



State Bar  
of Georgia

# BOG BOARD BOOK

**2025 Spring Meeting  
Athens, GA**

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



306<sup>th</sup> BOARD OF GOVERNORS MEETING

Saturday, March 22, 2025

9:00 a.m. – 12:00 p.m.

Hyatt Place Athens Hotel & The Classic Center

Athens, Georgia

*Dress: Business*

**AGENDA**

<b><u>Topics</u></b>	<b><u>Presenter</u></b>	<b><u>Page No.</u></b>
<b>1) ADMINISTRATION</b>		
a) Welcome and Call to Order.....	Ivy N. Cadle..... President	1
b) Pledge of Allegiance .....	Kevin Patrick Atlanta Circuit, Post 22	
c) Invocation.....	Maria Justus Eastern Circuit, Post 3	
d) Recognition of Special Guests .....	Ivy Cadle	
e) Roll Call .....	R. Javoyne Hicks..... Secretary	5
f) Future Meetings Schedule.....	Ivy Cadle .....	10
<b>2) INFORMATIONAL REPORTS</b>		
a) President's Report.....	Ivy Cadle	
b) Treasurer's Report.....	William "Bill" Gentry .....	12
	Treasurer	
c) Young Lawyers Division Report .....	Kenneth Mitchell, Jr. ....	28
	YLD President	
d) Office of the General Counsel Report.....	Russell Willard.....	34
	General Counsel	

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
e) 2025 Legislative Update .....	Jennifer McNeely Director of Governmental Affairs	
f) Unallocated Cash Report .....	Damon Elmore Executive Director	
g) Proposed Changes to the Georgia Rules of Professional Conduct (1) Rule 1-202. Membership Status.	Bill NeSmith..... Deputy General Counsel	37

### 3)ACTION

a) Minutes of the 305 <sup>th</sup> Meeting of the ..... Board of Governors on January 11, 2025	Javoyne Hicks .....	51
b) Approval of Formal Advisory Opinion Board ..... Appointment (1) Prof. Tia Gibbs (2026)	Ivy Cadle	
c) 2025-2026 Dues and State Bar Budget .....	Bill Gentry..... Treasurer	58
(1) Recommendations of the Executive Committee		
<ul style="list-style-type: none"> <li>• <b>Active Dues \$270</b></li> <li>• <b>Inactive Dues \$135</b></li> </ul>		
(2) Approval of Other Bar Dues Statement Items		
a) Center for Lawyer Wellbeing and Section Dues: \$10 to \$50 opt-in		
b) Assessments Required by Bar Rules or Mandated by the Supreme Court		
<ul style="list-style-type: none"> <li>• Clients’ Security Fund: \$15 per member per Bar Rule 1-506</li> <li>• Professionalism Fee: \$11/year</li> </ul>		
c) Other Contributions		
<ul style="list-style-type: none"> <li>• Legislative and Public Education Fund Contribution: \$100 optional contribution</li> <li>• Georgia Legal Services Program: \$400 suggested individual contribution/ \$100 suggested contribution for YLD</li> </ul>		

### 4)WRITTEN REPORTS

a) Executive Committee Minutes	
(1) December 5, 2024 .....	92
(2) February 5, 2025 .....	98

<b><u>Topics</u></b>	<b><u>Presenter</u></b>	<b><u>Page No.</u></b>
b) Law Practice Management Report .....		100
c) Sections Report.....		104
d) Institute of Continuing Legal Education Report .....		106
e) Chief Justice’s Commission on Professionalism Report.....		108
f) Media Report.....		119

## **5) CLOSING**

- a) Old Business ..... Ivy Cadle
- b) New Business ..... Ivy Cadle
- c) Announcements ..... Ivy Cadle
- d) Executive Session ..... Ivy Cadle
- e) Remarks / Q&A / Comments / Suggestions
- f) Adjournment



# 2025 Board of Governors Spring Meeting

**MARCH 21-23**

The Classic Center | Hyatt Place Athens/Downtown  
Athens, Georgia

Hotel cut-off | Thursday, Feb. 27 // Registration cut-off | Friday, March 14



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State Bar  
of Georgia



## SCHEDULE OF EVENTS

### Friday, March 21

9 a.m. – 6 p.m.

Registration

10 a.m. – 2 p.m.

State Disciplinary Board Meeting

(by invitation only)

11:30 a.m. – 1:30 p.m.

ICLE Board Meeting | Offsite | Dean Rusk Hall,

University of Georgia

(by invitation only)

12 – 3 p.m.

State Disciplinary Review Board Meeting

(by invitation only)

2:30 – 5 p.m.

Disciplinary Rules and Procedures Committee

3 – 5 p.m.

Member Benefits Committee

6:30 – 9 p.m.

Board of Governors Dinner | Offsite | The Foundry

### Saturday, March 22

8 a.m. – 12 p.m.

Registration

9 a.m. – 12 p.m.

Board of Governors Meeting

## SOCIAL EVENTS

### Board of Governors Dinner

Friday, March 21 | 6:30 – 9:30 p.m.

The Foundry | 295 E. Dougherty St., Athens

Friday night's Board Dinner will be held offsite at The Foundry at Hotel Abacus. This historic venue, inspired by its origin as an iron foundry dating back to the 1850s, is rooted in craftsmanship and camaraderie.

Make plans now to join your fellow Board members for an evening of good food and entertainment.

Shuttle service will be provided.

### Things to Do Around Athens

Athens is a lot more than just a college town. From its musical roots to a growing food scene to a vibrant arts community and a wide range of outdoor recreation options, there are plenty of things to do and see on a spring weekend in the Classic City, even if you aren't a Georgia fan. For information and ideas about what to do and where to go while in this charming city, visit [www.visitathensga.com](http://www.visitathensga.com).





## HOTEL ACCOMMODATIONS

Hyatt Place Athens/Downtown  
412 N. Thomas St.  
Athens, GA 30601  
706-425-1800  
Cut-off date | Thursday, Feb. 27

Hyatt Place Athens/Downtown will be our host hotel offering discounted room rates of \$169 single/double plus applicable taxes and fees. To make reservations and receive our special rate, visit <https://bit.ly/4hwBd1l> or call 888-492-8847 / 706-425-1800 and reference code G-SBG5.

Reservations must be made by Thursday, Feb. 27, as rooms will be on a space and rate availability basis after this date.

- Self-parking is \$10/day.
- Check-in is 3 p.m. | Check-out is 12 p.m.

### Attire

Business casual dress for all meetings and events.



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REPORTING**  
YOUR PATH THROUGH LITIGATION

## 2025 SPRING 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" (N/C) functions. You may also register online at [www.gabar.org](http://www.gabar.org). The registration deadline is Friday, March 14.

### Attendee Information

Bar Number \_\_\_\_\_

Name \_\_\_\_\_

Nickname \_\_\_\_\_

Spouse/Guest Name (if applicable) \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Special Needs/Dietary Restrictions \_\_\_\_\_

ADA: If you qualify for protection under the Americans with Disabilities Act and need assistance, please email [meetings@gabar.org](mailto:meetings@gabar.org).

### Cancellation/Refund Policy

Cancellation of registration must be received in writing no later than Friday, March 14, and will receive a full refund. Absolutely no refunds will be made after March 14. Requests should be emailed to [meetings@gabar.org](mailto:meetings@gabar.org) or mailed to State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303.

### Board Functions

Qty. \_\_\_\_\_

- ☐ BOG Dinner — Friday..... \$120 \_\_\_\_\_
- ☐ BOG Meeting — Saturday..... N/C \_\_\_\_\_

### Committee Meetings

- ☐ Disciplinary Rules and Procedures Committee..... N/C \_\_\_\_\_

Total Enclosed \$ \_\_\_\_\_

### Credit Card Information

Please bill my ☐ Visa ☐ MasterCard ☐ AmEx

Credit Card Number \_\_\_\_\_

Expiration Date \_\_\_\_\_

CSC \_\_\_\_\_

Zip Code \_\_\_\_\_

Name as it appears on the card (Please print) \_\_\_\_\_

Signature \_\_\_\_\_

Credit card and "no charge" registrations may be faxed to 404-527-8717.

### Registration and Payment Information

Registrations will be processed on a first-come, first-served basis. MasterCard, Visa and American Express are accepted. Please make checks payable to the State Bar of Georgia and mail them to: Meetings Department, 2025 Spring BOG Meeting, State Bar of Georgia, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303.

Register online  
[www.gabar.org](http://www.gabar.org)

### State Bar of Georgia Code of Conduct

Thank you for participating in an event sponsored by the State Bar of Georgia. To ensure that everyone enjoys their experience, we kindly request your cooperation in adhering to the following code of conduct:

- Please be considerate and respectful of fellow attendees, guests and staff members.
- Please refrain from disruptive behavior or engaging in any activity that may disturb others.
- Attendees and guests who engage in harassing or disruptive behavior will be immediately ejected from the program or event without refund or reimbursement.
- Attendees and guests are encouraged to promptly report any incidents, concerns or instances of inappropriate behavior to State Bar or venue personnel.

- Attendees and guests shall comply with requests from Bar or venue staff regarding operational and emergency procedures.
- Guests who consume alcoholic beverages shall do so in a responsible manner.
- Intervention with an impaired, intoxicated or underage guest will be handled promptly and safely. The State Bar of Georgia reserves the right to deny entry into an event and/or refuse service to guests displaying visible signs of impairment/intoxication.

State Bar of Georgia staff members are directed to intervene where necessary to help ensure the above expectations are met, and guests are encouraged to report inappropriate behavior to the nearest staff member. Attendees and guests who choose not to adhere to these provisions will be subject to ejection without a refund. If you feel that our staff does not address any issues to your satisfaction, please ask to speak with the Executive Director immediately.



## Board of Governors Attendance Record

	6-24 Saturday	11-24	1-25	3-25	6-25	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
Jonathan Lang Adams	*	e	*			Jonathan Lang Adams
Keith E. Adams	*	*	*			Keith E. Adams
Mark W. Alexander	*	*	*			Mark W. Alexander
JaDawnya Cintelle Baker	*	e	*			JaDawnya Cintelle Baker
Nina M. Baker	*	e	*			Nina M. Baker
Eric A. Ballinger	*	*	*			Eric A. Ballinger
Thua G. Barlay	*	*	*			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	*			N. John Bey
James D. Blich IV	u	u	*			James D. Blich IV
Sherry Boston	*	*	*			Sherry Boston
Charly Reneatha Bridgewater	*	*	*			Charly Reneatha Bridgewater
Ashley Mackin Brodie	*	u	*			Ashley Mackin Brodie
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	*			Tedra L. Cannella
David L. Cannon	*	u	*			David L. Cannon
Carl S. Cansino	u	*	e			Carl S. Cansino
Chris M. Carr	u	u	e			Chris M. Carr
Vernon L. Chambliss	*	*	*			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			Edward R. Collier
Daniel Jackson Connell III	*	*	u			Daniel Jackson Connell III
Susan P. Coppedge	*	*	*			Susan P. Coppedge
John Craig Cotton	*	*	*			John Craig Cotton
Martin L. Cowen III	*	*	*			Martin L. Cowen III
Veronica Rogusky Cox	*	*	*			Veronica Rogusky Cox
Gerald Davidson Jr.	*	e	*			Gerald Davidson Jr.

Standing Board Policy 300 (Board Attendance Policy)

An elected member of the Board of Governors shall attend at least 50 percent (50%) of the Board meetings held during the Bar year, unless his/her attendance is otherwise excused by the secretary. The burden of seeking and establishing an excused absence shall be upon the Board member. A written request to the Secretary for an excused absence shall be made within thirty (30) days prior to or after the missed meeting. **Should an elected Board member fail to meet the attendance requirement, the position shall become vacant, and the president of the State Bar shall fill the unexpired term by appointment.**

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	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	
J. Anderson Davis	u	*	*			J. Anderson Davis
William T. Davis	*	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
Danny L. Durham	*	*	e			Danny L. Durham
Susan E. Edlein	*	*	*			Susan E. Edlein
Otobong Ukpong "Oto" Ekpo	*	e	*			Otobong 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			Harold Eugene Franklin Jr.
Keith E. Gammage	*	*	*			Keith E. Gammage
William C. Gentry	*	u	*			William C. Gentry
Michael G. Geoffroy	*	u	u			Michael G. Geoffroy
Patricia A. Gorham	*	*	*			Patricia A. Gorham
Rebecca Holmes Liles Grist	u	*	*			Rebecca Holmes Liles Grist
Paul William Hamilton	*	*	*			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.	*	*	*			Render M. Heard Jr.
Amanda Nichole Heath	*	e	*			Amanda Nichole Heath
Matthew J. Hennessy	u	*	*			Matthew J. Hennessy
Thomas W. Herman	u	*	*			Thomas W. Herman
R. Javoyne Hicks	u	*	*			R. Javoyne Hicks
Kimberly Wilkerson Higginbotham	u	*	*			Kimberly Wilkerson Higginbotham
Donna S. Hix	u	*	*			Donna S. Hix
Norbert D. "Bert" Hummel IV	*	*	*			Norbert D. "Bert" Hummel IV
Stacey K. Hydrick	*	u	*			Stacey K. Hydrick
Shukura L. Ingram	*	*	*			Shukura L. Ingram
James T. Irvin	*	*	e			James T. Irvin

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Christopher Ross Jackson	*	*	*			Christopher Ross Jackson
Charles Michael Johnson	*	u	*			Charles Michael Johnson
Lester B. Johnson, III	u	*	*			Lester B. Johnson, III
Shiriki L. Cavitt Jones	*	*	*			Shiriki L. Cavitt Jones
Maria Christene Mekras Justus	*	u	*			Maria Christene Mekras Justus
Zahra S. Karinshak	*	e	e			Zahra S. Karinshak
John F. Kennedy	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	*			Edward B. Krugman
Jeffrey R. Kuester	*	*	*			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	*			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	*	*	e			Joyce Gist Lewis
Lisa Katsuko Liang	*	*	*			Lisa Katsuko Liang
Thomas Fredrick Lindsay	*	*	u			Thomas Fredrick Lindsay
David S. Lipscomb	*	*	*			David S. Lipscomb
John R. B. Long	*	*	*			John R. B. Long
Dax Eric Lopez	*	e	*			Dax Eric Lopez
Ronald A. Lowry	*	u	u			Ronald A. Lowry
Lindsey Stephens Macon	*	u	*			Lindsey Stephens Macon
John Bell Manly	*	*	*			John Bell Manly
Troy Windel Marsh Jr.	*	*	*			Troy Windel Marsh Jr.
Edward T. McAfee	*	*	*			Edward T. McAfee
Hugh J. McCullough	*	*	*			Hugh J. McCullough
Graham Elliott McDonald	*	u	*			Graham Elliott McDonald
Letitia A. McDonald	*	e	*			Letitia A. McDonald
Brad J. McFall	e	e	*			Brad J. McFall

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

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	Anetia Island	Jekyll Island	Savannah	Athens	Sawgrass	
H. Craig Stafford	u	*	*			H. Craig Stafford
Lawton E. Stephens	*	e	e			Lawton E. Stephens
Donna Coleman Stribling	*	e	*			Donna Coleman Stribling
Joseph C. Sumner, Jr.	*	u	u			Joseph C. Sumner, Jr.
Jason W. Swindle	*	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	*	*	*			Martin E. Valbuena
J. Henry Walker	*	u	*			J. Henry Walker
Janice M. Wallace	*	e	*			Janice M. Wallace
Amy Carol Walters	*	e	*			Amy Carol Walters
Andrew Jackson Welch, III	*	e	*			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			Douglas Woodruff
* - attended meeting						
* - attended virtually						
e - excused absence						
u - unexcused absence						

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## Future Meetings Schedule

### Executive Committee

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April 25, 2025	Executive Committee Meeting Local Affinity Bar Association Luncheon Edenfield House Inn, Swainsboro, GA
August 20-22, 2025	Supreme Court/Executive Committee Joint Meeting Cloudland at McLemore Resort, Rising Fawn, GA <i>(*Contract Pending)</i>
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

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Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Fall 2025	October 10-12, 2025	Cloudland at McLemore Resort Rising Fawn, GA <i>(*Contract Tentative)</i>
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta Atlanta, GA <i>(*Contract Tentative)</i>

*(Updated 2.19.25)*

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



## Future Meetings Schedule

### Board of Governors (cont...)

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Spring 2026	March 27-29, 2026	The Ritz-Carlton Reynolds, Lake Oconee Greensboro, GA <i>(*Contract Tentative)</i>
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

### Young Lawyers Division

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Spring 2025	March 28-30, 2025	Kimpton Aertson Hotel Nashville, TN
Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA <i>(*Contract Tentative)</i>
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

### American Bar Association Meetings

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

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

(Updated 2.19.25)

**\*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

To: Bar Officers/Finance Committee

From: Ron Turner *RT*

Date: February 24, 2025

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

Attached please find the January 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 \$13,700 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 unallocated cash will be used to fund this expenditure.**

## 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 will be used to fund this expenditure. 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 expenditure.



#### 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.**

#### Membership Database Project

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

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 will also be used to fund this expenditure. This project also was operational in September 2024.

#### Other Bar Center Operations

Audio and video equipment for the Bar is in excess of the budget by approximately **\$55,900** 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 expenditure.

The Bar incurred unbudgeted building rehab costs of approximately **\$794,400** for the following items: (1) lease buildout costs for a tenant to enter into a lease renewal for the occupation of space on the 6<sup>th</sup> floor in the amount of approximately \$35,000 (2) approximately **\$283,100** 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 1<sup>st</sup> and 3<sup>rd</sup> 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 \$12,000 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 and (7) electrical costs for the parking deck associated with the intended installation of EV chargers **and the installation of the EV charges themselves. These amounts total approximately \$99,900; however we do anticipate receiving a credit of \$18,000.** The resources in unallocated cash are being used to fund these costs.

#### Parking

Repairs and maintenance costs for the parking deck are over budget by **\$4,635** 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 **\$7,200**. 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 January 31, 2025

	Year Ending 06/30/2024	Year To Date January 31, 2025	% of Budget	Year Ending 06/30/2025
	Actual	Actual		Annual Budget
<b>Membership Numbers</b>				
Active Members	42,194	42,746	100.12 %	42,695
Inactive Members	8,017	7,877	100.41 %	7,845
Provisional Members	18	8	40.00 %	20
Associates/Affiliates	14	15	150.00 %	10
Foreign Legal Consultants	10	9	100.00 %	9
Students	520	468	99.57 %	470
Emeritus	4,617	4,713	102.79 %	4,585
<b>Total Membership Numbers</b>	<b>55,390</b>	<b>55,836</b>	<b>100.36 %</b>	<b>55,634</b>
<b>Revenue</b>				
Dues Active	10,957,918	11,245,592	99.77 %	11,271,480
Dues Inactive	1,067,188	1,052,746	101.66 %	1,035,540
Dues Provisional	16,932	9,108	76.67 %	11,880
Dues Associates	1,750	650	65.00 %	1,000
Dues Foreign Legal Consultant	2,448	2,376	100.00 %	2,376
Dues Late Fees	256,000	223,575	84.37 %	265,000
Dues NSF Check Fee	120	100	50.00 %	200
Dues Prior Years	5,705	6,394	106.57 %	6,000
<b>Total License and Dues</b>	<b>12,308,061</b>	<b>12,540,541</b>	<b>99.58 %</b>	<b>12,593,476</b>
Program Registration Income	4,790,586	1,950,811	44.34 %	4,400,000
Section Expense Reimbursement	301,039	320,694	100.00 %	320,694
CSF Expense Reimbursement	73,000	42,583	58.33 %	73,000
Advertising and Sales	45,389	37,757	143.97 %	26,225
Membership Income	165,617	118,760	67.17 %	176,800
Credit Card Processing Fees	107,601	46,473	43.43 %	107,000
Interest Income	454,907	483,633	175.87 %	275,000
Miscellaneous Revenues	21,581	204	0.93 %	22,000
<b>Total Bar Revenue</b>	<b>18,267,781</b>	<b>15,541,456</b>	<b>86.37 %</b>	<b>17,994,195</b>
<b>Total Bar Expenses</b>	<b>17,723,696</b>	<b>10,869,261</b>	<b>56.37 %</b>	<b>19,282,420</b>
<b>SBG Net Gain (Loss)</b>	<b>\$ 544,085 \$</b>	<b>\$ 4,672,195</b>	<b>(362.68) % \$</b>	<b>(1,288,225)</b>

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 January 31, 2025**

	Year Ending	Year To Date		Year Ending	
	06/30/2024 Actual	January 31, 2025 Actual	January 31, 2025 Actual	% of Budget	06/30/2025 Annual Budget
Total Bar Center Operations Revenue	3,314,107	1,682,001		59.58 %	2,822,960
Total Bar Center Operations Expenses	3,454,316	2,403,457		89.84 %	2,675,204
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ (140,209) \$</b>	<b>(721,456)</b>		<b>(488.28) % \$</b>	<b>147,756</b>
Combined Revenue	21,581,888	17,223,457		82.74 %	20,817,155
Combined Expenses	21,178,012	13,272,718		60.45 %	21,957,624
<b>Total Combined Net Income (Loss)</b>	<b>\$ 403,876 \$</b>	<b>3,950,739</b>		<b>(346.41) % \$</b>	<b>(1,140,469)</b>

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 January 31, 2025**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Bar Center Income and Cash Receipts</b>							
Bar Center Assessments	0	0.00 %	0	0.00 %	200	200	0
Gain/Loss Investment Interest Allocation	0	0.00 %	87,227	0.00 %	0	(87,227)	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	0	0.00 %	74,382	72.92 %	102,000	27,618	132,667
<b>Bar Center Income and Cash Receipts</b>	<b>0</b>	<b>0.00 %</b>	<b>\$ 661,609</b>	<b>44.79 %</b>	<b>\$ 1,477,200</b>	<b>\$ 815,591</b>	<b>\$ 1,790,131</b>
<b>Bar Center Expenses and Cash Disbursements</b>							
Bond Premium Amortization	0	0.00 %	5,842	34.36 %	17,000	11,158	17,366
Investment Service Fees	0	0.00 %	12,507	56.85 %	22,000	9,493	24,138
Museum and 1st Floor Exhibit	0	0.00 %	0	0.00 %	0	0	6,453
Audio Video, Furniture and Equipment	109	1.91 %	61,581	1,080.38 %	5,700	(55,881)	219,552
Building Rehabilitation	82,814	985.88 %	802,848	9,557.71 %	8,400	(794,448)	726,161
<b>Bar Center Expenses and Cash Disbursements</b>	<b>82,923</b>	<b>156.16 %</b>	<b>882,778</b>	<b>1,662.48 %</b>	<b>53,100</b>	<b>(829,678)</b>	<b>993,670</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ (82,923)</b>	<b>(5.82) %</b>	<b>\$ (221,169)</b>	<b>(15.53) %</b>	<b>\$ 1,424,100</b>	<b>\$ 1,645,269</b>	<b>\$ 796,462</b>
<b>Conference Center Income and Expenses</b>							
Room Rentals and Various Charges	848	6.78 %	8,110	64.88 %	12,500	4,391	13,817
Conference Center Operating Expenses	40,229	8.20 %	270,653	55.20 %	490,349	219,696	477,025
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (39,381)</b>	<b>8.24 %</b>	<b>\$ (262,543)</b>	<b>54.94 %</b>	<b>\$ (477,849)</b>	<b>\$ (215,306)</b>	<b>\$ (463,208)</b>
<b>Rental Income and Expenses</b>							
Rental Income	83,042	10.93 %	568,392	74.79 %	760,000	191,608	926,110
Building Operating Expenses	155,231	8.71 %	1,041,232	58.43 %	1,781,945	740,713	1,692,176
<b>Rental Combined Net Cash Flow</b>	<b>\$ (72,190)</b>	<b>7.06 %</b>	<b>\$ (472,840)</b>	<b>46.27 %</b>	<b>\$ (1,021,945)</b>	<b>\$ (549,105)</b>	<b>\$ (766,066)</b>
<b>Parking Income and Expenses</b>							
Parking Income	46,885	8.18 %	443,891	77.43 %	573,260	129,369	584,050
Parking Deck Operating Expenses	20,483	5.86 %	208,095	59.69 %	349,810	141,015	291,446
<b>Parking Combined Net Cash Flow</b>	<b>\$ 26,402</b>	<b>11.82 %</b>	<b>\$ 235,096</b>	<b>105.21 %</b>	<b>\$ 223,450</b>	<b>\$ (11,646)</b>	<b>\$ 292,603</b>
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ (168,091)</b>	<b>(113.76) %</b>	<b>\$ (721,456)</b>	<b>(488.28) %</b>	<b>\$ 147,756</b>	<b>\$ 869,212</b>	<b>\$ (140,209)</b>

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

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

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Revenues</b>				
Dues - Active	\$ 11,245,592	\$ 11,271,480	99.77 %	\$ 10,957,918
Dues - Inactive	1,052,746	1,035,540	101.66 %	1,067,188
Dues - Provisional	9,108	11,880	76.67 %	16,932
Dues - Misc. Types	3,026	3,376	89.63 %	4,198
Dues - Late Fees	230,069	271,200	84.83 %	261,825
Total Dues & Licenses	12,540,541	12,593,476	99.58 %	12,308,061
Program Registration Income	1,950,811	4,400,000	44.34 %	4,790,586
Section Expense Reimbursement	320,694	320,694	100.00 %	301,039
CSF Expense Reimbursement	42,583	73,000	58.33 %	73,000
Advertising and Sales	37,757	26,225	143.97 %	45,389
Membership Income	49,910	82,200	60.72 %	76,992
Pro Hac Vice	411,750	430,000	95.76 %	410,525
Pro Hac Vice Contra	(342,900)	(335,400)	102.24 %	(321,900)
Credit Card Processing Fees	46,473	107,000	43.43 %	107,601
Interest Income	483,633	275,000	175.87 %	454,907
Miscellaneous Revenues	204	22,000	0.93 %	21,581
Total Revenues	15,541,456	17,994,195	86.37 %	18,267,781
<b>Expenses</b>				
Administration	1,643,826	2,924,908	56.20 %	2,772,737
General Counsel	3,010,274	5,094,921	59.08 %	4,688,270
Communications	656,981	920,402	71.38 %	1,176,662
Lawyer's Assistance Program	116,250	155,000	75.00 %	125,000
Fee Arbitration	332,609	594,971	55.90 %	544,647
Law Practice Management	268,762	528,234	50.88 %	455,563
Sections	187,752	320,694	58.55 %	306,746
Savannah Office	175,804	316,729	55.51 %	306,971
Tifton Office	140,299	185,013	75.83 %	164,659
Young Lawyers	233,704	449,090	52.04 %	420,015
Unauthorized Practice of Law	570,493	994,864	57.34 %	942,450
Law Related Education	257,680	448,085	57.51 %	420,300
High School Mock Trial	62,899	182,067	34.55 %	167,484
ICLE	2,095,234	4,393,900	47.69 %	3,848,996

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

Created on 02/16/2025  
State Bar of Georgia

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

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	123,793	212,216	58.33 %	212,216
Fastcase	462,428	455,000	101.63 %	297,471
Officers' Expenses	24,553	102,470	23.96 %	79,023
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	457,915	948,690	48.27 %	857,373
Unallocated Services	(7,161)	0	0.00 %	(118,053)
Total Expenses	10,869,261	19,282,420	56.37 %	17,723,696
<b>Net Income</b>	<b>\$ 4,672,195</b>	<b>\$ (1,288,225)</b>	<b>(362.68) %</b>	<b>\$ 544,085</b>

*Note: For Total Other Expenses, the details can be found on the next page.*  
 Created on 02/16/2025  
 State Bar of Georgia

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

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Other Expenses</b>				
BOG and Member Meetings	\$ 179,116	\$ 588,200	30.45 %	\$ 530,767
Supreme Court Meetings	60,700	75,000	80.93 %	79,023
Executive Committee Meetings	43,168	42,000	102.78 %	7,681
Court of Appeals Meetings	600	20,000	3.00 %	0
State Disciplinary Board Lawyers	18,375	31,500	58.33 %	30,000
Electronic Ballots	11,623	20,000	58.11 %	17,674
Dues Notice	6,546	45,990	14.23 %	34,148
Letters of Good Standing	1,129	2,500	45.18 %	1,713
Bar Membership Cards	7,210	11,000	65.55 %	9,728
50 Year Certificates	21	6,000	0.35 %	4,670
Membership Database Project	63,179	0	0.00 %	57,912
State Bar Committees	3,924	20,000	19.62 %	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	11,070	29,000	38.17 %	22,811
Investment Service Fees	36,341	35,000	103.83 %	29,958
Access to Justice/Pro Bono	0	7,500	0.00 %	601
<b>Total Other Expenses</b>	<b>\$ 457,915</b>	<b>\$ 948,690</b>	<b>48.27 %</b>	<b>\$ 857,372</b>

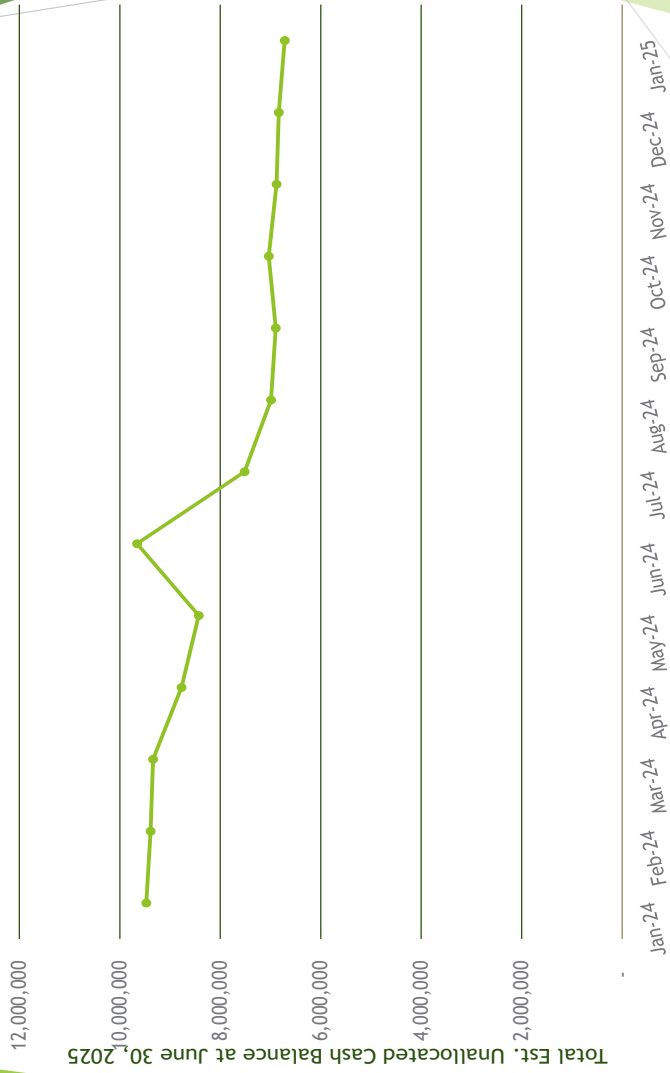


State Bar of Georgia  
Status and Use of Cash and Investments  
For the Current Period Ending January 31, 2025

	Current Month (January 2025)	Ending of Prior Fiscal Year (June 2024)	Dollar Change	% Increase/ Decrease
<b>Cash and Investments - Bar</b>	<b>\$ 37,901,841</b>			
<b>Less:</b>				
Georgia Bar Foundation Cash Included in Above Amount	(1,000)			
CCLC Cash and Investments Included in Above Amount	(5,750,272)			
Unrealized (Gain)/Loss in Investments	<u>(680,478)</u>			
<b>Net Cash Available for State Bar</b>	<b><u>31,470,091</u></b>			
<b>Use of Cash:</b>				
<b>Less:</b>				
Board Designated - See Separate Schedule Attached	(9,241,298)			
Donor Temporarily Restricted - See Separate Schedule Attached	<u>(3,663,121)</u>			
<b>Total Board Designated and Temporarily Restricted</b>	<b><u>(12,904,419)</u></b>			
<b>Other - Cash Allocated:</b>				
Collection of Outstanding Accounts Receivable	123,281			
Payment of Accounts Payable	(80,320)			
Payment of Accrued Vacation	(593,724)			
Deferred Income	(227,685)			
Payment of Credit Card Bill	(208,046)			
Payment of Accrued Salary	(558,790)			
Payment of Accrued Taxes	(42,748)			
Payment of Other Accrued Expenses (primarily pension)	(364,545)			
Payment to Client Security Fund	(3,085,510)			
Operational Expenses for Remaining Bar Year	(8,226,044)			
Additional Revenue for Bar Operations (Excluding Bar Center)	2,452,739			
Net Amount to be paid to Related Entities	<u>(465,040)</u>			
<b>Total Other - Cash Allocated</b>	<b><u>(11,276,432)</u></b>			
<b>Anticipated Use of Unauthorized Cash - Bar Operations</b>	<b><u>(6,061)</u></b>			
<b>Estimated Cash and Investments - June 30, 2025 - Bar</b>	<b><u>7,283,179</u></b>	<b>9,818,381</b>	<b>(2,535,202)</b>	<b>-26%</b>
<b>Cash and Investments - Bar Center</b>	<b>161,197</b>			
<b>Other Cash Allocated - Bar Center:</b>				
Collection of Outstanding Accounts Receivable	173,914			
Payment of Accounts Payable	(248)			
Deferred Income	(36,633)			
Payment of Other Accrued Expenses	(86,002)			
Additional Revenue for Bar Center Operations	<u>10,262</u>			
<b>Total Other - Cash Allocated - Bar Center</b>	<b><u>61,293</u></b>			
<b>Anticipated Use of Unauthorized Cash - Bar Center Operations</b>	<b><u>(787,855)</u></b>			
<b>Estimated Cash and Investments June 30, 2025 - Bar Center</b>	<b><u>(565,365)</u></b>	<b>(160,919)</b>	<b>(404,446)</b>	<b>-251%</b>
<b>Total Estimated Cash Balance at June 30, 2025</b>	<b>\$ 6,717,814</b>	<b>\$ 9,657,462</b>	<b>(2,939,648)</b>	<b>-30%</b>

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 January 31, 2025

	June 30, 2022	June 30, 2023	June 30, 2024	January 31, 2025
<b>Board Designated</b>				
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	226,463
Board Designated - Sections	3,677,156	3,664,312	3,745,183	4,214,437
YLD Meetings	88,929	77,999	49,795	50,398
<b>Total Board-Designated excludes ICLE</b>	<b>\$ 8,816,085</b>	<b>\$ 8,792,311</b>	<b>\$ 8,844,978</b>	<b>\$ 9,241,298</b>
<b>Donor Temporarily Restricted</b>				
Legislative	\$ 1,503,629	\$ 1,806,483	\$ 2,423,119	\$ 3,065,719
Law Related Education/Marshall fund	212,684	207,599	192,396	165,149
High School Mock Trial	18,617	15,299	17,481	27,593
Basics Program	115,094	116,951	121,963	142,616
Younger Lawyers	87,006	87,199	126,603	170,856
Lawyers Assistance	33,188	31,863	33,229	34,748
Georgia Diversity Program	46,528	13,555	6,374	2,894
Bar Media Conference	13,037	3,115	1,523	614
Law Day	6,266	6,212	6,317	6,416
Access to Justice	1,435	3,175	19,993	20,305
Promote Inclusion	8,842	8,701	5,924	8,533
Military Vet Pro Bono	14,240	14,481	15,101	15,336
Justice Portraits	1,006	1,022	1,066	1,083
Center for Lawyer Well-Being	0	0	0	1,258
<b>Total Donor Temporarily Restricted</b>	<b>\$ 2,061,572</b>	<b>\$ 2,315,655</b>	<b>\$ 2,971,089</b>	<b>\$ 3,663,120</b>
<b>Net Board Designated and Donor Temporarily Restricted</b>	<b>\$ 10,877,657</b>	<b>\$ 11,107,967</b>	<b>\$ 11,816,068</b>	<b>\$ 12,904,419</b>

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

<b>Dues</b>	<b>2024-25 Dues Season</b>	<b>2023-24 Dues Season</b>	<b>2022-23 Dues Season</b>
<b>Total Number of Members</b> at Apr 30 of Previous Bar year (active and inactive)	<b>50,114</b>	<b>49,695</b>	<b>49,400</b>
Active - Number Paid	43,168	42,632	42,018
Inactive - Number Paid	8,039	8,237	8,341
<b>Total Number of Members With Dues Paid</b>	<b>51,207</b>	<b>50,869</b>	<b>50,359</b>
<b>Percent of Total Members With Dues Paid</b>	<b>102.2%</b>	<b>102.4%</b>	<b>101.9%</b>
Number of Members Who Made A Contribution	8,643	9,091	8,482
Percent of Members Who Made A Contribution	16.9%	17.9%	16.8%
<b>Total Contribution Amount</b>	<b>\$ 819,783</b>	<b>\$ 862,990</b>	<b>\$ 803,415</b>
<b>Average Amount Paid</b>	<b>\$ 95</b>	<b>\$ 95</b>	<b>\$ 95</b>

**Legislative Contribution Amounts by Dues Year**

2024 - 2025	<u>\$ 819,783</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 January 31, 2025**

<b>Dues</b>	<b>2024-25 Dues Season</b>	<b>2023-24 Dues Season</b>	<b>2022-23 Dues Season</b>
<b>Total Number of Members</b> at Apr 30 of Previous Bar year (active and inactive)	<u><b>50,114</b></u>	<u><b>49,695</b></u>	<u><b>49,400</b></u>
Active - Number Paid	<u>43,168</u>	<u>42,632</u>	<u>42,018</u>
Inactive - Number Paid	<u>8,039</u>	<u>8,237</u>	<u>8,341</u>
<b>Total Number of Members With Dues Paid</b>	<u><b>51,207</b></u>	<u><b>50,869</b></u>	<u><b>50,359</b></u>
<b>Percent of Total Members With Dues Paid</b>	<u><b>102.2%</b></u>	<u><b>102.4%</b></u>	<u><b>101.9%</b></u>
Number of Members Who Made A Contribution	<u>3,453</u>	<u>3,575</u>	<u>3,539</u>
Percent of Members Who Made A Contribution	<u>6.7%</u>	<u>7.0%</u>	<u>7.0%</u>
<b>Total Contribution Amount</b>	<u><b>\$ 485,307</b></u>	<u><b>\$ 490,605</b></u>	<u><b>\$ 483,850</b></u>
<b>Average Contribution Amount</b>	<u><b>\$ 141</b></u>	<u><b>\$ 137</b></u>	<u><b>\$ 137</b></u>

**GLSP Contribution Amounts by Dues Year**

2024 - 2025	<u><u>\$ 485,307</u></u>
2023 - 2024	<u><u>\$ 490,605</u></u>
2022 - 2023	<u><u>\$ 483,850</u></u>
2021 - 2022	<u><u>\$ 478,287</u></u>
2020 - 2021	<u><u>\$ 436,815</u></u>

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

<b>Beginning Balance</b>	<b>\$ 2,423,119</b>
<b>Income:</b>	
Interest and Dividend Income	24,108
Gain/Loss Investment Interest Allocation	24,683
Miscellaneous Income	815,303
<b>Total Income</b>	<b>864,094</b>
<b>Expenditures:</b>	
Staff and Contract Lobbyists	194,756
Grassroots Efforts	146
Travel	1,650
Shared Office Allocation	12,642
Computer Hardware	1,266
Computer Software	175
Miscellaneous	10,859
<b>Total Expenditures</b>	<b>221,494</b>
<b>Net Donor Temporarily Restricted Balance</b>	<b>\$ 3,065,719</b>

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

	2022 June 30	2023 June 30	2024 June 30	January 31, 2025
<b>Fund Balance, Beginning of Year</b>	<b>\$ 1,798,187</b>	<b>\$ 1,634,260</b>	<b>\$ 2,212,202</b>	<b>\$ 2,782,908</b>
<b>Income:</b>				
Interest and Dividend Income	26,218	33,117	44,364	26,089
Gain/Loss Investment Interest Allocation	(79,620)	19,577	92,242	29,095
Client Security Fund Assessments	77,590	751,680	760,050	762,390
Restitution Income	85,621	18,445	821	4,982
<b>Total Income</b>	<b>\$ 109,809</b>	<b>\$ 822,819</b>	<b>\$ 897,477</b>	<b>\$ 822,556</b>
<b>Expenses:</b>				
Restricted Expenses	73,000	73,000	73,000	42,583
Client Security Fund Claims Payments	186,737	159,879	239,968	470,935
Bond Premium Amortization	8,444	4,288	5,737	2,049
Investment Service Fees	5,555	7,710	8,066	4,387
<b>Total Expenses</b>	<b>\$ 273,736</b>	<b>\$ 244,877</b>	<b>\$ 326,771</b>	<b>\$ 519,954</b>
<b>Net Income</b>	<b>\$ (163,927)</b>	<b>\$ 577,942</b>	<b>\$ 570,706</b>	<b>\$ 302,602</b>
<b>Fund Balance, End of Period</b>	<b>\$ 1,634,260</b>	<b>\$ 2,212,202</b>	<b>\$ 2,782,908</b>	<b>\$ 3,085,510</b>



March 29, 2025

Dear Board of Governors,

I am excited to share the happenings of the YLD as the organization's 78th president. Your Young Lawyers Division continues to live up to our motto of serving the public and the profession. Our committees continue to hold in-person and virtual meetings and engage in service-related projects throughout our state.

On Tuesday February 8, 2023, 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 will host the 2025 YLD Signature Fundraiser at Truist Park in the Hank Aaron Terrace. The 2025 Signature Fundraiser beneficiary is the YLD Public Interest Internship Program, which supports law students with funding for unpaid internships in public interest law. We will also recognize the service of 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. To this date, we have raised over \$50,000.

As I mentioned at previous meetings, our goal for this Bar year is to continue to make service our top priority, increase engagement with the YLD, and encourage young lawyers to develop their professional brand. So far, we have done just that. Since the Midyear Meeting, some of the things the YLD has accomplished are:

- YLD Ethics and Professionalism Committee hosted a CLE on Deposition Etiquette, which featured panelists Virginia Josey, Carlos Fernandez, and Taylor Dove, who discussed deposition techniques and strategies.
- YLD Family Law Committee hosted "Jury Trials in Family Law," a lunch and learn CLE, which involved a discussion with retired Judge Christopher Edwards about his perspective from the bench and in practice regarding jury trials in family law.
- YLD High School Mock Trial Committee volunteered all over the State for Georgia's High School Mock Trial Regional Competition. The Regional Competitions were held in Albany, Athens, Atlanta, Cartersville, Cumming, Dalton, Decatur, Gainesville, Jonesboro, Lawrenceville, Macon, Marietta, McDonough, Newnan, and Savannah.



- YLD Judicial Law Clerk Committee and YLD Federal Law Subcommittee hosted a CLE entitled “Bankruptcy Basics: Navigating the Law and Process,” which included a discussion with Judge Lisa A. Ritchey Craig, United States Bankruptcy Judge, Northern District of Georgia; and Megan Glimmerveen on bankruptcy fundamentals and how to navigate the legal process.
- YLD Solo Practice and Small Firm Committee hosted a CLE entitled, “How to Start and Run a Profitable Law Firm on a Budget,” which featured T. Jayden Doye, CPA, Prestige Accounting Solutions and Jodi A. Miles, Esq., Lawyer and Law Firm Coach, Carpe Argentum Coaching on how to get started running a profitable law firm with budget restraints.
- YLD Women in the Profession Committee hosted “Financial Literacy for Younger Lawyers,” a virtual lunch and learn which featured Megan McGuire, Partner and Co-Founder of SLP Wealth.

The YLD Spring Meeting will be held in Nashville, Tennessee from March 27-29, 2025. This meeting is our only standalone session. During the Spring Meeting, we will have our YLD General Session, YLD Leadership Academy Session 3, a CLE, and a community service event. The CLE will be about 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 service event will be in conjunction with Vanderbilt Law School.

I want to give a special shoutout to YLD members: Alec Chappell, Jena Emory, and Siena Gaddy who have done a fantastic job with the YLD Newsletter; Frank Gaddy, Javarus Gresham, Kayla Kudratt, Serreen Meki, Shannon Schoultz, Iyana Smith, and Terrell Thomas who executed a fantastic Signature Fundraiser event; and Leadership Academy Co-Chairs James Banter, Samantha Mullis, and Kelsie Speight who have planned a great year for our 2025 YLD Leadership Academy Class.

## **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 Child Protection and Advocacy Committee**

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

The YLD Child Protection and Advocacy Committee is planning to reschedule the social which was postponed due to the winter storm. Additionally, we are working on a service project/fundraiser to support children to possibly take place at the Annual Meeting. An organization we threw out there as a possibility to support was Fostering Families (an organization that meets material needs for children in foster care throughout GA).

### **YLD Community Service Projects Committee**

***Lyddy O'Brien and Taylor Wilson, Co-Chairs***

The YLD Community Service Projects Committee has arranged for volunteer days at food banks in Atlanta and Macon on February 8th. We are also planning an additional food bank volunteer day in the Savannah area, date to be determined. In addition to volunteering their time at the local food banks,

committee members will donate non-perishable food items to the food banks when they go to volunteer. Due to limited volunteer slots, this was not shared outside the CSP committee, but we may be able to arrange additional food bank volunteer days and open that to all YLD members. We are also in talks to arrange a volunteer event in Middle Georgia at the Peach County Law Library, which is renovating and needs assistance organizing their legal resources. This would happen in late February. After February, we hope to have additional in-person volunteer and networking opportunities in the Spring.

#### **YLD Corporate Counsel Committee**

***Javier Becerra, Blair Weatherly and Tayah Woodard, Co-Chairs***

The YLD Corporate Counsel Committee holds a virtual monthly meeting on the second Wednesday of every month at 12:30PM. Our next event will be a virtual CLE on March 11, 2025, from 12:00-1:00PM with the Business Litigation Subcommittee, on the "Impact of AI on Young Lawyers and the Future of Their Practice."

#### **YLD Estate and Elder Law Committee**

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

The YLD Estate and Elder Law Committee is planning a Wills Clinic - Scheduled for 4/5 from 9:30 to 12:30, in partnership with Atlanta Legal Aid Society, at Peace Baptist Church off Covington Hwy.

#### **YLD Inclusion in the Profession Committee**

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

The YLD Inclusion in the Profession Committee chose to table our CLE that was supposed to occur on February 13, 2025. We met with Damon on February 19, 2025, about committee expectations and possible programming.

#### **YLD Intrastate Moot Court Committee**

***Chelsea Harris and Megan McKown, Co-Chairs***

The YLD Intrastate Moot Court Committee is seeking volunteers for our Moot Court competition April 4th and 5th at the State Bar of Georgia! Sponsorships are still available if anyone is interested in sponsoring or volunteering, they can email Megan at Megan.McKown@paulding.gov.

#### **YLD Judicial Law Clerk Committee**

***Tate Crymes, Mallory Fleming, and Devon Holloway, Co-Chairs***

The YLD Judicial Law Clerk Committee and YLD Federal Law Committee are presenting a free virtual CLE on February 24, 2025, entitled "Bankruptcy Basics: Navigating the Law & Process." Judge Lisa Ritchey Craig and Megan Glimmerveen will present a broad overview of bankruptcy law and will answer audience questions about bankruptcy basics.

#### **YLD Law School Outreach Committee**

***Chelsea Dease, Farheen "Lina" Khan, and Emily Walker, Co-Chairs***

The YLD Law School Outreach Committee has volunteers signed up for the Black Students Retreat on

September 13-14, 2024, taking place at the Bar Headquarters. We are currently in coordination phase of events at each of Georgia's five law schools. We have two events in the works at Mercer, GSU Bar Association Fair on October 9th, and a spring panel at UGA and Emory. We are following up with John Marshall and we have also reached out to the YLD Women in the Profession Committee and Workers' Compensation Committee and look forward to hosting events with them!

#### **YLD Leadership Academy Committee**

***James Banter, Samantha Mullis, and Kelsie Speight, Co-Chairs***

The YLD Leadership Academy 2025 Class had our first session "Becoming a Leader in the YLD and State Bar" at the Bar Mid-Year meeting in Savannah. We enjoyed meeting the class with many taking advantage of the professional headshot studio! Session 1 included our annual YLD Past President's Panel, a CLE "Branding with Integrity", and YLD General Session.

Session 2 "Lawyers as Leaders in State Government" was on February 11th at the Georgia State Capitol. We were able to take a group photo with Governor Brian P. Kemp and First Lady of Georgia, Marty Kemp. We heard from several speakers who included lawyer lobbyists, lawyer-legislators, and lawyers who work for various Georgia state agencies. We learned more about the Tort Reform Bill and other upcoming legislation related to the practice of law. Session 2 wrapped up with a building tour and a swearing-in ceremony at the Nathan Deal Judicial Center. The tour included the Georgia Court of Appeals, Georgia State-wide Business Court, and the Supreme Court of Georgia. We heard from Court of Appeals Judge Kenneth B. Hodges III who provided practical appellate tips for brief writing and oral arguments. We heard from Judge William G. Hamrick III who provided us information and statistics of the advantages and efficiencies of having a State-wide Business Court. The day concluded with Supreme Court Justice Andrew A. Pinson who provided us with insight to his professional journey as well as advice for young lawyers. Justice Pinson then swore in several members of the Leadership Academy Class to the Court of Appeals and Supreme Court of Georgia.

Leadership Academy has four more sessions throughout the remainder of the Bar year. Session 3 "Networking Across State Lines" will be held in conjunction with the YLD Spring Meeting on March 28th – 30th in Nashville, Tennessee. Session 4 "Balancing Self Care and Lawyer Greatness" will be held on April 25th – 27th in Columbus. Session 5 "Community Leadership" will be held on May 17th – 18th in Augusta. Session 6 "Moving Forward in Leadership" will be our last session on June 5th – 8th in Ponte Vedra Beach, Florida, in conjunction with the State Bar's Annual Meeting.

#### **YLD National Moot Court Competition Committee**

***Jamie Christy and Douglas Comin, Co-Chairs***

We had 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 Real Estate Law Committee**

***Morgan Boulineau and Erika Harris Fritz, Co-Chairs***

YLD Real Estate Committee is planning to host a CLE regarding Torts in Real Estate at the Annual Georgia Bar Meeting in conjunction with the Real Property Law Section of the Georgia Bar. We are also working with the Real Property Law Section to circulate registration information for the Real Estate Institute

coming up in May, which will include a discount code for registering YLD members.

#### **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 a CLE titled How to Start and Run a Profitable Law Firm on a Budget on January 16, 2025. We also plan to host a CLE titled Choosing a Law Practice You Love in March and a Networking event and panel discussion in April.

#### **YLD Sports Law Committee**

***Joy Bonner and Caleb Ratliff, Co-Chairs***

The YLD Sports Law Committee is hosting A night with the Atlanta Hawks on March 4, 2025. The game is set to begin at 7:30 pm. Several members have expressed interest in meeting for a networking hour prior to the game, we are working on locations for this pre-event hour.

#### **YLD Women in the Profession Committee**

***Cayton Chrisman, Olivia Mercer and Megan McCulloch, Co-Chairs***

We recently hosted a virtual financial literacy lunch and learn on February 4th with guest speaker Meagan Landress McGuire. We recorded the session and distributed it to our members who were unable to attend live.

We are also planning to host our annual service event in partnership with Ronald McDonald's "Meals that Heal" where we will assist with preparing meals for families in need. The event date is TBD but will be held in person in Metro Atlanta.

We are planning to co-host with GAWL a Women in the Judiciary/Women's History event in honor of International Women's Day. We are currently coordinating to obtain the panel's schedules to select a date.

Finally, we will be hosting a networking event on May 25th to watch Atlanta United's match against Cincinnati. This is an annual event for WIP that has been very successful, and we are looking forward to it!

### **YLD AFFILIATES**

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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**

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#### **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 78<sup>th</sup> President of the YLD. I appreciate the ongoing support from the Bar leadership and Board of Governors to make this year a success.

Sincerely,

A handwritten signature in blue ink, appearing to read "Kenneth Mitchell Jr.", with a stylized, cursive script.

Kenneth Mitchell Jr.  
2024-25 YLD President



**RUSSELL D. WILLARD**  
*General Counsel*

Memorandum to: State Bar of Georgia Board of Governors  
From: Russell Willard  
Date: February 27, 2025  
Re: Report of the General Counsel

This is my first report to the Board as General Counsel, and it is an honor to serve as your General Counsel. I have had the pleasure of renewing my acquaintance with many of you and having the opportunity to meet some of you for the first time since I joined the State Bar last summer. I look forward to working with you all.

Paula Frederick left me with a tremendous staff in the Office of the General Counsel. We will continue our work providing sound counsel to the State Bar of Georgia and regulating the legal profession. We are also looking at areas on which there is the potential to improve, and I welcome any insights that you wish to share with me as we start on this path.

I am pleased to update you on our activity since the beginning of this Bar Year.

The Office of the General Counsel 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 9 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 33 cases and the Board has imposed confidential discipline in an additional 30 cases.

Several proposed rule changes and amendments to the bylaws were on the agenda for the Midyear Board meeting. As you are aware, all of the proposed amendments were adopted by the Board, and the amendments to existing:

- Article I. Members. Section 1. Registration of Members
- Article I. Members. Section 2. Active Members and Foreign Law Consultants.
- Article I. Members. Section 6. Affiliate Membership and Law Student Membership.

- Article IV. Executive Committee. Section 1. Members. (EC Elections)

and the amendments creating new provisions for:

- Article III. Board of Governors. Section 13. Standing Board Policies
- Article IV. Executive Committee. Section 3. Misconduct and Removal
- Article IV. Executive Committee. Section 4. Standing Executive Committee Policies.
- Article VIII. Committees – Generally. Section 5. Authority to Establish Internal Rules.
- Article VIII. Committees – Generally. Section 6. Quorum

have all been added to the State Bar of Georgia's Bylaws and are reflected on the Bar's website.

Since the last report of the General Counsel, the Supreme Court has entered orders approving the following revisions to the Georgia Rules of Professional Conduct:

- An amendment to Rule 4.2 that clarifies that a lawyer who is acting pro se in a matter may not have substantive communications with a represented party on the other side, except as allowed by the rule.
- An amendment to Rule 4-201 that adds two new investigating at-large members to the State Disciplinary Board.
- An amendment to Rule 4-209.1 that removes language that suggests special masters should only serve for five years, allowing for longer service.
- An amendment to Rule 4-214 that clarifies who may grant extensions for filing exceptions to the State Disciplinary Review Board.
- An amendment to Rule 4-221.1 that allows the release of confidential information to courts or related agencies in other jurisdictions to aid their investigation of a lawyer or a judge.

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).

Additionally, the period for comment is drawing to a close on the following proposed revisions to the Georgia Rules of Professional Conduct, and it is anticipated that motions will be pending with the Supreme Court by the time the Spring Meeting commences:

- An amendment that defines “attorney” and “counsel” and redefines “lawyer” (Rule 1.0).
- An amendment that creates an obligation for a lawyer to make reasonable efforts to prevent the inadvertent or unauthorized disclosure of, or unauthorized access to, client information (Rule 1.6).
- Amendments that clarify that reports of the Special Master are to be filed with the Clerk of the State Disciplinary Boards who will then file those reports with the Supreme Court on cases involving commission of a crime (Rule 4-106) and emergency suspension (Rule 4-108).

The Formal Advisory Opinion Board met on January 23, 2025. The Board issued the following Formal Advisory Opinions and requested that the Office of the General Counsel request consideration of these opinions by the Supreme Court:

- FAO No. 24-1 - May a lawyer use a third-party vendor to request the production of documents from a non-party pursuant to O.C.G.A. § 9-11-34(c) and to follow up on and effectuate such a request to a non-party, and if so, what degree of autonomy may the lawyer allow the third-party vendor?
- FAO 23-1 - Can an attorney fulfill his or her duties of “presence” at a real estate closing when using video conference?

**Receiverships:** The Office of the General Counsel staff is currently serving as receiver in nine 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.





### EXECUTIVE SUMMARY

To: Board of Governors

From: Russ Willard and Bill NeSmith

Date: March 22, 2025

Re: Proposed Changes to the Governance Rules for the State Bar of Georgia

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Below is a brief explanation of the proposed rule amendment on the agenda for the March 22, 2025 Board of Governor's meeting.

#### **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 non-active 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.

## **Rule 1-202. Membership Status**

Membership in the State Bar of Georgia shall consist of six categories: active, inactive, foreign law consultant, emeritus, members unable to practice law due to a disability, and retired status members. The bylaws shall make provision for the registration of each active member and the location of his or her principal office for the practice of law, the registration of each foreign law consultant and the location of his or her principal office, and the registration of emeritus and inactive members and their mailing addresses. Only Active Status members and Emeritus Status members may vote on any State Bar of Georgia matter or election or nominate an active member for office. Emeritus Status members can vote only in person or electronically.

(a) Inactive Status Members. Any member of the State Bar of Georgia may contact the Membership Department and elect to be transferred to Inactive Status membership provided that the member:

- (1) is not engaged in the practice of law;
- (2) does not hold himself or herself out as a practicing lawyer or attorney;

- (3) does not occupy any public or private position in which the member may be called upon to give legal advice or counsel; and
- (4) does not examine the law or pass upon the legal effect of any act, document, or law for the benefit of another person, company, or corporation.

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

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

(b) **Active Status Members.** Active Status members shall be all other lawyers, including judges but excluding foreign law consultants.

Only Active Status members of the State Bar of Georgia in good standing may hold office in the State Bar of Georgia.

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

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

the year in which the Emeritus Status member returns to Active Status or Inactive Status membership.

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

- (1) documentation from the Social Security Administration of approval of disability;
- (2) documentation from an insurance company of receipt of benefits based upon disability; or
- (3) documentation from a medical doctor that the member is disabled.

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

(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 Emeritus Member, or any Inactive Status member, with at least seven years of legal experience prior to electing Inactive Status, 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 approved 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 provides pro bono services; and
4. The approved pro bono entity and the member must work cooperatively to ensure that the pro bono client receives legal

services that are up to the standards otherwise specified in  
these rules.



## **Rule 1-202. Membership Status**

Membership in the State Bar of Georgia shall consist of six categories: active, inactive, foreign law consultant, emeritus, members unable to practice law due to a disability, and retired status members. The bylaws shall make provision for the registration of each active member and the location of his or her principal office for the practice of law, the registration of each foreign law consultant and the location of his or her principal office, and the registration of emeritus and inactive members and their mailing addresses. Only Active Status members and Emeritus Status members may vote on any State Bar of Georgia matter or election or nominate an active member for office. Emeritus Status members can vote only in person or electronically.

(a) Inactive Status Members. Any member of the State Bar of Georgia may contact the Membership Department and elect to be transferred to Inactive Status membership provided that the member:

- (1) is not engaged in the practice of law;
- (2) does not hold himself or herself out as a practicing lawyer or attorney;

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

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

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

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

(b) **Active Status Members.** Active Status members shall be all other lawyers, including judges but excluding foreign law consultants.

Only Active Status members of the State Bar of Georgia in good standing may hold office in the State Bar of Georgia.

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

(d) **Emeritus Status Members.** Any member in good standing of the State Bar of Georgia who will attain the age of 70 years in a Bar year

and who shall have been admitted to the practice of law for at least 25 years, five years of which must be as a member in good standing of the State Bar of Georgia, may request Emeritus Status from the State Bar of Georgia upon petition to and approval by the Membership Department. When approved, the member shall be transferred to Emeritus Status. An Emeritus Status member of the State Bar of Georgia shall not be required to pay license fees or other fees, may not hold office in the State Bar of Georgia, and may not practice law except as authorized in subsection (g). An Emeritus Status member may be reinstated to active or inactive membership upon application to the Membership Department and payment of non-prorated license fees for the year in which the Emeritus Status member returns to Active Status or Inactive Status membership.

(e) **Members Unable to Practice Law Due to Disability.** Any member of the State Bar of Georgia who is temporarily or permanently disabled may submit to the Executive Committee of the State Bar of Georgia a written request to be transferred to Disabled Status. Members who elect this status must submit adequate medical and/or psychological

documentation of their disability with the written request. Adequate documentation includes:

- (1) documentation from the Social Security Administration of approval of disability;
- (2) documentation from an insurance company of receipt of benefits based upon disability; or
- (3) documentation from a medical doctor that the member is disabled.

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

(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 Emeritus Member, or any Inactive Status member, with at least seven years of

legal experience prior to electing Inactive Status, 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 approved 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 provides pro bono services; and
4. The approved pro bono entity and the member must work cooperatively to ensure that the pro bono client receives legal services that are up to the standards otherwise specified in these rules.

**STATE BAR OF GEORGIA  
BOARD OF GOVERNORS  
MEETING MINUTES  
Saturday, January 11, 2025, 9:00 a.m.  
JW Marriott Savannah Plant Riverside District  
Savannah, Georgia**

The 305<sup>th</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the location, date and time shown above. President Ivy N. Cadle presided and called the meeting to order at 9:00 a.m.

Pledge of Allegiance

Lindsey Macon, Atlanta Circuit, Post 20, led the pledge of allegiance.

Invocation

Thua G. Barlay, Rockdale Circuit, gave the invocation.

Special Recognition

President Ivy N. Cadle recognized the members of the judiciary, the past presidents of the State Bar, and other special guests in attendance. He also recognized the YLD members in attendance and the current YLD Leadership Academy class.

Roll Call

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

Future Meetings Schedule

President Ivy N. Cadle reviewed the Future Meetings Schedule.

President's Report

President Ivy N. Cadle commended the members of the Executive Committee for their hard work on revising Bar rules and bylaws that needed updating. He noted that there were some in need of substantial changes, while many others were housekeeping updates to reflect the current workflow and needs of the Bar.

Treasurer's Report

Treasurer Bill Gentry reported on the Bar's finances. The Board of Governors received a copy of the October 2024 financials. He said that currently, finances are tracking on schedule, and there are no known issues. The Bar continues to be fiscally sound. He thanked the Board and members of the Bar for their generous contributions to both the Legislative Fund and Georgia Legal Services Program. Treasurer Gentry also reported the fiscal audit for the year ending June 30, 2024, was completed and there were no audit adjustments made by the auditors and there were no management letter comments related to operations. A copy of the audit report is posted on the State Bar's website.

Executive Director's Report

Executive Director Damon Elmore thanked the Bar staff for their hard work and dedication, particularly those working this meeting, and the course correction, the adaptation, and the pivots that they had to make for it because of the bad weather in North Georgia. He reported that Bar staff has been working diligently on finalizing budget options for 2025-2026. He said that facility improvements remain a significant part of our work, including the Coastal Georgia and the South Georgia offices. Recent improvements at the Atlanta office include mechanical, electrical and plumbing repairs, efficiency and member service enhancements, safety and security improvements, and general refreshments, which reflect a commitment to maintaining

professional, functional spaces that serve the needs of our members and staff effectively. He announced the new EV charging station spaces in the parking deck that were recently installed.

#### Young Lawyers Division Report

YLD President Kenneth Mitchell Jr. reported that the YLD Signature Fundraiser will take place on March 8 at Truist Park, where Paula Frederick will receive the YLD Lifetime Achievement Award and Ashley Akins will receive the Signature Service Award. He said the YLD Leadership Academy completed their first session the previous day and acknowledged those in the room. They will complete five more sessions, culminating in a graduation ceremony at the Annual Meeting in June. YLD President Mitchell added the YLD Spring Meeting will take place in Nashville on March 28-30 and will include a CLE on the ELVIS Act.

#### Chief Justice's Commission on Professionalism Report

Executive Director Karlise Grier reported on the activities of the Chief Justice's Commission on Professionalism. She thanked Chief Justice Michael P. Boggs for his continued leadership. The 25<sup>th</sup> Annual Justice Robert Benham Awards will be held on April 15 at the Nathan Deal Justice Center. CJCP will once again hold the Connect with a Colleague Contest from March 1 through April 30, 2025. To win a prize, attorneys may submit up to five entries for having lunch, dinner, coffee or a cocktail connection with a colleague outside the attorney's office, firm, or legal organization. The 2025 Law Day Theme is "The Constitution's Promise: Out of Many, One." The State Bar's Professionalism Committee will send suggested talking points to volunteers regarding the 2025 Law Day Theme before the month of May. She added that there are two upcoming free CLEs that will be held on Zoom, on March 7 and March 28, with 1 hour of ethics and 1 hour of professionalism each.

#### Special Committee on Artificial Intelligence and Technology Report

Chair Darrell Sutton reported on the Special Committee on Artificial Intelligence and Technology, which President Ivy Cadle created and appointed at the beginning of his year. He explained that the mission of the subcommittee includes making recommendations to the Supreme Court of Georgia and the Board of Governors about how the Georgia Rules of Professional Conduct covers developments in technology, particularly artificial intelligence, and the practice of law (examining whether GRPC and Bar policies are sufficient regarding a lawyer's technology-related actions, omissions, or conduct); and making recommendations about how the Bar can aid its members as they integrate artificial intelligence and technological advances into the practice of law (identifying AI tools for lawyers and 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). Areas of focus for the special committee are as follows: identify ethical implications for AI and other technology, as considered by the current GRPC; evaluate the need for revisions to the GRPC based upon the committee findings; and develop ideas and best practices for the State Bar providing assistance to practitioners implementing AI into their practices. The special committee plans to provide a comprehensive report and recommendations to the Board of Governors at the Annual Meeting in June 2025.

*President Ivy N. Cadle adjourned the Board of Governors Meeting and called to order the Plenary Session of the Membership of the State Bar of Georgia.*

#### Proposed Bylaws Changes

Following a report by Deputy General Counsel Bill NeSmith, the members of the State Bar of Georgia made the following actions on the proposed bylaws changes:

1. Article I. Members. Section 1. Registration of Members.



The proposed amendment, recommended by Bar Counsel, simplifies the language and reorganizes a long paragraph by creating subparts.

State Bar of Georgia members, by majority vote, approved the proposed changes.

2. Article I. Members. Section 2. Active Members and Foreign Law Consultants.

The proposed amendments, recommended by Bar Counsel, add “good standing” language and enabling rules for foreign law consultants.

State Bar of Georgia members, by majority vote, approved the proposed changes.

3. Article I. Members. Section 6. Affiliate Membership and Law Student Membership.

The proposed amendment, offered by the Membership Department, removes the provision that a law student member attends a law school in Georgia, making the bylaw consistent with Bar Rule 1-206.1.

State Bar of Georgia members, by majority vote, approved the proposed changes.

4. Article III. Board of Governors. Section 13. Standing Board Policies.

The amendment creates a new bylaw that provides authority for “Standing Board Policies.”

State Bar of Georgia members, by majority vote, approved the proposed changes.

5. Article IV. Executive Committee. Section 1. Members. (EC Elections)

This is a rewrite of the EC Election bylaw, designed to simplify the election process for Executive Committee members.

State Bar of Georgia members, by majority vote, approved the proposed changes.

6. Article IV. Executive Committee. Section 3. Misconduct and Removal.

This new bylaw guides the removal process for officers, board members, volunteers, guests, and others who have engaged in misconduct.

State Bar of Georgia members, by majority vote, approved the proposed changes.

7. Article IV. Executive Committee. Section 4. Standing Executive Committee Policies.

This amendment creates a new bylaw that provides authority for “Standing Executive Committee Policies.”

State Bar of Georgia members, by majority vote, approved the proposed changes.

8. Article VIII. Committees – Generally. Section 5. Authority to Establish Internal Rules.

The amendment creates a new bylaw that provides explicit authority for a State Bar committee to establish its operation or procedural rules.

State Bar of Georgia members, by majority vote, approved the proposed changes.

9. Article VIII. Committees – Generally. Section 6. Quorum.

This amendment creates a new bylaw that lowers the quorum requirements established by Roberts Rules of Orders (50% +1) to 40% of the committee membership. This allows committees with a large number of members (many of whom rarely attend meetings) to more easily establish a quorum and conduct the business of the committee.

State Bar of Georgia members, by majority vote, approved the proposed changes.

*President Ivy N. Cadle adjourned the Plenary Session of the Membership of the State Bar of Georgia and reconvened the Board of Governors Meeting.*

Minutes of the 304<sup>th</sup> Meeting of the Board of Governors

The minutes of the Board of Governors meeting held on November 2, 2024, were approved as presented by a majority vote.

Proposed Rules and Bylaws Changes

Following a report by Deputy General Counsel Bill NeSmith, the Board of Governors, by majority vote, took the following action on the proposed amendments to the following rules:

10. Bar Rule 1-302. Composition.

This is a rewrite of the rule defining the composition of the Board of Governors. This proposed change is designed to simplify the rule and remove old, archaic language that is no longer relevant.

The Board of Governors, by majority vote, approved the proposed changes.

11. Bar Rule 1-501. License Fees.

This proposed change simplifies the appeal process for challenging a delinquent dues payment and reduces the termination date from five years to three years, matching the Office of Bar Admissions rules.

The Board of Governors, by majority vote, approved the proposed changes.

12. Bar Rule 1-501.1 License Fees—Late Fee.

This proposed change removes the escalating late fee and sets it at \$175.

The Board of Governors, by majority vote, approved the proposed changes.

13. Bar Rule 4-106. Conviction of a Crime; Suspension and Disbarment.

The proposed amendment to Rule 4-106 comes as a motion from the Disciplinary Rules and Procedures Committee. The changes clarify that the report of a Special Master is to be filed with the State Disciplinary Clerk.

The Board of Governors, by majority vote, approved the proposed changes.

14. Bar Rule 4-108. Conduct Constituting Threat of Harm to Clients or Public; Emergency Suspension.

The proposed amendment to Rule 4-108 comes as a motion from the Disciplinary Rules and Procedures Committee. The changes clarify that the report of a Special Master is to be filed with the State Disciplinary Clerk.

The Board of Governors, by majority vote, approved the proposed changes.

15. GRPC 1.0. Terminology and Definitions.

The proposed amendment to Rule 1.0 comes as a motion from the Disciplinary Rules and Procedures Committee. The proposed amendments to Rule 1.0 amend the definition of “lawyer” and add definitions of “attorney” and “counsel.”

The Board of Governors, by majority vote, approved the proposed changes.

16. GRPC 1.6. Confidentiality of Information.

The proposed amendment to Rule 1.6 comes as a motion from the Disciplinary Rules and Procedures Committee. The proposed amendments to Rule 1.6 adopt language from ABA Rule 1.6(c).

The Board of Governors, by majority vote, approved the proposed changes.

Center for Lawyer Wellbeing Dues Approval

Chair of the Center for Lawyer Wellbeing Javoyne Hicks reported that the Board of Governors, per the Wellbeing Center bylaws, is required to approve the dues amount in order for it to be included on the annual license fee notice. The Board of Governors, by majority vote, approved the requested \$40 dues amount.

Nominations of ABA Delegates

President Ivy N. Cadle proposed the ABA delegate nominations listed below. The Board of Governors nominated the following attorneys to the Georgia ABA Delegate Posts as indicated. These positions are open to Georgia lawyers who are members of the ABA.

<u>Post</u>	<u>Delegate</u>
2	Glenn Hendrix (two-year appointment)
4	Paula J. Frederick (two-year appointment)

Nominations of State Bar Officers

The Board of Governors received the following nominations for State Bar officers for the 2025-2026 Bar year:

<u>Office</u>	<u>Nominator</u>	<u>Nominee</u>
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Secretary	Tracee R. Benzo Edward T. McAfee (Seconding)	Shiriki Cavitt Jones
Treasurer	Hon. Shondeana Morris Hon. Kenneth B. Hodges (Seconding)	R. Javoyne Hicks
President-elect	Past President Darrell Sutton Hon. Joseph P. Dent (Seconding)	William C. Gentry

Per Article VII, Section 1 “Nominations and Elections” of the State Bar of Georgia Bylaws, nominations are open for 10 days after this meeting.

#### Advisory Committee on Legislation (ACL)/Legislative Proposals

Following a report by State Bar Lobbyist Mark Middleton, the Board of Governors took the following action on proposed legislation:

<u>Legislative Proposal</u>	<u>Germane to Purposes of the Bar</u>	<u>Support on Merits 2/3 Majority</u>
<i>Professionalism Committee</i>		
1) Support for a Resolution of the General Assembly Recognizing April 2025 as Legal Professionalism Month	Passed by majority vote	Passed by 2/3 majority
<i>Indigent Defense Committee</i>		
2) Support for the Judicial Council’s Budget Request for FY 2026 – Continued Funding for the Georgia Resource Center	Passed by majority vote	Passed by 2/3 majority

#### Legislative Update

Legislative Consultant Mark Middleton reported that it is constitutionally mandated that the Legislature begins its session on the second Monday in January. He reported several new members in the Legislature and said the first week will be largely committee assignments and the Governor’s State of the State address. He said along with the two proposals that were just passed, there were two proposals passed at the Fall Meeting, the Committee to Promote Inclusion in the Profession’s proposal to support Funding for Civil Legal Services Grants for Victims of Domestic Violence and the Fiduciary Law Section’s proposal for Amendments to Title 53 and Related Code Sections. Outside of the Bar’s official legislative agenda, other items of interest will be an effort to increase salaries for judges along with a tort reform package from Governor Kemp. While those aren’t items that are on the Bar’s legislative agenda, State Bar lobbyists will be watching those and reporting back to the Bar as necessary.

#### Code of Conduct for Bar Events

The Board of Governors received the “Code of Conduct for Bar Events.”

#### Office of the General Counsel

The Board of Governors received a written report of the Office of the General Counsel.

#### Sections Report

The Board of Governors received a written report of the Sections.

Law Practice Management Program

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

ICLE Report

The Board of Governors received a written report on the activities of the Institute of Continuing Legal Education of the State Bar of Georgia.

Media Report

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

Old Business

There was no old business.

New Business

Treasurer Bill Gentry reported that the Senior Lawyers Committee continues to work to form a Senior Lawyers Division, that in part will: encourage pro bono participation, recognize cognitive decline, and isolation of senior lawyers. The committee is working on a business plan to present first to the Executive Committee and then to the Board of Governors at the Annual meeting in June.

Announcements

Sgt. Dexter Harden gave a report and recommendations on the condition of the roads due to the inclement weather.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

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

Adjournment

There being no additional business, the meeting was adjourned at 11:16 a.m.

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R. Javoyne Hicks, Secretary

Approved:

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Ivy N. Cadle, President



State Bar  
of Georgia

STATE BAR OF GEORGIA PROPOSED BUDGET  
FOR THE BAR YEAR 2025 - 2026

## **State Bar of Georgia**

### **2025 - 2026 Budget Assumptions**

1. Dues increase to \$270. The number of members was estimated based upon December 31, 2024 members and estimated additional members based upon the historical passing rate of the Bar exams along with estimated dates of joining the Bar, as well as expected attrition.
2. Investment (interest) income, bond amortization premium and investment expenses are based upon the annualization of available actual results. Since investments are generally not sold but are held until maturity, no gains or losses are budgeted. However, accounting rules dictate that all gains and losses whether realized or not must be recorded.
3. As of December 2024, the rate of inflation for the 12-month period ended November 30, 2024 was reported at 2.66% based upon the Annual CPI—BLS South Region. With the recommendation of the Personnel Committee, salary increases are included at 4% on average. This represents a 2% COLA increase for all employees and a potential additional merit increase of 2% for high performers.
4. Vendor quotes or actual contracted amounts used whenever information was available.
5. The Bar does not pay rent to any independent company or organization for the Bar Center in Atlanta.
6. For building rental income, assumed all tenants in building as of January 1, 2025 will continue to be in building for the 2025 - 2026 year and that the amount of leased space would be the same except that the amount of square footage leased by CJCC would be reduced by approximately 60%.
7. The parking deck has been used more for special events parking and less for monthly and daily parking. Assumed that this same type of parking operations will continue for 2025 - 2026.
8. Includes Programs and Personnel information.
9. Includes estimated income of a \$3.00 per transaction credit card convenience fee associated with the payment of the annual dues. This fee is only charged if the member pays by the use of a credit card.

**State Bar of Georgia**  
**2025-2026 Proposed State Bar of Georgia Consolidated Budget - with Bar Center**  
**(Active dues \$270 and Inactive dues \$135 in 2025-2026)**  
**For the Fiscal Year 2025-2026**

	2021-2022	2022-2023	2023-2024	2023-2024	2024-2025	2025-2026
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
<b>Membership Numbers</b>						
Active Members	41,143	41,628	42,194	41,940	42,695	43,700
Inactive Members	8,341	8,169	8,017	7,940	7,845	7,740
Provisional Members	37	26	18	225	20	50
Associates/Affiliates	15	11	14	12	10	13
Foreign Legal Consultants	6	9	10	7	9	9
Students	401	453	520	410	470	415
Emeritus	3,794	4,189	4,617	4,300	4,585	5,025
<b>Total Membership Numbers</b>	<b>53,737</b>	<b>54,485</b>	<b>55,390</b>	<b>54,834</b>	<b>55,634</b>	<b>56,952</b>
<b>Revenue</b>						
Dues Active	10,425,069	10,798,285	10,957,918	10,904,400	11,271,480	11,799,000
Dues Inactive	1,082,021	1,085,384	1,067,188	1,032,200	1,035,540	1,044,900
Dues Provisional	16,891	18,524	16,932	29,250	11,880	6,750
Dues Associates	1,300	1,050	1,750	1,200	1,000	900
Dues Foreign Legal Consultant	1,524	1,429	2,448	1,820	2,376	2,430
Dues Late Fees	285,645	252,825	256,000	250,000	265,000	260,000
Dues NSF Check Fee	80	220	120	300	200	140
Dues Prior Years	8,519	5,655	5,705	5,000	6,000	7,500
<b>Total License and Dues</b>	<b>11,821,049</b>	<b>12,163,372</b>	<b>12,308,061</b>	<b>12,224,170</b>	<b>12,593,476</b>	<b>13,121,620</b>
Program Registration Income	4,842,269	4,882,064	4,790,586	4,750,000	4,400,000	4,800,000
Section Expense Reimbursement	188,676	301,403	301,039	300,973	320,694	335,385
CSF Expense Reimbursement	73,000	73,000	73,000	73,000	73,000	190,000
Advertising and Sales	54,863	48,045	45,389	27,150	26,225	27,340
Membership Income	156,271	174,181	165,617	163,900	176,800	175,350
Credit Card Processing Fees	102,501	119,502	107,601	105,000	107,000	115,000
Interest Income	(37,130)	(33,332)	454,907	140,000	275,000	330,000
Miscellaneous Revenues	1,506	186,223	21,581	6,000	22,000	22,000
<b>Total Bar Revenue</b>	<b>17,203,005</b>	<b>17,914,458</b>	<b>18,267,781</b>	<b>17,790,193</b>	<b>17,994,195</b>	<b>19,116,695</b>
<b>Total Bar Expenses</b>	<b>14,242,535</b>	<b>16,229,190</b>	<b>17,723,696</b>	<b>18,354,301</b>	<b>19,282,420</b>	<b>20,164,543</b>
<b>SBG Net Gain (Loss)</b>	<b>\$ 2,960,470</b>	<b>\$ 1,685,268</b>	<b>\$ 544,085</b>	<b>\$ (564,108)</b>	<b>\$ (1,288,225)</b>	<b>\$ (1,047,848)</b>

Note: Non-Cash depreciation expenses are excluded from this schedule.  
 Created on 02/21/2025, 8:27 AM EST  
 State Bar of Georgia



**State Bar of Georgia**  
**2025-2026 Proposed State Bar of Georgia Consolidated Budget - with Bar Center**  
**(Active dues \$270 and Inactive dues \$135 in 2025-2026)**  
**For the Fiscal Year 2025-2026**

	2021-2022	2022-2023	2023-2024	2023-2024	2024-2025	2025-2026
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Total Bar Center Operations Revenue	2,176,271	2,972,797	3,314,107	2,638,200	2,822,960	2,904,940
Total Bar Center Operations Expenses	2,267,649	2,601,174	3,454,316	2,684,753	2,675,204	2,931,965
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ (91,378)</b>	<b>\$ 371,623</b>	<b>\$ (140,209)</b>	<b>\$ (46,553)</b>	<b>\$ 147,756</b>	<b>\$ (27,025)</b>
Combined Revenue	19,379,276	20,887,255	21,581,888	20,428,393	20,817,155	22,021,635
Combined Expenses	16,510,184	18,830,364	21,178,012	21,039,054	21,957,624	23,096,508
<b>Total Combined Net Income (Loss)</b>	<b>\$ 2,869,092</b>	<b>\$ 2,056,891</b>	<b>\$ 403,876</b>	<b>\$ (610,661)</b>	<b>\$ (1,140,469)</b>	<b>\$ (1,074,873)</b>

Note: Non-Cash depreciation expenses are excluded from this schedule.  
 Created on 02/21/2025, 8:27 AM EST  
 State Bar of Georgia

State Bar of Georgia  
2025-2026 Proposed Total Bar Center Operations Budget  
For the Fiscal Year 2025-2026

	2021-2021 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Bar Center Income and Cash Receipts</b>						
Bar Center Assessments	350	165	0	200	200	0
Gain/Loss Investment Interest Allocation	(347,796)	55,035	263,476	0	0	0
CCLC Contributions to Bar Center	1,286,677	1,400,670	1,393,988	1,300,000	1,375,000	1,390,000
Interest and Dividend Income	115,359	115,247	132,667	98,000	102,000	138,000
<b>Bar Center Income and Cash Receipts</b>	<b>\$ 1,054,590</b>	<b>\$ 1,571,077</b>	<b>\$ 1,790,131</b>	<b>\$ 1,398,200</b>	<b>\$ 1,477,200</b>	<b>\$ 1,528,000</b>
<b>Bar Center Expenses and Cash Disbursements</b>						
Furniture/Equipment	0	0	0	0	0	0
Bond Premium Amortization	37,249	15,712	17,366	32,000	17,000	12,000
Investment Service Fees	24,411	26,697	24,138	22,000	22,000	24,000
Parking Deck Construction	0	850	0	0	0	0
Conference Center Renovations	12,911	0	0	0	0	9,500
Museum and 1st Floor Exhibit	0	0	6,453	5,000	0	0
Audio Video, Furniture and Equipment	650	18,990	219,552	3,500	5,700	34,000
Building Rehabilitation	17,794	47,347	726,161	0	8,400	0
2nd Floor Buildout	129,298	30,025	0	0	0	0
<b>Bar Center Expenses and Cash Disbursements</b>	<b>222,313</b>	<b>139,621</b>	<b>993,670</b>	<b>62,500</b>	<b>53,100</b>	<b>79,500</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ 832,277</b>	<b>\$ 1,431,456</b>	<b>\$ 796,462</b>	<b>\$ 1,335,700</b>	<b>\$ 1,424,100</b>	<b>\$ 1,448,500</b>
<b>Conference Center Income and Expenses</b>						
Room Rentals and Various Charges	5,869	12,683	13,817	10,000	12,500	13,500
Conference Center Operating Expenses	420,660	444,934	477,025	488,316	490,349	492,708
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (414,792)</b>	<b>\$ (432,251)</b>	<b>\$ (463,208)</b>	<b>\$ (478,316)</b>	<b>\$ (477,849)</b>	<b>\$ (479,208)</b>
<b>Rental Income and Expenses</b>						
Rental Income	935,972	919,520	926,110	920,000	760,000	752,000
Building Operating Expenses	1,343,086	1,683,844	1,692,176	1,824,302	1,781,945	1,989,330
<b>Rental Combined Net Cash Flow</b>	<b>\$ (407,114)</b>	<b>\$ (764,324)</b>	<b>\$ (766,066)</b>	<b>\$ (904,302)</b>	<b>\$ (1,021,945)</b>	<b>\$ (1,237,330)</b>
<b>Parking Income and Expenses</b>						
Parking Income	179,841	469,518	584,050	310,000	573,260	611,440
Parking Deck Operating Expenses	281,590	332,775	291,446	309,635	349,810	370,427

State Bar of Georgia  
2025-2026 Proposed Total Bar Center Operations Budget  
For the Fiscal Year 2025-2026

	2021-2021 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
Parking Combined Net Cash Flow	\$ (101,749)	\$ 136,743	\$ 292,603	\$ 365	\$ 223,450	\$ 241,013
Total Bar Center Operations Net Gain (Loss)	\$ (91,378)	\$ 371,623	\$ (140,209)	\$ (46,553)	\$ 147,756	\$ (27,025)

Administration

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 1,177,453	\$ 1,198,492	\$ 1,234,436	\$ 1,297,320	\$ 1,317,620	\$ 1,370,129
Overtime	6,457	3,992	2,540	7,200	4,730	4,919
Taxes and Benefits	336,685	323,243	384,921	385,059	415,905	430,807
Pension	82,039	93,904	89,593	99,276	99,832	97,171
<b>Total Personnel Services</b>	<b>1,602,634</b>	<b>1,619,631</b>	<b>1,711,490</b>	<b>1,788,855</b>	<b>1,838,087</b>	<b>1,903,026</b>
<b>Operating Expenses</b>						
Shared Office Allocation	441,480	503,989	528,259	514,013	541,791	519,812
Postage and Freight	2,765	4,235	4,754	4,900	5,200	5,750
Printing	0	108	149	100	2,600	2,600
Supplies	3,028	2,727	2,324	4,423	2,700	2,600
Telephone	4,350	4,500	4,500	3,600	4,500	4,500
Subscriptions and Books	2,003	2,097	4,674	4,220	2,710	3,270
Dues and Memberships	1,525	1,565	2,417	2,560	2,360	3,010
Licenses and Certifications	0	0	90	0	0	0
Seminars and Training	658	4,409	4,798	6,250	5,400	5,900
Miscellaneous	3,371	8,057	9,404	3,350	11,750	10,250
Attorney and Staff Travel	30,236	29,357	38,462	45,800	44,910	55,800
Executive Director Travel	10,350	16,690	23,476	17,000	22,000	26,200
Lunches	945	2,065	1,161	1,900	3,000	2,650
Bank Fees	18,671	11,369	2,789	19,500	14,000	3,500
Credit Card Discount and Fees	260,735	311,946	303,678	270,000	295,000	307,000
Computer Hardware	4,077	0	0	0	1,600	800
Computer Software	1,289	1,938	0	0	1,800	2,400
Membership Software License	75,241	71,539	117,490	85,000	120,000	123,500
Contract Programming	5,740	4,569	11,919	6,600	5,500	5,500
<b>Total Operating Expenses</b>	<b>866,464</b>	<b>981,160</b>	<b>1,060,344</b>	<b>989,218</b>	<b>1,086,821</b>	<b>1,085,042</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0</b>	<b>904</b>	<b>0</b>	<b>0</b>	<b>500</b>
<b>Total Expenses</b>	<b>\$ 2,469,098</b>	<b>\$ 2,600,791</b>	<b>\$ 2,772,738</b>	<b>\$ 2,778,073</b>	<b>\$ 2,924,908</b>	<b>\$ 2,988,568</b>

OGC & CAP Income Statement Combined

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 2,543,939	\$ 2,695,722	\$ 2,792,696	\$ 2,934,523	\$ 3,018,850	\$ 3,240,066
Salaries-Hourly PT	24,903	23,837	24,178	50,335	40,961	42,399
Overtime	1,230	1,771	2,962	4,300	2,800	2,812
Taxes and Benefits	610,857	645,290	748,392	814,837	876,739	1,020,146
Pension	176,280	195,326	187,255	195,229	193,011	214,759
<b>Total Personnel Services</b>	<b>3,357,209</b>	<b>3,561,946</b>	<b>3,755,483</b>	<b>3,999,224</b>	<b>4,132,361</b>	<b>4,520,182</b>
<b>Operating Expenses</b>						
Shared Office Allocation	492,420	562,142	623,340	606,531	639,310	693,083
Postage and Freight	12,976	14,032	13,972	16,000	16,000	17,600
Printing	0	56	2,364	500	5,500	10,500
Supplies	8,431	19,789	17,515	25,000	22,000	27,000
Telephone	3,601	3,934	2,580	3,700	4,500	4,800
Subscriptions and Books	20,059	20,075	23,482	21,000	21,000	24,200
Dues and Memberships	7,737	8,893	10,918	9,047	14,000	17,500
Seminars and Training	5,373	8,927	9,515	12,500	12,500	19,500
Miscellaneous	298	979	2,468	2,000	2,000	2,500
Recruitment Costs	0	0	0	2,000	2,000	3,000
Attorney and Staff Travel	28,820	38,045	62,685	50,000	78,500	109,865
Investigator Travel	2,436	3,402	6,999	4,500	6,000	7,200
Lunchreons	0	578	3,338	1,300	2,000	6,600
Computer Hardware	20,973	2,795	2,746	3,000	0	8,025
Computer Software	4,499	5,043	8,306	5,500	10,600	11,600
Contract Programming	19,937	14,625	28,575	20,000	20,000	26,000
Receiverships	1,265	7,545	4,206	5,000	7,500	7,500
State Disciplinary Board Panel	38,549	64,686	82,616	50,000	70,000	82,000
Contract Special Master	67,121	124,628	0	0	0	0
Lexis Online	18,719	21,005	25,568	23,000	24,150	29,700
<b>Total Operating Expenses</b>	<b>753,214</b>	<b>921,179</b>	<b>931,193</b>	<b>860,578</b>	<b>957,560</b>	<b>1,108,173</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>1,110</b>	<b>1,594</b>	<b>5,000</b>	<b>5,000</b>	<b>5,000</b>
<b>Total Expenses</b>	<b>\$ 4,110,423</b>	<b>\$ 4,484,235</b>	<b>\$ 4,688,270</b>	<b>\$ 4,864,802</b>	<b>\$ 5,094,921</b>	<b>\$ 5,633,355</b>

Communications

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022	2022-2023	2023-2024	2023-2024	2024-2025	2025-2026
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
<b>Personnel Services</b>						
Salaries	243,424	276,098	288,693	290,716	302,374	313,343
Overtime	818	535	472	1,600	1,000	1,040
Taxes and Benefits	77,954	94,660	104,073	99,057	104,364	110,722
Pension	13,727	18,447	17,865	18,671	19,337	20,026
<b>Total Personnel Services</b>	<b>335,923</b>	<b>389,740</b>	<b>411,103</b>	<b>410,044</b>	<b>427,075</b>	<b>445,131</b>
<b>Expenses</b>						
Shared Office Allocation	67,920	77,537	84,520	82,241	86,687	86,635
Postage and Freight	1,403	1,891	1,426	1,500	2,000	2,000
Supplies	1,084	80	607	1,000	1,000	1,000
Telephone	825	900	900	900	900	900
Subscriptions and Books	6,157	4,192	3,604	6,095	6,335	7,890
Dues and Memberships	270	405	405	405	405	405
Seminars and Training	50	1,185	3,098	3,500	4,500	5,200
Miscellaneous	961	352	84	1,300	1,000	1,000
Attorney and Staff Travel	8,698	11,669	12,651	12,200	16,500	22,650
Luncheons	0	0	0	100	100	100
Credit Card Discount and Fees	0	292	321	0	300	300
Computer Hardware	1,359	1,104	0	0	0	2,500
Computer Software	1,458	1,458	1,458	1,600	1,600	1,600
Media Consultants	32,473	28,759	30,436	40,000	33,000	33,000
Website Maintenance	32,111	55,660	65,263	40,000	68,000	87,400
Website Redesign	0	0	275,105	0	0	0
Membership Certificates	2,143	1,845	2,574	2,000	2,000	2,000
<b>Subtotal</b>	<b>156,912</b>	<b>187,329</b>	<b>482,452</b>	<b>192,841</b>	<b>224,327</b>	<b>254,580</b>
<b>Subtotal</b>	<b>492,834</b>	<b>577,068</b>	<b>893,556</b>	<b>602,885</b>	<b>651,402</b>	<b>699,711</b>
<b>Publications</b>						
Bar Journal	223,868	359,790	273,976	364,300	256,500	246,100
Supplemental Directory	6,353	8,451	9,130	10,000	10,500	11,250
Special Publications and Printing	0	937	0	2,000	2,000	1,000
<b>Total Publications</b>	<b>230,221</b>	<b>369,178</b>	<b>283,106</b>	<b>376,300</b>	<b>269,000</b>	<b>258,350</b>
<b>Total Communications</b>	<b>723,056</b>	<b>946,247</b>	<b>1,176,662</b>	<b>979,185</b>	<b>920,402</b>	<b>958,061</b>

Fee Arbitration

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 255,292	\$ 271,077	\$ 248,357	\$ 296,848	\$ 263,660	\$ 274,206
Overtime	48	0	22	1,500	1,000	1,040
Taxes and Benefits	95,581	77,095	108,623	97,730	121,994	142,541
Pension	14,854	20,085	11,941	20,436	16,480	17,124
<b>Total Personnel Services</b>	<b>365,775</b>	<b>368,257</b>	<b>368,943</b>	<b>416,514</b>	<b>403,134</b>	<b>434,911</b>
<b>Operating Expenses</b>						
Shared Office Allocation	67,920	77,537	84,520	82,241	86,687	86,635
Postage and Freight	6,785	5,408	4,404	7,800	8,300	7,000
Printing	2,764	2,444	1,706	3,200	4,200	4,200
Supplies	1,012	1,796	1,856	1,700	2,000	3,250
Subscriptions and Books	900	977	1,415	1,010	1,900	800
Dues and Memberships	305	305	310	400	500	500
Seminars and Training	0	0	0	400	450	2,400
Miscellaneous	735	71	740	1,200	1,300	1,000
Attorney and Staff Travel	0	0	3,145	2,500	1,000	4,000
Luncheons	168	1,317	1,928	2,500	2,500	3,500
Computer Hardware	4,077	680	680	1,000	0	0
Computer Software	0	0	0	0	0	800
Contract Labor	72,000	72,000	72,000	75,000	75,000	75,000
Contract Programming	94	963	3,000	2,000	6,000	3,000
<b>Total Operating Expenses</b>	<b>156,760</b>	<b>163,498</b>	<b>175,704</b>	<b>180,951</b>	<b>191,837</b>	<b>192,085</b>
<b>Total Expenses</b>	<b>\$ 522,535</b>	<b>\$ 531,755</b>	<b>\$ 544,647</b>	<b>\$ 597,465</b>	<b>\$ 594,971</b>	<b>\$ 626,996</b>

State Bar of Georgia  
Budget Report  
For the Bar Year 2025-2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
Consultation	\$ 665	\$ 1,619	\$ 2,171	\$ 1,000	\$ 1,500	\$ 3,000
Publications	70	110	50	100	100	75
Vendor Directory	12,250	350	11,170	10,000	8,000	10,000
Miscellaneous Income	1,007	1,413	1,580	750	750	1,200
<b>Total Revenues</b>	<b>13,992</b>	<b>3,492</b>	<b>14,971</b>	<b>11,850</b>	<b>10,350</b>	<b>14,275</b>
<b>Personnel Services</b>						
Salaries	209,760	261,104	265,614	275,311	286,349	297,802
Overtime	1,708	1,921	1,772	5,000	2,500	2,600
Taxes and Benefits	77,159	82,615	90,307	107,883	113,588	146,754
Pension	6,597	14,931	14,321	17,960	18,476	16,235
<b>Total Personnel Services</b>	<b>295,224</b>	<b>360,571</b>	<b>372,014</b>	<b>406,154</b>	<b>420,913</b>	<b>463,391</b>
<b>Operating Expenses</b>						
Shared Office Allocation	67,920	77,537	84,520	82,241	86,687	86,635
Postage and Freight	2,377	1,069	1,122	2,000	2,000	1,500
Printing	0	372	200	1,000	1,000	800
Supplies	1,069	797	290	1,500	1,000	800
Telephone	0	0	900	900	900	900
Subscriptions and Books	4,631	3,872	2,798	6,500	6,900	4,500
Dues and Memberships	675	324	720	1,700	1,800	1,800
Seminars and Training	461	211	1,339	1,300	1,500	1,500
Miscellaneous	163	909	200	350	350	350
Attorney and Staff Travel	4,524	8,133	5,961	9,950	9,950	18,000
Lunches	102	75	310	200	200	300
Credit Card Discount and Fees	0	116	345	0	350	400
Computer Hardware	4,076	0	0	0	0	0
Computer Software	4,785	4,899	4,706	7,034	7,034	8,766
<b>Total Operating Expenses</b>	<b>90,783</b>	<b>98,314</b>	<b>103,411</b>	<b>114,675</b>	<b>119,671</b>	<b>126,251</b>
<b>Total Expenses</b>	<b>386,007</b>	<b>458,885</b>	<b>475,425</b>	<b>520,829</b>	<b>540,584</b>	<b>589,642</b>
<b>Solo and Small Firm</b>	<b>0</b>	<b>10,306</b>	<b>4,900</b>	<b>7,000</b>	<b>2,000</b>	<b>2,000</b>
<b>Showcase Programs</b>	<b>0</b>	<b>(2,763)</b>	<b>(10)</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Net Income</b>	<b>\$ (372,015)</b>	<b>\$ (447,850)</b>	<b>\$ (455,563)</b>	<b>\$ (501,979)</b>	<b>\$ (528,234)</b>	<b>\$ (573,367)</b>



State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 93,781	\$ 110,778	\$ 127,061	\$ 116,494	\$ 132,400	\$ 140,400
Overtime	940	419	488	500	500	520
Taxes and Benefits	41,820	52,227	57,579	58,410	62,660	66,917
Pension	5,962	6,902	7,404	7,032	7,987	8,469
<b>Total Personnel Services</b>	<b>142,503</b>	<b>170,326</b>	<b>192,532</b>	<b>182,436</b>	<b>203,547</b>	<b>216,306</b>
<b>Operating Expenses</b>						
Shared Office Allocation	33,960	38,768	42,261	41,121	43,343	43,318
Postage and Freight	13	0	0	0	0	0
Printing	0	341	0	0	0	0
Supplies	774	49	322	700	400	400
Telephone	750	900	900	900	900	900
Subscriptions and Books	3,101	1,984	1,856	2,500	2,500	2,200
Dues and Memberships	90	90	135	150	150	150
Seminars and Training	88	0	850	500	750	1,000
Miscellaneous	465	0	0	0	0	0
Attorney and Staff Travel	6,881	9,838	13,536	10,300	14,250	18,350
Luncheons	43	0	0	0	0	0
Credit Card Discount and Fees	0	25	29	0	0	0
Computer Hardware	1,358	0	0	0	0	0
Computer Software	611	729	729	800	800	800
Committee Brochures	7,063	8,987	0	9,200	7,500	1,200
President	8,354	10,544	14,446	20,000	20,000	18,000
President Elect	5,230	10,621	7,151	15,000	13,500	12,150
Immediate Past President	9,046	3,385	9,595	12,500	11,000	10,000
Treasurer	1,241	1,300	1,300	1,300	2,500	2,500
Secretary	1,300	1,300	1,300	1,300	2,500	2,500
Meetings	47,500	47,500	47,500	47,500	47,500	47,500
<b>Total Operating Expenses</b>	<b>127,868</b>	<b>136,361</b>	<b>141,910</b>	<b>163,771</b>	<b>167,593</b>	<b>160,968</b>
<b>Committees Activities</b>						
Committees Income	(1,470)	(4,365)	(6,905)	(2,500)	(4,000)	(1,000)
Committees Expense	58,708	58,561	92,478	103,100	81,950	93,950
<b>Total Committees Activities</b>	<b>57,238</b>	<b>54,196</b>	<b>85,573</b>	<b>100,600</b>	<b>77,950</b>	<b>92,950</b>
<b>Total Expenses</b>	<b>\$ 327,608</b>	<b>\$ 360,884</b>	<b>\$ 420,015</b>	<b>\$ 446,807</b>	<b>\$ 449,090</b>	<b>\$ 470,224</b>

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 514,990	\$ 541,658	\$ 566,639	\$ 570,971	\$ 593,865	\$ 519,941
Overtime	0	0	0	255	250	260
Taxes and Benefits	176,574	173,957	202,982	194,405	216,233	194,377
Pension	34,177	39,161	37,397	39,041	40,436	25,056
<b>Total Personnel Services</b>	<b>725,741</b>	<b>754,776</b>	<b>807,018</b>	<b>804,672</b>	<b>850,784</b>	<b>739,634</b>
<b>Operating Expenses</b>						
Shared Office Allocation	101,880	116,305	126,781	123,362	130,030	108,294
Postage and Freight	818	729	679	900	900	900
Printing	0	96	0	100	100	100
Supplies	1,101	760	1,457	1,000	1,000	1,000
Subscriptions and Books	716	546	669	850	800	725
Dues and Memberships	500	530	610	720	700	840
Seminars and Training	300	0	0	500	500	500
Miscellaneous	310	125	0	1,100	1,000	1,000
Attorney and Staff Travel	32	0	87	800	800	800
Investigator Travel	2,108	851	890	3,750	3,000	3,000
Luncheons	0	0	0	1,200	1,000	1,000
Computer Hardware	6,794	0	0	0	0	0
Lexis Online	3,492	4,171	4,259	4,070	4,250	4,475
<b>Total Operating Expenses</b>	<b>118,051</b>	<b>124,113</b>	<b>135,432</b>	<b>138,352</b>	<b>144,080</b>	<b>122,634</b>
<b>Total Expenses</b>	<b>\$ 843,792</b>	<b>\$ 878,889</b>	<b>\$ 942,450</b>	<b>\$ 943,024</b>	<b>\$ 994,864</b>	<b>\$ 862,268</b>

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 89,239	\$ 94,481	\$ 113,667	\$ 99,605	\$ 118,545	\$ 123,287
Overtime	0	0	0	250	250	260
Taxes and Benefits	46,988	51,917	59,331	56,905	61,423	65,392
Pension	3,261	5,855	6,588	6,002	7,139	7,426
<b>Total Personnel Services</b>	<b>139,488</b>	<b>152,253</b>	<b>179,586</b>	<b>162,762</b>	<b>187,357</b>	<b>196,365</b>
<b>Operating Expenses</b>						
Shared Office Allocation	16,980	19,384	21,130	20,560	21,672	21,659
Postage and Freight	96	17	5	150	150	150
Printing	0	445	0	100	100	100
Supplies	257	982	409	1,200	1,200	1,200
Telephone	15,735	8,179	6,989	7,000	7,500	7,500
Subscriptions and Books	303	174	192	180	200	200
Miscellaneous	38	4,679	10	4,000	4,000	2,000
Attorney and Staff Travel	1,984	2,471	3,990	2,200	1,000	1,000
Parking Savannah	2,220	1,110	0	0	0	0
Luncheons	0	0	0	100	100	100
Computer Hardware	1,359	0	1,922	0	0	0
Computer Software	0	0	0	100	100	100
Equipment Maintenance and Rental	1,467	1,459	1,328	2,300	2,300	1,800
Rent and Utilities	78,390	98,423	83,951	85,000	87,550	89,550
Facilities Maintenance	3,144	1,416	3,015	3,500	3,500	3,500
<b>Total Operating Expenses</b>	<b>121,973</b>	<b>138,739</b>	<b>122,941</b>	<b>126,390</b>	<b>129,372</b>	<b>128,859</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>18,331</b>	<b>4,444</b>	<b>4,000</b>	<b>0</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 261,461</b>	<b>\$ 309,323</b>	<b>\$ 306,971</b>	<b>\$ 293,152</b>	<b>\$ 316,729</b>	<b>\$ 325,224</b>

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Personnel Services</b>						
Salaries	\$ 49,539	\$ 60,707	\$ 63,510	\$ 63,998	\$ 66,564	\$ 69,227
Salaries-Hourly PT	19,525	11,699	20,837	22,715	30,030	31,231
Taxes and Benefits	16,396	18,355	19,960	20,287	21,810	23,175
Pension	1,120	3,762	3,698	5,211	5,805	6,038
<b>Total Personnel Services</b>	<b>86,580</b>	<b>94,523</b>	<b>108,005</b>	<b>112,211</b>	<b>124,209</b>	<b>129,671</b>
<b>Operating Expenses</b>						
Shared Office Allocation	12,735	14,538	15,847	15,420	16,254	16,244
Postage and Freight	510	495	490	330	650	700
Printing	0	0	0	100	100	100
Supplies	2,195	2,025	2,111	2,500	2,500	2,500
Telephone	8,616	7,074	6,385	7,000	7,000	7,000
Subscriptions and Books	502	340	358	350	400	400
Seminars and Training	0	0	0	0	1,000	1,000
Miscellaneous	34	0	0	200	200	200
Attorney and Staff Travel	2,097	2,423	3,395	3,000	1,000	1,500
Luncheons	0	0	24	100	100	100
Computer Hardware	1,777	0	504	0	0	0
Computer Software	0	0	0	200	200	1,900
Equipment Maintenance and Rental	1,451	1,461	1,328	2,000	2,000	2,000
Rent and Utilities	19,574	19,928	20,622	21,200	23,000	23,500
Facilities Maintenance	360	785	4,188	1,900	6,400	5,700
<b>Total Operating Expenses</b>	<b>49,851</b>	<b>49,069</b>	<b>55,252</b>	<b>54,300</b>	<b>60,804</b>	<b>62,844</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>2,760</b>	<b>1,402</b>	<b>2,500</b>	<b>0</b>	<b>11,000</b>
<b>Total Expenses</b>	<b>\$ 136,430</b>	<b>\$ 146,352</b>	<b>\$ 164,659</b>	<b>\$ 169,011</b>	<b>\$ 185,013</b>	<b>\$ 203,515</b>

Law Related Education

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
Miscellaneous Income	\$ 59	\$ 218	\$ 227	\$ 0	\$ 0	\$ 0
<b>Total Revenues</b>	<b>59</b>	<b>218</b>	<b>227</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Personnel Services</b>						
Salaries	182,256	210,153	226,032	227,729	236,860	246,700
Overtime	0	0	0	500	350	364
Taxes and Benefits	66,907	96,057	111,763	126,581	121,224	129,154
Pension	11,024	15,469	14,900	15,557	16,128	16,779
<b>Total Personnel Services</b>	<b>260,187</b>	<b>321,679</b>	<b>352,695</b>	<b>370,367</b>	<b>374,562</b>	<b>392,997</b>
<b>Operating Expenses</b>						
Shared Office Allocation	50,940	58,153	63,390	61,681	65,015	64,977
Postage and Freight	17	45	0	50	50	60
Printing	0	1,527	0	1,500	1,000	500
Supplies	930	1,244	1,343	1,200	1,000	1,500
Subscriptions and Books	355	387	385	400	250	300
Seminars and Training	0	0	300	500	1,000	200
Miscellaneous	639	185	377	800	500	500
Attorney and Staff Travel	1,700	3,163	2,037	5,500	4,608	3,860
Luncheons	53	0	0	120	100	100
Computer Hardware	5,354	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>59,988</b>	<b>64,704</b>	<b>67,832</b>	<b>71,751</b>	<b>73,523</b>	<b>71,997</b>
<b>Furniture/Equipment</b>						
	0	772	0	0	0	0
<b>Total Expenses</b>	<b>320,175</b>	<b>387,156</b>	<b>420,527</b>	<b>442,118</b>	<b>448,085</b>	<b>464,994</b>
<b>Net Income</b>	<b>\$ (320,116)</b>	<b>\$ (386,938)</b>	<b>\$ (420,300)</b>	<b>\$ (442,118)</b>	<b>\$ (448,085)</b>	<b>\$ (464,994)</b>

High School Mock Trial

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
Miscellaneous Income	\$ 40	\$ 505	\$ 337	\$ 500	\$ 5,500	\$ 200
<b>Total Revenues</b>	<b>40</b>	<b>505</b>	<b>337</b>	<b>500</b>	<b>5,500</b>	<b>200</b>
<b>Personnel Services</b>						
Salaries	64,259	71,086	71,531	72,080	74,970	77,969
Taxes and Benefits	33,444	36,898	33,990	41,845	30,469	32,441
Pension	0	0	4,165	4,332	4,506	4,686
<b>Total Personnel Services</b>	<b>97,703</b>	<b>107,984</b>	<b>109,686</b>	<b>118,257</b>	<b>109,945</b>	<b>115,096</b>
<b>Operating Expenses</b>						
Shared Office Allocation	16,980	19,384	21,130	20,560	21,672	21,659
Postage and Freight	230	66	115	1,000	500	300
Printing	0	56	0	0	0	0
Supplies	655	674	234	600	800	700
Subscriptions and Books	543	593	1,304	1,000	900	1,300
Dues and Memberships	200	200	0	200	200	200
Miscellaneous	0	58	768	400	200	300
Attorney and Staff Travel	1,674	2,003	2,485	2,750	3,150	3,000
Luncheons	145	0	589	500	500	600
Credit Card Discount and Fees	0	14	6	0	100	100
Computer Hardware	1,359	0	0	0	3,000	0
Computer Software	473	364	0	0	400	600
<b>Total Operating Expenses</b>	<b>22,259</b>	<b>23,412</b>	<b>26,631</b>	<b>27,010</b>	<b>31,422</b>	<b>28,759</b>
<b>HSMT Events</b>						
Sponsorships	0	0	(10,000)	0	0	(5,000)
Law Academy	3,729	2,284	6,203	5,975	5,500	5,500
Regional Competition	(13,579)	(239)	(7,458)	450	(3,300)	(4,000)
State Competition	8,268	6,481	16,754	16,200	17,000	18,000
National Competition	6,944	14,442	17,087	15,000	17,000	18,000
District Competition	8,485	7,220	8,938	10,000	10,000	9,000
2019 NMSMTC-Athens	(19)	0	(19)	0	0	0
<b>Total HSMT Events</b>	<b>13,828</b>	<b>30,188</b>	<b>31,505</b>	<b>47,625</b>	<b>46,200</b>	<b>41,500</b>
<b>Total Expenses</b>	<b>133,790</b>	<b>161,585</b>	<b>167,822</b>	<b>192,892</b>	<b>187,567</b>	<b>185,355</b>

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
Net Income	(133,750)	(161,081)	(167,485)	(192,392)	(182,067)	(185,155)

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Program Revenue</b>						
Registration Revenue	\$ 4,854,415	\$ 4,890,539	\$ 4,827,097	\$ 5,000,000	\$ 4,500,000	\$ 4,850,000
Sponsorship	0	1,000	0	0	0	0
Program Discounts	(18,447)	(15,585)	(33,421)	(250,000)	(100,000)	(50,000)
Other	6,301	6,110	(3,090)	0	0	0
<b>Total Program Revenue</b>	<b>4,842,269</b>	<b>4,882,064</b>	<b>4,790,586</b>	<b>4,750,000</b>	<b>4,400,000</b>	<b>4,800,000</b>
<b>Total Program Expenditures</b>	<b>869,548</b>	<b>1,619,046</b>	<b>1,773,059</b>	<b>1,525,000</b>	<b>1,601,500</b>	<b>1,784,000</b>
<b>Net Margin on Programs</b>	<b>3,972,721</b>	<b>3,263,018</b>	<b>3,017,527</b>	<b>3,225,000</b>	<b>2,798,500</b>	<b>3,016,000</b>
<b>Personnel Services</b>						
Salaries Full Time	870,218	908,053	1,060,131	1,160,740	1,376,679	1,335,312
Salaries Part Time	1,625	21,463	22,894	45,000	31,500	32,760
Overtime Pay	5,093	9,895	16,447	20,000	21,000	26,000
Taxes and Benefits	214,519	245,924	267,900	462,715	502,927	489,964
Pension	49,163	42,570	50,293	66,585	73,811	80,016
<b>Total Personnel Services</b>	<b>1,140,618</b>	<b>1,227,905</b>	<b>1,417,665</b>	<b>1,755,040</b>	<b>2,005,917</b>	<b>1,964,052</b>
<b>Operating Expenses</b>						
Shared Office Allocation	322,620	348,916	380,343	370,087	433,433	433,177
Board and Committee Meetings	3,860	237	1,108	4,000	4,000	2,000
Dues and Memberships	1,330	3,411	4,705	7,000	7,000	6,000
Licenses and Certification	501	750	611	3,000	3,000	1,500
Seminars and Training	3,724	5,027	8,822	25,000	22,000	12,000
Attorney and Staff Travel	9,193	30,411	18,333	50,000	20,000	27,000
Supplies	2,548	6,456	19,568	20,000	10,000	20,000
Printing	0	444	0	2,500	1,500	1,500
Subscriptions and Books	735	89,505	77,830	105,000	95,000	93,000
Postage and Freight	486	174	30	750	250	250
Telephone	3,450	5,400	5,475	8,100	8,100	8,100
Internet Services	630	213	231	4,500	4,500	7,200
Computer Software	79,479	660	0	5,000	1,000	1,000
Contract Programming	15,071	1,037	0	25,000	3,000	3,000
Computer Hardware	6,656	14,078	11,670	15,000	0	5,000
Miscellaneous	506	1,180	3,594	10,000	5,000	4,000
Professional Fees	0	4,800	0	12,500	5,000	8,000



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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
Equipment Maintenance and Rental	0	0	0	1,000	0	1,000
Other Business Insurance (Not Group)	0	0	0	10,000	0	0
Credit Card Discount and Fees	120,795	115,005	105,783	142,500	120,000	110,000
Banking Fees	8	0	0	1,000	200	100
Luncheons	1,589	4,136	4,058	4,000	4,000	5,000
Recruitment	0	0	0	2,500	0	0
Contract Labor	0	0	0	5,000	1,000	1,000
Volunteer Recognition	0	0	2,865	5,000	5,000	8,000
Marketing Materials	0	0	335	10,000	15,000	8,000
<b>Total Operating Expenses</b>	<b>573,181</b>	<b>631,840</b>	<b>645,361</b>	<b>848,437</b>	<b>767,983</b>	<b>765,827</b>
<b>Furniture and Equipment</b>						
Furniture and Equipment	0	0	2,505	5,000	2,500	2,500
<b>Total Expenses</b>	<b>1,713,799</b>	<b>1,859,745</b>	<b>2,065,531</b>	<b>2,608,477</b>	<b>2,776,400</b>	<b>2,732,379</b>
<b>Net Income Before Other Inc and Exp</b>	<b>2,258,922</b>	<b>1,403,273</b>	<b>951,996</b>	<b>616,523</b>	<b>22,100</b>	<b>283,621</b>
<b>Other Income and Expenses</b>						
Interest Income	3,356	86,605	132,063	30,000	100,000	130,000
Bond Premium Amortization	(6,444)	(4,868)	(588)	(7,000)	(6,000)	(4,000)
Investment Service Fees	(9,382)	(9,431)	(9,817)	(10,000)	(10,000)	(10,000)
<b>Total Other Income and Expenses</b>	<b>(12,470)</b>	<b>72,306</b>	<b>121,658</b>	<b>13,000</b>	<b>84,000</b>	<b>116,000</b>
<b>Net Income</b>	<b>\$ 2,246,452</b>	<b>\$ 1,475,579</b>	<b>\$ 1,073,654</b>	<b>\$ 629,523</b>	<b>\$ 106,100</b>	<b>\$ 399,621</b>

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Other Activities</b>						
SBG President	11,880	19,437	22,075	36,000	36,000	36,000
SBG President Elect	3,995	6,447	22,000	22,000	22,000	20,000
SBG President Elect Elect	0	0	0	1,350	1,350	1,350
SBG Treasurer	3,443	3,800	3,758	4,000	4,500	4,500
SBG Secretary	3,727	1,995	4,000	4,000	4,500	4,500
SBG Immediate Past President	9,208	9,233	11,912	14,500	14,500	13,500
SBG Past Past President	0	1,800	1,620	1,620	1,620	1,620
Exec. Comm. - Bert Hummel	0	0	2,478	3,000	3,000	3,000
Exec. Comm. - R. Gary Spencer	0	0	2,259	3,000	3,000	3,000
Exec. Comm. - Shiriki Cavitt Jones	0	0	2,551	3,000	3,000	3,000
Exec. Comm. - David S. Lipscomb	0	0	2,305	3,000	3,000	3,000
Exec. Comm. - Martin E. Valbuena	0	0	1,066	3,000	3,000	3,000
Exec. Comm. - Joyce Gist Lewis	0	0	3,000	3,000	3,000	3,000
<b>Total Officer's Expenses</b>	<b>32,253</b>	<b>43,727</b>	<b>79,024</b>	<b>101,470</b>	<b>102,470</b>	<b>99,470</b>

<b>Miscellaneous</b>						
BOG and Member Meetings	384,136	400,237	530,767	556,000	588,200	597,500
Supreme Court Meetings	26,489	46,661	79,023	40,000	75,000	79,000
Executive Committee Meetings	40,983	33,891	7,681	50,000	42,000	62,000
Court of Appeals Meetings	0	0	0	0	20,000	20,000
Lawyer's Assistance Program	85,000	125,000	125,000	125,000	155,000	155,000
Sections	188,553	249,356	306,746	301,039	320,694	335,385
State Disciplinary Board Lawyers	32,375	30,000	30,000	34,000	31,500	34,000
Elections	18,628	23,411	17,674	19,000	20,000	18,000
Dues Notice	31,474	34,805	34,148	42,825	45,990	38,000
Letters of Good Standing	2,294	2,211	1,713	2,300	2,500	2,400
Bar Membership Cards	8,236	10,671	9,727	8,800	11,000	12,500
50 Year Certificates	1,831	3,823	4,671	6,500	6,000	6,300
Fastcase	267,738	281,418	297,471	297,000	455,000	480,000
Membership Database Project	0	0	57,911	0	0	0
State Bar Committees	18,231	18,705	16,070	25,000	20,000	20,000
Georgia Diversity Program	10,000	10,000	10,000	10,000	10,000	10,000
ABA Delegate Breakfast	0	2,134	2,117	2,500	2,500	3,000
1st Floor Painting	2,700	2,600	0	5,500	0	6,000
Commitment to Equality Awards	2,500	2,500	2,500	2,500	2,500	7,500
Resource Center Contribution	55,166	55,166	55,166	55,166	55,166	55,166
Bond Premium Amortization	39,604	9,750	22,811	67,500	29,000	23,000
Investment Service Fees	21,995	14,524	29,957	29,000	35,000	36,000
Access to Justice/Pro Bono	0	2,500	602	2,500	7,500	30,000

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Total Miscellaneous	1,237,933	1,359,363	1,641,755	1,682,130	1,934,550	2,030,751
Pro Bono	212,216	212,216	212,216	212,216	212,216	212,216
Total Other Activities	1,482,402	1,615,306	1,932,995	1,995,816	2,249,236	2,342,437
Unallocated Services	(59,323)	(133,549)	(118,053)	0	0	0
Grand Total	14,242,536	16,229,190	17,723,696	18,354,301	19,282,420	20,164,543

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	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Shared Office Overhead</b>						
Rubbish Removal	0	0	0	0	0	3,000
Telephone	55,305	95,780	52,326	52,800	54,000	54,200
Computer Software	3,896	5,126	6,854	4,600	5,300	6,800
Internet Services	0	0	24,868	24,750	25,200	26,100
Equipment Rental	53,243	54,525	55,738	60,000	57,500	57,000
Kitchen	15,302	22,320	21,953	23,000	27,000	25,500
Facilities Maintenance	10,270	12,007	13,423	17,000	15,000	20,050
Payroll Service	15,438	16,189	16,538	16,500	17,500	18,000
Audit	21,600	37,892	27,023	29,500	32,500	34,500
Building and Other Insurance (Not Group)	178,998	209,576	237,469	245,000	250,000	228,800
Furniture/Equipment	0	0	4,668	0	0	0
Supplies and Printing	41,920	47,880	47,494	48,000	48,000	44,000
<b>Subtotal</b>	<b>395,972</b>	<b>501,295</b>	<b>508,354</b>	<b>521,150</b>	<b>532,000</b>	<b>517,950</b>
<b>Other Services</b>						
Accounting	496,812	513,676	546,817	556,295	577,214	573,797
Human Resources	217,912	253,755	273,786	269,646	288,433	310,298
Mailroom	74,221	82,009	84,164	86,757	89,715	75,190
Receptionist	107,377	65,882	46,838	73,534	69,604	82,914
Information Technology	645,753	673,616	768,833	839,463	938,940	946,195
<b>Subtotal Other Services</b>	<b>1,542,075</b>	<b>1,588,938</b>	<b>1,720,438</b>	<b>1,825,695</b>	<b>1,963,906</b>	<b>1,988,394</b>
<b>Total Shared Office Overhead</b>	<b>1,938,047</b>	<b>2,090,233</b>	<b>2,228,792</b>	<b>2,346,845</b>	<b>2,495,906</b>	<b>2,506,344</b>
<b>Total Allocated Services</b>	<b>(1,997,370)</b>	<b>(2,223,782)</b>	<b>(2,346,845)</b>	<b>(2,346,845)</b>	<b>(2,495,906)</b>	<b>(2,506,344)</b>
<b>Unallocated Services</b>	<b>(59,323)</b>	<b>(133,549)</b>	<b>(118,053)</b>	<b>0</b>	<b>0</b>	<b>0</b>

State Bar of Georgia  
Budget Template  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Related Organizations Shared</b>						
<b>Office Allocations</b>						
Georgia Bar Foundation	\$ 3,500	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,240	\$ 4,400
Continuing Legal Education	84,900	67,845	63,390	61,681	86,687	86,635
TILPP	33,960	29,075	0	41,121	0	0
Pro Bono	58,896	49,598	51,503	51,503	54,784	55,510
Professionalism	3,500	4,000	4,000	4,000	4,240	4,400
Sections	33,960	58,153	63,391	61,681	65,015	64,977
<b>Subtotal</b>	<b>218,716</b>	<b>212,671</b>	<b>186,284</b>	<b>223,986</b>	<b>214,966</b>	<b>215,922</b>
<b>State Bar Departments - Shared</b>						
<b>Office Allocation</b>						
Membership	84,900	96,921	105,651	102,802	108,358	108,294
Meetings	33,960	38,768	42,261	41,121	43,343	43,318
Executives	322,620	368,300	380,347	370,090	390,090	368,200
General Counsel	492,419	562,142	623,340	606,531	639,310	693,083
Communications	67,920	77,537	84,520	82,241	86,687	86,635
Fee Arbitration	67,920	77,537	84,520	82,241	86,687	86,635
Law Practice Management	16,980	19,384	21,130	20,560	21,672	21,659
Savannah Office	12,735	14,538	15,847	15,420	16,254	16,244
Tifton Office	33,960	38,768	42,261	41,121	43,343	43,318
Younger Lawyers	101,880	116,305	126,781	123,362	130,030	108,294
Unauthorized Practice of Law	50,940	58,153	63,390	61,681	65,015	64,977
Law Related Education	16,980	19,384	21,130	20,560	21,672	21,659
ICLE	322,620	348,916	380,343	370,087	433,433	433,177
Conference Center	67,920	77,537	84,520	82,241	86,687	86,635
Legislative Program	16,980	19,384	0	20,560	21,672	21,659
<b>Subtotal</b>	<b>1,778,654</b>	<b>2,011,111</b>	<b>2,160,561</b>	<b>2,122,859</b>	<b>2,280,940</b>	<b>2,290,422</b>
<b>Total Allocated Services</b>	<b>\$ 1,997,370</b>	<b>\$ 2,223,782</b>	<b>\$ 2,346,845</b>	<b>\$ 2,346,845</b>	<b>\$ 2,495,906</b>	<b>\$ 2,506,344</b>

2025-2026 State Bar of Georgia Budget  
Percentage of Shared Office Overhead Expense

State Bar of Georgia

	25-26 Emp	%25-26 Emp.	%25-26 Emp.
Exec	17	14.08%	15.08%
Mtgs	2	1.66%	1.77%
Memb	5	4.14%	4.43%
OGC	32	26.50%	28.38%
CAP	0	0.00%	0.00%
COM	4	3.31%	3.55%
F.A.	4	3.31%	3.55%
LPM	4	3.31%	3.55%
TIF	0.75	0.62%	0.67%
SAV	1	0.83%	0.89%
YLD	2	1.66%	1.77%
HSMT	1	0.83%	0.89%
UPL	5	4.14%	4.43%
TILPP	0	0.00%	0.00%
CONF	4	3.31%	3.55%
LRE	3	2.48%	2.66%
LEG	1	0.83%	0.89%
CLE	4	3.31%	3.55%
SEC	3	2.48%	2.66%
ICLE	20	16.56%	17.74%
BAR:			
GBF	3	2.48%	
PB	3	2.48%	
PROF	2	1.66%	

Total	120.8
BAR	112.8

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
After Hours Fees	\$ 3,665	\$ 8,415	\$ 9,633	\$ 7,000	\$ 8,500	\$ 9,500
Beverage Service	306	518	524	1,000	1,000	1,000
Cleaning Fees	930	1,725	1,432	1,000	1,000	1,000
Audio Video Support	968	2,025	2,228	1,000	2,000	2,000
<b>Total Revenues</b>	<b>5,869</b>	<b>12,683</b>	<b>13,817</b>	<b>10,000</b>	<b>12,500</b>	<b>13,500</b>
<b>Personnel Services</b>						
Salaries	218,064	231,413	240,245	238,434	247,995	241,449
Overtime	3,560	5,881	4,257	11,500	7,500	4,500
Taxes and Benefits	80,095	81,281	91,014	93,357	98,111	102,643
Pension	12,901	14,797	14,456	15,021	15,356	14,781
<b>Total Personnel Services</b>	<b>314,620</b>	<b>333,372</b>	<b>349,972</b>	<b>358,312</b>	<b>368,962</b>	<b>363,373</b>
<b>Operating Expenses</b>						
Shared Office Allocation	67,920	77,537	84,520	82,241	86,687	86,635
Postage and Freight	1	0	2	0	0	0
Supplies	3,379	2,477	3,108	2,913	2,500	3,200
Subscriptions and Books	5,896	5,935	5,969	11,350	7,000	6,200
Miscellaneous	154	120	118	1,000	500	500
Conference Center Copier	6	0	0	0	0	0
Attorney and Staff Travel	216	363	0	500	500	500
Luncheons	0	0	66	0	0	0
Credit Card Discount and Fees	0	138	114	0	200	200
Computer Hardware	4,122	0	0	0	0	0
Computer Software	0	0	1,338	0	0	0
After Hours Security	94	0	0	1,000	500	500
Contract Programming	0	312	0	500	500	1,500
Equipment Maintenance and Rental	4,564	4,606	4,043	4,500	5,000	5,000
Furniture Repairs and Maintenance	9,889	13,050	12,441	10,000	10,000	14,000
Kitchen	4,085	7,024	5,894	8,000	8,000	10,000
Facilities Maintenance	375	0	0	0	0	0
<b>Total Operating Expenses</b>	<b>100,701</b>	<b>111,562</b>	<b>117,613</b>	<b>122,004</b>	<b>121,387</b>	<b>128,235</b>
<b>Total Expenses</b>	<b>415,321</b>	<b>444,934</b>	<b>467,585</b>	<b>480,316</b>	<b>490,349</b>	<b>491,608</b>
<b>Furniture/Equipment</b>	<b>5,339</b>	<b>0</b>	<b>9,440</b>	<b>8,000</b>	<b>0</b>	<b>1,100</b>

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

2021-2022	2022-2023	2023-2024	2023-2024	2024-2025	2025-2026
Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
\$ (414,792)	\$ (432,251)	\$ (463,208)	\$ (478,316)	\$ (477,849)	\$ (479,208)

Net Income



Other Bar Center Operations

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
Interest and Dividend Income	\$ 115,359	\$ 115,246	\$ 132,667	\$ 98,000	\$ 102,000	\$ 138,000
Gain/Loss Investment Interest Allocation	(347,796)	55,035	263,476	0	0	0
Bar Center Assessments	350	165	0	200	200	0
CCLC Contributions to Bar Center	1,286,677	1,400,631	1,393,988	1,300,000	1,375,000	1,390,000
<b>Total Revenues</b>	<b>1,054,590</b>	<b>1,571,077</b>	<b>1,790,131</b>	<b>1,398,200</b>	<b>1,477,200</b>	<b>1,528,000</b>
<b>Operating Expenses</b>						
Bond Premium Amortization	37,249	15,712	17,366	32,000	17,000	12,000
Investment Service Fees	24,411	26,697	24,138	22,000	22,000	24,000
Parking Deck Construction	0	850	0	0	0	0
Conference Center Renovations	12,911	0	0	0	0	9,500
Museum and 1st Floor Exhibit	0	0	6,453	5,000	0	0
Audio Video, Furniture and Equipment	650	18,990	219,552	3,500	5,700	34,000
Building Rehabilitation	17,794	47,347	726,161	0	8,400	0
2nd Floor Buildout	129,298	30,025	0	0	0	0
<b>Total Operating Expenses</b>	<b>222,313</b>	<b>139,621</b>	<b>993,670</b>	<b>62,500</b>	<b>53,100</b>	<b>79,500</b>
<b>Total Expenses</b>	<b>222,313</b>	<b>139,621</b>	<b>993,670</b>	<b>62,500</b>	<b>53,100</b>	<b>79,500</b>
<b>Net Income</b>	<b>\$ 832,277</b>	<b>\$ 1,431,456</b>	<b>\$ 796,462</b>	<b>\$ 1,335,700</b>	<b>\$ 1,424,100</b>	<b>\$ 1,448,500</b>

Rental

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
Revenues						
Income Rental Operations	\$ 935,972	\$ 919,520	\$ 926,110	\$ 920,000	\$ 760,000	\$ 752,000
<b>Total Revenues</b>	<b>935,972</b>	<b>919,520</b>	<b>926,110</b>	<b>920,000</b>	<b>760,000</b>	<b>752,000</b>
Operating Expenses						
Equipment and Supplies	0	841	0	0	0	0
Personnel Management Salary	9,346	12,945	39,288	60,000	60,000	65,000
Administrative Taxes and Benefits	483	1,190	14,793	6,127	16,800	25,200
Travel	0	185	0	100	100	100
Supplies	0	0	322	100	100	100
Telephone Expense	908	5,894	2,491	1,500	2,040	1,900
Management Fees	61,718	63,569	65,476	70,000	69,000	70,000
Bank Fees	1,449	1,350	1,474	1,800	1,800	1,800
R&M Salaries	185,290	190,698	197,748	201,600	225,100	225,100
R&M Taxes and Benefits	65,729	64,992	69,992	88,000	96,800	96,800
R&M HVAC	56,631	77,878	54,904	200,000	66,600	68,640
R&M Plumbing	12,919	101,417	17,354	7,600	9,000	9,000
R&M Fire/Life Prevention	7,482	10,753	19,135	11,925	13,925	15,425
R&M Electrical/Lamps	14,669	15,156	8,132	17,000	17,000	17,000
R&M Water Treatment	8,782	10,673	11,846	12,000	12,300	12,300
R&M Life Safety Contract	6,888	7,567	23,922	12,000	12,000	64,715
R&M Tools/Radios	1,934	0	791	2,500	2,500	3,000
R&M Elevators	25,864	24,966	33,577	30,000	31,200	32,500
R&M Pest Control	3,528	3,480	3,720	3,500	3,780	4,000
R&M Rubbish Removal	14,547	13,269	15,125	13,000	14,000	13,000
R&M Other: Locks and Keys	50	0	0	300	300	300
R&M Painting	0	6,555	5,379	9,000	9,000	9,000
R&M Other: General Building	0	51,959	7,673	3,400	3,400	41,400
R&M Lobby	0	0	1,701	3,000	3,000	3,000
Uniforms	902	696	1,167	1,000	1,500	1,500
Electric	319,668	327,738	402,894	330,000	350,000	418,000
Water	27,033	68,345	45,652	60,000	65,000	65,000
Gas	23,378	30,932	23,277	32,000	32,000	32,000
Security Contract	273,667	340,602	373,294	373,000	388,000	400,000
Cleaning	156,544	176,181	175,964	186,000	188,700	188,700
Grounds Supplies and Maintenance	4,078	5,574	7,000	7,000	7,000	24,000
Insurance	59,599	67,439	75,507	80,850	80,000	80,850
<b>Total Operating Expenses</b>	<b>1,343,086</b>	<b>1,683,844</b>	<b>1,692,176</b>	<b>1,824,302</b>	<b>1,781,945</b>	<b>1,989,330</b>

Rental

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
Total Expenses	1,343,086	1,683,844	1,692,176	1,824,302	1,781,945	1,989,330
Net Income	\$ (407,114)	\$ (764,324)	\$ (766,066)	\$ (904,302)	\$ (1,021,945)	\$ (1,237,330)

Parking

State Bar of Georgia  
Budget Report  
For the Bar Year 2025 - 2026

	2021-2022 Actual	2022-2023 Actual	2023-2024 Actual	2023-2024 Annual Budget	2024-2025 Annual Budget	2025-2026 Annual Budget
<b>Revenues</b>						
Monthly Parking Operations	\$ 56,339	\$ 70,196	\$ 115,838	\$ 65,000	\$ 113,220	\$ 117,540
Daily Parking Operations	19,050	31,934	54,862	20,000	10,040	53,900
Special Events Parking Operations	104,452	367,388	413,350	225,000	450,000	440,000
<b>Total Revenues</b>	<b>179,841</b>	<b>469,518</b>	<b>584,050</b>	<b>310,000</b>	<b>573,260</b>	<b>611,440</b>
<b>Operating Expenses</b>						
Salaries	111,985	110,937	98,946	99,600	130,000	131,867
Payroll Taxes	14,458	15,467	13,856	14,000	18,200	18,600
Workers' Compensation	13,315	14,341	12,855	14,600	18,000	17,300
Medical Ins/Benefits	18,823	19,762	17,677	21,000	24,780	23,700
Signs	0	549	0	0	0	0
Uniforms	0	638	91	240	240	400
Repairs and Maintenance	24,898	27,667	24,913	25,200	26,000	35,000
Tickets	0	0	0	600	600	600
Cell Phone/Beeper	907	611	666	1,900	840	840
Office Expenses	7,078	26,939	10,290	9,270	10,290	10,490
Invoicing Expenses	4,204	4,721	5,344	4,275	5,200	5,600
Bank Charges	2,587	4,394	4,770	4,000	4,600	5,100
Credit Card Fees	3,478	8,722	7,836	6,800	9,500	10,000
Garage Insurance	9,059	10,367	12,110	11,400	11,000	14,500
Business License	1,028	1,004	873	1,200	1,410	1,000
Management Fee	4,200	4,200	4,200	4,200	4,200	4,200
Security	61,293	71,455	63,210	80,000	68,000	74,000
Payroll Processing	2,946	3,082	3,080	3,500	3,500	3,800
Equipment and Supplies	0	0	943	850	850	650
Miscellaneous	0	395	186	500	500	500
Cleaning	0	900	3,600	0	3,600	3,780
Fire Safety	0	1,633	0	2,500	2,500	2,500
Incentive Management Fees	1,331	4,991	6,000	4,000	6,000	6,000
<b>Total Operating Expenses</b>	<b>281,590</b>	<b>332,775</b>	<b>291,446</b>	<b>309,635</b>	<b>349,810</b>	<b>370,427</b>
<b>Total Expenses</b>	<b>281,590</b>	<b>332,775</b>	<b>291,446</b>	<b>309,635</b>	<b>349,810</b>	<b>370,427</b>
<b>Net Income</b>	<b>\$ (101,749)</b>	<b>\$ 136,743</b>	<b>\$ 292,603</b>	<b>\$ 365</b>	<b>\$ 223,450</b>	<b>\$ 241,013</b>

**State Bar of Georgia  
Dues and Revenue History**

Dues History:		Year End 6-30	Active & Inactive Members (Includes Nonpaying students)
\$75	8 Years	1976-1983	6/30/83 = 15,000
\$90	4 Years	1984-1987	6/30/87 = 19,425
\$110	2 Years	1988-1989	6/30/89 = 20,193
\$135	6 Years	1990-1995	6/30/95 = 26,320
\$150	5 years	1996-2000	6/30/00 = 30,694
\$175	3 years	2001-2003	6/30/03 = 33,706
\$190	1 year	2004	6/30/04 = 34,717
\$208	1 year	2005	6/30/05 = 35,704
\$218	1 year	2006	6/30/06 = 36,694
\$230	2 years	2008	6/30/08 = 38,852
\$236**	3 years	2009-2011	6/30/11 = 42,334
\$238	1 year	2011-2012	6/30/12 = 42,957
\$240	1 year	2012-2013	6/30/13 = 44,184
\$246***	1 year	2013-2014	6/30/14 = 45,143
\$248	3 years	2014-2017	6/30/17 = 47,967
\$250	1 year	2017-2018	6/30/18 = 48,046
\$252	1 year	2018-2019	6/30/19 = 48,324
\$254	3 years	2019-2022	6/30/22 = 49,943
\$260	2 years	2022-2024	6/30/24 = 50,773
\$264	1 year	2024-2025	6/30/25 = 51,049 - Budgeted

\*\*One time dues credit of \$20 per active member (\$10 inactive) approved by Board of Governors, reducing net active dues to \$216 (\$108 inactive) for 2008-09 only.  
 \*\*\*One time dues credit of \$2 per active member (\$1 inactive) approved by Board of Governors, reducing net active dues to \$244 (\$122 inactive) for 2013-14 only.

Membership counts as of June 30, 2017 and subsequent represent total members excluding emeritus.

**State Bar of Georgia**

**2025-2026 Dues Recommendation to the Board of Governors and Other Dues Items**

Motion: To submit the following recommendation to the Board of Governors for approval:

1. Dues at \$270 for active members and \$135 for inactive and provisional members
2. Center for Lawyer Wellbeing and Section dues to be reflected on the dues statement ranging from \$10-\$50; and
3. In accordance with Bar Rule 1-506 regarding the Clients' Security Fund, each member is assessed a fee of \$15. This assessment shall be used only to fund the Clients' Security Fund; and
4. Professionalism Fee (\$11) mandated by the Supreme Court; and
5. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
6. A suggested \$400 opt-in provision for individual contributions (\$100 for younger lawyers) for the Georgia Legal Services Program.

## MOTION

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.

**DRAFT**  
**STATE BAR OF GEORGIA**  
**EXECUTIVE COMMITTEE MEETING**  
**MINUTES**  
**December 5, 2024, 1 p.m.**  
**Atlanta Marriott Alpharetta**  
**Alpharetta, GA**

Members Participating

Ivy N. Cadle, President; William C. “Bill” Gentry, Treasurer; R. Javoyne Hicks, Secretary; Kenneth Mitchell Jr., YLD President; Brittanie Browning, YLD Immediate Past President; Norbert “Bert” Hummel; Shiriki Jones; Joyce Gist Lewis; David S. Lipscomb; R. Gary Spencer; and Martin Valbuena.

Members Absent

Christopher P. Twyman, President-Elect; J. Antonio “Tony” DelCampo, Immediate Past President; and Veronica Cox, YLD President-Elect.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Jennifer McNeely, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; Ron Turner, Chief Financial Officer; and Russ Willard, General Counsel Designate.

Call to Order

President Ivy N. Cadle called the meeting to order at 1 p.m. The members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Ivy Cadle reviewed the Future Meetings Schedule, including the upcoming meetings of the Executive Committee and Board of Governors.

President’s Report

President Ivy Cadle reported that the Special Committee on Artificial Intelligence and Technology and the Attorney-Client Solicitation Committee have been broken into subcommittees to focus on certain tasks and deliverables. More information on what those committees have been working on will be forthcoming. President Cadle welcomed the new Director of Governmental Affairs, Jennifer McNeely, to her first Executive Committee meeting.

Executive Director’s Report

Executive Director Damon Elmore gave a brief update on the following committees: Artificial Intelligence and Technology, Attorney-Client Solicitation, and the Supreme Court’s Study Committee on Legal Regulatory Reform. The Supreme Court’s study committee has five Bar appointments. They will meet in March, and Chief Justice Michael Boggs has asked for a report by June. Executive Director Elmore reported that the Bar’s parking deck now has EV charging stations on floors four and five. He said there will be a more comprehensive report on unallocated cash at the next Executive Committee Meeting; he wants to ensure that Bar leadership is updated regularly on the unallocated cash. He also reported that the Supreme Court held an administration banc today and will review the submitted advertising rules and appointments to the Unlicensed Practice of Law district committees.

Treasurer’s Report

Treasurer William C. Gentry reported on the provided financial statements through September 2024. He said the first quarter historically has the least amount of activity. He reported there are no negative or significant surprises. Treasurer Gentry said the October finances are complete, and the finance team is currently working on the November finances.



### YLD Report

YLD President Kenneth Mitchell reported the Leadership Academy Alumni Lunch was that same day. Past President Patrise Perkins Hooker was the keynote. He said the YLD has had a busy fall, including some of the following events: the Community Service Committee planted trees for Trees Atlanta; the Litigation Committee had a CLE titled “When in Rome;” the Law School Outreach Committee had an event at Mercer; and the Solo Small Firm Committee had a program titled “Building Your Brand with Purpose.” He said the YLD is now preparing for the Midyear Meeting. The YLD’s Signature Fundraiser will be held on March 8 at the Hank Aaron Terrace at Truist Park, with the theme “A Night on the Diamond,” and he asked the Executive Committee for their support. He added that the Spring Meeting will be held in Nashville, including a CLE on the ELVIS Act.

### Office of the General Counsel Report

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss the litigation report. Thereafter, the Executive Committee emerged from Executive Session by unanimous voice vote.

### Legislative Report

Director of Governmental Affairs Jennifer McNeely reported the Advisory Committee on Legislation will meet on December 10. She said there will be some bills from last year’s Bar agenda, in addition to the bills that were voted on at the Fall Board of Governors Meeting. There will also be two separate bills for judicial funding, one for superior court and one for state court. The Bar will review those once they are in final draft.

### Executive Committee Minutes

Secretary Javoyne Hicks presented for approval the minutes of the October 3, 2024, Executive Committee meeting, which passed by unanimous vote.

### Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous vote: Mary Conner Ball-035375; John Charles Bircher, III-057521; Peter S. Dardi-205333; Elizabeth A. DiRusso-360751; Millicent Boyce Dittmar-222929; Susan Gundling Ebersbacher-238220; Curtis Douglas Edmonds-239651; Steven Spencer Elg-940592; Cynthia Sims Garcia -001130; Todd Bradley Johnson-273387; Kerry Jeanne O’Connell-188726; Stephen Douglas Palmer-560202; Bonnie Elaine Rosen-773445; Matthew Joseph Shechtman-757781; Aaron Joshua Shnider-202388; Brandon Sinnott-359465; Hoyt Gold Tessener-887644; Kevin Blair Wilson-112117.

### Members Requesting Disability

Pursuant to State Bar Rule 1-202, the Executive Committee approved one request for disabled status by unanimous vote.

### Request for Reinstatement and Resignation in Good Standing

The Executive Committee approved one request to withdraw a petition for resignation and allow the petitioner to resign in good standing. Currently, their status is listed as “administrative suspension for non-payment of dues,” on the website and it jeopardizes their license in another state. The Executive Committee by unanimous vote approved the request, with one abstention.

### Proposed Bylaws and Rules Changes

#### *1. Article IV. Executive Committee. Section 1. (EC Elections) (Second Read)*

This is a rewrite of the EC Election bylaw, designed to simplify the election process for Executive Committee members.

By unanimous vote, the Executive Committee approved the proposed change as amended.

2. *Article IV. Executive Committee. Section 3. Misconduct and Removal. (Second Read)*

This new bylaw guides the removal process for officers, board members, volunteers, guests, and others who have engaged in misconduct.

By unanimous vote, the Executive Committee approved the proposed change as amended, with one abstention.

3. *Article IV. Executive Committee. Section 4. Standing Executive Committee Policies. (Second Read)*

This new bylaw is similar to Article III Section 13, Standing Board Policies, previously approved by the Executive Committee. This new bylaw provides enabling language in the bylaws for Executive Committee Standing Policies.

By unanimous vote, the Executive Committee approved the proposed change as presented.

4. *Bar Rule 1-302. Composition.*

This is a rewrite of the rule defining the composition of the Board of Governors. This proposed change is designed to simplify the rule and remove old, archaic language that is no longer relevant.

By unanimous vote, the Executive Committee approved the proposed change as presented.

5. *Bar Rule 1-501. License Fees.*

This proposed change simplifies the appeal process for challenging a delinquent dues payment and reduces the termination date from five years to three years, matching the Office of Bar Admissions rules.

By unanimous vote, the Executive Committee approved the proposed change as presented.

6. *Bar Rule 1-501.1 License Fees—Late Fee.*

This proposed change removes the escalating late fee and sets it at \$175.

By unanimous vote, the Executive Committee approved the proposed change as presented.

7. *Bar Rule 4-106. Conviction of a Crime; Suspension and Disbarment.*

The proposed amendment to Rule 4-106 comes as a motion from the Disciplinary Rules and Procedures Committee. The changes clarify that the report of a Special Master is to be filed with the State Disciplinary Clerk.

By unanimous vote, the Executive Committee approved the proposed change as presented.

8. *Bar Rule 4-108. Conduct Constituting Threat of Harm to Clients or Public; Emergency Suspension.*

The proposed amendment to Rule 4-108 comes as a motion from the Disciplinary Rules and Procedures Committee. The changes clarify that the report of a Special Master is to be filed with the State Disciplinary Clerk.

By unanimous vote, the Executive Committee approved the proposed change as presented.

9. *GRPC 1.0. Terminology and Definitions.*

The proposed amendment to Rule 1.0 comes as a motion from the Disciplinary Rules and Procedures Committee. The proposed amendments to Rule 1.0 amend the definition of “lawyer” and add definitions of “attorney” and “counsel.”

By unanimous vote, the Executive Committee approved the proposed change as presented.

10. *GRPC 1.6. Confidentiality of Information.*

The proposed amendment to Rule 1.6 comes as a motion from the Disciplinary Rules and Procedures Committee. The proposed amendments to Rule 1.6 adopt language from ABA Rule 1.6(c).

By unanimous vote, the Executive Committee approved the proposed change as presented.

Legislative Consultant Agreement

Executive Director Damon Elmore presented State Bar Lobbyist Roy Robinson’s 2025 contract, which the Executive Committee approved unanimously.

BASICS Program

President Ivy Cadle explained the reason this item is on the agenda. He said that the BASICS Committee receives its funding from the Georgia Bar Foundation, which is added to their line item in the Bar’s budget. The Bar then disperses it to the BASICS program, based on the submitted invoices that at least two BASICS Committee members approve. He said he believes it is problematic from an accounting standpoint, and that he believes they would do better as a 501(c)(3) than a State Bar committee.

BASICS Committee Chair Judge Shondeana Morris and BASICS Committee Member Seth Kirschenbaum presented to the committee on behalf of BASICS. Mr. Kirschenbaum said that since 2020, BASICS has not received money from the Bar. In January 2020, in return for the BASICS committee withdrawing their request for money, the Board of Governors allowed the BASICS committee to continue to operate. State Bar Past President Darrell Sutton attended by phone to affirm those details. The BASICS Committee believes their relationship with the State Bar legitimizes the program and gives the Georgia Bar Foundation comfort that their grants are being used appropriately. Seth reported there is a Memorandum of Understanding between the BASICS Committee and the Southeastern Management company, which runs the program, and there is no liability for the Bar. Their request is to continue to allow the committee to operate without the financial support of the Bar. President Ivy Cadle and the Executive Committee agreed there was no need for further action on this item, and the committee can continue its work as a standing committee of the Bar.

Committee Updates

Executive Committee liaisons to State Bar committees gave updates regarding the committees they are assigned to.

Personnel Committee Update

Damon Elmore reported that the Bar’s senior staff reported to the Personnel Committee and asked for their support for a 4% increase for staff, breaking down to 2% for COLA and 2% for merit. They also asked the Personnel Committee to consider supporting an increase in staff in the Office of the General Counsel, consisting of one screening attorney and one appellate attorney. Those positions would be a \$360,000 increase in budget, equating to an increase of \$16 in Bar dues. Senior staff would also like to add a paralegal

to the department, but they are looking into other ways to fund that position. He reported that the Personnel Committee supported all of the suggestions above.

#### Programs Committee Update

Executive Committee Member Martin Valbuena reported that the Programs Committee met and reviewed three requests. The first was a request from the Access to Justice Committee for \$30,000 to conduct a statewide survey to examine the current pro bono services offered by Georgia's public interest programs. The Programs Committee asked them for additional information, and they will meet again to provide a recommendation to the Finance Committee before their meeting once that information is received. The committee approved a \$5,000 request from the Committee to Promote Inclusion in the Profession to conduct their annual CLE at the Bar's Annual Meeting. The final request was from the Georgia Resource Center for continued funding of \$55,166. It was approved with the understanding this would be their last year of funding from the Bar.

#### Standing Executive Committee and Board Policy Review

The Executive Committee asked the Office of the General Counsel to draft the respective bylaw or rule per the policy to review at a future meeting: Standing Board Policy 100, Standing Board Policy 200, Standing Board Policy 600, and Standing Executive Committee Policy 300.

#### Board of Governors Meeting Minutes

The Executive Committee was provided with a draft copy of the November 2, 2024, minutes of the Fall Meeting.

#### Old Business

There was no old business.

#### New Business

President Ivy Cadle was contacted by Rachel Spears and Betsy Griswold of Pro Bono Partnership of Atlanta. Their goal is to have as many lawyers as possible to be able to assist with pro bono work. They've asked that the Bar consider lowering the age for emeritus status to increase the number in that category who can perform pro bono work. President Cadle asked senior Bar staff if the Bar should consider changing the rule and allowing those with inactive status to perform pro bono work. General Counsel Paula Frederick is concerned with the level of lawyering from inactive members for the indigent who deserve good legal representation. President Cadle also asked the Bar's Supreme Court liaisons their opinion, and they said they wouldn't have written the rule as it is.

President Cadle has asked the Office of the General Counsel to work with him to write a new rule, or incorporate into the current rules, that an inactive or emeritus member can perform pro bono work if they have completed a CLE and they are working under an approved pro bono entity that has liability insurance. He said more information will be available on this in the near future.

#### Announcements

Executive Committee Member Martin Valbuena announced that his son Andrew passed the bar!

#### Adjournment

There being no further business, the meeting was adjourned at 4:35 p.m.

Approved:

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R. Javoyne Hicks, Secretary

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Ivy N. Cadle, President

**DRAFT  
STATE BAR OF GEORGIA  
EXECUTIVE COMMITTEE MEETING  
MINUTES**

**Wednesday, February 5, 2025  
Specially Called Meeting**

Members Participating

Ivy N. Cadle, President; Christopher P. Twyman, President-Elect; William C. “Bill” Gentry, Treasurer; R. Javoyne Hicks, Secretary; J. Antonio “Tony” DelCampo, Immediate Past President; Kenneth Mitchell Jr., YLD President; Brittanie Browning, YLD Immediate Past President; Norbert “Bert” Hummel; Shiriki Jones; Joyce Gist Lewis; David S. Lipscomb; R. Gary Spencer; and Martin Valbuena.

Members Absent

Veronica Cox, YLD President-Elect.

Staff Participating

Damon Elmore, Executive Director; Megan Jones, Executive Administrative Assistant; Jennifer McNeely, Director of Governmental Affairs; Ron Turner, Chief Financial Officer; and Russ Willard, General Counsel.

Call to Order

Upon obtaining approval in advance for a specially called meeting of the Executive Committee by a two-thirds vote, President Ivy Cadle called the meeting to order at 4:07 p.m.

Legislative Proposals

Per Standing Board Policy 100, the Executive Committee considered HB 85, known as the Superior Court Judicial Compensation Reform Act. This bill would revise how superior court judges’ salaries are calculated, allowing them to opt-in to a pay system that includes state base pay, up to 90% of the salary of U.S. District Court judges for the Northern District of Georgia, plus locality pay, capped at 10% of the state salary. Following some discussion, the Executive Committee, by unanimous vote, determined that the proposal is *Keller* compliant and meets the criteria of not being able to go before the Board of Governors due to timing. By two-thirds vote, the Executive Committee voted to support HB 85 and add it to the State Bar’s legislative agenda.

The Executive Committee also considered a similar bill, HB 86, which would revise the salary structure for key Georgia state judicial positions, linking their pay to the salaries of U.S. District Court Judges for the Northern District of Georgia. Salary maximums are capped at 100% of the federal judges’ salary for Supreme Court Justices, 99% for Court of Appeals Judges, and 95% for State-wide Business and Tax Court Judges. Following some discussion, the Executive Committee, by unanimous vote, determined that the proposal is *Keller* compliant and meets the criteria of not being able to go before the Board of Governors due to timing. By two-thirds vote, the Executive Committee voted to support HB 86 and add it to the State Bar’s legislative agenda.

The Executive Committee then discussed incoming legislation on tort reform. Members decided that this is not the proper forum for taking any stance on this topic, but that it may be beneficial for the Board of Governors to discuss it at a future meeting.

Adjournment

There was no further business discussed at this specially called meeting. The meeting was adjourned at 4:56pm

\_\_\_\_\_  
R. Javoyne Hicks, Secretary

Approved:

\_\_\_\_\_  
Ivy N. Cadle, President

## Law Practice Management Program

(Abbreviated report for the 2024-2025 Bar Year)

**Total Number of Members Served – 359**

**July 1, 2024 – February 21, 2025**

The program has successfully engaged a total of 359 members and their staff from July 1, 2024, to February 21, 2025. During this period, we made contact with 105 existing members, 246 new members, and 8 law firm staff.

### **Resource Requests**

Members have contacted our program to discuss or request the following:

- **Starting a Law Practice** – 115 copies of the *Starting a Georgia Law Practice Guide* were distributed to our members by request, including 22 via email, 78 through web store orders, and 15 during office visits to the Bar Center. Additionally, we received 28 inquiries by phone and email regarding resources for opening a law practice.
- **Software Recommendation/Technology Advice** – We received a total of 23 inquiries from members seeking law office software recommendations via email and phone.
- **LPM Resources Assistance** – The program has responded to 498 phone and email inquiries, assisting members with resources on opening a law practice, program events, bar member services, library resources, and more. Of these, 43 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 26 virtual consultation appointments were completed during this period. Our program scheduled 20 general law firm assessments and 6 corrective action virtual consultations to discuss law firm practice management matters.

### **Resource Library**

The [LPM Lending Library](#) offers 1,431 books, CDs, and DVDs for checkout by members and their staff, with options for pickup at the Bar Center or mailing. During this period, 77 members registered for access to the library. Additionally, 13 patrons visited the resource library, 18 members checked out a total of 46 books, and we responded to 101 email inquiries and 6 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 195 Instagram followers, 83 LinkedIn followers, and 451 [LPM Insider](#) subscribers, totaling 729 followers—and growing.

### **Speaking Engagements and LPM Seminars**

A total of 9 programs were completed and scheduled during this period. The Program staff delivered 6 continuing legal education sessions and special presentations to Georgia lawyers, as well as to other related groups both nationally and locally. Additionally, 3 programs are scheduled for future dates. See the list of events below.

Date	Event Name	Presentation(s)
Oct.7-8, 2024	<a href="#">Clio Cloud Conference</a> , Austin, TX	<i>Client Experience Panel</i> - Speakers: Daniela Szary, Lolita Rudovica, Host: Nkoyo-Ene Effiong Lewis
Nov. 20, 2024	<a href="#">Clio Connects</a> : 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	<i>Shielding Justice: Navigating Cybersecurity Challenges in Law Firms CLE</i> , 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

### **vLex Fastcase Platform Report**

vLex Fastcase is ranked as one of the best member benefits products that the Bar offers, with over 50% of our 50,000+ members logging into their Fastcase account each year.

On September 26<sup>th</sup>, 2024, vLex Fastcase launched their new platform. Members can expect significant improvement to the vLex Fastcase platform due to its excellent design. A key feature of the upgrade is the new Cert citator, which flags negative treatment and other citing references to a case.

vLex Fastcase provides a plethora of tutorials in the form of videos, tips on navigating documents, Smart Topics, and a Knowledge Base center. It's recommended that first-time users participate in the "Guided Tour" to learn about the design, features, and tools available to users within the new vLex Fastcase system.

Docket Alarm, a database of over 650 million dockets and documents, is now available for our members. Several members have expressed gratitude for this extra content, which has been helpful for litigation strategy, calendaring, research, business development, and calculating legal risk.

Training is scheduled to begin in January 2025 at the Bar Conference Center with two sessions to take place every other month and will cover the vLex Fastcase Platform and Docket Alarm.

### **vLex Fastcase Usage Report (July 2024-January 2025)**

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Total
First Time Logins	66	58	46	38	25	35	36	304
Total Logins	9,554	10,382	6,001	8,895	7,070	5,820	7,363	54,885
Total Users Who Logged In	2,590	2,662	2,087	2,108	1,835	1,808	2,043	15,123
Searches Conducted	34,453	36,840	21,447	12,613	3,610	3,854	4,569	117,386
Documents Viewed	125,030	123,216	72,683	40,295	13,007	17,688	18,092	409,991
Documents Printed	27,966	59,940	19,020	21,713	2,634	3,872	4,980	140,125
Total Transactions	199,649	233,098	121,284	85,462	28,181	33,057	37,083	737,814

## vLex Fastcase Reported Issues/Problems (July 2024-February 2025)

<b>Fastcase Reported Issues / Problems</b>	
<b>Issue Reported to Member Benefits Coordinator (MBC)</b>	<b>Response</b>
<b>MBC 8/07/2024</b> A few members called with complaints of slowdown on site.	<b>Fastcase Response 8/07/2024</b> Slowness must have been affected by the new platform rollout.
<b>MBC 9/02/2024</b> 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.	<b>Fastcase Response 9/02/2024 (still ongoing for some members as of 9/30/2024.)</b> Provided members with a free 1-week trial which was extended 2 more times to alleviate the problem.
<b>MBC 09/26/2024 through 11/25/2024</b> 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.	<b>Fastcase Response Ongoing</b> 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.
<b>MBC 12/01/2024 through 2/20/2025</b> 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.	<b>Fastcase Response 12/01/2024 through 2/20/2025</b> Fastcase is working with Bar staff to hold bi-monthly in-person training classes and the option to view the training on demand.

### CloudLawyer/ReliaGuide Report

The Profile Builder tool has been a game changer for attorneys entering information in their profile. Over 500 attorneys have used this new tool. Profile Builder uses the power of AI, previously provided profile information, and guides the member through a series of optional questions to create a robust and professional profile with a unique tagline and biography. The newly formed profiles are making a distinct impact on client acquisition from this same time last year; there is a 33.2% increase in completed contact requests and 13.6% increase in clicks on phone and email.

Statistic Updates Through February 15<sup>th</sup>

- 84,729 interactions with member profiles (views, clicks, and contact requests)
- profile views
- 1,232 completed contact form requests
- 1,454 clicks on lawyer's email
- 1,856 clicks on lawyer's phone number
- 1,040 total sign ins
- 287 Profile Plus subscriptions
- 18 analytics products purchased
- 11 website products purchased

State Bar of Georgia  
Private Health Insurance Exchange  
February 10, 2025

WEBSITE ANALYTICS	
Total Users	89,701
Total Sessions	142, 552
Total Pageviews	329,743
INDIVIDUAL ENROLLMENTS	
Total Enrollments	8,475
• Medical	2,664
• Medicare	53
• Dental	1,235
• Vision	582
• Telehealth	573
• ID Theft Protection	49
• Life / AD&D	2,955
• Disability	294
• Long-Term Care Enrollments	70
EMPLOYER ENROLLMENTS	
Total Enrollments	3,641
• Medical	1,458
• Ancillary	1,765
• Professional Liability	416
• Cyber Security	2

## **Sections Department**

### **Events, Website and Daily Duties**

Since the beginning of the 2024-25 Bar year, the Sections Department has remained dedicated to supporting our members through daily administrative responsibilities while facilitating an extensive schedule of Continuing Legal Education (CLE) programs. Since July 1, we have successfully organized 48 CLE events, delivering a total of 106 CLE credit hours to 2,300 members.

Notably, we hosted five comprehensive CLE programs exceeding five hours, including:

- **The E-Discovery & Use of Technology Law Section's Legal Showcase and CLE**, offering 5 hours of general CLE credit.
- **The Eminent Domain Annual Seminar in Savannah**, providing 5.5 hours of general CLE credit, 1 hour of professionalism credit and 1 hour of trial credit.
- **The General Practice & Trial Law Section's Jury Trial Seminar**, offering 6 hours of CLE credit.
- **The Real Property Law Section's Commercial Real Estate Seminar**, delivering 6 hours of general CLE credit.
- **The Real Property Law Section's Residential Real Estate Seminar**, providing 5 hours of general CLE credit and 1 hour of ethics.

Our role in organizing these events includes setting up registration through the Bar's database—either in iMIS or Affinipay, based on section preferences. We also coordinate event promotions via the Bar's website, email campaigns and other marketing initiatives, ensuring maximum reach and engagement. Additionally, we assist with cross-promotion of events across various sections and obtain CLE credit approval for event materials.

Our team manages logistical and operational tasks such as registering speakers, confirming attendee sign-ins for CLE eligibility and processing CLE credit by recording attendance in our CLE portal. Furthermore, we prepare detailed financial reports for the Accounting Department to facilitate accurate allocation of CLE-related expenses. As a token of appreciation, we work closely with section chairs to select and present appropriate gifts to event speakers.

Beyond CLE events, all sections hold at least one annual meeting, while several also conduct regular monthly meetings, fostering ongoing engagement within their practice areas.

### **Newsletters & Creative Content**

We have published multiple newsletters, with additional editions planned for the coming months. While some sections distribute newsletters exclusively via email, others continue to utilize traditional print and mail distribution. In addition, we design promotional materials such as invitations, save-the-date announcements and other graphics to enhance event marketing efforts.

## **Sponsorships, Scholarships & Donations**

The Sections Department plays a crucial role in coordinating sponsorships for various events, ensuring that sponsorship materials and packages are effectively prepared and distributed. We also manage the accurate processing and allocation of sponsorship payments.

Additionally, multiple sections award scholarships annually, and we oversee all related paperwork to ensure a seamless and efficient process.

Sections also actively contribute to charities of their choice, demonstrating a strong commitment to community engagement. We facilitate these charitable efforts by ensuring that all donations are properly processed and documented.

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The Sections Department remains committed to providing essential support for our members, ensuring the success of CLE programs, sponsorship initiatives and community outreach efforts. Our continued focus on administrative excellence and engagement strengthens the impact of our sections, benefiting both the legal profession and the broader community.

## **M E M O R A N D U M**

To: ICLE Advisory Board Members

From: Julia Neighbors, ICLE Director

Date: February 25, 2025

Re: Institute of Continuing Legal Education

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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 (January 1 – February 28, 2025)**

- Institutes- 3
  - Estate Planning Institute, Athens, GA
  - Update on Georgia Law (Ski LE), Avon, CO
  - Defense of Drinking Drivers, Atlanta, GA
- Bar Center Programs – 11
  - Litigation Under 42 USC Section 1983
  - Premises Liability
  - Post Judgment Collection
  - Restrictive Covenants and Trade Secrets
  - Professionalism, Ethics and Malpractice
  - Fundamentals of Health Care Law
  - Succeeding in Family Law Hearings and Trials
  - Beginning Lawyers
  - Trial and Error
  - Medical Malpractice Boot Camp
  - Social Security Law

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**HEADQUARTERS**

104 Marietta St. NW, Suite 100  
Atlanta, GA 30303-2743  
404-527-8700 · 800-334-6865  
Fax 404-527-8717  
[www.gabar.org](http://www.gabar.org)

**COASTAL GEORGIA OFFICE**

7402 Hodgson Memorial Drive  
Suite 105  
Savannah, GA 31406  
912-239-9910 · 877-239-9910  
Fax 912-239-9970

**SOUTH GEORGIA OFFICE**

244 E. 2nd St. (31794)  
P.O. Box 1390  
Tifton, GA 31793-1390  
229-387-0446 · 800-330-0446  
Fax 229-382-7435

- On Demand Programs
  - 5,285 on demand products purchased by 3,759 members (July 1 – January 31, 2025)
  - 12,329 on demand programs purchased by 8,119 members (February 1, 2024 – January 31, 2025)

### **Upcoming Off-Site Programs and Institutes**

- 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
- 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

### **Programming Updates**

ICLE is now offering 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.

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.



# CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

## Members

The Honorable Michael P. Boggs (Chair)  
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  
Office  
Griffin, Georgia

Mr. Ivy N. Cadle  
Baker Donelson Bearman Caldwell &  
Berkowitz PC  
Macon, Georgia

Professor Nathan S. Chapman  
University of Georgia School of Law  
Athens, Georgia

Professor Clark D. Cunningham  
Georgia State University College of Law  
Atlanta, Georgia

Ms. Anissa D. Floyd  
Smurfit Westrock  
Atlanta, Georgia

Mrs. Molly Barrett Gillis  
The Gillis Law Firm, LLC  
Marietta, Georgia

The Honorable Elizabeth D. Gohel  
Court of Appeals of Georgia  
Atlanta, Georgia

The Honorable Steven D. Grinberg  
U.S. District Court, Northern District of Georgia  
Atlanta, Georgia

Professor Tonja Jacobi  
Emory University School of Law  
Atlanta, Georgia

Mr. Francis Johnson  
Davis Bozeman Johnson Law  
Statesboro, GA

Mrs. Nekia Hackworth Jones  
Federal Government  
Atlanta, GA

Professor Patrick E. Longan  
Mercer University School of Law  
Macon, Georgia

The Honorable T. Russell McClelland III  
State Court of Forsyth County  
Cumming, Georgia

Mr. Kenneth Mitchell Jr.  
Cobb County Solicitor General's Office  
Marietta, Georgia

Ms. Rizza O'Connor  
Bryant & O'Connor Law Firm  
Vidalia, Georgia

The Honorable Benjamin S. Richardson  
Chattahoochee Circuit Superior Court  
Columbus, Georgia

Ms. Lauren Shubow  
Atlanta Circuit Public Defender's Office  
Atlanta, Georgia

Mrs. Cathy Clark Tyler  
Atlas 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:** March 22, 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. The Commission's primary charge is to enhance professionalism among Georgia's lawyers and judges. **Chief Justice Michael P. Boggs** serves as the current Chair of the Commission. **Justice Andrew A. Pinson** serves as the Supreme Court Advisor to the Commission. You may find a complete list of Commission members, advisors, and liaisons at the Commission's web site at <http://cjcpga.org/commission-members-2023-2024/>. A brief update regarding the Commission's work as of February 25, 2025, is as follows.

## THE 25<sup>TH</sup> ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Commission, in partnership with the Georgia Legal History Foundation (GLHF), will host the 25<sup>th</sup> 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.

The Benham Awards Selection Committee met on November 21, 2024, to select the Award Recipients. The CSA25 District Award Recipients are as follows: 1) **Mr. Wade W. Herring II**, Savannah, GA; 2) **Hon. Bryan Ramos**, Brookhaven, GA; 3) **Mr. Steve Jay Labovitz**, Atlanta, GA; 4) **Hon. Sonja N. Brown**, Marietta, GA; and 5) **Hon. William H. McClain**, Douglasville, GA. The CSA25 Lifetime Achievement Award Recipients are as follows: **Ms. Cathy Cox**, Milledgeville, GA and **Mr. Kenneth Dious**, Athens, GA. As a result of the generosity of the sponsors for the Benham Awards, the Awards Ceremony is free and open to the public. The Commission thanks its fundraising partner, the Georgia Legal History Foundation for its assistance and support.

The Commission will provide updates regarding the 25<sup>th</sup> Annual Justice Robert Benham Awards for Community Service (CSA25), including information about tickets for the awards ceremony at the link here: <https://cjcpga.org/benhamcsa25/>.





### **GRANT AWARDS FOR PROGRAMS OR PROJECTS THAT PROMOTE LEGAL PROFESSIONALISM**

The Commission's Grants Committee, which is chaired by **Ms. Nekia Hackworth Jones**, accepted applications electronically for grants to promote legal professionalism from June 7, 2024, until July 15, 2024. At its October 29, 2024, meeting the Grants Committee recommended four (4) grants to the Commission, which the Commission approved. The 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; 3) **Safety Valve Project**, Savannah, GA; 4) **Southwest Georgia Legal Self-Help Center**, Albany, GA. 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. More information regarding the Commission's Grants Program, including a recording of the May 2024 Grants Program training, is available at <http://cjcpga.org/grants/>.

### **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 edited 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)*. The Commission will provide additional information regarding CLE attendance and evaluations in the next Board report. The Commission hopes to "premiere" the CLE video of Jim Elliott on or before March 31, 2025.

### **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.

#### **CONNECT WITH A COLLEAGUE CONTEST**


The Committee's Connect With A Colleague Sub-Committee is co-chaired by **Mr. Carlos Vilela** and **Ms. Cathy Hampton**, with staff support from the Commission. On February 25, 2025, several members of the Committee joined the Governor for a photo as he presented the Committee with the 2025 Legal Professionalism month proclamation. In conjunction with the gubernatorial proclamation, **the Connect With A Colleague sub-committee, will hold a Connect With A Colleague Contest from March 1, 2025 – April 30, 2025**. The sub-committee asks Georgia attorneys to submit up to five entries; one for each separate lunch, dinner, coffee or cocktail connection with a colleague outside the attorney's office, firm, or legal organization that occurs between March 1, 2025 – April 30, 2025.

## WHY HAVE A CONNECT WITH A COLLEAGUE CONTEST?

At a 1988 Consultation on Professionalism and the Practice of Law, attorney Susan Cahoon remarked:

*[S]ome of the greatest criticisms of the trial bar's professionalism these days centers on the discovery process concerning frivolous objections, fights, and the lack of cooperative spirit. . . . I think most young lawyers learn, if they learn at all, by the example of the people . . . with whom they practice. I really have felt for some time that the courts may have to intervene in a stronger manner to impose real sanctions, especially if the lawyers are failing to train their younger compadres that there are certain things they shouldn't be doing.*

**Proceedings of a Consultation on Professionalism and the Practice of Law** at pages 16 – 17, <https://cjcpga.org/wp-content/uploads/2021/02/1988ConsultationOnProf.pdf>. If we don't continuously train lawyers about the importance of professionalism, we may continue to see orders like the one below that was issued by an Alabama judge.<sup>1</sup>

<p>Case 1:24-cv-01496-RDP Document 7 Filed 11/26/24 Page 1 of 2</p> <p style="text-align: right;">FILED 2024 Nov-26 PM 01:57 U.S. DISTRICT COURT N.D. OF ALABAMA</p> <p style="text-align: center;">UNITED STATES DISTRICT COURT FOR THE NORTHERN DISTRICT OF ALABAMA EASTERN DIVISION</p> <p>PAMELA MCCULLERS, }        Plaintiff, }        v. } Case No.: 1:24-cv-01496-RDP        KOCH FOODS OF ALABAMA, LLC, et }        al., }        Defendants. }</p> <p style="text-align: center;"><b>ORDER</b></p> <p>Before the court is Defendants' Opposed Motion to Extend Responsive Pleading Deadline. (Doc. # 4). Plaintiff has conditioned her consent to the extension on a promise that no motion to dismiss will be filed in response to the complaint. (<i>Id.</i>).</p> <p>There is generally no good reason that an extension such as this should be opposed, let alone denied. The Golden Rule—do unto others as you would have them do unto you—is not just a good rule of thumb for everyday life. It is a critical component of legal professionalism. Sadly, in recent years compliance with the rule is becoming rarer and rarer in the litigation arena. It is time to reverse that trend, even if it is only in this case.</p> <p>Here, Plaintiff's counsel's conditioning of any agreement to an extension was wholly inappropriate, particularly in light of the looming Thanksgiving holiday. Such nonsense wastes time, damages professional relationships, and makes the lawyer withholding consent (or conditioning it) appear petty and uncooperative. Judges rightly expect lawyers to handle minor procedural issues like extensions without unnecessary conflict, and refusing to do so is unprincipled.</p>	<p>Case 1:24-cv-01496-RDP Document 7 Filed 11/26/24 Page 2 of 2</p> <p>Conditioning or denying consent to an extension in this way is fiddle-faddle for an additional reason: it rarely provides any legitimate strategic advantage. Everyone encounters unexpected delays, and extending professional courtesy really costs nothing. But, fostering goodwill by agreeing to short extensions could benefit counsel later in this case—or in future dealings with opposing counsel. The court's job is to address the merits of the case, not to navigate a world of technicalities. Refusing such a reasonable extension request stinks of petty gamesmanship. Professionalism demands that lawyers pick their battles wisely, and minor extension requests simply are not the place for unnecessary posturing.</p> <p>Plaintiff's counsel's opposition is meritless. For these reasons, Defendants' Motion (Doc. # 4) is <b>GRANTED</b>. Defendants' answer or responsive pleading <b>SHALL</b> be filed <b>on or before January 6, 2025</b>.</p> <p>Further, the court <b>ORDERS</b> that, <b>on or before December 31, 2024</b>, counsel for both Plaintiff and Defendants are to go to lunch together. Plaintiff's counsel will pay the bill. Defendants' counsel will leave the tip. The parties will discuss how they can act professionally throughout the rest of this case. <b>Within ten (10) days</b> of the lunch, the parties <b>SHALL</b> file a joint report describing the conversation that occurred at lunch and the amount of the tip.</p> <p><b>DONE and ORDERED</b> this November 26, 2024.</p> <p style="text-align: right;">   <b>R. DAVID PROCTOR</b>        CHIEF U.S. DISTRICT JUDGE     </p> <p style="text-align: center;">2</p>
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The training does not always have to be formal or structured or to qualify for professionalism CLE credit, hence the

<sup>1</sup> To review the above order and the docket in *McCullers v. Koch*, obtained for the Commission from PACER courtesy of attorney **Cathy L. Scarver**, please visit <https://www.dropbox.com/scl/fod2sz5wyzflv035gqfl5cl/AMdEwP5ic16KUXPclmM27WE?rlkey=kq36vqazz3hr04kg63f0l2va&st=v95fdrvw&d=0>. Thank you to attorney **Jennifer Mock** for her assistance with *McCullers v. Koch* case to the Commission's attention.

Connect With A Colleague contest. It is a fun, informal way of passing on several of Georgia's aspirational professionalism values to younger (and perhaps older) lawyers.

The Committee and the Commission thank the current 2025 Connect With A Colleague Contest sponsors who are as follows: **Mr. Jeffrey M. Smith**, Principal Shareholder, Greenberg Traurig, LLP for center-court Hawks tickets and **Thompson Hine LLP** for a donation of up to \$350 towards a monetary prize or gift. The Commission also thanks **Ms. Samantha Mullis** for her creativity and initiative in developing the **Past Presidents Prize**. Thank you to the State Bar of Georgia Past Presidents and the YLD Past Presidents for their generosity and support. The Committee will use the **Past Presidents Prize** to purchase gift certificates for hotel stays at the King and Prince Beach and Golf Resort on St. Simons Island. Last, but not least, the Committee thanks Samantha for asking and the **State Bar of Georgia** for obtaining from the Omni gift certificates for two (2) one night hotel stays at any Omni Hotel brand property.

*Join the Commission and the State Bar of Georgia Committee on Professionalism in training lawyers about professionalism in a fun and creative way by sharing the QR code or website below with the colleagues and bar associations in your judicial circuits!*

**For more information** about the Connect With A Colleague contest and to find a flyer that you may download and share with your colleagues, please visit <https://cjcpga.org/cwac/>.



#### **JUGGLING LIFE AND PROFESSIONALISM CLE**

The State Bar of Georgia Committee on Professionalism, with staff support from the Commission, will present a **FREE to attend** CLE via Zoom on **Friday, March 7, 2025**, entitled *Juggling Life and Professionalism*. The planning team for the CLE includes 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 confirmed for the CLE are **Gwendolyn Fortson Waring**, Owner, The Waring Law Firm LLC; **Hon. Wes Taylor**, 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 will serve as the moderator for the panel.

The Commission will post information regarding the CLE as it becomes available at [https://cjcpga.org/life\\_professionalism\\_and\\_ethics\\_sbg\\_cop\\_cle\\_03-07-25/](https://cjcpga.org/life_professionalism_and_ethics_sbg_cop_cle_03-07-25/)



#### **VOLUNTEERS ARE NEEDED FOR LAW DAY 2025**

*As you plan your May 2025 calendars*, please consider scheduling time for a 2025 Law Day activity on a date and at a time and place of your choosing. In 2024, the Law Day sub-committee was pleased that lawyers and/or judges in 7 out of the ten judicial circuits participated in the Bar's Law Day 2024 activities. Additional information about Law

Day 2024 is available in an August 2024 Georgia Bar Journal Article written by **Denise Warner** at the link here: <https://digitaleditions.walsworth.com/publication/?m=15035&i=828375&p=44&ver=html5>.

With the assistance of **Hon. Cheveda D. McCamy**, Superior Court Judge, Alcovy Judicial Circuit, the Law Day Committee is currently working on a pilot project by holding a Law Day 2025 contest on Instagram for Newton High School students. If the pilot project is successful, the Law Day Committee will discuss holding the contest in additional jurisdictions in 2026.

**In 2025, the Law Day sub-committee hopes to have participation for all 10 judicial circuits in a State Bar Law Day activity.** The leaders for the State Bar's 2025 Law Day initiative are **the Honorable Ashley Palmer**, Judge, State Court of Cobb County; Attorney **Denise Warner**, Senior Staff Attorney to the Honorable Brian E. Lake, Superior Court of DeKalb County; and Attorney **Marlan J. Eller**, Staff Attorney to Judge Howard C. Kaufold, Jr., Oconee Judicial Circuit. Each year, the State Bar, along with many other bar associations and legal organizations, partner with the American Bar Association to promote Law Day. **The 2025 Law Day Theme is The Constitution's Promise: Out of Many, One.** The State Bar's Law Day sub-committee will send suggested talking points to volunteers regarding the 2025 Law Day Theme prior to the month of May.

**To sign up to volunteer for a Law Day 2025 project or for more information** regarding Law Day 2025, please visit: <https://www.gabar.org/law-day>



#### **CLOSING A LAW PRACTICE CLE**

The State Bar of Georgia Committee on Professionalism, with staff support from the Commission, will present a **FREE to attend** CLE via Zoom on **Friday, March 28, 2025**, that will begin during the lunchtime hour. The working title of the CLE is Closing A Law Practice and Transitioning To A New Practice or Out of the Practice of Law. The Commission will apply for 2 hours of CLE credit, including 1 hour of ethics CLE credit and 1 hour of professionalism CLE credit. The planning team for the CLE includes 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 confirmed for the CLE are **William C. Gentry**, Attorney at Law, Gentry Law Firm LLC, **Hon. Glenda Hatchett**, Of Counsel, Stewart Miller Simmons Trial Attorneys and **Andreea Morrison**, Deputy General Counsel, Office of General Counsel, State Bar of Georgia. **Additional speakers may be announced.** **The Honorable Kimberly A. Alexander**, Judge, State Court of DeKalb County, will serve as the moderator for the panel.

#### **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 now published four times per year. The November 2024 Georgia Bar Journal Professionalism Page entitled **2024 Law School Orientations on Professionalism** is attached as "Exhibit A." 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 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://cjcpgea.org/professionalism-cle-guidelines/>. Please contact the Commission's Executive Director, Karlise Y. Grier, via e-mail at [kygrier@cjcpgea.org](mailto:kygrier@cjcpgea.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://cjcpgea.org/2u/>

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

**LinkedIn:** <https://www.linkedin.com/company/cjcpgea/>

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

**Facebook:** <https://www.facebook.com/cjcpgea2/>

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



# 2024 Law School Orientations on Professionalism

The Chief Justice's Commission on Professionalism thanks all the lawyers and judges for helping to make the 2024 Law School Orientations on Professionalism a success.

BY KARLISE Y. GRIER



In August 2024, for the 32nd consecutive year, the State Bar of Georgia Committee on Professionalism, led by Chair Michael V. Herskowitz, an attorney with the U.S. Attorney's Office for the Northern District of Georgia, and Vice Chair Carlos Vilela, a hearing officer with the Cobb County Probate Court, and the staff of the Chief Justice's Commission on Professionalism hosted the Law School Orientations on Professionalism. The orientations continued even during the COVID-19 pandemic when everyone sheltered in place because of the commitment of Georgia's five law schools, the dedication of Georgia's lawyers and judges who served as group leaders, and the work of the committee volunteers and Commission staff. I wondered during that time if we would have difficulty convincing our volunteer group leaders to return to the schools in person once we were allowed to gather again. Fortunately, the history

Supreme Court of Georgia Justice Andrew Pinson gave remarks at the Georgia State University College of Law Orientation on Professionalism.

PHOTO BY ALEA DE BENGSON

of the last two years has shown that we have not. This year, the law schools were served by a combined 162 group leaders, 18 of whom served on two different dates at two different schools. Special recognition belongs to Court of Appeals of Georgia Presiding Judge Christopher J. McFadden, who served as a group leader at three of the five law schools. The evaluation results and other information about the Law School Orientations on Professionalism are available on the Commission's website at [cjcpga.org/law-school-orientations-on-professionalism-2024](http://cjcpga.org/law-school-orientations-on-professionalism-2024).

A reader who is not familiar with the Law School Orientations on Professionalism may wonder why lawyers and judges volunteer for the program. Based on my conversations with group leaders from diverse backgrounds and practice areas, I believe there is one primary answer—because these lawyers and judges understand the importance of teaching lawyers to think about professionalism at the very beginning of their legal careers. Supreme Court of Georgia Chief Justice Michael P. Boggs expressed a similar view in a letter he wrote to the students at each of Georgia's law schools. In the letter, he wrote: "I truly believe that judges and lawyers need to emphasize the importance of professionalism to law students from the very start of their legal careers to help avoid disciplinary issues, but even more to teach that they are part of a professional community. ... For our profession to thrive, we must remember that the way in which we resolve disputes defines part of the character of our society, and we should act accordingly."



PHOTO BY ALEA DE BENGSON

Group leaders for the Law School Orientation on Professionalism at Georgia State University College of Law on Aug. 13.

### 2024 Professionalism Plenary Speakers and/or Administration of Professionalism Oath or Student Honor Code Pledge

AUG. 3  
Atlanta's John Marshall Law School  
**Hon. Eric Richardson**  
*State Court of Fulton County*

AUG. 13  
Georgia State University College of Law  
**Justice Andrew A. Pinson**  
*Supreme Court of Georgia*

AUG. 15  
Emory University School of Law  
**Hon. Elizabeth L. Branch**  
*U.S. Court of Appeals for the Eleventh Circuit*

AUG. 16  
Mercer University Walter F. George  
School of Law  
**Hon. Shondeana Crews Morris**  
*Superior Court of DeKalb County*

AUG. 16  
University of Georgia School of Law  
**Dean Andrea Dennis**  
*Associate Dean for Academic Affairs*





Group leaders for the orientation at Atlanta's John Marshall Law School on Aug. 3.

PHOTO BY JOHN E. RAMPBOTT



Group leaders for the orientation at Emory University School of Law on Aug. 15.

PHOTO BY PROFESSOR DERRICK HOWARD

The orientations are designed to provide incoming 1Ls with their first introduction to professionalism. Georgia lawyers and judges are invited 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. The 2024 Law School Orientation Subcommittee was co-chaired by J. Maria Waters, an attorney with Worsham Corsi Dobur & Berss, and Samantha M. Beskin-Schemer,

a partner with Beskin & Beskin P.C. The subcommittee is responsible for designing the hypothetical problems, learning objectives and group leader training materials that are used at four of the law school's orientation programs. Other members and advisors for the 2024 Law School Orientations Subcommittee were: Hon. Kimberly Alexander; Jordan Bracewell, Mercer University Walter F. George School of Law, 2024 J.D.; Assistant Director of Student Affairs Leron Burge, Atlanta's John Marshall Law School; Professor Nathan S. Chapman, University of Georgia School of Law; Professor Derrick Howard, Emory University School of Law; Ashley S. Lewis; Angelyn McDonald; C. Brad Marsh; Shinnay Richards, Atlanta's John Marshall Law School, 2024 J.D.; Director of Student Life Cody Teague, Georgia State University College of Law; and problem editors Michael Herskowitz; Ian Diego Reyes, Georgia State University College of Law, 2025 J.D.; Jabu M. Sengova and Carlos Vilela. The subcommittee embodies the vision the Supreme Court of Georgia had for the state's legal profession when it adopted A Lawyer's Creed and the Aspirational Statement on Professionalism and wrote: "The Court feels that enhancement of professionalism can be best brought about by the cooperative efforts of the organized bar, the courts, and the law schools with each group working independently, but also jointly in that effort."

Ivy Cadle, 62nd president of the State Bar of Georgia, also personally wrote to all of the students to share with them



# 2024 Law School Orientations on Professionalism Group Leader Volunteers

Sarah B. "Sally" Akins	Lawrence A. Cooper	Jennifer Nichole Johnson	Benjamin A. Pearlman
Crighton T. Allen	Nicole Crites	Bethany Nicole Johnston	Earl Porter
Mecca S. Anderson	Michael Cross	Kristina Jones	Megan Ross Pulsts
Anna Arceneaux	Elizabeth Tate Crymes	Shiriki Cavitt Jones	Kristen C. Quinton
Eleanor Mixon Attwood	Charles Woods Cullen	Hon. Paula E Kapiloff	David A. Rapaport
Rocky James Babson	Nancy Daspit	Marcus G. Keegan	Balean Reid
Hon. Eric A. Ballinger	Theodore H. Davis	Bobga L. Kehbuma	Robin L. Rock
Hon. Kimberly F. Bandoh	Isaiah D. Deleamar	Cari E. King	Mark A. Rogers
Monique Dela Torre Bandong	David S. DeLugas	David A. Kleber	Claudia Saari
Maria Banjo	Jeffrey Diamond	Jean M. Kutner	Timothy J. Santelli
Stewart Banner	Michelle Cohen Egan	Kevin V. Kwashnak	Margaret Schweizer
Meredith M. Barnes	Joshua Harris Elbaz	Jennifer Lewis	Lauren Beth Shubow
Samantha M. Beskin-Schemer	James E. Elliott Jr.	Melina D. Lewis	Sara Sibley
William J. Black	Barry Lane Fitzpatrick	Hon. Ryan Locke	Robert Wright Smith
Thomas Charles Blaska II	Maya Hassan Fouad	Patrick E. Longan	Aimee F. Sobhani
Mara L. Black	Angela Nicole Frazier	Hon. Lisa Lott	Falon Taylor Michelle Stimpson
Lauren L. Boffill	Adrianne C. Freeman	Alexander S. Lurey	Matthew Britt Stoddard
Nicholas M. Booth	Franklin T. Gaddy	Elizabeth Markowitz	Megan E. Strickler
Charles Neely Bowen	Siena Berrios Gaddy	Charles Brad Marsh	Donald C. Suessmith Jr.
Hon. Eric Alan Brewton	Terrica Redfield Ganzy	Katie Rose Martin	Michael B. Syrop
Christopher O. Brock	Jennifer Geadra Fernandez	Gerald Mason	Henry C. Tharpe
Brian D. Burgoon	Megan Ashley Glimmerveen	Claire A. Mattson	John Phillip Thielman
Ungeliqua A. Burns	Robin Golvesky	Kenneth W. Mauldin	Uchenna Mary-Anne Uzoka
Scott D. Cahalan	Karlise Y. Grier	Kevin A. Maxim	Tash J. Van Dora
Albert Caproni	Blake Dexter Halberg	Lauren A. McAuley	Eric A. von Hacke
James E. Carlson	James W. Hays	David H. McCain	Randee J. Waldman
Chelsea Champion	Michael V. Herskowitz	Hon. Cheveda D. McCamy	Thomas Leland Walker
Hon. Edwina M. Charles	Corey Hirokawa	Hon. Christopher J. McFadden	Emily C. Ward
Hon. Benjamin W. Cheesbro	Thomas Tucker Hobgood	Ruth Rocker McMullin	Kathleen Ann Wasch
Christy Crowe Childers	Stephen J. Hodges	Shannon L. Mills	Rob G. Wellon
Rhani Choi	Hon. Sheila S. Huddleston	Jennifer Campbell Mock	Donald H. White
Darryl B. Cohen	Julie Hunter	Ashley Adams Nechay	Samuel Carlos Wood
S. Christopher Collier	Hon. Gary E. Jackson	William D. NeSmith III	Carla E. Young
Ramona A. Condell	Hon. Phillip Jackson	Robert E. Norman	Jill Thrasher Young
Daniel Conner	TyShawn Y. Jackson	Lyddy E. O'Brien	
Lisa R. Coody	Eric T. Johnson	Hon. Samuel Dwight Ozburn	

Are you interested in serving as a group leader for the 2025 Law School Orientations on Professionalism? Complete the contact form found at [bit.ly/groupleader2025](http://bit.ly/groupleader2025).



some of the lessons he learned as a law student and as a practicing lawyer.

You don't get a second chance to make a first impression. My law school journey began 20 years ago. This spring, my law school classmate became a Superior Court judge. As an adjunct professor, my former students are now judges, district attorneys, civil servants and more. Looking back, I'm grateful that I was friends with many and that I established solid professional and social relationships with my classmates. It is much easier to become friends with a law school classmate than it is to befriend that same individual later in life. You should know the relationships you establish now will carry throughout your entire professional life. Take the initiative to start developing your professional reputation now. Be kind to others. Ask questions. "Be curious, not judgmental," like Ted Lasso. Learn about your classmates and where they come from. Twenty years later, you will be glad you did. I know I am.

Cadle's words are great advice for all lawyers. They also resonate with me because at the law school orientations, I often meet group leader volunteers who I originally met at different times throughout my 30+ year professional career. I, too, am glad I got to know these colleagues along the way. Mere words always seem inadequate to express the gratitude I feel for the many lawyers and judges who are the heart of the orienta-



Group leaders for the orientation at Mercer University Walter F. George School of Law on Aug. 16.



Group leaders for the orientation at University of Georgia School of Law on Aug. 16.

tions. Neither the Chief Justice's Commission on Professionalism, nor the law schools nor I could offer this wonderful program without our hundreds—literally—of volunteers. Thus, to them I can only say "thank you" and hope they truly understand the depth of feeling it encompasses. Equally important, I look forward to our legal communities—bar, bench and academia—continuing jointly to enhance

professionalism among Georgia's current and future lawyers and judges. ●



**Karlise Y. Grier**  
Executive Director  
Chief Justice's Commission  
on Professionalism  
[kygrier@cjcpga.org](mailto:kygrier@cjcpga.org)

PUBLISHED ARTICLES 2024-2025			Headline	Circulation
6/13/2024	Newspaper Albany Herald		Ivy Cadie installed as 62nd State Bar of Georgia president	3,763
6/13/2024	Clayton News-Daily, Jonesboro		Ivy Cadie installed as 62nd State Bar of Georgia president	643
6/13/2024	Rockdale Citizen, Conyers		Ivy Cadie installed as 62nd State Bar of Georgia president	1,254
6/13/2024	Morgan County Citizen, Madison		Ivy Cadie installed as 62nd State Bar of Georgia president	2,574
6/13/2024	Henry Herald, McDonough		Ivy Cadie installed as 62nd State Bar of Georgia president	1,111
6/13/2024	Rome News-Tribune		Ivy Cadie 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		Ratliff 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
		<b>TOTAL CIRCULATION</b>	<b>295,692</b>

