,668	-	-	12,626,668
ICLE				
Program revenues	4,790,571	-	-	4,790,571
Total ICLE	4,790,571	-	-	4,790,571
Other revenues				
Contributions	-	1,234,693	1,249,254	2,483,947
Section dues	-	1,678,774	-	1,678,774
Convention and meeting fees	-	47,500	-	47,500
Law practice management fees	20,222	-	-	20,222
Young lawyers division fees	4,980	-	-	4,980
High school mock trial fees	52,230	-	-	52,230
Investment income	212,543	878,861	-	1,091,404
Rental income	-	939,928	-	939,928
Other	761,509	-	-	761,509
Total other revenues	1,051,484	4,779,756	1,249,254	7,080,494
Net assets released from restrictions	-	593,820	(593,820)	-
Total revenues and other support	18,468,723	5,373,576	655,434	24,497,733
EXPENSES				
Program services				
Counsel	4,695,043	-	-	4,695,043
Communications	934,436	-	-	934,436
Membership	1,114,314	-	-	1,114,314
Unauthorized practice of law	947,824	-	-	947,824
Law practice management	479,364	-	-	479,364
Law related education	423,214	-	-	423,214
Fee arbitration	545,228	-	-	545,228
Sections	1,782,184	-	-	1,782,184
Young lawyers division	569,112	-	-	569,112
ICLE	3,854,346	-	-	3,854,346
Other programs	214,423	1,891,044	-	2,105,467
Total program services	15,559,488	1,891,044	-	17,450,532
Supporting services				
Management and general	2,514,676	3,842,160	-	6,356,836
Total expenses	18,074,164	5,733,204	-	23,807,368
CHANGE IN NET ASSETS	394,559	(359,628)	655,434	690,365
NET ASSETS, BEGINNING	6,065,703	27,460,339	2,315,655	35,841,697
TRANSFERS	115,758	(115,758)	-	-
NET ASSETS, ENDING	\$ 6,576,020	\$ 26,984,953	\$ 2,971,089	\$ 36,532,062

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2023

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,163,372	\$ -	\$ -	\$ 12,163,372
Advertising	48,045	-	-	48,045
Membership	293,683	-	-	293,683
Total fees	<u>12,505,100</u>	<u>-</u>	<u>-</u>	<u>12,505,100</u>
ICLE				
Program Revenues	4,882,060	-	-	4,882,060
Total ICLE	<u>4,882,060</u>	<u>-</u>	<u>-</u>	<u>4,882,060</u>
Other revenues				
Contributions	-	1,448,010	1,009,287	2,457,297
Section dues	-	1,461,594	-	1,461,594
Convention and meeting fees	-	47,500	-	47,500
Law practice management fees	40,522	-	-	40,522
Young lawyers division fees	8,115	-	-	8,115
High school mock trial fees	50,367	-	-	50,367
Assessment income	-	165	-	165
Investment income (loss)	(57,606)	216,178	58,158	216,730
Rental income	-	931,685	-	931,685
Other	<u>729,414</u>	<u>-</u>	<u>-</u>	<u>729,414</u>
Total other revenues	770,812	4,105,132	1,067,445	5,943,389
Net assets released from restrictions	<u>-</u>	<u>813,362</u>	<u>(813,362)</u>	<u>-</u>
Total revenues and other support	<u>18,157,972</u>	<u>4,918,494</u>	<u>254,083</u>	<u>23,330,549</u>
EXPENSES				
Program services				
Counsel	4,525,474	-	-	4,525,474
Communications	951,935	-	-	951,935
Membership	1,010,758	-	-	1,010,758
Unauthorized practice of law	887,421	-	-	887,421
Law practice management	494,060	-	-	494,060
Law related education	391,421	-	-	391,421
Fee arbitration	537,443	-	-	537,443
Sections	1,509,743	-	-	1,509,743
Young lawyers division	551,927	-	-	551,927
ICLE	3,505,970	-	-	3,505,970
Other	<u>473,287</u>	<u>1,853,070</u>	<u>-</u>	<u>2,326,357</u>
Total program services	14,839,439	1,853,070	-	16,692,509
Supporting services				
Management and general	<u>2,491,496</u>	<u>3,626,108</u>	<u>-</u>	<u>6,117,604</u>
Total expenses	<u>17,330,935</u>	<u>5,479,178</u>	<u>-</u>	<u>22,810,113</u>
CHANGE IN NET ASSETS	827,037	(560,684)	254,083	520,436
NET ASSETS, BEGINNING	<u>5,122,265</u>	<u>28,137,424</u>	<u>2,061,572</u>	<u>35,321,261</u>
TRANSFERS	<u>116,401</u>	<u>(116,401)</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 6,065,703</u>	<u>\$ 27,460,339</u>	<u>\$ 2,315,655</u>	<u>\$ 35,841,697</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA

COMBINED STATEMENT OF FUNCTIONAL EXPENSES

FOR THE YEAR ENDED JUNE 30, 2024

	Program services										Supporting services			
	Counsel	Communications	Membership	Unauthorized practice of law	Law practice management	Law related education	Fee arbitration	Sections	Young lawyers division	ICLE	Other programs	Total program services	Management and general	Total
Personnel costs	\$ 2,819,837	\$ 289,165	\$ 302,958	\$ 566,639	\$ 267,385	\$ 226,032	\$ 248,379	\$ 178,905	\$ 127,649	\$ 1,099,472	\$ 110,174	\$ 6,236,495	\$ 1,712,515	\$ 7,948,010
Payroll taxes	203,189	21,405	22,625	42,932	19,971	16,861	19,630	13,624	9,280	84,755	6,171	480,143	125,837	585,980
Employee benefits	732,458	100,532	123,985	197,448	84,656	110,102	100,934	35,391	55,704	233,438	37,792	1,812,440	526,288	2,338,728
Office expenses	-	-	-	-	-	-	-	-	33,792	-	-	33,792	79,022	112,814
Shared administrative expenses	566,400	79,511	99,390	119,268	79,511	59,633	79,511	63,391	39,757	357,604	18,626	1,582,802	212,239	1,795,041
Rent and utilities	-	-	-	-	-	-	-	-	-	-	-	-	891,362	891,362
Office expenses	36,430	2,933	4,509	2,136	2,512	1,343	7,966	4,698	1,222	25,073	365	89,187	82,448	171,635
Printing and publications	-	273,976	-	-	-	-	-	-	-	-	-	273,976	-	273,976
Subscription and books	23,482	3,604	1,188	669	2,798	385	1,415	2,874	1,857	77,631	1,496	117,609	10,921	128,530
Dues and memberships	10,918	405	67,933	610	720	300	310	-	135	4,705	150	85,866	2,752	88,638
Seminars and training	9,515	3,098	-	1,339	1,359	300	-	-	850	8,622	-	23,924	18,923	42,847
Travel	69,684	12,651	-	977	5,961	2,038	3,145	4,793	13,535	18,333	4,863	135,990	69,324	205,304
Meetings and luncheons	3,338	-	290	-	310	-	-	1,889	123,005	5,166	645,032	781,158	17,576	795,734
Professional services and contract labor	28,575	30,436	675	-	-	-	72,000	-	-	-	-	448,890	580,536	1,016,245
Professional legal fees	-	-	-	-	-	-	-	-	-	-	-	264,255	-	264,255
Membership software license	-	-	117,490	-	-	-	-	-	-	-	-	117,490	-	117,490
Website redesign	-	29,300	57,912	-	-	-	-	-	157,173	1,797,289	273,093	3,694,164	-	3,694,164
Program expenses	-	-	-	-	-	-	-	1,476,619	-	-	-	267,382	-	267,382
Contributions	-	-	-	-	-	-	-	-	-	-	-	-	297,470	297,470
Fidelity Insurance	-	-	-	-	-	-	-	-	-	-	-	-	87,616	87,616
Computer software	8,305	1,458	-	-	-	-	-	-	-	-	-	-	15,198	159,344
Credit card discount and fees	-	-	-	-	4,706	-	-	-	729	-	95	410,249	7,952	418,201
Building rental costs	-	321	303,676	-	345	-	-	-	29	105,783	-	-	437,793	437,793
Building parking costs	-	-	-	-	-	-	-	-	-	-	-	-	289,549	289,549
Other	99,558	77,051	935	4,259	560	377	1,420	-	-	-	-	216,363	60,297	264,660
Depreciation	63,354	8,590	10,738	12,886	8,590	6,443	8,590	-	4,395	38,657	2,148	164,291	1,147,097	1,311,388
	\$ 4,695,043	\$ 934,436	\$ 1,114,314	\$ 947,624	\$ 479,364	\$ 423,214	\$ 545,228	\$ 1,702,184	\$ 589,112	\$ 3,854,346	\$ 2,105,467	\$ 17,460,532	\$ 6,356,836	\$ 23,807,368

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA

COMBINED STATEMENT OF FUNCTIONAL EXPENSES

FOR THE YEAR ENDED JUNE 30, 2023

	Program services										Supporting services			
	Counsel	Communications	Membership	Unauthorized practice of law	Law practice management	Law related education	Fee arbitration	Sections	Young lawyers division	ICLE	Other programs	Total program services	Management and general	Total
Personnel costs	\$ 2,721,320	\$ 276,693	\$ 313,323	\$ 541,659	\$ 263,025	\$ 210,153	\$ 271,077	\$ 134,963	\$ 111,197	\$ 599,411	\$ 222,524	\$ 6,095,304	\$ 1,937,096	\$ 7,613,120
Payroll taxes	193,530	29,703	23,940	41,057	19,723	15,408	20,972	10,432	8,084	72,079	16,392	442,290	105,512	547,902
Employee benefits	647,086	92,404	103,689	172,061	77,823	96,118	76,208	32,901	51,065	216,415	82,344	1,648,114	475,725	2,123,339
Office expenses	-	-	-	-	-	-	-	-	27,151	-	-	27,151	43,727	70,878
Shared administrative expenses	520,604	71,808	89,759	107,711	71,808	53,856	71,808	59,153	35,903	323,134	35,903	1,440,447	210,673	1,651,120
Rent and utilities	-	-	-	-	-	-	-	-	-	-	-	-	538,825	538,825
Office expenses	37,811	3,807	4,942	1,595	2,238	2,816	9,648	3,382	1,290	12,474	1,847	81,740	177,060	258,800
Printing and publications	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Subscription and books	20,075	4,193	301	546	3,872	387	977	2,309	1,984	89,805	1,221	125,370	8,903	134,273
Dues and memberships	8,993	405	51,510	530	324	-	305	-	90	3,411	915	66,383	1,794	68,177
Seminars and training	8,927	1,185	-	-	211	-	-	-	-	5,027	300	15,650	11,704	27,354
Travel	41,448	11,669	10	851	8,134	3,163	-	3,881	9,838	30,411	7,997	117,402	53,275	170,677
Meetings and luncheons	578	-	63	-	75	-	1,317	75	105,931	4,374	503,483	615,896	21,342	637,238
Professional service and contractor	139,253	28,759	1,200	-	-	-	72,963	-	-	5,838	448,881	666,894	380,087	1,076,981
Professional legal fees	-	-	-	-	-	-	-	-	-	-	467,909	467,909	-	467,909
Professional expenses	-	-	71,539	-	-	-	-	-	-	-	214,791	3,304,755	-	3,519,539
Membership software license	-	-	-	-	-	-	-	1,262,918	192,951	1,654,095	-	3,304,755	-	3,304,755
Contributions	-	-	-	-	-	-	-	-	-	-	267,382	267,382	-	267,382
Facilities	-	-	-	-	-	-	-	-	-	-	-	-	281,419	281,419
Insurance	-	-	-	-	-	-	-	-	-	-	-	-	77,806	77,806
Computer software	5,044	1,458	874	-	4,899	-	-	729	729	660	539	14,932	111,037	126,869
Credit card discount and fees	-	292	311,947	-	116	-	-	-	25	115,004	103	427,487	8,859	436,346
Building rental costs	-	-	-	-	-	-	-	-	-	-	-	-	559,614	559,614
Building parking costs	-	-	-	-	-	-	-	-	-	-	-	-	27,226	27,226
Other	98,120	67,412	23,479	4,296	30,395	957	751	-	-	2,754	-	269,146	264,036	514,082
Depreciation	82,775	11,417	14,272	17,126	11,417	8,653	11,417	-	5,709	51,378	2,854	216,928	1,159,274	1,376,202
	\$ 4,325,474	\$ 961,995	\$ 1,010,768	\$ 887,421	\$ 494,060	\$ 391,421	\$ 537,443	\$ 1,509,743	\$ 551,927	\$ 3,505,970	\$ 2,326,357	\$ 16,692,509	\$ 6,117,604	\$ 22,810,113

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

	2024	2023
OPERATING ACTIVITIES		
Change in net assets	\$ 690,365	\$ 520,436
Adjustments to reconcile change in net assets to net cash and cash equivalents provided by operating activities		
Depreciation	1,311,388	1,376,203
Net realized and unrealized (gains) losses on investments	(560,204)	149,964
Loss on disposal of fixed assets	461	23,914
Decrease (increase) in accounts receivable	19,009	(54,230)
Decrease (increase) in receivables from related parties	107,702	(10,584)
Decrease in receivables from employees	1,982	1,200
(Increase) decrease in accrued interest receivable	(44,260)	11,463
(Increase) in prepaid and other assets	(46,213)	(8,511)
Increase in accounts payable	548,609	111,742
Increase (decrease) in employee benefits payable	70,837	(98,075)
(Decrease) increase in payables to related parties	(26,331)	84,491
Increase (decrease) in accrued vacation	18,558	(39,154)
(Decrease) increase in deferred income - dues and sections	(701,305)	2,299,032
(Decrease) in other deferred income	(23,596)	-
Increase in payable to Clients' Security Fund	565,706	582,941
(Increase) in right-of-use assets - operating	(15,539)	(339,257)
Increase in lease liability - operating	20,504	332,715
Total adjustments	1,247,308	4,423,854
Net cash and cash equivalents provided by operating activities	1,937,673	4,944,290
INVESTING ACTIVITIES		
Purchases of building improvements, furniture, fixtures, and equipment	(1,151,749)	(114,785)
Purchases of investments	(6,538,885)	(8,477,875)
Proceeds from sale and maturity of investments	4,979,424	8,153,131
Net cash and cash equivalents (used in) investing activities	(2,711,210)	(439,529)
Net (decrease) increase in cash and cash equivalents	(773,537)	4,504,761
Cash and cash equivalents, beginning	25,859,017	21,354,256
Cash and cash equivalents, ending	\$ 25,085,480	\$ 25,859,017
SUPPLEMENTAL CASH FLOW INFORMATION		
Operating right-of-use assets obtained in exchange for new operating lease liabilities	\$ 88,335	-

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 1 – Summary of significant accounting policies

Description of Business – The State Bar of Georgia is a membership organization of attorneys in the state of Georgia that performs as a society and regulatory agency for its membership. The State Bar of Georgia Foundation, Inc. ("SBGF") is a foundation that supports the charitable and educational activities of the State Bar of Georgia. Pursuant to an agreement executed on December 30, 2016, between the Institute of Continuing Legal Education in Georgia, an unincorporated Georgia nonprofit association, and the State Bar of Georgia Foundation, Inc., a Georgia nonprofit corporation, the assets of the Institute of Continuing Education in Georgia were transferred to the SBGF for the purposes of continuing to provide continuing legal education in Georgia. After receiving these assets, SBGF entered into a contract with the State Bar of Georgia to create a program to provide continuing legal education to Georgia lawyers. As a result, the Institute of Continuing Legal Education of the State Bar of Georgia ("ICLE") was created as a program of the State Bar of Georgia, with the purpose of promoting a well-organized, properly planned, and adequately supported program of continuing legal education by which members of the legal profession may enhance their skills, keep abreast of developments in the law, ethics, and professionalism, engage in the study and research of the law, and disseminate the knowledge thus obtained. The combined financial statements include the State Bar of Georgia and the State Bar of Georgia Foundation, Inc., hereinafter collectively referred to as the "State Bar."

Accrual Basis – The combined financial statements of the State Bar have been prepared on the accrual basis of accounting. Under this method of accounting, revenues are recognized when earned, and expenses are recognized when incurred.

Basis of Presentation – The State Bar's net assets and revenue, expenses, gains, and losses are classified based on the existence or absence of donor-imposed restrictions. Accordingly, net assets of the State Bar and changes therein are classified and reported as net assets without donor restrictions and net assets with donor restrictions.

Net Assets Without Donor Restrictions – Net assets available for use in general operations and not subject to donor (or certain grantor) restrictions. It is the policy of the Board of Directors to review their financial standing from time to time and to designate sums of net assets without donor restrictions for specific efforts.

Net Assets With Donor Restrictions – Net assets subject to donor- (or certain grantor-) imposed restrictions. Some donor-imposed restrictions are temporary in nature, such as those that will be met by the passage of time or other events specified by the donor. Other donor-imposed restrictions are perpetual in nature, where the donor stipulates that resources be maintained in perpetuity. Gifts of long-lived assets and gifts of cash restricted for the acquisition of long-lived assets are recognized as revenue when the assets are placed in service. Donor-imposed restrictions are released when a restriction expires, this is, when the stipulated time has elapsed, when the stipulated purpose for which the resource was restricted has been fulfilled, or both.

Revenue is reported as increases in net assets without donor restrictions unless use of the related assets is limited by donor-imposed restrictions. Expenses are reported as decreases in net assets without donor restriction. Gains and losses on investments and other assets or liabilities are reported as increases or decreases in net assets without donor restriction unless their use is restricted by explicit donor stipulation or by law. Expirations of net assets with donor restrictions (i.e., the donor-stipulated purpose has been fulfilled and/or the stipulated time period has elapsed) are reported as reclassifications between the applicable classes of net assets.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 1 – Summary of significant accounting policies (Continued)

Cash and Cash Equivalents – For purposes of the combined statements of cash flows, the State Bar considers all highly liquid debt instruments with original maturities of three months or less to be cash equivalents. Cash equivalents were \$13,599,761 and \$15,323,591 at June 30, 2024 and 2023, respectively, consisting of money market funds. These funds are not insured.

At June 30, 2024 and 2023, in addition to the money market deposits above, the State Bar maintained bank deposits in excess of federally insured limits of \$10,643,019 and \$9,771,504, respectively.

Investments – All investments are reported in the combined statements of financial position at fair market value. In addition, both realized and unrealized gains and losses are included in the combined statements of activities. The State Bar has adopted an investment policy.

Fair Value of Financial Instruments – The State Bar has estimated the fair values of its financial instruments using available market information and other valuation methodologies in accordance with accounting principles generally accepted in the United States of America (“generally accepted accounting principles”). Accordingly, the estimates presented are not necessarily indicative of the amounts that the State Bar could realize in a current market exchange. Determinations of fair value are based on subjective data and significant judgment related to timing of payments and collection of the amounts to be realized. Different market assumptions and/or estimation methodologies might have a material effect on the estimated fair value amounts.

The carrying value of financial instruments such as cash and cash equivalents, other receivables, due to/from related organizations, accounts payable, and accruals approximate fair value because of the terms and relative short maturity of the financial instruments. The State Bar believes the carrying values of its financial instruments are reasonable estimates of their values, unless otherwise noted.

The fair value hierarchy for inputs used in measuring fair value maximizes the use of observable inputs and minimizes the use of unobservable inputs by requiring that the most observable inputs be used when available. Observable inputs are those that market participants would use in pricing the asset or liability based on market data obtained from sources independent of the State Bar. Unobservable inputs reflect the State Bar’s assumption about the inputs market participants would use in pricing the asset or liability developed based on the best information available in the circumstances.

The fair value hierarchy is classified in one of the following three levels based on the inputs:

Level 1: Financial instruments with unadjusted, quoted prices listed on active market exchanges.

Level 2: Financial instruments valued using inputs that include quoted prices for similar assets and liabilities in active markets, and inputs that are observable for the asset or liability, either directly or indirectly, for substantially the full term of the financial instrument.

Level 3: Financial instruments that are not actively traded on a market exchange and require using significant unobservable inputs in determining fair value.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 1 – Summary of significant accounting policies (Continued)

Building, Furniture, Fixtures, and Equipment – Additions to building, furniture, fixtures, and equipment in excess of \$2,500 are capitalized. Building, furniture, fixtures, and equipment are carried at cost. Depreciation expense is computed based on the estimated useful lives of the respective assets using the straight-line method of depreciation. The estimated useful lives range from three to twenty-seven and a half years.

Accounts Receivable – Accounts receivable are reported net of an allowance for credit losses. As of both June 30, 2024 and 2023, the allowance for credit losses was zero. Management determines the allowance for credit losses using the aging of accounts in addition to historical experience with various payors.

Revenue Recognition – The State Bar follows Financial Accounting Standards Board ("FASB") Topic 606, *Revenue from Contracts with Customers*. Membership dues, annual license fees, ICLE seminar fees and Bar Center assessments are recorded as revenue in the applicable year when received. Any amounts collected prior to and including June 30 applicable to the subsequent year's membership dues, assessments, or seminars are recorded as deferred income in the combined statements of financial position. Annual license fee and Bar Center assessment notices for the fiscal years ended June 30, 2024 and 2023 were sent out in April 2023 and April 2022, respectively.

Functional Allocation of Expenses – The costs of providing the various programs and other activities have been summarized on a functional basis in the combined statements of functional expense. Costs directly attributable to their program are summarized by their natural classification on the statement of functional expense. The State Bar's operating costs have been allocated between program and management and general. Costs that were not directly attributable to program or management and general have been allocated based on the size of the program or time spent.

Use of Estimates by Management – The preparation of the combined financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities at the date of the combined financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Income Taxes – The State Bar was established as an instrumentality of the state of Georgia, and its income is therefore exempt from income tax under Internal Revenue Code Section 115, per the Internal Revenue Service determination letter dated May 11, 1965. Under Section 115, net income from an activity other than an essential governmental function can be subject to taxation. In management's opinion, the State Bar did not have any such net income during the years ended June 30, 2024 and 2023.

The State Bar has evaluated the effect of generally accepted accounting principles guidance for Accounting for Uncertainty in Income Taxes. Management believes that the State Bar continues to satisfy the requirements of a tax-exempt organization and therefore had no uncertain income tax positions at June 30, 2024 and 2023.

The State Bar files Forms 990 in the U.S. federal jurisdiction and the State of Georgia.

Clients' Security Fund (CSF) – The State Bar of Georgia Clients' Security Fund is a trust administered by the CSF Board of Trustees to provide monetary relief to persons who suffer reimbursable losses as a result of the dishonest conduct of a suspended or disbarred member (or members) of the State Bar of Georgia. The CSF is governed by State Bar Rules 10-101 through 10-112.

The CSF is funded by an annual assessment of \$15 per dues-paying lawyer. The Board of Trustees shall not spend more than received through the annual assessment in a single year. The Board of Governors may from time to time adjust the fund's maximum annual assessment to advance the purposes of the fund or to preserve the fiscal integrity of the fund.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 1 – Summary of significant accounting policies (Continued)

Recent Accounting Pronouncements – On July 1, 2023, the State Bar adopted Accounting Standards Update (ASU) 2016-13 *Financial Instruments – Credit Losses* (Topic 326): *Measurement of Credit Losses on Financial Instruments* and all related subsequent amendments thereto (Accounting Standards Codification (ASC 326)). This standard replaced the incurred loss methodology with an expected loss methodology that is referred to as the current expected credit loss ("CECL") methodology. CECL requires an estimate of credit losses for the remaining estimated life of the financial asset using historical experience, current conditions, and reasonable and supportable held-to forecasts and generally applies to financial assets measured at amortized cost, including maturity debt securities and accounts receivable. Financial assets measured at amortized cost will be presented at the net amount expected to be collected by using an allowance for credit losses. The State Bar adopted ASC 326 using the modified retrospective method for all financial assets measured at amortized cost and any off-balance sheet credit exposures. Results from reporting periods beginning after July 1, 2023 are presented under ASC 326 while prior period amounts continue to be reported in accordance with previously applicable GAAP. There was no material impact to the estimate of credit losses. Disclosures about the State Bar's estimated credit losses are presented in Note 1.

Note 2 – Liquidity and availability of financial assets

The following reflects the State Bar's financial assets as of the combined statements of financial position date as of June 30, 2024 and 2023, reduced by amounts not available for general use within one year of the combined statements of financial position date of June 30, 2024 and 2023 because of contractual or donor-imposed restrictions or internal designations.

	<u>2024</u>	<u>2023</u>
Cash and cash equivalents	\$ 25,085,480	\$ 25,859,017
Accounts receivable	833,807	962,500
Accrued interest receivable	112,008	67,748
Investments	<u>19,373,716</u>	<u>17,254,051</u>
	<u>45,405,011</u>	<u>44,143,316</u>
Less: Donor-imposed restricted cash and cash equivalents	(2,971,089)	(2,315,655)
Less: Board-designated cash and cash equivalents, accounts receivable, accrued interest receivable, and investments	<u>(20,401,231)</u>	<u>(20,488,773)</u>
Total financial assets without donor restriction or other restrictions available for general use within one year	<u>\$ 22,032,691</u>	<u>\$ 21,338,888</u>

The State Bar manages its liquidity by developing and adopting annual operating budgets that provide sufficient funds for general expenditures in meeting its liabilities and other obligations as they become due. Cash needs of the State Bar are expected to be met on a monthly basis from program service fees and contributions.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 3 – Membership

Membership in the State Bar totaled 55,390 and 54,485 at June 30, 2024 and 2023, respectively.

Note 4 – Investments

Investments are carried at fair market value. Proceeds from the sale of investments may be used in the operations of the State Bar.

As of June 30, 2024 and 2023, investments at fair value are summarized as follows:

	<u>2024</u>	<u>2023</u>
Money market funds	\$ 2,476,541	\$ 2,298,888
Equities	3,415,295	1,979,513
Fixed income	5,249,832	5,256,596
Government securities	8,232,048	7,719,054
Total investments	<u>\$ 19,373,716</u>	<u>\$ 17,254,051</u>

For the years ended June 30, 2024 and 2023, total investment income are summarized as follows:

	<u>2024</u>	<u>2023</u>
Interest and dividends	\$ 531,200	\$ 366,694
Net realized and unrealized gains (losses)	560,204	(149,964)
Total investment income	<u>\$ 1,091,404</u>	<u>\$ 216,730</u>

Note 5 – Fair value measurements

As required by FASB's fair value measurements and disclosure guidance, assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2024:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Investments:				
Money market funds	\$ 2,476,541	\$ -	\$ -	\$ 2,476,541
Equities	3,415,295	-	-	3,415,295
Fixed income	5,249,832	-	-	5,249,832
Government securities	8,232,048	-	-	8,232,048
Total	<u>\$ 19,373,716</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 19,373,716</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 5 – Fair value measurements (Continued)

The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2023:

	Level 1	Level 2	Level 3	Total
Investments:				
Money market funds	\$ 2,298,888	\$ -	\$ -	\$ 2,298,888
Equities	1,979,513	-	-	1,979,513
Fixed income	5,256,596	-	-	5,256,596
Government securities	7,719,054	-	-	7,719,054
Total	<u>\$ 17,254,051</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 17,254,051</u>

Note 6 – Building, furniture, fixtures, and equipment

The Bar Center building, furniture, fixtures, and equipment as of June 30, 2024 and 2023 are summarized as follows:

	2024	2023
Building and improvements	\$ 27,414,492	\$ 27,157,796
Furniture and office equipment	3,072,530	3,264,030
Computer and electronic equipment	1,216,851	998,674
Software	119,775	-
Construction in process	72,663	23,095
	<u>31,896,311</u>	<u>31,443,595</u>
Less accumulated depreciation	<u>(25,682,024)</u>	<u>(24,841,464)</u>
	<u>\$ 6,214,287</u>	<u>\$ 6,602,131</u>

Land, furniture, fixtures, and equipment other than the Bar Center as of June 30, 2024 and 2023 are summarized as follows:

	2024	2023
Furniture and office equipment	\$ 999,098	\$ 999,600
Computer and electronic equipment	342,255	327,319
Leasehold and building improvements	122,157	65,390
Software	1,498,078	1,493,703
Assets not yet in service	358,815	-
	<u>3,320,403</u>	<u>2,886,012</u>
Less accumulated depreciation	<u>(2,384,428)</u>	<u>(2,177,781)</u>
	<u>\$ 935,975</u>	<u>\$ 708,231</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 7 – Retirement plan

The State Bar has a money purchase pension plan that covers substantially all employees. State Bar contributions to this plan for the years ended June 30, 2024 and 2023 were \$550,059 and \$492,230, respectively.

Note 8 – Leases

Lessor – The State Bar leases office space to both related and nonrelated parties. Rental income totaled \$939,928 and \$931,685 in 2024 and 2023, respectively. These amounts included receipts of \$60,893 and \$62,144 in 2024 and 2023, respectively, from related parties. Certain of the leases have expiration dates through June 2028 and certain of the leases are renewable annually or cancelable at the request of the lessee.

As of June 30, 2024, approximate future minimum annual lease payments for the leases that are not renewable annually or cancelable are as follows:

For the year ending June 30,	2025	\$	149,442
	2026		27,575
	2027		28,117
	2028		<u>28,675</u>
	Total	\$	<u>233,809</u>

Lessee – The State Bar has entered into various noncancelable operating lease agreements for the rental of photocopiers and mailing equipment. These lease agreements expire on various dates through September 2029.

In addition, the State Bar entered into a lease on November 1, 2008 for its Coastal Georgia office space in Savannah. The lease expired on October 31, 2013 with two five-year options available to renew through 2023. The State Bar renewed the lease under its second option during 2018, with expiration on October 31, 2022. The State Bar then entered into a new lease at a new location in which the lease term commenced on January 1, 2023, that expires on December 31, 2027.

The State Bar also maintains a lease for its satellite office in Tifton, Georgia. The initial lease expired on September 30, 2021, and was then month-to-month through September 30, 2022. The lease was renewed on September 30, 2022, expiring on September 30, 2025.

The following summarizes the carrying value of the related right-of-use assets - operating as of June 30:

	<u>2024</u>	<u>2023</u>
Accumulated basis	\$ 485,138	\$ 420,150
Less – accumulated amortization	<u>(130,342)</u>	<u>(80,893)</u>
	<u>\$ 354,796</u>	<u>\$ 339,257</u>

The following summarizes the weighted average discount rate as of June 30:

	<u>2024</u>	<u>2023</u>
Weighted average discount rate	3.60%	3.76%

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 8 – Leases (Continued)

The following is a schedule by years of minimum future rentals on the operating leases and the amortization of the net present value (NPV) of the lease liability as of June 30, 2024:

Year Ending June 30:	Minimum annual lease payments	Amortization of NPV of lease liabilities - operating
2025	\$ 121,401	\$ 109,869
2026	97,866	90,506
2027	86,860	82,715
2028	54,939	53,741
2029	16,545	16,388
	<u>\$ 377,611</u>	<u>\$ 353,219</u>

Rental expense charged to operations amounted to \$167,010 and \$180,401 for the years ended June 30, 2024 and 2023, respectively.

Note 9 – Related-party transactions

The Commission on Continuing Lawyer Competency contributed \$1,393,988 and \$1,400,631 to the State Bar in 2024 and 2023, respectively. These amounts represent approximately 5% of the total amount of State Bar's revenue and other support for 2024 and 2023.

The State Bar was also reimbursed by related organizations for their share of salary and operating expenses for the years ended June 30, 2024 and 2023 as follows:

	<u>2024</u>	<u>2023</u>
Commission on Continuing Lawyer Competency	\$ 509,393	\$ 694,947
Chief Justice's Commission on Professionalism	193,763	150,384
Georgia Bar Foundation, Inc.	<u>97,653</u>	<u>103,731</u>
	<u>\$ 800,809</u>	<u>\$ 949,062</u>

The following represents a summary of amounts due from related parties as of June 30, 2024 and 2023:

	<u>2024</u>	<u>2023</u>
Commission on Continuing Lawyer Competency	\$ 692,795	\$ 782,565
Georgia Bar Foundation, Inc.	<u>3,462</u>	<u>21,394</u>
	<u>\$ 696,257</u>	<u>\$ 803,959</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 9 – Related-party transactions (Continued)

The following represents a summary of amounts due to related parties as of June 30, 2024 and 2023:

	<u>2024</u>	<u>2023</u>
Chief Justice's Commission on Professionalism	\$ 238,996	\$ 265,327
	<u>\$ 238,996</u>	<u>\$ 265,327</u>

Note 10 – Board-designated net assets

The State Bar had Board-designated net assets available for the following purposes at June 30, 2024 and 2023:

	<u>2024</u>	<u>2023</u>
Bar Center	\$ 13,554,369	\$ 14,082,422
General Operations	4,750,000	4,750,000
Litigation	300,000	300,000
Sections	3,745,184	3,664,313
Conventions	49,795	77,999
Operating contingencies – ICLE	144,435	144,435
Replacement of equipment – ICLE	225,000	225,000
ICLE operations	4,216,170	4,216,170
	<u>\$ 26,984,953</u>	<u>\$ 27,460,339</u>

Bar Center net assets primarily consist of the net depreciated cost of the Bar Center building, building improvements, and related Conference Center furniture and equipment.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 11 – Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2024 and 2023 were available for the following purposes and are included in cash and cash equivalents:

	<u>2024</u>	<u>2023</u>
Legislative Program	\$ 2,423,119	\$ 1,806,483
Law-Related Education/Marshall Fund	192,396	207,599
High School Mock Trial	17,481	15,299
BASICS Program	121,963	116,951
Young Lawyers Division	126,603	87,199
Lawyer Assistance Program	33,229	31,863
Georgia Diversity Program	6,374	13,554
Bar Media Conference	1,523	3,116
Justice Portraits	1,066	1,022
Law Day	6,317	6,212
Promote Inclusion	5,924	8,702
Access to Justice	19,993	3,175
Military Vet Pro Bono	15,101	14,480
	<u>\$ 2,971,089</u>	<u>\$ 2,315,655</u>

Note 12 – Net assets released from restrictions

Net assets were released from donor restrictions in 2024 and 2023 by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors as follows:

	<u>2024</u>	<u>2023</u>
Legislative Program	\$ 367,215	\$ 548,400
BASICS Program	50,584	40,616
Young Lawyers Division	65,269	126,010
Law-Related Education/Marshall Fund	24,431	9,628
Georgia Diversity Program	52,192	56,409
Promote Inclusion	14,925	10,022
Bar Media Conference	1,709	10,089
Lawyer Assistance Program	159	2,022
High School Mock Trial	10,999	9,883
Other programs	6,337	283
	<u>\$ 593,820</u>	<u>\$ 813,362</u>

Note 13 – Contingencies

The State Bar is subject to various suits and proceedings arising in the ordinary conduct of its affairs and has been named as a defendant in several lawsuits. In the opinion of the Office of the General Counsel, all suits and actions now pending or likely to be filed will be resolved without material adverse effect on the financial position of the State Bar.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2024 AND 2023

Note 14 – Subsequent events

The State Bar has evaluated subsequent events occurring through October 23, 2024, the date on which the combined financial statements were available to be issued.

SUPPLEMENTAL INFORMATION

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2024

	SBG and SBGF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 24,837,272	\$ 248,208	\$ -	\$ 25,085,480
Accounts receivable, net	121,100	-	-	121,100
Receivable from related parties	696,257	-	-	696,257
Receivable from employees	16,450	-	-	16,450
Accrued interest receivable	112,008	-	-	112,008
Prepaid and other assets	435,786	-	-	435,786
Investments, at fair value	16,893,483	2,480,233	-	19,373,716
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,214,287	-	-	6,214,287
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	935,975	-	-	935,975
Right-of-use assets - operating	354,796	-	-	354,796
Total assets	<u>\$ 50,617,414</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 53,345,855</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 2,451,045	\$ -	\$ -	\$ 2,451,045
Accrued salary and retirement plan expense	938,939	-	-	938,939
Payable to Clients' Security Fund	2,782,908	-	-	2,782,908
Payable to related parties	238,996	-	-	238,996
Accrued vacation	593,724	-	-	593,724
Deferred income - dues and sections	9,454,962	-	-	9,454,962
Lease liability - operating	353,219	-	-	353,219
Total liabilities	<u>16,813,793</u>	<u>-</u>	<u>-</u>	<u>16,813,793</u>
Net assets				
Without donor restrictions				
Undesignated	4,217,014	2,359,006	-	6,576,020
Board-designated	26,615,518	369,435	-	26,984,953
Total without donor restrictions	30,832,532	2,728,441	-	33,560,973
With donor restrictions	2,971,089	-	-	2,971,089
Total net assets	<u>33,803,621</u>	<u>2,728,441</u>	<u>-</u>	<u>36,532,062</u>
Total liabilities and net assets	<u>\$ 50,617,414</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 53,345,855</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2023

	SBG and SGBF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 25,609,092	\$ 249,925	\$ -	\$ 25,859,017
Accounts receivable, net	140,109	-	-	140,109
Receivable from related parties	805,736	-	(1,777)	803,959
Receivable from employees	18,432	-	-	18,432
Accrued interest receivable	67,748	-	-	67,748
Prepaid and other assets	389,573	-	-	389,573
Investments, at fair value	14,889,516	2,364,535	-	17,254,051
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,602,131	-	-	6,602,131
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	708,231	-	-	708,231
Right-of-use assets - operating	339,257	-	-	339,257
Total assets	\$ 49,569,825	\$ 2,614,460	\$ (1,777)	\$ 52,182,508
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 1,902,436	\$ -	\$ -	\$ 1,902,436
Accrued salary and retirement plan expense	868,102	-	-	868,102
Payable to Clients' Security Fund	2,217,202	-	-	2,217,202
Payable to related parties	265,327	1,777	(1,777)	265,327
Accrued vacation	575,166	-	-	575,166
Deferred income - dues and sections	10,156,267	-	-	10,156,267
Other deferred income	23,596	-	-	23,596
Lease liability - operating	332,715	-	-	332,715
Total liabilities	16,340,811	1,777	(1,777)	16,340,811
Net assets				
Without donor restrictions				
Undesignated	3,822,455	2,243,248	-	6,065,703
Board-designated	27,090,904	369,435	-	27,460,339
Total without donor restrictions	30,913,359	2,612,683	-	33,526,042
With donor restrictions	2,315,655	-	-	2,315,655
Total net assets	33,229,014	2,612,683	-	35,841,697
Total liabilities and net assets	\$ 49,569,825	\$ 2,614,460	\$ (1,777)	\$ 52,182,508

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2024

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Eliminations</u>	<u>Total</u>
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,308,061	\$ -	\$ -	\$ 12,308,061
Advertising	45,389	-	-	45,389
Membership	273,218	-	-	273,218
Total fees	<u>12,626,668</u>	<u>-</u>	<u>-</u>	<u>12,626,668</u>
ICLE				
Program revenues	4,790,571	-	-	4,790,571
Total ICLE	<u>4,790,571</u>	<u>-</u>	<u>-</u>	<u>4,790,571</u>
Other revenues				
Contributions	2,483,947	-	-	2,483,947
Section dues	1,678,774	-	-	1,678,774
Convention and meeting fees	47,500	-	-	47,500
Law practice management fees	20,222	-	-	20,222
Young lawyers division fees	4,980	-	-	4,980
High school mock trial fees	52,230	-	-	52,230
Investment income	965,240	126,164	-	1,091,404
Rental income	939,928	-	-	939,928
Other	761,509	-	-	761,509
Total other revenues	<u>6,954,330</u>	<u>126,164</u>	<u>-</u>	<u>7,080,494</u>
Total revenues and other support	<u>24,371,569</u>	<u>126,164</u>	<u>-</u>	<u>24,497,733</u>
EXPENSES				
Program services				
Counsel	4,695,043	-	-	4,695,043
Communications	934,436	-	-	934,436
Membership	1,114,314	-	-	1,114,314
Unauthorized practice of law	947,824	-	-	947,824
Law practice management	479,364	-	-	479,364
Law related education	423,214	-	-	423,214
Fee arbitration	545,228	-	-	545,228
Sections	1,782,184	-	-	1,782,184
Young lawyers division	569,112	-	-	569,112
ICLE	3,854,346	-	-	3,854,346
Other programs	2,105,467	-	-	2,105,467
Total program services	<u>17,450,532</u>	<u>-</u>	<u>-</u>	<u>17,450,532</u>
Supporting services				
Management and general	6,346,430	10,406	-	6,356,836
Total expenses	<u>23,796,962</u>	<u>10,406</u>	<u>-</u>	<u>23,807,368</u>
CHANGE IN NET ASSETS	574,607	115,758	-	690,365
NET ASSETS, BEGINNING	<u>33,229,014</u>	<u>2,612,683</u>	<u>-</u>	<u>35,841,697</u>
NET ASSETS, ENDING	<u>\$ 33,803,621</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 36,532,062</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2023

	SBG and SBGF	ICLE	Elimination	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,163,372	\$ -	\$ -	\$ 12,163,372
Advertising	48,045	-	-	48,045
Membership	293,683	-	-	293,683
Total fees	12,505,100	-	-	12,505,100
ICLE				
Program revenues	4,882,060	-	-	4,882,060
Total ICLE	4,882,060	-	-	4,882,060
Other revenues				
Contributions	2,457,297	-	-	2,457,297
Section dues	1,461,594	-	-	1,461,594
Convention and meeting fees	47,500	-	-	47,500
Law practice management fees	40,522	-	-	40,522
Young lawyers division fees	8,115	-	-	8,115
High school mock trial fees	50,367	-	-	50,367
Assessment income	165	-	-	165
Investment income	134,924	81,806	-	216,730
Rental income	931,685	-	-	931,685
Other	729,414	-	-	729,414
Total other revenues	5,861,583	81,806	-	5,943,389
Total revenue and other support	23,248,743	81,806	-	23,330,549
EXPENSES				
Program services				
Counsel	4,525,474	-	-	4,525,474
Communications	951,935	-	-	951,935
Membership	1,010,758	-	-	1,010,758
Unauthorized practice of law	887,421	-	-	887,421
Law practice management	494,060	-	-	494,060
Law related education	391,421	-	-	391,421
Fee arbitration	537,443	-	-	537,443
Sections	1,509,743	-	-	1,509,743
Young lawyers division	551,927	-	-	551,927
ICLE	3,505,970	-	-	3,505,970
Other programs	2,326,357	-	-	2,326,357
Total program expenses	16,692,509	-	-	16,692,509
Supporting services				
Management and general	6,103,305	14,299	-	6,117,604
Total expenses	22,795,814	14,299	-	22,810,113
CHANGE IN NET ASSETS	452,929	67,507	-	520,436
NET ASSETS, BEGINNING	32,776,085	2,545,176	-	35,321,261
NET ASSETS, ENDING	\$ 33,229,014	\$ 2,612,683	\$ -	\$ 35,841,697

October 23, 2024

To the Board of Governors of the
State Bar of Georgia
Atlanta, GA

We have audited the combined financial statements of State Bar of Georgia (the "State Bar") for the year ended June 30, 2024, and we will issue our report thereon dated October 23, 2024. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated March 6, 2024. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by State Bar of Georgia are described in Note 1 to the combined financial statements. During the year ended June 30, 2024, State Bar of Georgia adopted Financial Accounting Standards Board (FASB) Accounting Standards Update (ASU) No. 2016-13, *Financial Instruments – Credit Losses (Topic 326): Measurement of Credit Losses on Financial Instruments*. This ASU modifies the measurement of expected credit losses on certain financial instruments. We noted no transactions entered into by the State Bar during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the combined financial statements in the proper period.

Accounting estimates are an integral part of the combined financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the combined financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the combined financial statements were:

Management's estimate of the fair value of investments is based on various valuation methodologies and is the price that would be received to sell an asset or paid to transfer a liability. We evaluated the methods, assumptions, and data used to develop the estimated fair value of investments in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of functional allocation of expenses between program and supporting services is based on a reasonable basis, such as square footage or time spent. We evaluated the key factors and assumptions used to develop the functional allocation of expenses in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of depreciation expense is based on the estimated useful lives of the assets. We evaluated the key factors and assumptions used to develop the estimate of depreciation expense in determining that it is reasonable in relation to the combined financial statements as a whole.

Management's estimate of the allowance for credit losses for receivables, is based on the estimate of individual collectability. We evaluated the key factors and assumptions used to develop the allowance for credit losses in determining that it is reasonable in relation to the combined financial statements taken as a whole.

The combined financial statement disclosures are neutral, consistent, and clear.

Difficulties Encountered in Performing the Audit

We encountered no difficulties in dealing with management in performing and completing our audit.

Disagreements with Management

For purposes of this letter, a disagreement with management is a disagreement on a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the combined financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated October 23, 2024.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the State Bar's combined financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the State Bar's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Other Matters

With respect to the supplementary information accompanying the combined financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with U.S. generally accepted accounting principles, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the combined financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the combined financial statements or to the combined financial statements themselves.

This information is intended solely for the use of management and the Board of Governors of the State Bar of Georgia and is not intended to be, and should not be, used by anyone other than these specified parties.

Mauldin & Jenkins, LLC



CENTER FOR LAWYER WELLBEING

- Created by Attorney Wellness Committee; established by Supreme Court of Georgia
- Emphasizing a profession inclusive of wellbeing as a critical part of practicing law and an essential element of lawyer competency and protecting the public
- Promoting holistic wellness for lawyers and those they serve
- Offering resources, events, and exclusive benefits for personal and professional growth
- Encouraging all lawyers to join and integrate wellbeing into their legal practice

VISIT GABAR.ORG/WEELLBEINGCENTER FOR MORE INFORMATION AND TO JOIN



* The benefits listed are a representative example of the current, planned and potential offerings to members. Benefits are subject to change. Not all benefits are available to law school students, subject to Bar rules and policies.

BENEFITS TO INCLUDE:

Annual Dues: \$40
Law Students: Free

- Discounts on Continuing Education and Professional Development.
- Discounts on Wellness Products and Services.
- Priority Access to Wellness Events and Programs.
- Recognition and Rewards.
- Exclusive Access to Premium Wellness Resources.
- Networking with Wellness Experts and Peers.
- Exclusive Member-Only Events and Perks.

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RUSSELL D. WILLARD
General Counsel

Memorandum to: State Bar of Georgia Board of Governors
From: Russell Willard
Date: May 6, 2025
Re: Report of the General Counsel

I am pleased to update you on the activity of the Office of the General Counsel since my last report to you at the Spring Meeting.

The Office of the General Counsel has received 2,481 grievances from the start of this Bar Year through the end of April. After screening by Grievance Counsel, 184 were determined to merit consideration by the State Disciplinary Board and were forwarded to the State Disciplinary Board for additional investigation. An additional 14 grievances were administratively mooted after an order of disbarment was entered by the Georgia Supreme Court.

This Bar Year the Supreme Court has entered public orders in 43 cases and the Board has imposed confidential discipline in an additional 46 cases.

Since the last report of the General Counsel, the Supreme Court has entered orders approving the following revisions to the Bar Rules:

- An amendment to Rule 1-302 regarding composition of the Board of Governors that clarifies how Board of Governors seats are allocated in the event of a circuit split or the creation of a new judicial circuit. This rule was approved by the Board of Governors at the Mid-Year Meeting in January 2025, and, following its approval by the Supreme Court of Georgia, is effective on May 29, 2025.
- An amendment to the Georgia Rules of Professional Conduct, Rules 4-106 and 4-108, that specifies that the report and recommendation of the Special Master shall be filed with the Clerk of the State Disciplinary Boards, who shall then file that report and recommendation, along with the record, with the Clerk of the Supreme Court of Georgia. This rule was approved by the Board of Governors at the Mid-Year Meeting in January 2025, and, following its approval by the Supreme Court of Georgia, is effective on May 29, 2025.
- An amendment to the Georgia Rules of Professional Conduct, Rule 1.0 that defines “attorney” and “counsel” and redefines “lawyer” This rule was approved by the Board of Governors at the Mid-Year Meeting in January

2025, and, following its approval by the Supreme Court of Georgia, is effective on May 29, 2025.

The following proposed revisions to the Georgia Rules of Professional Conduct are pending with the Supreme Court:

- Part VII of the Bar Rules, which deals with lawyer advertising and solicitation.
- Adding an email address as a supplemental form of service of disciplinary process (Rule 4-203.1).
- An amendment that creates an obligation on a lawyer to make reasonable efforts to prevent the inadvertent or unauthorized disclosure or unauthorized access to client information (Rule 1.6).
- An amendment to the terminology used in the Table of Contents for the Rules of Professional Conduct (Rule 4-102).
- An amendment that specifies that the report and recommendation of the Special Master in a case involving the imposition of reciprocal discipline shall be filed with the Clerk of the State Disciplinary Boards, who shall then file that report and recommendation, along with the record, with the Clerk of the Supreme Court of Georgia (Rule 9.4).
- An amendment to the rules governing the Client Security Fund to add the death or disability of a lawyer to suspension, disbarment, or voluntary surrender of a license to the conditions that allow for the filing of a CSF claim (Rule 10-106).

Receiverships: The Office of the General Counsel staff is currently serving as receiver in ten active matters. State Bar members are handling another 25 receiverships for deceased or disbarred lawyers.

Clients' Security Fund: The Fund Trustees have reviewed 39 claims this Bar Year. They have approved 29 claims for a total of \$639,489.98.

**FORTY-FIFTH ANNUAL REPORT TO
THE HONORABLE JUSTICES OF THE SUPREME COURT
AND THE HONORABLE MEMBERS
OF THE BOARD OF GOVERNORS
OF THE STATE BAR OF GEORGIA
BY
THE COMMITTEE ON THE ARBITRATION OF ATTORNEY FEE DISPUTES**

The Committee on the Arbitration of Attorney Fee Disputes is privileged to submit the following report concerning the Fee Arbitration Program's forty-fifth year of operation.

1. Committee Membership.

Ms. Judy C. King, an attorney in Lawrenceville, has continued to serve as the Committee Chairperson. Mr. Mark C. Bips, an attorney in Decatur, Hon. John M. Defoor II, an Atlanta attorney and judge in Fulton County, Mr. Wesley Charles Ross, an attorney in Lawrenceville, Ms. Rosalind A. Rubens-Newell, an attorney in Atlanta, and Mr. Darrell Lee Sutton, an attorney in Marietta are our returning Bar members. Mr. Alan Granath and Mr. Vince Clanton are our current lay members; however, we are in need of an additional lay member. Mr. David Lipscomb, an attorney in Lawrenceville, continues to serve as our Executive Committee Liaison, and Ms. Donna Davis is our Staff Liaison. Mr. Bill NeSmith is our in-house Bar Counsel. Our Committee continues to collaborate harmoniously with each other and works closely with the staff to ensure the success of the Fee Arbitration Program.

2. Participation.

Interest in the Fee Arbitration Program remains high. Although most Petitions for Fee Arbitration are downloaded from our website, our staff mailed an average of twenty (20) Petitions per month in fiscal year 2025; in comparison, the Program's staff mailed an average of seventy-nine (79) Petitions per month in fiscal year 2024. As a reminder, we placed a portable document format (PDF) of our instruction letter and Petition for Fee Arbitration, with direct links to our Rules and FAQs, on the State Bar of Georgia's website on March 15, 2024, drastically reducing the number of Petitions that are mailed to attorneys and/or the public.

The Program's staff handles a large volume of incoming and outgoing correspondence via United State Postal Service, FedEx, and email each month. They also received approximately thirty-seven (37) newly filed Petitions in fiscal year 2025, between July 1, 2024, through April 30, 2025. This number is consistent with the number of new Petitions filed in fiscal year 2024. The revisions that the staff made to the Program's webpage in March 2024 continues to show the Program in a positive light, making it more appealing to Georgia's attorneys and their former clients. We have had an average of one (1) attorney each month initiating the Fee Arbitration process against a client, while all other Petitions are initiated by clients and their Co-Petitioner(s) (i.e. third-party payor). The Program's staff's creativity as it relates to webpage design ideas is extremely limited in that all Bar webpages must look similar; however, we hope that the information that has been published on our webpage will allow the algorithms for search engines, such as Google or Bing, to

bring more traffic to the page when keywords are used in individual searches to bring more awareness to the Program.

3. Current Activity.

The Program staff managed an average of one thousand one hundred and six (1006) calls each month, in fiscal year 2025, May 1, 2024, through April 30, 2025. The staff's knowledge of the Fee Arbitration Program's Rules and their familiarity with each case and the parties involved helps them effectively handle these calls in a professional manner.

In our current cases, we continue to find that the January 2022 Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted, has negatively impacted the Program. After being served, 62% of Respondents served did not agree to be bound by the results of the arbitration or failed to respond after being served and notified multiple times. This failure to respond resulted in Petitions being dismissed, even in cases where jurisdiction appeared to be proper, because the attorney's lack of response is tantamount to declining to be bound by the results of the arbitration.

Additionally, we have found a direct correlation between the 2022 Fee Arbitration Program's Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted and the drastic reduction in number

of hearings held each year. During COVID, in fiscal year 2022, July 1, 2021, through June 30, 2022, we held eighty (80) hearings. In fiscal year 2023, July 1, 2022, through June 30, 2023, we held forty (40) hearings. However, in fiscal year 2024, July 1, 2023, through June 30, 2024, we only scheduled twenty-two (22) hearings because many respondents declined to be bound by the result of the arbitration. The Fee Arbitration Program staff continues to receive voluminous complaints from the public about Rule 6-204(h), especially when cases are dismissed and/or jurisdiction is declined. It is important to note that jurisdiction is accepted, and hearings are scheduled only if there appears to be merit and the dispute is within the jurisdiction that the Supreme Court of Georgia gives the Program through its Rules, even when both the Petitioner and Respondent agree to be bound by the results of the arbitration. We do not hold hearings on cases where jurisdiction does not appear to be proper.

4. Hearings.

The Fee Arbitration Program has continued to provide both in-person and Zoom hearings for cases in which jurisdiction was accepted. Providing Zoom hearings allows parties who are out of town, at work, on vacation, incarcerated, and/or otherwise unavailable to appear in person to have an opportunity to present their cases and answer the arbitrators' questions.

In fee disputes involving attorneys and clients, cases are heard by a panel of three (3) volunteer arbitrators. These arbitration panels consist of two active members of the

Bar, who are in good standing, with no disciplinary history and no cases pending before the Committee on the Arbitration of Attorney Fee Disputes. This service is offered at no charge to members of the Bar and the public, no matter who initiates the Petition.

In fee disputes involving attorney parties as it relates to joint fees or the dissolution of a law firm or practice, the hearing is held by a panel of three (3) arbitrators who are all active members of the Bar, who are in good standing, with no disciplinary history and no cases pending before the Committee on the Arbitration of Attorney Fee Disputes. There is a nominal fee paid by the parties for the arbitrators' time in arbitrating the attorney/law firm versus attorney/law firm fee disputes.

In all hearings, we offer small tokens of gratitude, lapel pens and a letter of appreciation, to each arbitrator. Additionally, we provide a light lunch for arbitrators who appear in-person for hearings.

5. The Fee Arbitration Program Staff.

Ms. Donna Davis is the Director of the Fee Arbitration Program. Ms. Davis began her career at the Bar in the Fee Arbitration Program in August 1996, then assisted several departments on the Administrative side of the Bar. Ms. Davis worked in the Client Assistance Program of the Office of the General Counsel for 25 years, before returning to the Fee Arbitration Program as Director, in 2023.

The Senior Coordinator is Ms. Guianina Sherridan has worked in the Fee Arbitration Program since May 2017. Ms. Jodi Lipsitz is our Coordinator; she worked at the State Bar of Georgia for several years before being rehired by the Fee Arbitration Program in October 2022. Our Administrator, Ms. Kaia Saldana, joined the Fee Arbitration Program in June 2023. Together, our staff ensures that the Program is run timely, effectively and professionally.

6. **Appreciation.**

The Committee wishes to continue to show our appreciation to the attorneys and public members who have served as volunteer arbitrators for the Fee Arbitration Program. Our Program depends on you for our success.

We would also like to thank the Supreme Court of Georgia Justices and the State Bar of Georgia's Board of Governors for their time and consideration in these matters.

The Committee hopes that all who read this report will understand the importance of the Fee Arbitration Program and its desire to renew and strengthen the trust the public has in Georgia's legal system and members of the State Bar of Georgia.

Respectfully submitted, this
30th day of April 2025,
Judy C. King,



Chairperson
Committee on the Arbitration of Attorney Fee Disputes

Law Practice Management Program

(Abbreviated report for the 2024-2025 Bar Year)

Total Number of Members Served – 473

July 1, 2024 – April 25, 2025

The program has successfully engaged a total of 473 members and their staff from July 1, 2024, to April 25, 2025. During this period, we made contact with 137 existing members, 323 new members, and 13 law firm staff.

Resource Requests

Members have contacted our program to discuss or request the following:

- **Starting a Law Practice** – 159 copies of the *Starting a Georgia Law Practice Guide* were distributed to our members by request, including 26 via email, 114 through web store orders, and 19 during office visits to the Bar Center. Additionally, we received 30 inquiries by phone and email regarding resources for opening a law practice.
- **Software Recommendation/Technology Advice** – We received a total of 27 inquiries from members seeking law office software recommendations via email and phone.
- **LPM Resources Assistance** – The program has responded to 900 phone and email inquiries, assisting members with resources on opening a law practice, program events, bar member services, library resources, form requests, and more. Of these, 75 inquiries specifically focused on best practices for various practice management topics, including effective client communication, streamlined workflow efficiency, optimized billing practices, secure and organized document management, sound financial management, proper trust account management, leveraging technology for practice improvement, and strategic succession planning.

Consultations

A total of 38 virtual consultation appointments were completed during this period. Our program scheduled 32 general law firm assessments and 6 corrective action virtual consultations to discuss law firm practice management matters.

Resource Library

The [LPM Lending Library](#) offers 1,433 books, CDs, and DVDs for checkout by members and their staff, with options for pickup at the Bar Center or mailing. During this period, 99 members registered for access to the library. Additionally, 21 patrons visited the resource library, 24 members checked out a total of 65 books, and we responded to 126 email inquiries and 10 phone calls for library assistance and resource requests.

Social Media Outreach

Members can stay connected with LPM by following the GA Law Practice Advisor on [LinkedIn](#) and [Instagram](#) and subscribing to our newsletter, *The LPM Insider*, for practice tips and the latest updates on LPM events and programming. Since launching our social media channels, we have gained 201 Instagram followers, 87 LinkedIn followers, and 479 [LPM Insider](#) subscribers, totaling 767 followers—and growing.

Speaking Engagements and LPM Seminars

A total of 11 programs were completed and scheduled during this period. The Program staff delivered 10 continuing legal education sessions and special presentations to Georgia lawyers, as well as to other related groups, both nationally and locally. Additionally, 2 programs are scheduled for future dates. See the list of events below.

Date	Event Name	Presentation(s)
Oct.7-8, 2024	Clio Cloud Conference , Austin, TX	<i>Client Experience Panel</i> - Speakers: Daniela Szary, Lolita Rudovica, Host: Nkoyo-Ene Effiong Lewis

Nov. 20, 2024	Clio Connects : An Atlanta Customer Event, Atlanta, GA	<i>Creating a Dignified Client Experience in the Age of AI</i> , Nkoyo-Ene Effiong Lewis, sponsored by Clio
Dec. 6, 2025	First Amendment Lawyer Bridge's Zoom Meeting: Trust Accounting Webinar	<i>Trust Account Management</i> , Nkoyo-Ene Effiong Lewis, sponsored by Southern Center for Human Rights
Jan. 15, 2025	vLex Fastcase Training CLE, State Bar of Georgia Conference Center, Room 3, Atlanta, GA	<i>vLex Fastcase Training</i> , Sheila Baldwin, sponsored by the State Bar's Law Practice Management Program
Feb. 11, 2025	Cybersecurity Webinar CLE	Shielding Justice: Navigating Cybersecurity Challenges in Law Firms CLE , Wilson Joseph, sponsored by the State Bar's Law Practice Management Program
Feb. 25, 2025	Beginning Lawyers Program CLE , State Bar of Georgia Conference Center, Atlanta, GA	<i>Law Practice Management and Ethics</i> , Nkoyo-Ene Effiong Lewis and Russell D. Willard, Sponsored by the State Bar's Transition Into Law Practice Program (TILPP)
March 2025 (TBD)	Tifton Bar Association Virtual Brown Bag Lunch CLE, Tifton, GA	<i>The State Bar's Law Practice Management Program</i> , Nkoyo-Ene Effiong Lewis, sponsored by the State Bar of Georgia, South Georgia location
March 19, 2025	vLex Fastcase Training CLE , State Bar of Georgia Conference Center, Room 3, Atlanta, GA	<i>vLex Fastcase Training</i> , Sheila Baldwin, sponsored by the State Bar's Law Practice Management Program
April 25, 2025	Take Charge! Solo & Small Firm Summit CLE , Atlanta, GA, State Bar of Georgia Conference Center, Atlanta, GA	Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program
May 21, 2025	vLex Fastcase Training CLE, State Bar of Georgia Conference Center, Room 3, Atlanta, GA	<i>vLex Fastcase Training</i> , Sheila Baldwin, sponsored by the State Bar's Law Practice Management Program
September 18-19, 2025	Take Charge! Solo & Small Firm Conference CLE , Atlanta, GA, State Bar of Georgia Conference Center, Atlanta, GA	Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program

vLex Fastcase Platform Report

vLex Fastcase: New Platform and Documents

vLex Fastcase continues to be one of the Bar's most valuable member benefits, providing free legal research to all members. Over 50% of our 50,000+ members log into their Fastcase account annually.

As of September 26, 2024, members have access to an upgraded vLex Fastcase platform with a streamlined design that allows for faster access to expanded content. A standout feature of the upgrade is the new **Cert** citator, which flags negative treatment and citing references with improved detail and broader coverage—making it a more powerful tool for assessing a case's precedential value.

To help members make the most of the new platform, vLex Fastcase offers a wide range of tutorials, including videos, Smart Topics, navigation tips, and a comprehensive Knowledge Base. First-time users are encouraged to take the "Guided Tour" to become familiar with the platform's features and tools.

In addition, Docket Alarm—a database of over 650 million dockets and legal documents—is now available to members. This expanded resource has been well-received and is especially useful for litigation strategy, calendaring, research, business development, and legal risk analysis.

In-person training is available six times a year at the State Bar of Georgia. The next session will be held on **May 21**. To register, visit the **State Bar's Events Calendar** and sign up.

In-person training is available 6 times a year at the State Bar of Georgia. The next class will be held on May 21. To register go to the ICLE Event calendar and sign up.

vLex Fastcase Usage Report (July 2024-March 2025)

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Total
First Time Logins	66	58	46	38	25	35	36	29	42	375
Total Logins	9,554	10,382	6,001	8,695	7,070	5,820	7,363	7,330	7,823	70,038
Total Users Who Logged In	2,580	2,662	2,087	2,108	1,835	1,808	2,043	2,079	2,072	19,274
Searches Conducted	34,453	36,840	21,447	12,613	3,610	3,854	4,569	4,825	4,598	126,809
Documents Viewed	125,030	123,216	72,683	40,295	13,007	17,668	18,092	20,813	18,041	448,845
Documents Printed	27,966	59,940	19,020	21,713	2,634	3,872	4,980	6,832	3,569	150,526
Total Transactions	199,649	233,098	121,284	85,462	28,181	33,057	37,083	41,908	36,145	815,867

vLex Fastcase Reported Issues/Problems (July 2024-April 2025)

vLex Fastcase Reported Issues / Problems	
Issue Reported to Member Benefits Coordinator (MBC)	Response
MBC 8/07/2024 A few members called with complaints of slowdown on site.	Fastcase Response 8/07/2024 Slowness must have been affected by the new platform rollout.
MBC 9/02/2024 Bar iMIS and website project caused members to be unable to access their account. Many calls and email were coming in with a variety of reports of lack of access.	Fastcase Response 9/02/2024 (still ongoing for some members as of 9/30/2024.) Provided members with a free 1-week trial which was extended 2 more times to alleviate the problem.
MBC 9/26/2024 through 11/25/2024 Members were unable to access the membership portal due to old data saved to members accounts. A message was sent with instructions on how to clear the cache and to confirm the correct link to the Bar website. Over 250 emails and calls were responded to during the launch period from 8/26/24 through 11/25/24.	Fastcase Response Ongoing In cases where the member was able to get into their vLex Fastcase account but not able to navigate the system, FC staff did a great job troubleshooting many calls.
MBC 12/01/2024 through 2/20/2025 The issue of members being unable to connect to their accounts has significantly decreased. Staff has been able to resolve these cases quickly without needing to escalate them to Fastcase. Currently, the majority of support requests relate to navigating the vLex Fastcase platform. In most cases, staff can resolve these concerns within five minutes.	Fastcase Response 12/01/2025 through 2/20/2025 Fastcase is working with Bar staff to hold bi-monthly in-person training classes and the option to view the training on demand.
MBC 03/01/2025 – 03/30/2025 Currently, the majority of support requests relate to navigating the vLex Fastcase platform.	Fastcase Response 03/01/2025 – 03/30/2025 In most cases, staff can resolve these concerns within five minutes.
MBC 04/01/2025 Member experiencing some performative issues with searching and requested help using the Boolean method.	Fastcase Response 04/04/25 TJ Diggins and I were able to make suggestions to complete his research.
MBC 04/01/2025 We received 7 calls where members wanted assistance going back to Fastcase 7.	Fastcase (Bar Staff) Response 4/29/2025 I guided them on a quick tour if they had time. Otherwise, I showed them how to return to the previous platform.
MBC Ongoing problem since launch on 09/26/2025 We have received over 200 calls where members are not able to access their Fastcase account. This came to be a problem with the new Bar platform.	Fastcase (Bar Staff) Responses The problem originated with the Bar's SSO. Bar staff sends an email with a link for members to use when first using the new site which corrects the problem.

CloudLawyer/ReliaGuide Report

Spring has been a time of steady growth for the directory. When compared with the same time frame last year, contact requests increased by 16.2% and clicks on email addresses increased by 29.4%. The marketing collaboration between the bar and ReliaGuide has helped create greater legal services coverage throughout Georgia and increased opportunities for members to be contacted by potential clients.

Statistic Updates Through April 26th:

- 210,987 interactions with member profiles (views, clicks, and contact requests)
- profile views
- 3,083 completed contact form requests
- 3,743 clicks on lawyer’s email
- 5,116 clicks on lawyer’s phone number
- 2,878 total sign ins
- 334 Profile Plus subscriptions
- 17 analytics products purchased
- 11 website products purchased



**State Bar of Georgia
Private Health Insurance Exchange
April 25, 2025**

WEBSITE ANALYTICS	
Total Users (Past 12 months)	11,259
Total Sessions (Past 12 months)	14,589
Total Pageviews (Past 12 months)	19,845
INDIVIDUAL ENROLLMENTS	
Total Enrollments	8,638
• Medical	2,715
• Medicare	53
• Dental	1,249
• Vision	586
• Telehealth	573
• ID Theft Protection	49
• Life / AD&D	3,040
• Disability	295
• Long-Term Care Enrollments	70

EMPLOYER ENROLLMENTS	
Total Enrollments	3,847
• Medical	1,524
• Ancillary	1,905
• Professional Liability	416
• Cyber Security	2

Administrative Law Section 2024-2025 Annual Report

Section Chair: Tara Dickerson

This letter is the Administrative Law Section's annual report for 2024-2025.

The Section held its Annual Meeting on October 3, 2024, and held elections for Section officers. The undersigned was elected Chair of the Section, Allen Lightcap, Esq., was elected Vice-Chair, and Christian Herd, Esq., was elected as Secretary.

The Annual Meeting Also featured a robust panel discussion on the Administrative Procedures Act juxtaposed against the now overturned Chevron decision. And a discussion of the administrative and constitutional implications of the Loper Bright and Jarkey decisions. As well as the implications of Corner Post Inc, V. Board of Governors of the Federal Reserve System decision. Our distinguished panel included physician and professor Dr. Anjali Deshmukh currently at Georgia State School of Law; Eric Segall, Georgia State Ashe Family Chair Professor of Law; Professor Matthew Lawrence, Emory School of Law; and Professor Alexandra Volokh, Emory School of Law.

On May 1, 2024, the Administrative Law Section partnered with the Dispute Resolution Section of the Atlanta Bar Association to discuss "Government Agencies and ADR: Opportunities, Trends and Best Practices". This event was well attended with breakfast at the Buckhead Club. A panel of experts discussed their diverse experiences in various areas of alternative dispute resolution practice. The Section hosted its Annual Holiday Party at Fadó on December 13th, 2024. We held our first "Ugly Sweater Contest" with prizes for the winners. The party was well attended, and a merry time was had by all.

The leadership team is having ongoing discussions of future CLE events as well as any opportunities to partner with other Sections for the same. We meet on March 14th, 2025, to solidify our plans. We will be working with the State Bar to set a date for our next CLE. Currently, the Section has 199 members, and its budget is in excellent condition.

Alternative Dispute Resolution Section 2024-2025 Annual Report

Section Chair: Shan Momin

The Alternative Dispute Resolution (ADR) Section is pleased to report its activities for the 2024-2025, as of April 25, 2025.

General Overview

The ADR Section currently has 694 members, up from 615 in 2024. Our section is primarily composed of active lawyers who practice in the fields of mediation and arbitration. The Section's primary mandate is to offer members a platform to network and stay informed about trends and legal developments related to mediation and arbitration. We offer numerous opportunities to earn continuing legal education (CLE) credits, primarily through regular virtual programs.

The Section also partners with the Georgia Office of Dispute Resolution (GODR) to co-host GODR's Annual ADR Institute, a full-day, in-person CLE program that brings together neutrals, mediators, arbitrators, attorneys, and other dispute resolution professionals.

Leadership

Our Section continues to cultivate a pipeline of engaged practitioners to ensure leadership continuity. Two current officers, Joyce Klemmer and Doug Witten, are expected to move into the roles of Chair and Vice Chair, respectively. The Executive Committee has proposed the nominations of G. Grant Greenwood (Macon, Georgia) as Secretary and David Bobo Mullens (Savannah, Georgia) as Treasurer. The nominations slate will be voted on at the Section's upcoming annual meeting on May 15, 2025.

In July 2024, the Section's Executive Committee expanded to include recent Section Chairs Scott Zucker, Erika Birg, and Sasan Nematbakhsh, as well as Sam Sparks (Chair-Elect of the Atlanta Bar Association's ADR Section) and Hon. Gail Tusan. They joined long-standing At-Large members Mark Dehler and Ray Chadwick, who have been instrumental in leading our three in-person programs in 2025.

Financials

We began this term with **\$62,924.32** and currently have **\$73,840.44** available for programming and events.

Programming

Continuing the trend of recent terms, we hosted one program per month, either virtual or in person. Our virtual Lunch and Learn series—recorded and published on the Section's webpage for later viewing—remains an effective way to engage members by covering diverse and timely topics

relevant to ADR practice. Attendance for these virtual programs has ranged from 30 to 150 members. We are especially grateful for the support of the State Bar (particularly Lane Sosebee) in helping coordinate these events. To promote inclusivity and ensure that all Section members benefit from our programming, the Executive Committee set a goal to host more in-person programs outside metro Atlanta. We are pleased to report that we held two successful half-day programs in Macon and Savannah, with a third scheduled for Augusta. These programs have been well received by local members, and collaboration with local practitioners and centers was critical to their success.

2024–2025 Programs Offered (and Scheduled)

1. *Setting the Table for Success: Improving the Odds for Productive Mediation* (virtual, June 18, 2024)¹
2. *Effective Strategies in Mediation and Negotiation, and Yogi Berra* (Macon, September 25, 2024)
3. *Mediation Day 2024* (virtual, October 17, 2024)
4. *Georgia Office of Dispute Resolution's 32nd Annual ADR Institute* (State Bar of Georgia, November 19, 2024)
5. *Promoting Legal Diversity in Dispute Resolution* (virtual, December 3, 2024)
6. *Religious Dispute Resolution* (virtual, January 14, 2025)²
7. *Effective Strategies in Mediation and Negotiation* (Savannah, February 13, 2025)
8. *Maximizing ADR Opportunities: Hot Tips from the Bench* (virtual, February 18, 2025)
9. *Preparing for Your First Arbitration* (virtual, March 31, 2025)
10. *The Rise of Mass Arbitrations* (virtual, April 2, 2025)³
11. *Keys to a Successful Mediation* (CLE and networking at the State Bar of Georgia, May 15, 2025)⁴
12. *Effective Strategies in Mediation and Negotiation* (Augusta, June 11, 2025)

¹ Organized by Scott Zucker (Immediate Past Chair) following last term's Annual Report.

² Collaboration with Emory University's Center for the Study of Law and Religion.

³ Collaboration with the ADR Section of the Atlanta Bar Association.

⁴ Collaboration with the State Bar of Georgia's Young Lawyers' Workers' Compensation Division.

Construction Law Section 2024-2025 Annual Report

Section Chair: Peter Crofton

The Construction Law Section (the “Section”) had a great year. Since its formation on November 2, 2018, Section membership has grown to 538 members, and the Section has collected \$35,794.17 in our account with the Bar. Our significant projects this year are discussed below.

1. Women in Construction

The Construction Law Section presented our annual Women in Construction Roundtable. The Women in Construction Roundtable was held on March 4, and showcased the contributions of women in the construction industry, particularly in construction law. The Roundtable featured a former Vice President and Deputy General Counsel of SmurfitWestRock Jessica McKinney, the former general counsel and current CEO of Oglethorpe Power Annalisa Bloodworth, and a the founder of the boutique construction law firm The Parick Law Group Elizabeth Patrick. Over twenty-five people attended the engaging panel discussion about the impact of women and women attorneys in the construction industry.

2. Holiday Party

The Construction Law Section joined with the Energy Law Section to hold a Holiday Party. The event, hosted by King & Spalding on its rooftop event space, allowed the members of both sections to mingle and enjoy conversing in a relaxed and festive environment. The party was enjoyed by all who attended (as demonstrated by smiles on the faces of the people in the photo below).

3. Section Leadership

As the Section has grown, we have expanded our section leadership to increase the range of offerings to members and to give more people an opportunity to be involved. This year we added an advisory Board to help grow both the number and the appeal of the events offered to the section members. We added five additional members to the Board and gave each new member specific activities to help organize and put on. Our Women in Construction event was the first of the events produced by our new Board members, with several more coming in the fall of this year.

4. Conclusion

This has been a year of growth for the section and its leadership. We are well positioned to continue to expand the programs and socials that we offer our members. We are also looking forward to upcoming joint programs with the Construction Law Sections of the Bars in surrounding states.

Creditor's Rights 2024-2025 Annual Report

Section Chair: Adam Cleveland

The Section officers for the 2024-25 period remain: Chair – Adam Cleveland, Vice-chair – Jacob Maurer, Secretary – Shenika Collier, Treasurer – Bryan Kaplan.

The Section co-hosted a summer event with the Construction Law Section at ASW Distillery on August 13, 2024 including fine whiskey and bourbons, cocktails, mocktails/sodas, adult slushies, and, most importantly, Fox Bros Bar-B-Q.

The Section held its annual Luncheon on December 10th, 2024. William NeSmith, Deputy General Counsel - State Bar of Georgia, gave a presentation on Legal Professionalism for one (1) hour of Professionalism CLE credit.

The Section presented a three (3) hour CLE seminar online on February 10, 2025 which included information on garnishments, extraordinary post-judgment remedies, replevins, and dispossessory actions.

The Section's goal for 2025-26 is to reinstitute its online forum for its 406 members.

Elder Law Section 2024-2025 Annual Report

Section Chair: Paul Hamilton

The Elder Law Section of the State Bar of Georgia is a recently revived Section which elected officers for 2024-2025 in the first time in several years. The officers elected are Paul Hamilton, Chair of the Section, Josh Nelson, Vice-Chair of the Section, and William D. Rhoads, Secretary of the Section.

In September, the Section held a LunchnLearn via zoom, in order to try to engage members of the Section and to see what information members would find useful from the Section. The LunchnLearn was well attended. Using the information received from attendees of the LunchnLearn, the Section held an in-person CLE at the Georgia Bar focused on new legislation found in OCGA Title 44, Chapter 17 regarding transfer on death deeds. Several hundred attorneys from across the state attended the CLE for a presentation led by the officers of the Section as well as trying to learn how to best use the legislation for our clients. The CLE was interactive, with many representatives of the real property bar present as well, giving their thoughts on how the transfer on death deeds affected title to properties.

Following the in-person CLE, the Section hosted a meet and greet at Top Golf, so that we could begin to connect names with faces, and try to build personal relationships with our fellow elder law practitioners. Currently, the Section is continuing to work to create a FaceBook group to serve as a list-serve of sorts, for commonly asked questions as well as more nuanced advice among members. Vice-Chair Josh Nelson has graciously led that technological charge.

The Section is actively planning a larger and more comprehensive CLE for one of the State Bar of Georgia's annual meetings. Additionally the Section is currently revising its By-laws.

The membership of the Elder Law Section of the State Bar of Georgia stands at 633. The Funds on hand for the Section are \$161,190.95.

Eminent Domain Section 2024-2025 Annual Report

Section Chair: Warren Tillery

During this Bar year, the Section held a social event / holiday party on December 17, 2024, at TheAmericano in Buckhead—attended by approximately twenty-five members and their spouses.

The Section also held a virtual continuing legal education seminar regarding Robert's Rules of Order on March 26, 2025. Mr. Bill NeSmith presented. While this event was sponsored by the Eminent Domain Section, it was open to anyone who wanted to attend—including several non-lawyer elected and appointed officials serving local governments.

The annual Section meeting and seminar will be held on May 21, 2025, at the Bar Headquarters in Atlanta. In addition to the Eminent Domain Section's annual elections and business meeting, this event will include approximately six hours of continuing legal education credit on various topics relevant to the eminent domain field (pending approval).

The Section also updated its bylaws this year for the Board of Governors' consideration at the Annual Meeting. The previous Section bylaws were last approved in 1995, contemporaneously with the creation of the Section. As a result, these new bylaws bring the Section into compliance with changes to the Bar since the last bylaws were approved. To that end, I hope that the Board of Governors will approve them at the Annual Meeting.

Our membership continues to grow. For example, the Eminent Domain Section had 163 members as of the beginning of the Bar year. That number increased to 181 as of the date of this letter, representing about a ten percent increase.

The Section's finances also remain healthy. A copy of the financial report as of the date of this letter is enclosed. Notably, the Section's balance is \$56,934.49.

Finally, the Pursley Award—our Section's lifetime-achievement award named for its first recipient and well-known practitioner of eminent domain, Charles Pursley—was conferred on Karen Gilpin Thomas, who is a very deserving recipient and outstanding member of our Section.

It has been an honor and pleasure to serve as the chairperson of the Eminent Domain Section this Bar year and to have been on the Section's Executive Committee the last three Bar years. As my service comes to an end, the Section is in good hands. The Executive Committee's nominations for officers during this coming Bar year are as follows: (1) this year's vice-chairperson, Mr. Matt Reeves, to become the chairperson; (2) this year's secretary-treasurer, Ms. Camesha Mitchell, to become the vice-chairperson; and, (3) Ms. Elizabeth Story to become the next secretary-treasurer. Of course, these roles remain subject to the Section's election that will take place on May 21, 2025.

Ms. Mary Jo Sullivan, Mr. Lane Sosebee, and Ms. Challie Smith have done an outstanding job in supporting our Section this year. Were it not for their efforts and support, this role would have been extremely difficult.

Energy Law Section 2024-2025 Annual Report

Section Chair: Peter Crofton

The Energy Law Section (the “Section”) had a great year. Since its formation on October 28, 2023, Section membership has grown to 29 members, and the Section has collected \$1,131.90 in our account with the Bar. Our significant projects this year are discussed below.

1. Social Events

The Energy Law Section held a social event on May 22, 2024, at the Headquarters of Georgia Power Company. The Energy Law Section joined with the Construction Law Section to host a Holiday Party in November 2024. The Energy Law Section is conducting a wine tasting social on April 30, 2025, and is joining the Construction Law Section in hosting a reception at the Bar’s 2025 Annual Meeting. The social events are an important part of what the Section’s recruiting efforts as well as a good opportunity to build stronger relationships between energy law practitioners.

2. Education

The Section began offering CLE this Spring, with the first of a three-part series on March 27, 2025. The CLE programs are presented by Prof. Buford Pollett, the Energy Law Professor for the University of Tulsa. Mr. Pollett is a member of the Energy Law Section and a Georgia native. The first program was an overview of renewable energy nationwide, while the two subsequent programs with focus on solar energy in Georgia and other alternative energy source and carbon management in Georgia. The Section also invited the students in Emory’s 2025 Energy Law Class to attend the three presentations.

3. Conclusion

The Energy Law Section is positioned to help the many lawyers who work or will work in the expanding energy sector in Georgia. We look forward to continuing to grow the Section and to increase the professionalism, comradery, and skills of the our members.

Entertainment and Sports Law Section 2024-2025 Annual Report

Section Chair: Nancy Prager

The Entertainment and Sports Section of the State Bar of Georgia had a stellar 2024-2025 season. Our Most Valuable Players were the members of the Executive Committee:

Chair: Nancy Prager

Vice-Chair - Entertainment: Chelsea Mitchell

Vice-Chair - Sports: Whitney Riden

Secretary: Ashlee Rouse

Member-At-Large - Sports: Donovan Potter

Member-At-Large - Entertainment: Brianna Smith

The Executive Committee has been diligently working this year to create engaging programs and opportunities for our Section's members. Our focus has been on facilitating member participation in activities and providing relevant continuing legal education. We recently added a pinch hitter to the team. David A. Wilson has agreed to fill the newly created position of Treasurer on the Committee. We are excited to see the results of his contribution to our efforts.

We had a great season opener with a Kick-Off Party where many new and returning members gathered along with prospective members. Brianna Smith organized a Bingo game that encouraged thoughtful interactions among our members. Thanks to Caren Cook and the Hawks, Kerry Nicholson and TJ Mihill were able to attend an exciting Hawks game for each getting BINGO!

In the Fall, the Section hosted an incredibly timely and informative CLE on navigating the NIL ecosystem and representing amateur athletes. Our Section's sports leaders, Donovan and Whitney did a great job organizing and moderating the panels comprised of Lexi Trumble, Shayla Wright, Ivory Tabb, Cathy Hampton, David A. Wilson and J.J. Poole. We also heard from Professor Moraima "Mo" Ivory, Director of the Center for Entertainment, Sports and Intellectual Property at Georgia State University College of Law in conversation with Nancy Prager about the program's recent "Legal Life of the Olympics" class which culminated in the students attending the Olympics in Paris!

Our Spring Entertainment Law Bootcamp spanned the breadth of entertainment law, including panels on everything from AI to the legal issues podcasters face. Chair Chelsea Mitchell and her Co-Chairs Ashlee Rouse and Brianna Smith did a great job creating a robust agenda and cultivating informative speakers and moderators: Kendall Carter, Jonathan Grunberg, Keisha Perry Walker, Nancy Prager, Yuri Eliezer, Rick McMurtry, Russell Willard, Vincent Phillips, III, John Seay, Orlando McGhee, Stacy Epps, Trace Brooks, Laura French, Donald Albright, Uwonda Carter, Gordon Firemark. The great news is that the CLE is available through ICLE for those who may be interested but were unable to attend in person.

Following the Bootcamp, the Section had a cocktail party at the Ellis Hotel's rooftop. It was such a treat to socialize with our colleagues as well as enjoy the incredible view of the city on a beautiful Spring day! Not only did those who attended our bootcamp come, but also members of the section who were unable to attend in person stopped by for a drink.

As the leadership for the Section serve a two-year term, we are excited about what else we have in store for our members and community. We are planning to create a scholarship program to benefit students attending law schools in the state as well as working on exciting programming for the summer and beyond. Additionally we look forward to working with other Sections and Committees of the Bar because Entertainment and Sports attorneys are team players! Our goal is to lay the foundation for a robust and thriving section at the end of our term.

MEMORANDUM

TO: Mary Jo Sullivan, Sections Director
Lane Sosebee, Senior Sections Coordinator
State Bar of Georgia
104 Marietta St., Suite 100
Atlanta, GA 30303

FROM: Charlie Denton, ELS Chair
Barnes & Thornburg LLP

RE: State Bar of Georgia Environmental Law Section 2024-2025 Annual Report

DATE: May 6, 2025

It has been my honor to serve as the Chair of the Environmental Law Section (“ELS” or the “Section”) during the 2024-2025 Bar Year. This year, the Board met monthly with the primary goal to engage membership and provide value. Our second goal was to increase communication among the officers. I am proud to report that the Section membership is strong, our financial condition is great, and participation at events has exceeded expectations. I am also pleased to report that there has been increased involvement by the Board. This has been a very productive year and we anticipate that the momentum will continue to grow in the future.

I. General Overview

According to the current bylaws, which we are reviewing for updates consistent with the State Bar’s new model, the purpose of the Environmental Law Section is to promote the goals of the State of Georgia within the field of environmental law. The Section provides its members with a unique opportunity to get to know other lawyers from industry, federal and state government, public interest organizations and private law firms who practice environmental law on a day-to-day basis. Membership in the Section also enables members to stay informed on current environmental subjects. The Section sponsors varied programs providing opportunities for Continuing Legal Education (CLE) credit as well as social events.

The Environmental Law Section currently has 353 members. The Section has over \$113,000 in its account, which does not include the revenues and expenses from the April 29, 2025, ELS Annual CLE Seminar. We have been able to keep section dues low at \$25 per person and hope to continue keeping the rate affordable so more people can participate.

The current officers are Charlie Denton, Chair; Wyatt Kendall, Chair Elect; Stephen Smith, Secretary; Jack Devine, Treasurer; Laura Benz, Member-At-Large; and Nic Howell, Immediate Past Chair.

II. Activities

Under the leadership of immediate past chair Nic Howell, the Section hosted and organized the Tri-State CLE seminar with the Environmental Law Sections for North and South Carolina in Savannah at the JW Marriott from June 13 – 15, 2024. Over 130 lawyers, judges, regulators and consultants from Georgia, North Carolina, South Carolina and elsewhere gathered for CLE regarding national, regional and state environmental laws, cases and regulatory updates. Nine (9) total CLE hours of programs were presented.

The Section’s 2024 – 2025 Bar year programming began with a virtual CLE event titled *Is Judicial Deference to Agencies Over* on November 12, 2024. The CLE event consisted of an overview of recent

Supreme Court Cases affecting environmental and administrative law, and commentary from Professor Mindy Goldstein of Emory University School of Law, Professor Eric J. Segall from Georgia State University College of Law, April Lipscomb of the Southern Environmental Law Center, and Jack Devine of KMCL Law. The event was well attended with over 70 people participating. The discussion focused on a range of issues, including Chevron deference, the Seventh Amendment, common law causes of action and the in-house adjudication of certain administrative violations by regulatory agencies.

Next, in December 2024, the Board hosted a holiday event for the Section at the Epicurean Hotel in Atlanta, Georgia. The holiday party provided Section members with a chance to network and included an update on Section news, upcoming activities, and events. Approximately 35 people attended the Section holiday party.

The biggest event for our Section has historically been the Annual CLE seminar, presented this year on April 29, 2025, at the King & Spalding offices in Atlanta. The seminar was a success, with over 75 people registering and attending. The seminar generated over \$6,000 in sponsorships and \$4,600 in registrations revenue for the Section. The seminar offered six (6) CLE hours, including an hour of Professionalism credit. The agenda for the seminar was as follows:

- Opening Remarks from Kevin J. McOmber, EPA Region 4 Administrator
- Energy Infrastructure and the Environment
- Georgia-Specific Case Law Update
- James H. Bratton, Jr Annual Lifetime Achievement Award
- Professionalism
- PFAS Regulatory and Litigation Update
- Trump 2.0

This year, the James G. Bratton, Jr Annual Lifetime Achievement Award was given to Doug Henderson of King & Spalding, recognizing his longstanding and extensive contributions to both the Section and the practice of environmental law in Georgia.

Next year, the Section will participate in the planning of the Tri-State CLE seminar in conjunction with North and South Carolina. North Carolina has primary responsibility to plan and host the 2026 Tri-State CLE seminar, but the Section will work closely to ensure the program is well executed and representative of issues relevant to Georgia environmental law practitioners.

III. Annual Student Scholarships

Our Section has proudly awarded annual scholarships to law students who excel in environmental law. They are recommended by their professors at University of Georgia, Georgia State, Emory University and Mercer University. This year, we awarded scholarships in the amount of \$750 per law student. Three (3) of the scholarship winners were able to join the Section at its Annual CLE Seminar on April 29, 2025.

Family Law Section 2024-2025 Annual Report

Section Chair: Jonathan Dunn

The Family Law Section has maintained robust momentum over the past several months. Our Executive Committee meetings—from September 2024 through April 2025—have focused on refining our continuing legal education offerings, evaluating vendor and contract options for the Family Law Institute (FLI), managing a healthy fiscal profile, expanding legislative and community service initiatives, and bolstering committee and social media efforts. This report synthesizes key decisions and future plans to guide us into an active and innovative 2025.

1. Executive Summary

During the reporting period, our Section upheld a regular “second Tuesday” meeting schedule while also planning a Committee Retreat at the Ritz-Carlton Lake Oconee. With budget reports evolving from approximately \$352K in September 2024 to nearly \$399K in the fall, and later rising to more than \$466K by February/March 2025, the Section has demonstrated effective fiscal stewardship. New member introductions, active discussions on CLE formats, vendor contracts, legislative outreach, and community service initiatives illustrate our commitment to quality education and community impact.

2. Membership, Finances, and Organizational Developments

Meeting Attendance & Scheduling: Our meetings have seen active participation through in-person attendance complemented by phone and Zoom. We have maintained our regular meeting schedule while planning additional events—most notably our contribution to the Midyear Meeting, Committee Retreat at Ritz-Carlton Lake Oconee, and our flagship program, the Family Law Institute.

Budget Report Highlights:

- In September 2024, the reported balance was \$352,273.59
- By October and November 2024, figures consistently ranged around \$397–\$399K.
- In February and March 2025, our bank balance rose to \$466,397.95.

These figures reflect successful fundraising, prudent management, and a growing financial cushion in support of our educational and community initiatives.

3. Continuing Legal Education (CLE) Programs & Family Law Institute (FLI)

Nuts and Bolts & Midyear Meeting:

- The Nuts and Bolts series—targeted as a 2-per-year event—is actively scheduled, with a successful CLE in March 2025 helmed by our Secretary Jamie Perez. Registrations are robust (with 90 registrants reported in March), and discussions continue on optimizing

registration cost and logistics for a 2nd event in Fall 2025, to be coordinated by incoming Secretary Roslyn Grant Holcomb.

- The Midyear Meeting was held January 9–12, 2025, in Savannah. The Section’s programming included a panel featuring Superior Court judges addressing topics ranging from judicial insights on child support to equitable caregiving. The Section hosted a cocktail after the CLE to facilitate networking and receive feedback from Section members and attendees.

Family Law Institute (FLI) 2025 & Future Planning:

- The FLI Ad Hoc and Exploratory Committees, comprised of Vice Chair Jeremy Abernathy, Secretary Jamie Perez, Sponsorship Chair Megan Wyss, Incoming Secretary Roslyn Grant Holcomb, and Technology Chair Kevin Rubin, have been central to our planning efforts. During multiple meetings, the Committee has:
 - Reviewed relationships with ICLE. In September and October 2024, discussions weighed whether to continue with ICLE based on recent concessions and a well-defined template, while also exploring alternative vendors for 2026.
 - Decided to proceed with ICLE for the 2025 event. Key contractual details—such as hotel arrangements, room totals, and proof of expenses—are under review (with follow-up emails and proposed MOUs circulated in November 2024).
 - Set the event’s theme as “The Roller Coaster of Family Law,” scheduled for May 30–June 1, 2025.
 - Undertaken detailed discussions about registration fee structures. The Committee has approved a reduced fee of \$595 for the 2025 FLI, backed by robust sponsorship efforts to ensure attendee numbers remain strong.
 - Outlined a multi-component program that includes wellness activities (such as a soundbath), first-timers’ breakfasts, judge/speaker dinners, an after-party, an inclusion event, and sports tournaments. Scholarship funding and speaker reimbursement policies have also been established.

4. Family Law Review

Under Kem Eyo’s editorial leadership, the Family Law Review continues to be an effective forum for professional engagement and thought leadership.

- Deadlines for upcoming issues have been firmly established with issues dispatched in Fall of 2024 and Spring of 2025.
- Recent email blasts have yielded a strong influx of articles.
- Efforts are underway to update committee contact lists and sponsor details, ensuring that the publication remains timely and reflective of our community’s dynamic interests.

5. Legislative Monitoring and Advocacy

Legislative issues remain a vital agenda item for the Section, with regular updates provided by Legislative Liaison Erik Chambers:

- Recent discussions have highlighted member concerns regarding the timeliness of legislative alerts (for example, feedback around HB 253 and issues of custody legislation).
- Erik and the Legislative Subcommittee are actively expanding contacts and planning targeted communications. A focus on consolidating attorney's fees statutes and drafting proposals for fee allowances in contempt cases for custody, visitation, and child support matters has emerged.
- Meetings have underscored a proactive plan to draft and distribute legislative updates, ensuring members remain informed and engaged with emerging legal issues.
- Katie Connell has kept the Committee abreast of new legislation and developments originating from the Georgia Commission on Child Support.

6. Special Projects, Charitable Initiatives, and Community Service

Charities/Community Service (Alex Cutler and Ashley O'Neil):

- The Section has approved significant donations, including a \$5,000 contribution to support AVL's annual campaign and a \$2,500 donation to the Bard Show.
- Strategic discussions in multiple meetings have addressed whether to standardize our charitable focus—by geographic nexus or familial relevance—and to allocate a dedicated budget for such initiatives.
- The Committee further approved a donation of \$1,500 to America's Second Harvest, and \$2,500.00 to the Supreme Cork.
- Additionally, a recurring pledge of \$350 to TILPP has been affirmed.

7. Committee Initiatives and Social Outreach

Inclusion Committee (Nilu Abdi-Tabari):

- Spearheaded by Nilu, the Inclusion Committee hosted its first event at the Legal Aid Building in January, with an additional event planned for the FLI. The Committee is exploring opportunities to re-introduce members through community-building events and fun gatherings (including potential field days and awards).

Technology and Social Media (Kevin Rubin and William Alexander):

- Kevin and William are investigating a rebranding of our FLI Facebook page—considering merging it with the Section's page—as well as expanding to other platforms, including Instagram.
- Efforts include soliciting quotes for regular social media postings and forging a cohesive digital presence across all channels.

Young Lawyer Division (YLD)(Ashley O'Neil):

- Under new leadership, the YLD is working to revive pre-COVID in-person committee life.
- The Committee has moved to include plans to sponsor networking sessions and speaker events (with a noted upcoming "Supreme Cork" event).

8. Looking Ahead

Upcoming Meetings and Key Dates:

- The Family Law Institute 2025 is slated for May 30–June 1, 2025, with detailed planning in progress regarding speakers, events, and sponsorship.
- Continued follow-up with legislative contacts and vendor negotiations for future FLI events (including 2026 and 2027) will remain top priorities.

9. Conclusion

The period from September 2024 through April 2025 has been a time of active planning, thoughtful decision-making, and dynamic strategic initiatives for the Family Law Section. Celebrating our strong financial performance, innovative educational programming, enhanced legislative outreach, and renewed commitments to charitable and community service efforts, we are well positioned to move confidently into 2025. We commend our dedicated Executive Committee and members, sponsors, speakers, and contributors, whose ongoing efforts are the backbone of our continued success and impact.

Franchise and Distribution Law Section 2024-2025 Annual Report

Section Chair: Amy T. Andrews

The Franchise and Distribution Law Section is pleased to report on its activities for the past year.

Membership and Finance

At the time of this report, the Section membership is 161 members. Additionally, at the time of this report, the Section has a balance of \$11,121.53. The Section is in a sound financial position to fund our programming for the next fiscal year.

Section Officers

Chair: Amy T. Andrews

Vice Chair: Anne Baroody

Treasurer: Carol Terry

Secretary: Kitt Shipe

Immediate Past Chair: Bin Mintor

Section Events

In October 2024, the Section hosted a one-hour CLE on the topic of Legal Operations and Contract Lifecycle Management at the office of GoTo Foods. Panelists included Dana Bybee, Director of Practice Solutions at Bradley Arant Boult Cummings, LLP, Eric D. Greenberg, General Counsel at Cox Media Group, and Harrison Underwood, Legal Operations Contractor at GoTo Foods. Amy Andrews, VP & Associate General Counsel of GoTo Foods, moderated the panel discussion. The networking portion of the event was held at Blue Moon Pizza and was sponsored by Major, Lindsay & Africa.

In December 2024, the Section hosted a holiday party and a one-hour CLE on the topic of Maximizing the Effectiveness of Mandatory Pre-Litigation Mediation in Franchise Disputes. The event was held at the office of Bradley Arant Boult Cummings, LLP. The panelists included Ronald T. Coleman, Jr., Partner at Bradley Arant Boult Cummings, LLP, Brad Shipe, Partner at Shipe Dosik Law LLC, and Adele Vespa of Franchise Mediation Resolutions With Adele. The event was co-sponsored by Bradley Arant Boult Cummings, LLP and Shipe Dosik Law LLC.

In March 2025, the Section hosted a one-hour CLE on the topic of Practical Tips for Negotiating Critical Franchise Agreement Terms from Both Sides of the Table. The event was held at Industrious at Old Fourth Ward. The panelists included Sonny Cohen, Member of Clark Hill and Michael S. Rosenthal, Member of Clark Hill. Carol Terry, General Counsel of Chicken Salad Chick moderated the panel discussion.

Currently, the Section is planning our last annual event to take place in July 2025. We are tentatively planning a legal update. At this meeting, the new slate of officers for the Section for the 2025-2026 year will be selected.

Health Law Section 2024-2025 Annual Report

Section Chair: Aaron M. Danzig

The Health Law Section, with over 800 members, is pleased to report on its activities for the past year.

The officers of the section are Aaron Danzig (Chair), Wade Miller (Co-chair), and Brittany Jones (Treasurer).

Our Annual Meeting coincided with the Section's annual Advanced Health Law seminar in the fall. At the meeting, we voted to revise our by-laws to be in line with the Bar's standard section by-laws template.

Unfortunately, last Bar year we did not hold our annual Advanced Law Seminar but bounced back this year with a very well-attended and favorably reviewed seminar at the Loew's Hotel. We held sessions on AI & Healthcare, False Claims Act Trials, the Supreme Court's Administrative State Rulings and Impact on Healthcare, Commercial Payor Disputes and the No Surprises Act, and a Legislative Update on what to expect from the 2025 session. We also provided an hour of professionalism CLE with an informative discussion with The Honorable Keith R. Blackwell and Rajesh Shaw.

On April 23, 2025, we hosted a sold-out Lunch-n-Learn entitled, "Private Equity in the Crosshairs: Transactional and Regulatory Considerations for Health Care Investments in 2025." We also published two newsletters with multiple articles covering the gamut of health law.

Finally, the Section awards the Alan Rumph Memorial Fellowship to provide summer funding to law students with an interest in health law and a commitment to pursuing a career in health law in Georgia. This year, we awarded three \$6,000 fellowships to students at the University of Georgia, Georgia State University and Emory University. After accounting for the Rumph Fellowship awards, we have \$27,805.54 in our operating account.

It has been my honor and pleasure to lead this Section over the past year. We are proud of the work we have done and look forward to much more in the coming year.

Intellectual Property Law Section 2024-2025 Annual Report

Section Chair: Chittam Thakore

I. 2024-2025 Accomplishments

Building on our past years' successes, the IP Section once again this year undertook multiple in-person events focused on key practice areas of interest to our members. We are also laser-focused on bringing back our historical member favorite event—the IP Section's annual conference—and continuing discussions to bring back our Judges Dinner from the pre-pandemic era.

For the first time since inclement weather (2019) followed by the COVID pandemic (2020 onward) disrupted our annual IP Section conference, we will offer a day-long annual conference at the GA Bar conference center. The conference will offer members 6 CLE hours of programs featuring panel discussion and speakers on developments in copyright, trademark, trade secret, and patent law, as well as informative presentations on professionalism and ethics.

The Section is also continuing its efforts to significantly improve member access and information exchange by remaining engaged with its third-party website programming vendor to continue the process of updating, maintaining, and streamlining the Section's website.

Overall, the IP Section is in outstanding shape. This year's Executive Committee included Chittam Thakore, who stepped up from her post as Chair Elect to replace Katie Bates as Chair of the Section, as Ms. Bates stepped down at the beginning of the 2024-25 Bar year for personal health and family-related reasons; Chittam Thakore (also Chair Elect); Josh Curry (Vice Chair), Meredith Ragains (Secretary), and Andrew Strickland (Treasurer). Our membership remains strong, still exceeding 1,200 members. We are also fiscally sound, with a balance of approximately \$224,000—the result of accumulated member dues, fiscal responsibility, and suspension of certain section-wide in-person events post-pandemic. As our section-wide spend increases, with events such as the upcoming annual conference, we anticipate a resulting drop in the Section's budget. But we have taken measures to ensure a conservative budget for the reinstitution of our member favorite annual conference, so as to balance the expenses. Following the anticipated success of this post-pandemic inaugural annual conference, our goal is to relaunch our sponsorship drives to generate revenue for the Section. At the same time, we plan to maintain our goal of extending financially supporting and partnering with our sister and related-IP-focused organizations, including the Pro Bono Partnership of Atlanta, Georgia Lawyers for the Arts, Georgia PATENTS, and the Georgia Intellectual Property Alliance.

II. Committee Reports

(i) The In-House Committee, led by Justin Ward and Joe Staley, will host an in-person CLE at the IP Section's annual conference on June 13, 2025, titled Navigating Ethics while Protecting Intellectual Property; Legal Issues and Updates from an In-House Perspective. The panel will also discuss new and exciting legal issues and updates that are relevant for 2025. The In-House Committee is also working on a virtual fall CLE that will cover an exciting and relevant IP topic.

(ii) The Community Outreach Committee, led by Meredith Ragains, has arranged, for the second year in a row, a will volunteer project for the IP Section membership at PAWS Atlanta on Saturday, May 31. PAWS Atlanta is Georgia's oldest no-kill animal shelter having started in 1966 as the DeKalb Humane Society. The shelter has found homes for more than 49,000 dogs and cats in the

past almost 60 years! Our members plan to roll up our sleeves with several important tasks: First, we will help the PAWS Development Team with an upcoming fundraising campaign. Second, our group will clean the walking trail throughout the shelter, allowing the PAWS volunteers and staff to walk the dogs safely while they get the exercise and stimulation they need. The big pay-off for our hard work will happen at the end when we get to socialize with some of the doggies and the kitties in the Cat Cottage. We will help them get ready to meet potential adopters!

(iii) The Patent Committee, led by David Reed, will present a CLE at the upcoming IP Section annual conference focused on a topic that is top of mind for many a patent practitioner—the Federal Circuit’s en banc consideration of the question of damages and the admissibility of expert testimony in *EcoFactor Inc. v. Google LLC*. The Patent Committee’s distinguished panel will discuss recent developments and trends in patent damages, including developing issues surrounding reasonable royalty models and expert testimony and their impact on patent licensing.

(iv) The Copyright Committee, led by Alcide Honoree and Jelani Miller, continued its focus this year upon rebuilding membership and committee engagement. The committee will hold a CLE during the IP Sections annual conference on Developments in Copyright and AI. The committee also plans to host a member social in May and plans are underway for an additional CLE.

(v) The Trade Secrets Committee, led by Mike Cicero and Neal Weinrich, has presented a number of CLEs and events for its members. For example, on June 25, 2024, the Committee conducted a 90-minute CLE titled “The FTC’s Noncompete Ban: Where It Stands and How It Will Impact the Protection of Trade Secrets.” This program spurred almost 100 people to register, considering both live and virtual attendees together. Then, on April 28, 2025, the Committee conducted another 90-minute CLE session titled “AI and Trade Secrets: What Practitioners Need to Know.” The session proved highly interactive with members of the live audience asking probing questions. The Committee plans to present another CLE at the IP Section annual conference and continues to bask in positive member feedback.

(vi) The Trademark Committee, led by first-term co-chairs Cher Gregoire and Jason Cooper, will host a CLE as part of the IP Section annual conference in June 2025 featuring Doug Isenberg, who will provide section members with an overview of the Uniform Domain Name Dispute Resolution Policy (UDRP), highlight some important statistics on cases, offer tips about how to file a successful UDRP complaint, and discuss interesting and important decisions from the past year. The Trademark Committee is also planning a late spring or early summer happy hour to recruit new members, and it is also exploring other potential member outreach efforts, including another social event and/or CLE in the fall, or gauging IP section member interest in participating in a GLA trademark-related pro bono clinic in the summer/fall.

(vii) The Communications Committee, led by Rachel Fields, continues to revitalize the Section website (<http://georgiaip.org>) to increase member usability and access. Efforts remain ongoing to improve and update the website, as activities are planned. A Section Newsletter was also released in November 2024, with a second planned for June 2025.

III. Summation

The IP Section continues to admirably serve its members by offering them relevant programing and networking opportunities. A mix of diverse speakers, across a mix of IP-related topics, has provided exciting educational and networking opportunities for our members. While the Section

had a setback early in the Bar year—the stepping down of our then Chair Ms. Katie Bates due to family and health concerns—the Section has rallied. Not only that, it has gone from strength to strength. For example, this year, the Section hosted a much lauded appreciation dinner for past Section Chairs, which served to strengthen bonds and reaffirm the historical link between the Section and past Chairs. Moreover, the reinstatement of one of our flagship section-wide events—the annual conference—is generating excitement and enthusiasm, and preparations for a most robust revival are under way! Through these and other efforts, the IP Section will continue to promote the highest standards of excellence in the practice of IP law.

Nonprofit Law Section 2024-2025 Annual Report

Section Chair: Claire Oates

Membership and Initiatives

The Nonprofit Law Section had 345 members as of March 25, 2025. The Section has seen an increase in membership over the last few years and is committed to additional membership outreach. In particular, the Section is interested in reaching newer lawyers. The Section also hopes to partner with other Sections and pursue pro bono activities supporting non-profit organizations in the coming year.

Account Balance

The balance of our operating account is \$28,841 as of April 26, 2025. Our annual expenses are in line with our annual revenues.

2024-2025 Officers and Executive Committee Members

Officers

- Chair – Claire Oates, Boys & Girls Clubs of America
- Vice Chair – Jonathan Poole, Emory University
- Secretary/Treasurer – Lauren Bellamy, Grady Health System

Additional Executive Committee Members:

- Kathryn Hecker, Arnall Golden Gregory
- Joel Arogeti, Kitchens Kelley Gaines P.C.
- Cara Mitchell, Children’s Healthcare of Atlanta
- D.A. Wilson, The Wilson Firm
- Allison Thompson, Boys & Girls Clubs of America
- Eric Johnson, CARE

Section Activities

Continuing Legal Education (“CLE”)

This fiscal year, with the help of the State Bar, the Section organized six (6) hours of CLEs for Section members. All virtual CLEs were free for members. These included:

- January 2025 (2 hours; virtual)
 - *Employment Law Essentials: FLSA Compliance for Nonprofits*
 - *Emerging Topics in Employment Law*
- March 2025 (4 hours; virtual)
 - *Nonprofit Organizations and Insurance: Market Updates and Lessons Learned*
 - *A Pro Bono Primer: Advising Nonprofits on Document Retention, Destruction, and Production*
 - *Immigration Compliance & Enforcement: What Nonprofits Need to Know*
 - *Trying to Keep Up: An Overview of Some of the More Consequential Executive Orders Affecting Nonprofits*
- 2 Section Email Updates (January, March)

Officers Elected at Annual Meeting for 2025-2026 Fiscal Year

- Chair – Jonathan Poole, Emory University
- Vice Chair – Lauren Bellamy, Grady Health System
- Secretary/Treasurer – Allison Thompson, Boys & Girls Clubs of America

In addition, the Section's bylaws allow for up to three (3) additional members to join the 2025-2026 Fiscal Year Executive Committee. We are in the process of interviewing Section members from across the nonprofit sector and look forward to new representation on next year's Executive Committee.

Privacy & Technology Law Section 2024-2025 Annual Report

Section Chair: Heather Kuhn

Introduction:

The Privacy & Technology Law Section (“PTLS”) has grown and established a reputation for providing quality and frequent content and connections. Not only are we a source of information for our members within Georgia but we are expanding that recognition nationally to become the premiere location within the southeast. This increased profile is a tribute to the hard work of our executive committee and our partners at the Georgia Bar. It has been a privilege to serve in a leadership role for this committee. The entire section has worked incredibly hard this year and I am honored to present our work to the Board of the State Bar of Georgia.

Officers:

- Heather Kuhn – Chair
- Antonette Igbenoba – Vice Chair
- Alexa Limeres -- Secretary

The PTLS elects a new Secretary every June for a three-year term in which that individual will succeed from Secretary to Vice Chair and finally Chair on their third year. These three officers cannot do all the work that is required to continue to bring diverse and impactful programs to our section members. As such, the Officers have created Executive Committees in which we have additional leaders for our section. The Officers & Executive Committee Leaders create the Board.

- The PTLS Executive Committees and Executive Committee leaders are as follows:

(C) Chair/ (VC) Vice Chair

- Programming: Jason Loring (C), Bob Jett (VC)
- Communications: Bunny Sandefur Howell (C), Leeza Snyderman (VC)
- Social: Ashley Whitaker (C), Madiha Merchant (VC)
 - Book Club – Kendall Carter
- Community Outreach: Prentecia Floyd (C), Terrance Pryor (VC)
- Student/ New Practitioners: Charlie Britt (C), Will Bracker (VC)
- Diversity & Inclusion: Alexis Hall (C), James Boxton (VC)
- Past Officers: Will Bracker, Christina McCoy
- At Large EC Member: Ami Rodrigues

Membership:

As of the last update in April, this section has grown to 956 members continuing the upward trend over the past several years. In the last six years, our section membership has more than doubled. I believe all the work put into the PTLS by the Officers, EC Leaders, section members, and State Bar of Georgia employees are thanks for our continued success. With the increasing global and domestic laws of privacy, cybersecurity, AI and the advancement of technology, the importance of the PTLS is becoming more important than ever.

Financials:

Our section continues to be financially secure and apply the funds to legal activities, community outreach, and CLEs for our members. We require two Officers to approve spend over \$2,500 per event hosted by our EC Leaders. As of April 11th, we have \$51,863.24 in our account, which will help the PTLS to achieve its goals in years to come.

Board Meetings:

A cadence is established for the Officers to meet every month (“Officer Meeting”). The Officers and EC Leaders meet once per month on the second Friday from 12:30 to 1:30 pm (“Board Meeting”). The agenda and past meeting minutes are sent out the Thursday prior to the Board Meeting so all corrections can be made during our meeting. During the Board Meeting, we approve minutes, review financials & membership numbers, discuss any old business, review each committee programs in detail, and have an open table for discussion.

Executive Committee Annual Updates:

- Programming Committee
 - Purpose: This committee is focused on bringing relevant and engaging privacy, cybersecurity, technology and AI-related CLE content to our section members. At the beginning of the year, we solicited our members using a survey in order to find out what content they would like covered in CLEs.
 - Outside of our annual conference programming, the following CLEs were offered by the section in the past year:
 - De-Identification CLE with counsel from Duck Duck Go and Mckesson legal de-identification lead.
 - Part 2 of De-Identification CLE focused on deep dive scenarios
 - AI Governance CLE with speakers from Jones Walker, Accenture, Center for Advanced AI (article published in Law360 on CLE event)
 - Privacy Policy and Website Terms of Use CLE with the ProBono Partnership of Atlanta
 - Healthcare Privacy CLE
- Social Committee
 - Purpose: This committee is focused on bringing social events, whether virtual or in-person, that offer our section members educational and networking opportunities.
 - Bi-Monthly Book Club: To reach our section members, we came up with creative ways in which to meet virtually. One of those being a bi-monthly virtual book club which is hosted by Kendall Carter. This year our section members have read and had thoughtful discussions on the following books: “Hacker’s Mind” – collection of essays; Dark Matters
 - Networking Events: Privacy Day Happy Hour at Pour Tap; Networking breakfasts, lunches in various cities around Georgia to expand accessibility of events; Happy Hour at PTLF; Speaker Dinner prior to PTLF
- Communications Committee
 - Purpose: This committee is focused on discovering and enhancing ways in which to communicate and deliver information to all our section members. The Communications Committee has spent countless hours updating our website. This is a space where we communicate on future events, post jobs in the field, provide photos of past events, and provide presentation materials for all to continue to their education in the technology or privacy legal field. Please review our website [here](#). The Communications Committee increased outreach by creating a more active LinkedIn presence and more regularly communicating with members.

- Community Outreach Committee
 - Purpose: This committee is focused on finding ways to connect with the community and share our expertise with members in need. They focused on the below events and relationships:
 - ProBono Partnership of Atlanta CLE and volunteer intake to support non-profit clients with Privacy Policies and Website Terms of Use.
 - Outreach to Elderly Community Members to explain privacy rights to individuals including how to avoid scams
- Student and New Practitioner Committee
 - Purpose: This committee is focused on seeking ways to reach out to new practitioners (both students and attorneys entering into the privacy, cybersecurity or technology law field). They focused on:
 - Continuing the Mentoring Program
 - Law Student Speed Interviewing Event
 - AVLFI donation of \$1,000
 - \$1,500 donation to Georgia Lawyers for the Arts
 - Expanded relationships with local law schools and related student organizations
- Diversity & Inclusion Committee
 - Purpose: This committee is focused on ensuring all activities are inclusive and diverse for all section members and reaching out to the broader community.

Privacy & Technology Law Forum (“PTLF”):

Every year the PTLF Vice Chair is responsible for our annual conference, which occurred even amidst a pandemic. This year was our 39th annual conference where we had 22 panels, 55 speakers, and 200 attendees on Day 1 and 140 attendees on Day 2. We had 7 companies and law firms sponsor the event and saw an increase in ticket sales and LinkedIn visibility. In addition, we launched two new annual PTLF Section Awards including the Vanguard Award and the Rising Star Award. The Vanguard Award was given to Jon Neiditz who has been a thought-leader in this space, mentor to many and founder of the section in its infancy.

We continued with a two-day program for our PTLF program which was held in person on Day 1 at the Georgia Bar and virtually on Day 2 in March 2024. The conference had three tracks for participants to jump between including Privacy, Cybersecurity/ AI and Technology Transactions. Keynotes included a Chief Privacy Officer Panel and a New York Times technology reporter – Kashmir Hill. Overall, participants had great feedback on the quality, depth and breadth of the content and look forward to next year.

Conclusion:

This past year, we have focused on expanding the reach of our section to as many of our 956 members as possible by expanding the locations and medium our events were hosted. We had a broad variety of CLEs and social events. Our members often express appreciation for how active the section is and how interesting the programming is. We believe that we deliver value to our members and respond to their needs. It goes without saying that success is not achieved on your own, and the PTLF success is attributed to the Officers, EC Leaders, our members, and Mary Jo Sullivan, Lane Sosebee and Challie Smith. All the information provided herein shows how the Officers, EC Leaders, and our members participated this Bar year. I specifically would like to focus

on Mary Jo Sullivan, Lane Sosebee and Challie Smith. These individuals go above and beyond to make sure the Officers can bring value to our section members – main point of contact to assist in planning events, communication pointers more efficiently and effectively to our section members, fielding all our questions as it relates to the State Bar, assisting in all our CLEs, and much more. They were key to the success of PTLF this year. We could not be as impactful or successful without them.

Real Property Law Section 2024-2025 Annual Report

Section Chair: Stuart S. Gordan

Year In Review

The 2024-2025 year was another banner year for the Real Property Law Section. We sponsored the following CLEs for members of the Section and the State Bar:

1. Commercial Real Estate seminar on November 14, 2024;
2. Residential Real Estate seminar on January 15, 2025;
3. Title Standards seminar in the morning of February 11, 2025, and the afternoon of February 25, 2025;
4. Real Property Law Institute from May 8-10, 2025.

The Commercial Real Estate seminar was particularly noteworthy, as this year the event was not a standard lecture presentation, but rather a hands-on workshop focused on all matters relating to land surveys. For example, during various parts of the day attendees received hand-outs of land surveys and legal descriptions, and following instruction and discussion, were tasked with completing various practical challenges and solving customary survey-related problems.

The Real Property Law Institute included the full complement of annual required CLE hours, plus social activities such as a kickoff party, organized ecology tour to explore Amelia Island, a 5k run/walk and a golf tournament. The Section also awarded the George A. Pindar Award,

granted to a member of the Section whose lifetime contribution has been significant to the Real Estate Bar, and who unselfishly gives of him or herself for the benefit of the Bar. We are a few short years away from the 50th anniversary of the Institute, and are very proud of the fact that our Section members and industry partners continue to attend and support the event.

We also sponsored non-CLE events this year:

- Joint social event with the Southeast Land Title Association at Good Game Restaurant at The Battery on August 15, 2024;
- Title and Closing Boot Camp with the Atlanta Bar Association Real Estate Section on September 12, 2024;
- Banquet on November 14, 2025, to honor the speakers at the Commercial Real Estate seminar and recipients of our law school scholarship winners; and
- Senior Wills Legacy Lunch and Learn with the Mayor's Office of the City of Atlanta and the Georgia Legal Services Pro Bono Project to assist with will preparation as a measure to prevent heirs issues with chain of title, on December 14, 2024, and April 12, 2025.

Throughout the year, our Section's Executive Committee sub-committees actively engaged in their respective responsibilities. The sub-committees were:

1. Commercial Real Estate;

2. Communication;
3. Ethics and Professionalism;
4. Legislative and Governmental Relations;
5. Litigation;
6. Pro Bono Initiatives;
7. Recognition;
8. Residential Real Estate;
9. Real Property Law Institute; and
10. Title Standards.

The Communication subcommittee continued the push to expand our presence on social media, as well as published a quarterly digital newsletter. The Legislative and Governmental Relations subcommittee spent a considerable amount of time identifying proposed bills that affect real property, and highlighted same to the Section. This subcommittee also coordinated with the State Bar's legislative staff, and provided comments and feedback regarding proposed bills. On numerous occasions, members attended hearings or met with interested parties regarding proposed legislation.

The Litigation subcommittee reported on appellate cases that similarly affect real property, and the Recognition subcommittee oversaw the awarding of scholarships to law school students and the George A. Pindar Award.

A large part of the Section's work involves supporting and assisting Georgia residents, which should not be a surprise considering the Section members are attorneys. The Pro Bono Initiatives subcommittee assisted with the above-referenced Senior Wills Legacy Lunch and Learn with the Mayor's Office of the City of Atlanta and the Georgia Legal Services Pro Bono Project, coordinated the ecology tour at the Institute, and oversaw donations to Georgia-based organizations that serve real estate and real estate-related organizations. Each of the following organizations received \$3,000 stipends: Atlanta Legal Aid Society, Inc., Atlanta Volunteer Lawyers Foundation, Georgia Heirs Property Law Center, Middle Georgia Justice, and Pro Bono Partnership of Atlanta.

Further, the Section awarded scholarships of \$2,000 to one law student from each of the Georgia-based law schools, and awarded stipends of \$2,500 to six attorneys working at non-profits or public interest organizations so that they could attend the Real Property Law Institute. At least one of the recipients of the law school scholarship is attending the 2025 Institute. The overall goal of these initiatives is to encourage attorneys to enter the real property field and become involved in the Section and State Bar.

All in all, the 2024-2025 year continued the Section's push to attract a variety of new attorneys to the Section and the real property field, and to support Section members as we assist Georgia residents.

Sub-Committees

The Executive Committee implements many CLE courses for our members throughout the year. The largest of these is our seminar in May of each year – Real Property Law Institute (RPLI). Our 2024 RPLI was held in Charleston, SC, , the reigning No. 1 City in the U.S. as awarded by Travel + Leisure magazine, with around 300 attendees. The seminar hosted 23 speakers including Executive Committee members, Georgia attorneys, surveyors, and an American Land Title Association officer. Over the three days we held a joint session, and a residential and commercial break out for a total of 12 hours CLE credit including 2 trial practice, 1 professionalism and 1 ethics.

The 2025 Real Property Law Institute is scheduled for May 8-10, 2025, back in sunny Amelia Island, FL. An annual event sponsored by the Real Property Law Section, the Institute provides Section members with continuing legal education hours and opportunities to socialize and meet colleagues and industry partners.

The Institute's schedule is a 3-day event, with Day 1 being a joint session, Day 2 having both a Residential Breakout Session and a Commercial Breakout Session and Day 3 back in a joint session. With a theme of Shifting the Sands, the individual sessions are designed to provide attendees with critical information for practicing law in the coming years. In addition to returning, all-time favorite sessions such as the Judicial Update presented by Carl Clark and Cases Since Last RPLI That You'll Know by One Name This Year presented by T. Matthew Mashburn, there also are sessions, such as Georgia's new Transfer on Death Deeds. Each of these sessions touch on hot topics in today's society and legal profession, as well as again, help Section members plan to navigate their futures.

An important part of the Institute is the collaboration and involvement with industry partners, many of whom are other lawyers, companies and vendors. We are thankful to these partners, as all available sponsor tables sold-out this year. The Institute certainly will be a great event for Section members.

Commercial Real Estate

Sub-Committee Co-Chairs: Kyle J. Levstek and Paula Rothenberger

On November 14, 2024, over 125 veteran attorneys, young lawyers, paralegals, and legal assistants headed to the auditorium at the State Bar of Georgia for the Commercial Real Estate Seminar. This year's seminar was developed based on a need articulated on the Real Estate Listserv, to grow the skillset of the real estate professional with regard to survey review and the drafting of legal descriptions. Kyle J. Levstek, Paula Rothenberger, Leonard R. Gray Jr., and Mark Chastain prepared and presented 6 credit hours' worth of fantastic material and developed this dream into a Title and Survey Workshop where attendees reviewed surveys, drafted legal descriptions, read record and survey legal descriptions, and underwrote endorsements. Attendees loved the hands-on materials and were fully engaged during this informative and stimulating day of survey focused CLE.

Communication

Sub-Committee Chair: Kelsea Laun

Following our commitment to provide information to the section in a more efficient and modern manner, we continued to build on our relationship with the digital media advisor first engaged last

year and have built a robust social media presence through our section accounts with Facebook, LinkedIn, and Instagram. We publish a quarterly newsletter with substantial content, including topical articles authored by our membership, and continue to share section email and social media blasts with legislative updates, continuing education opportunities, and solicitation of input and updates from our section members. Our listserv continues to be an active resource for our members, holding strong with approximately 10 emails and responses per day.

Legislative and Governmental Relations

Sub-Committee Chair: Matthew F. Totten

During the recently-concluded first year of the 2025-2026 two-year Legislative Session of the Georgia General Assembly, the Legislative Subcommittee (“Legislative Committee”) of the Real Property Law Section (“RPLS” or “Section”) worked with literally hundreds of lawyers, bankers, realtors, title company representatives, as well as representatives of many interest groups, including the Georgia Association of Realtors, the American Land Title Association, the Southeast Land Title Association, Georgia Commercial Real Estate Coalition, Georgia Real Estate Closing Attorneys Association, Atlanta Apartment Association, Mortgage Bankers Association of Georgia, Georgia Bankers Association, Community Bankers Association, Georgia Home Builders Association, and several sections of the State Bar of Georgia, including the Fiduciary Law Section, the Family Law Section, and the Elder Law Section.

Additionally, as a benefit to the Section, Legislative Committee member Joey Strength, along with associates of his firm, generated two legislative tracking summaries for use and reference by the Section at large, in order to particularly highlight potentially impactful proposed legislation and legislation which subsequently “crossed over” timely to the opposite chamber.

Our discussions and direct involvement with requests to sponsor and/or support several bills, as well as testify in hearings at the Georgia General Assembly, included several bills that affect the practice of law involving real estate as well as affect the citizens of Georgia, including:

<p>HB 289 / SB 90</p>	<p>Interrelated Bills to Address Electronic Methods of Notarization of Documents</p>	<p>Neither bill progressed out of respective initial- referred committees</p>	<p><u>Real Estate Matters and Notes</u> Bills as proposed would affect the practice of law involving real estate, including as to the scope and duties of an attorney in supervising and conducting a real estate closing, particularly relating to the attestation of deeds.</p> <p>The Legislative Committee and Section leadership, as requested by Bar leadership, served as a resource and intermediary to the various parties which introduced and/or sponsored the respective legislation, including as potential amendments and substitutes were circulated to said bills. It is anticipated that ongoing dialogue will continue as to potential solutions palatable to all sponsors and stakeholders to this legislation.</p>
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HB 403	A Bill to amend Title 44 of OCGA, relating to property, so as to enhance protections for homeowners and tenants by revising or repealing certain provisions inhibiting housing stability	<p style="text-align: center;">02/13/2025</p> <p style="text-align: center;">House Second Readers</p> <p>02/12/2025 House First Readers 02/11/2025 House Hopper</p>	<p><u>Real Estate Matters and Notes</u> Bill impacts real estate and the practice of law by the proposed alteration of HOA/COA lien notice and the proposed elimination of statutory foreclosure for such association liens, elimination of state level rent control prohibitions, the proposed statutory voiding of deeds, including security deeds and deeds of conveyance, if an entity owns interest in certain number and dollar figures of certain residential properties, and the elimination of nonjudicial power of sale foreclosures against certain individuals.</p>
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<p>HB 289 / SB 90</p>	<p>Interrelated Bills to Address Electronic Methods of Notarization of Documents</p>	<p>Neither bill progressed out of respective initial-referred committees</p>	<p><u>Real Estate Matters and Notes</u> <u>Bills as proposed would affect</u> <u>the practice of law involving</u> <u>real</u> <u>estate, including as to the</u> <u>scope</u> <u>and duties of an attorney in</u> <u>supervising and conducting a</u> <u>real estate closing,</u> <u>particularly relating to the</u> <u>attestation of deeds.</u></p> <p><u>The Legislative Committee</u> <u>and Section leadership, as</u> <u>requested by Bar leadership,</u> <u>served as a resource and</u> <u>intermediary to the various</u> <u>parties which introduced and/</u> <u>or sponsored the respective</u> <u>legislation, including as</u> <u>potential amendments and</u> <u>substitutes were circulated to</u> <u>said bills. It is</u> <u>anticipated that ongoing</u> <u>dialogue will continue as to</u> <u>potential</u> <u>solutions palatable to all</u> <u>sponsors</u> <u>and stakeholders to this</u></p>
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			<u>legislation.</u>
HB 403	A Bill to amend Title 44 of OCGA, relating to property, so as to enhance protections for homeowners and tenants by revising or repealing certain provisions inhibiting housing stability	House Second 02/ 13/2025 Readers 02/12/2025 House First Readers 02/11/2025 House Hopper	<u>Real Estate Matters and Notes</u> <u>Bill impacts real estate and the</u> <u>practice of law by the</u> <u>proposed alteration of</u> <u>HOA/COA lien notice and the</u> <u>proposed elimination of</u> <u>statutory foreclosure for such</u> <u>association liens, elimination</u> <u>of</u> <u>state level rent control</u> <u>prohibitions, the proposed</u> <u>statutory voiding of deeds,</u> <u>including security deeds and</u> <u>deeds of conveyance, if an</u> <u>entity owns interest in certain</u> <u>number and dollar figures of</u>

			<u>certain residential properties,</u> <u>and the elimination of</u> <u>nonjudicial power of sale</u> <u>foreclosures against certain</u> <u>individuals.</u>
HB 289 / SB 90	Interrelated Bills to Address Electronic Methods of Notarization of Documents	Neither bill progressed out of respective initial-referred committees	<u>Real Estate Matters and Notes</u> <u>Bills as proposed would affect</u> <u>the practice of law involving</u> <u>real</u> <u>estate, including as to the</u> <u>scope</u> <u>and duties of an attorney in</u> <u>supervising and conducting a</u> <u>real estate closing,</u> <u>particularly relating to the</u> <u>attestation of deeds.</u> <u>The Legislative Committee</u> <u>and Section leadership, as</u> <u>requested by Bar leadership,</u> <u>served as a resource and</u>

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HB 403	A Bill to amend Title 44 of OCGA, relating to property, so as to enhance protections for homeowners and tenants by revising or repealing certain provisions inhibiting housing stability	House Second 02/ 13/2025 Readers 02/12/2025 House First Readers 02/11/2025 House Hopper	<u>Real Estate Matters and Notes</u> <u>Bill impacts real estate and the practice of law by the proposed alteration of HOA/COA lien notice and the proposed elimination of statutory foreclosure for such association liens, elimination of state level rent control prohibitions, the proposed statutory voiding of deeds, including security deeds and deeds of conveyance, if an entity owns interest in certain</u>

			<u>number and dollar figures of certain residential properties, and the elimination of nonjudicial power of sale foreclosures against certain individuals.</u>
			<u>618 to address concerns raised by, among other stakeholders, the Georgia Association of Realtors.</u>

SB 119	<p>A Bill to amend Title 8 of OCGA, relating to general provisions for manufactured or mobile homes, so as to provide limited exceptions under which a manufactured home shall become real property</p>	<p>04/07/2025</p> <p>03/25/2025</p> <p>03/06/2025</p> <p>Senate Sent to Governor</p> <p>House Passed/Adopted</p> <p>Senate Passed/Adopted</p>	<p><u>Real Estate Matters and Notes</u> Bill impacts real estate and the practice of law by the statutory creation of an additional method for a manufactured home lien holder to preserve its certificate of title lien priority subsequent to the recording of a Certificate of Permanent Location.</p> <p>Subsequent to Hurricane Helene, several bills were introduced this session to address issues which cropped up during disaster recovery efforts, including eligibility of a party for disaster relief and other funds due to the storm.</p> <p>After the Legislative Committee and Section leadership highlighted this bill and a separately introduced analogous House bill to the Section, individual Section members engaged with legislative sponsors and other</p>
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			stakeholders as to the process of recording the revised Certificate of Permanent Location and process to “unattach” any manufactured home foreclosed as personal property.
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Litigation

Sub-Committee Chair: Larry Evans

Our Litigation sub-committee periodically informs the board and section on any pending or completed suits during the year. For instance, one of the most recent cases is as follows:

- Vaughn v. Windfield Homeowners Association, Inc., No. A24A1751 (February 21, 2025)
- General Overview: In 1987, the Windfield subdivision established protective covenants with 20-year automatic renewals unless amended by majority vote. Property owners functioned as an association, electing leadership and managing common areas. In 2023, the Vaughns purchased a lot and began operating short-term rentals. Other property owners then amended the original declaration to formally establish an association governed by the Property Owners' Association Act and ban short-term rentals, securing a two-thirds majority vote without the Vaughns' consent. The Vaughns filed suit, seeking to invalidate the amendment. The trial court ruled for the association, finding only a majority vote was required, membership could be implied, and the association substantially complied with legal requirements. The Vaughns appealed.
- Holding: On appeal, the Vaughns argued that the Association could not impose new restrictions on the use of their property without their consent unless the Association was subject to the Act, arguing further that the Association was not subject to the Act. The Court of Appeals affirmed the trial court's decision, holding that: (1) The amendments to the original 1987 neighborhood covenants constituted a "declaration" under the Property Owners' Association Act (the "Act"), as required for the Association to be subject to the Act and for homeowners to be bound by covenants restricting short-term rentals. Citing OCGA § 44-3-221(6), the Court explained that although the original 1987 covenants did not constitute a "declaration" under the Act—because they were not administered by an association with mandatory membership—the document set out means to amend by a majority vote. The Court noted that two-thirds of the property owners voted for the amendments, which were properly recorded in compliance with OCGA §§ 44- 3-222 and 44-3-

235(a). (2) The Vaughns impliedly consented to be members of the original homeowners' association, and thus were bound when the Association amended the covenants. Applying OCGA § 14-3-601, which governs nonprofit corporations, the Court held that consent to membership may be express or implied. The Court determined that the Vaughns' deed, closing documents, and seller's disclosure alerted them to the existence of the Association and certain restrictive covenants, and the Vaughns acted in conformity with their membership when they paid assessments. The Court further concluded that the Association was properly formed as a nonprofit corporation as required by OCGA § 44-3-227(a). Importantly, the Court rejected the Vaughns' argument that the 1987 declaration could not be amended to adopt the Act because the statutes only apply to an amendment of a "declaration" as that term is defined in the Act. The Court reasoned that such an interpretation would lead to the "nonsensical result" that no homeowners association could avail itself of the Act if its original declaration did not satisfy the statutory definition. The Court emphasized that under OCGA § 44-3-233, the legislature had instructed courts to liberally construe statutory requirements when determining whether an association has been properly established, and that substantial compliance with requirements is sufficient. Additionally, the Court clarified that the seller's disclosure was not inadmissible hearsay in this context, as it was not being used to prove the existence of a mandatory association but rather to show that the Vaughns were on notice of, and participating in, the existing association.

Recognition

Sub-Committee Co-Chairs: Thua G. Barlay and Crystal C. Baker

Our Recognition sub-committee this year continued to focus on ensure that bar members understand the good works that our section does.

In addition, we continued recognizing individuals for great work focused on real property law: Pindar Award: The George A. Pindar Award is granted by our section to a member of the section whose lifetime contribution has been significant to the real estate bar. The main objective of the award is to honor a member who unselfishly gives of him or herself for the benefit of the bar. The Executive Committee determined annually if the award shall be granted and will vote to give the award to a person or persons whom the committee thinks represents the ethics

and ideals of George A. Pindar. For the 2024, the awardee was Robert B. Brannen, Jr. Rob is Partner with Bouhan Falligant LLP in Savannah and an attorney licensed in the State of Georgia. A 38-year industry professional, Rob represents national title insurance companies in multi-million dollar transactions and represents local and national development companies, equity funds and construction companies in the acquisition, financing and development of real estate for retail, office, industrial and residential development.

Scholarships: For the 2024-25 year, the section awarded scholarships to students from several Georgia law schools. At our annual awards dinner, the section recognized these students. The awarded students were Aniket "Nick" Pai (Emory University School of Law), Katie Anderson (Mercer University School of Law), Charlie Hulett (Georgia State College of Law), Elena Rogers (University of Georgia School of Law), and Joy Smith (John Marshall School of Law).

Residential Real Estate

Sub-Committee Co-Chairs: Tamara Brooks & Kirsten Howard

The Residential Sub-Committee typically hosts an annual Residential Seminar to provide CLE hours to members of the State Bar. The annual Residential Real Estate seminar was held on January 15, 2025 at the State Bar of Georgia. There were 100 attendees. Some of the topics included FinCen and the Corporate Transparency Act, How to avoid fraud in real estate transactions, a robust discussion on the new Transfer on Death Deed and the always popular Underwriting Panel. It was well received by all and we had a Happy Hour at the conclusion of the seminar.

As with our commercial real estate seminar, we also enlisted sponsors for this seminar with each attendee paying only ten dollars per CLE credit.

Title Standards

Sub-Committee Chair: Allie Jett and Aimee Latourette

The Title Standards committee's activities for the 2024-2025 year involved putting on our annual CLE - this time broken into two segments and with the addition of a social hour afterwards that was well attended. Our first half-day session was on February 11. Our topics and speakers included Bill NeSmith, Deputy General Counsel for the Bar, who gave a very entertaining discussion on attorney ethics. Mr. Ed Carver of Fidelity Title gave an ever-relevant discussion on Decedent's Estates. And Faith Lynn a commercial title examiner with Bold Examinations presented on the basics of running a title examination.

Our second session, an afternoon session that was followed by a reception, was on February 25. Our speakers included Thua Barlay of Lueder Larkin & Hunter, who presented a very topical discussion of Transfer On Death Deeds; David Klein of Rountree Lietman Klien & Greer presented on Forms of Title Litigation; and committee co-chair Aimee LaTourette of Schulten Ward Turner & Weiss presented a legal update on matters coming out of the last legislative session including prohibited transactions by foreign nationals and HB 1292. We very much enjoyed being able to socialize with the seminar attendees following the session.

We will be presenting a number of updates to the Title Standards to the membership of the section at our annual meeting in May.

Pro Bono Initiatives

Sub-Committee Co-Chairs: Jennifer Rentenbach and Ellen Smith

During the 2024-2025 session, the Pro Bono Sub-Committee of the Real Property Law Section of the State Bar of Georgia contributed to the Section through the following efforts.\

Donations and Pro Bono Opportunities:

The Pro Bono Sub-Committee reached out to a number of non-profit organizations that directly or indirectly provide services to indigent Georgia individuals and families. Donations totaling

\$15,000 were distributed among five non-profit organizations throughout the state. These funds will support Georgia families in various real property related legal matters, including, landlord/tenant issues, foreclosure prevention assistance, tangled title and heirs property issues, home purchase and ownership education, and preserving property rights through estate planning. Pro bono service opportunities with each of these non-profit organizations will be highlighted in

an upcoming RPLS newsletter. The Sub-Committee also assisted with recruiting volunteer attorneys from the Section to help staff two estate planning events for seniors sponsored by the City of Atlanta.

RPLI Scholarships:

The Pro Bono Sub-Committee accepted applications from 8 members of the Georgia Bar for scholarships that include the 2025 Real Property Law Institute registration fee, three nights hotel accommodations at the conference hotel, and a small travel stipend. The recipients of 6 scholarships practice in an area with an emphasis in real property law matters either through public service or are employed by a non-profit organization.

RPLI Educational Family Activity:

Continuing our commitment to support public outreach and conservation in our Real Property Law Institute host city, the Pro Bono Sub-Committee organized a free, family-friendly Ecology of Amelia Island Nature Tour at RPLI. This 2-hour guided tour will highlight the three different ecosystems found on Amelia Island: the maritime forest, the beach sand dunes, and the marsh.

STATE BAR OF GEORGIA TAXATION LAW SECTION

2024 – 2025 ANNUAL REPORT

The Taxation Law Section fulfilled its purpose “to promote the objectives of the State Bar of Georgia with the field of tax law” during the 2024 – 2025 State Bar fiscal year. As provided in its bylaws, the Taxation Law Section actively promoted the continuing education of its members in the field of tax law, provided opportunities for professionals and business groups to interact and engage in activities related to tax law, and worked to achieve improved compliance with the tax laws of Georgia and the U.S.

FISCAL YEAR FOCUS

Training and networking opportunities focused on the newly created Georgia Tax Court, which the People of Georgia approved this fiscal year via a Constitutional Amendment referendum.

GOVERNANCE

The Taxation Law Section is governed by its Executive Committee. During the current fiscal year, the Executive Committee consisted of the following officers:

<i>Chair:</i>	David Greenberg	<i>(The Home Depot; Atlanta, GA)</i>
<i>Chair-Elect:</i>	DiAndria Green	<i>(Bennett Thrasher; Atlanta, GA)</i>
<i>Vice Chairperson:</i>	Edward Rappaport	<i>(Saylor Law Firm; Atlanta, GA)</i>
<i>Secretary:</i>	Lauren White	<i>(Asbury Law Firm; Atlanta, GA)</i>
<i>Treasurer:</i>	Alexus Holton	<i>(James Bates Brannan Groover; Macon, GA)</i>
<i>Member-at-Large:</i>	Nicholas Lyskin	<i>(Fox Rothschild; Atlanta, GA)</i>
<i>Immediate Past Chair:</i>	Alla Raykin	<i>(Eversheds Sutherland; Atlanta, GA)</i>

SEMINARS AND MEETINGS

Georgia Department of Revenue Liaison Meeting (with the Atlanta Bar – Tax Section): On December 11, 2024, the Section held its annual Georgia Department of Revenue Liaison Meeting at the Atlanta Georgia Bar conference center. Section members Frank O’Connell (*Commissioner, Georgia Department of Revenue*), Richard Litwin (*Owner, Litwin Law Firm*), and Mace Gunter (*Tax Counsel, Delta Air Lines*) served as moderators:

- Section members Alla Raykin (*Counsel, Eversheds Sutherland*) and Jonathan Feldman (*Partner, Eversheds Sutherland*) presented “Creation of the Georgia Tax Court,” which provided an overview of the Constitutional Amendment and related legislation establishing the Georgia Tax Court.
- Section members Kelsey Finn (*Tax Policy Director, Georgia Department of Revenue*) and Jarter Gao (*Tax Policy, Managing Attorney, Georgia Department of Revenue*) provided a legislative and policy update on Income Tax and Sales & Use Tax.
- Frances Mulderig (*Senior Assistant Attorney General, State Law Department*) provided an update on significant judicial decision involving Georgia tax law.
- Kerry Herndon (*Director, Compliance Division, Georgia Department of Revenue*) provided an update on tax collections issues.

The meeting both began and concluded with a networking opportunity for Section members. The Section paid all fees for members’ CLEs.

INTERNAL USE

Annual Professionalism and Ethics Conference (with the Atlanta Bar – Tax Section):

On March 6, 2025, the Section hosted its Annual Professionalism and Ethics Conference at Eversheds Sutherland Atlanta conference center. Section members David F. Golden (*Partner, Troutman Pepper Locke*) and Christopher Perkins (*Judicial Law Clerk, Georgia Tax Tribunal*) presented alongside Hon. Charles Beaudrot (*Judge, Office of Administrative Hearings*) and Section member Hon. Larry O’Neal (*Judge, Georgia Tax Tribunal*):

- David Golden led a conversation entitled “Tax Ethics and Professionalism,” which provided an overview of ethical and professionalism issues related to both Federal and Georgia tax practice. The presentation covered the Lawyer’s Creed, the Georgia Standards of Professionalism, IRS Circular 230, and applicable ABA ethics opinions.
- Judge Beaudrot led a conversation entitled “Professionalism in Administrative Litigation,” which analyzed specific ethical and professionalism issues impacting administrative practice.
- Christopher Perkins and Judge O’Neal led a conversation entitled “Ethics and Professionalism in the Georgia Tax Tribunal,” which covered specific ethical and professionalism quandaries facing attorneys practicing before the Georgia Tax Tribunal, an administrative update from the Tribunal that included a summary of key cases decided in the previous term, and a conversation addressing the practical, ethical, and professionalism issues attorneys will need to navigate during the transition from the Georgia Tax Tribunal to the Georgia Tax Court.

The meeting both began and concluded with a networking opportunity for Section members. The Section paid all fees for members’ CLEs.

SPONSORSHIPS

Law Student Awards: The Taxation Law Section continued its annual support of the future practice of tax law in Georgia with a series of \$1,500 awards to exceptional law students at Emory University, University of Georgia, Georgia State University, and Mercer University. The recipients of these annual awards were:

<i>Emory University:</i>	Taylor Chervo
<i>University of Georgia:</i>	Nicholas Nelson
<i>Georgia State University:</i>	Elizabeth Corbett
<i>Mercer University:</i>	Haley Pendleton

Each recipient was invited to participate in the Annual Professionalism and Ethic Conference to learn about the practice of taxation law as a Georgia barred attorney and network with Section members. Taylor, Elizabeth, and Haley accepted our invitation, and each had extensive conversations with Section members and the panel.

FINANCIALS

The Section opened the fiscal year with \$35,025.95 of available funds.

The Section received \$16,927 in funds through section fees. Additionally the Section received \$342.83 from interest and dividend income and \$353.11 from Gain or Loss in Investment Interest allocation. These additional income lines are our portion of earnings related to reserve funds held by the State Bar. This amounts to \$17,622.94 of total Section revenue.

The Section spent \$2,731.16 to hold the Georgia Department of Revenue Liaison Meeting and the Annual Professionalism and Ethics Conference. Membership dues covered any CLE fees

Taxation Law Section Report (FY2024)

associated with the events, the cost of the facilities, and the cost of the networking functions occurring before and after the events. The Atlanta Bar Tax Section also supported these events, which reduced the burden on Section members. The Section further spent \$6,000 (\$1,500 per student) on the Law Student Awards. This amounts to \$8,731.16 of discretionary spending.

In addition to these expenses to support Section membership and the growth of the profession, the Section spent \$8,133.45 to the State Bar for "Section Assessment," and \$84.57 for Investment Service Fees and Bond Premium Amortization (State Bar required fees). These fees amount to \$8,218.02 of nondiscretionary spending.

The Section altogether spent \$16,949.18 of total spending, with \$8,731.16 of discretionary spending and \$8,218.02 of nondiscretionary spending.

We project the fiscal year income, discretionary spending, and nondiscretionary spending will result in a net gain of \$673.76. The section projects it will close the fiscal year with \$35,699.71 of available funds.

David Greenberg, *Chair*

White Collar Law Section 2024-2025 Annual Report

Section Chair: Charles E. Peeler

The Section will hold its annual meeting on May 29, 2025 and elect new Section officers. Currently, Charles E. Peeler serves as the Section's Chair; Spence Pryor serves as Vice Chair – Criminal; Ellen Persons serves as Vice Co-Chair – Civil; Holly Pierson serves as Secretary; Carl Lietz serves as Programs Director; and Dominyka Plukaite serves as Young Lawyers Division Liaison.

The Section hosted its first-ever kick-off event and holiday party at Alston & Bird on December 19, 2024, which also featured a presentation and discussion of several white collar war stories from Larry D. Thompson, a legendary white collar attorney at Finch McCranie LLP and former U.S. Deputy Attorney General, the second highest ranking position in the U.S. Department of Justice. The event presented an excellent networking opportunity for Section members.

On March 20, 2025, the Section partnered with Atlanta Bar Association's Criminal Law Section to host a CLE on parallel investigations, featuring various "high caliber" speakers of the Securities and Exchange Commission, Department of Justice, and Georgia Medicaid Fraud Control Unit. The event was informative, well-attended, and followed by a networking happy hour at Troutman Pepper Locke offices in Atlanta.

The Section has partnered with BakerHostetler, who will graciously sponsor the Section's next networking event at the Four Seasons on May 29, 2025.

Currently, the Section has 121 members, and its budget is in excellent condition.

Workers' Compensation Law Section 2024-2025 Annual Report

Section Chair: Michael Boesch

The Workers' Compensation Law Section of the State Bar of Georgia continues to thrive, both in membership and in its contributions to the Georgia legal and injured worker communities. We remain grateful for the invaluable support from the State Bar staff and the Board of Governors.

Membership

As of this report, the Section has 951 members. We are proud of our growing and active membership, and we appreciate each member's contribution to maintaining the Section's tradition of collegiality and excellence.

Financial Report

As of the most recent accounting, the Section's fund balance stands at \$162,177.10.

Continuing Legal Education

As in years past, the Section sponsored two major educational events:

Workers' Compensation Law Institute. Our flagship CLE event was again held at the Jekyll Island Convention Center and chaired by myself, Michael Boesch. I was fortunate to work with an outstanding group of co-chairs: Amanda Conley, Administrative Law Judge Nicole Tifverman, and Will Warhay. This program brought together attorneys, judges, and other professionals for in-depth discussion on key legal and procedural topics affecting our practice. We are especially grateful to all the speakers who generously donated their time and expertise to educate others in the field.

Workers' Compensation for the General Practitioner. This seminar, held in June, was organized and chaired by Vice Chair Dan Lovein. It provided an essential overview for attorneys less familiar with our practice area, offering instruction on core procedures and common litigation challenges before the State Board of Workers' Compensation. This seminar continues to serve as an important entry point for attorneys exploring the field.

Charitable Contributions

The Section remains deeply committed to supporting the mission of Kids' Chance of Georgia. We once again held our annual fundraiser and auction in conjunction with the Jekyll seminar. Proceeds helped fund scholarships for children of injured Georgia workers. Thanks to the continued generosity of our members, the Section helps make meaningful educational opportunities possible for these students.

Leadership and Acknowledgements

The work of the Section is made possible by a dedicated Executive Committee and many volunteer contributors. Our gratitude goes out to every speaker, auction donor, and planner who contributed their time, energy, and resources this year.

Current Officers:

Chair: Michael A. Boesch

Vice Chair: N. Daniel Lovein

Workers' Compensation for the General Practitioner: Sherrill Britt
Secretary and Distinguished Service Award: Ryan V. Klee
Treasurer: Luanne B. Smith
Co-Editor of the Newsletter: Jennifer H. Chapin
Co-Editor of the Newsletter: Rob Hendrix
Immediate Past Chair: Nathan C. Levy

We thank every Section member for their ongoing participation and service, and we look forward to another year of growth and impact.



M E M O R A N D U M

To: ICLE Advisory Board Members

From: Julia Neighbors, ICLE Director

Date: April 30, 2025

Re: Institute of Continuing Legal Education/State Bar of Georgia

I am pleased to present the following report for your review of the Institute of Continuing Legal Education's activities for the period through February 28, 2025.

ICLE is not able to do its work without the support of volunteers who serve as Program Chairs and speakers, and we are indebted to them and to every Georgia lawyer who volunteers his or her time in service to the legal profession.

ICLE Programs (March 1 – April 30, 2025)

- Off-Site Programs
 - General Practice and Trial Institute -March 13-15, 2025 – Savannah, GA
 - Basic Fiduciary Law 101 – March 19, 2024 – Macon, GA
 - Agriculture Law – March 20, 2025 – Macon, GA
- Bar Center Programs
 - Abusive Litigation
 - Plaintiff's Personal Injury
 - Secured Lending
 - Small Firm Boot Camp
 - Entertainment Law Boot Camp
 - Truck Accident Claims
 - Expert Testimony
 - Gain the Edge! Negotiation Strategies for Lawyers
 - Zoning Law
 - Professional and Ethical Dilemmas in Litigation
 - Georgia Auto Insurance Claims Law
 - Jury Trials in Divorce
 - Take Charge! Solo and Small Firm Summit

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- On Demand Programs
 - 12,309 on demand products purchased by 8,272 members (July 1 – April 29, 2025)
 - March 2025 – 5,212 products purchased
 - 13,714 on demand programs purchased by members 8,847 (May 1, 2024 – April 29, 2025)

Upcoming Off-Site Programs and Institutes

- Real Property Law Institute – May 8-10, 2025 – Fernandina Beach, FL
- Family Law Institute – May 30- June 1, 2025 – Fernandina Beach, FL
- Annual Meeting - June 5-6, 2025 – Ponte Vedra, FL
 - War Stories and Georgia Evidence Update
 - Center for Lawyer Wellbeing Inaugural CLE
- Fiduciary Law Institute - July 24-26, 2025 – Fernandina Beach, FL
- Institute for City and County Attorneys - September 11-12, 2025 – Athens, GA
- Solo and Small Firm Conference – September 18-19, 2025- Atlanta, GA
- Advanced Health Law (Contract Pending) – October 8, 2025 -Atlanta, GA
- Workers Compensation Law Institute - October 9-11, 2025 – Jekyll Island, GA
- Health Care Fraud (Contract Pending) – October 22-23, 2025 – Jekyll Island, GA
- Insurance Law Institute (Contract Pending) – October 23-25, 2025 – Ponte Vedra, FL

Programming Updates

ICLE currently offers one-hour on-demand programs, one on professionalism, and the other on ethics. We will continue to review the on-demand catalog and upcoming live program for 60 minutes sessions that address ethics, professionalism, or Georgia law updates as we plan to produce and make available more one-hour on-demand programs. Additionally, the on-demand catalog of programs includes programs through February 2025.

ICLE continues to encourage and support innovative and interactive programming, and previous programs have incorporated the use of the Bar's courtroom and utilized a podcast format. In addition to the traditional lecture and panel discussion formats, we continue to see the use of break-out sessions and interactivity and encourage these formats and explore new ways to enhance the delivery of educational content.

Program Planning

ICLE continues to update and refine its production process to ensure more efficient planning. This includes reviewing program production timelines for Bar Center, alternate venue, and destination programs; confirming program dates earlier (several institutes have confirmed dates through 2027); and continued collaboration and communication with Sections, Committees, and other program sponsors.



To: Board of Governors
State Bar of Georgia

From: John G. Marty
UPL Director

Date: April 30, 2025

Re: UPL Update

The Unlicensed Practice of Law (UPL) Department acts at the direction of a statewide Standing Committee and ten District Committees representing each of the judicial districts in Georgia. UPL committees are appointed directly by the Supreme Court of Georgia and are charged with the consideration of complaints received, processed, and thoroughly investigated by the UPL Department. We are grateful to all our attorney and nonattorney volunteers who serve on these important committees.

An online complaint portal may be found on the Bar's website under the UPL program page: <https://www.gabar.org/programs/unlicensed-practice-of-law>. Please don't hesitate to contact our office if we may ever be of assistance.

Attached please find statistics from our most recent reporting period for your review.

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STATE BAR OF GEORGIA INVESTIGATIONS REGARDING
THE UNLICENSED PRACTICE OF LAW

Reporting period May 1, 2024, through April 30, 2025

Informal Investigations Initiated in 2024 (CY)	205
Informal Investigations Initiated in 2025 (to date)	62
Informal Investigations Pending (as of April 30, 2025)	54

Statistics

Formal Investigations Initiated	42
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Nature of Formal Investigation:

Regular UPL	33
Disbarred/Suspended/Inactive Lawyer	6
Out of State Lawyer	2
Paralegal/Document Preparation Service	1

Source of Formal Investigation:

Lawyer	22
Public (Individual)	9
Judge	9
State Agency	1
State Bar of Georgia	1

Judicial Districts:

District 1	1
District 2	2
District 3	1
District 4	10
District 5	12
District 6	3
District 7	3

District 8	0
District 9	8
District 10	2
Formal Investigations Pending	29
Formal Investigations Closed	108
Disposition:	
Subject Signed Cease & Desist Affidavit	41
Subject Agreed to Comply	31
Subject Referred to Prosecutor	12
Subject Not Found	9
Subject Warned of Investigation	7
Further Action Unnecessary	5
Referred to OGC	3

State Bar of Georgia Coastal Georgia Office Statistics July 2024 to April 2025								
Month	Client/Misc Meetings	Depositions	Mediation/Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)	Telephone Engagement (Inbound/Answered)
Jan-24								
February								
March								
April								
May								
June								
July	2	2	2			6	21	68/61
August	4	2	4	1		11	45	67/53
September	3		2	2		7	41	59/46
October	1	3	2			6	35	83/72
November	1	2		1		4	24	57/48
December		4		2		6	32	41/36
To Date Total:	11	13	10	6		40	198	375/316
Attorney Locations for 2023: Savannah, Atlanta, Hinesville, Macon, Albany, Alpharetta, Brunswick, Tucker, Canton, Thomaston, Cordele, Roswell, Lexington, Covington, Sylvania, Pembroke, Valdosta, Cartersville, Hazelhurst, Kennesaw, Griffin, St Louis MO								
Month	Client/Misc Meetings	Depositions	Mediation/Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)	Telephone Engagement (Inbound/Answered)
Jan-25	3		3		1	7	33	68/59
February	3	4	2	1	2	12	83	65/55
March	3	2	6		3	14	68	64/52
April	6	4	2	1		13	82	75/72
May								
June								
July								
August								
September								
October								
November								
December								
To Date Total:	15	10	13	2	6	46	266	272/238
Attorney Locations for 2025: Savannah, Atlanta, Duluth, Hinesville, Rincon, Brunswick, Marietta, Macon, Valdosta, Augusta, Milledgeville, Alpharetta, Tucker, Peachtree Corners, Gainesville, Statesboro, Richmond VA, Dallas TX, Lancaster SC								

State Bar of Georgia - South Georgia Office Statistics (July 2024 - April 2025)							
2024							
Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Telephone Engagement (Inbound/Answered)
January							
February							
March							
April							
May							
June							
July	0	4	3	17	0	24	96/73
August	5	1	0	13	0	19	103/83
September	0	2	0	10	0	12	72/59
October	2	2	3	15	0	22	130/95
November	3	4	5	16	0	28	49/40
December	0	6	2	6	0	14	95/76
Year Total:	10	19	13	77	0	119	545/426
Attorney Locations 2024: Adel, Albany, Athens, Atlanta, Brunswick, Columbus, Cordele, Decatur, Douglas, Dublin, Lakeland, Lawrenceville, Macon, Marietta, Moultrie, Savannah, Senoia, Sylvester, Tallahassee (FL), Thomasville, Tifton, Valdosta, Woodstock							
2025							
Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Telephone Engagement (Inbound/Answered)
January	2	1	1	12	1	17	108/69
February	2	9	0	15	1	27	79/66
March	3	2	2	14	3	24	87/75
April	4	4	3	23	0	34	86/72
May							
June							
July							
August							
September							
October							
November							
December							
Year Total:	11	16	6	64	5	102	360/282
Attorney Locations 2025: Adel, Albany, Alpharetta, Ashburn, Atlanta, Buckhead, Cobb, Cordele, Decatur, Gainesville, Jonesboro, Lawrenceville, Macon, Marietta, Moultrie, Norcross, Peachtree Corners, Pooler, Savannah, Sylvester, Thomasville, Tifton, Valdosta, Waycross							
* Note: Miscellaneous Meetings include video conferences, hearings and focus groups							

MEDIA REPORT

PUBLISHED ARTICLES 2024-2025				Headline	Circulation
Date	Newspaper				
6/13/2024	Albany Herald			Ivy Cadle installed as 62nd State Bar of Georgia president	3,763
6/13/2024	Clayton News-Daily, Jonesboro			Ivy Cadle installed as 62nd State Bar of Georgia president	643
6/13/2024	Rockdale Citizen, Conyers			Ivy Cadle installed as 62nd State Bar of Georgia president	1,254
6/13/2024	Morgan County Citizen, Madison			Ivy Cadle installed as 62nd State Bar of Georgia president	2,574
6/13/2024	Henry Herald, McDonough			Ivy Cadle installed as 62nd State Bar of Georgia president	1,111
6/13/2024	Rome News-Tribune			Ivy Cadle installed as 62nd State Bar of Georgia president	6,515
6/14/2024	Daily Report, Atlanta			Baker Donelson Litigator Leads State Bar	1,905
6/16/2024	Douglas County Citizen, Douglasville			Dalia Racine elected to Bard of Governors of State Bar	1,313
6/17/2024	Albany Herald			Joe Dent re-elected to State Bar of Georgia Board of Directors	3,763
6/17/2024	Madison County Journal, Danielsville			Richard Campbell re-elected to Board of Governors of State Bar of Georgia	2,179
6/17/2024	Rome News-Tribune			Davis Re-Elected To Ga. Bar Board of Governors	6,515
6/17/2024	Gwinnett Daily Post, Lawrenceville			Lawrenceville attorneys re-elected to Board of Governors of State Bar of Georgia	63,470
6/19/2024	Albany Herald			District Attorney Mulholland elected to State Bar of Georgia Board of Governors	3,763
6/19/2024	Statesboro Herald			Snipes is re-elected to State Bar of Ga. Board	4,429
6/20/2024	Newton Citizen, Covington			Judge Cheveda McCamy Receives State Bar of Georgia Leadership Award	982
6/22/2024	Griffin Daily News			Wallace reelected to Board of Governors of State Bar of Georgia	3,188
6/24/2024	Valdosta Daily Times			Valdosta attorneys re-elected to Board of Governors of State Bar of Georgia	2,291
6/24/2024	Daily Tribune News, Cartersville			Pritchard elected to State Bar of Georgia's Board of Governors	2,414
6/24/2024	Covington News			Newton County Bar Association Honored by State Bar of Georgia	2,873
6/24/2024	Atlanta Daily World			GABWA Honored with Prestigious President's Cup by State Bar of Georgia	10,000
6/24/2024	Rome News-Tribune			Ratloff of Cox Byington Twyman Awarded Joe Dent Hospitality Award	6,515
6/25/2024	Rome News-Tribune			Twyman Installed as President-Elect of State Bar of Georgia	6,515
6/25/2024	Cherokee Tribune, Canton			Cherokee County Case Manager Honored with Child Advocacy Award	3,502
6/25/2024	Marietta Daily Journal (Northside Neighbor)			Sandy Springs Bar Association Receives State Honors	9,821
6/26/2024	Gwinnett Daily Post, Lawrenceville			Mary Lynn Paulson Honored by State Bar of Georgia Young Lawyers Division	63,470
6/27/2024	The Champion, Decatur			State bar honors, elects locals	413
6/28/2024	Augusta Chronicle			Georgia Bar honors Columbia County DA Bobby Christine for work with military	8,271
6/28/2024	Newnan Times-Herald			Newnan attorneys honored by State Bar of Georgia's Young Lawyers Division	4,822
6/29/2024	Cherokee Tribune, Canton			Judge Cannon Re-Elected to State Bar of Georgia Board of Governors	3,502
6/29/2024	Times-Georgian, Carrollton			Baker re-elected to state bar board of governors	2,176
6/29/2024	Marietta Daily Journal			William C. Gentry Installed as Treasurer of State Bar of Georgia	9,821
6/30/2024	Atlanta Daily World			Atlanta Attorneys Joyce Gist Lewis, Gary Spencer Elected to Executive Comm	10,000
6/30/2024	Dalton Daily Citizen			Miller reelected to State Bar of Georgia's Board of Governors	3,804
7/2/2024	Union Recorder, Milledgeville			Area attorneys elected to state bar Board of Governors	3,048
7/17/2024	Daily Report, Atlanta			Georgia Legal Community Mourns Loss of Joseph Bankoff	1,905

MEDIA REPORT

7/19/2024	Northeast Georgian, Cornelia	Letter to the Editor: Congratulations to Weidner	4,622
9/7/2024	Times-Georgian, Carrollton	Georgia legal community mourns loss of Gary Bunch	2,176
9/18/2024	Jackson Herald, Jefferson	Congratulations to new Superior Court Judge Sarah Griffie	3,307
11/13/2024	Forest-Blade, Swainsboro	After early career turns, Ivy Cadle settles into State Bar pilot's seat	3,963
11/16/2024	Atlanta Daily World	State Bar of Georgia Pays Homage to Judge Thelma Wyatt Cummings Moore	10,000
11/20/2024	Tifton Gazette	Congratulations to new Superior Court Judge Ralph W. Powell	911
11/23/2024	Times-Georgian, Carrollton	Congratulations to Solicitor General on state commission appointment	2,176
12/11/2024	Tifton Gazette	Georgia legal community mourns loss of District Attorney Bryce Johnson	911
1/3/2025	Albany Herald	Georgia legal community mourns loss of Pete Donaldson	3,763
1/27/2025	Moultrie Observer	Georgia legal community mourns loss of Billy Fallin	1,333
3/6/2025	Newnan Times-Herald	Georgia legal community mourns loss of Judge Billy Lee	4,822
3/13/2025	Newnan Times-Herald	Georgia legal community mourns loss of Mike Sumner	4,822
4/14/2025	Valdosta Daily Times	Congratulations to Haynes Studstill on appointment to Board of Regents	2,291
5/6/2025	Waycross Journal-Herald	Congratulations to and thanks to Chief Justice Boggs	4,940
		TOTAL CIRCULATION	307,627

