



State Bar  
of Georgia

# BOG BOARD BOOK

**2024 Fall Meeting**  
**Jekyll Island, GA**

---

*This book serves as the agenda and materials for the State Bar of Georgia's 2024 Fall Board of Governors Meeting.*



# State Bar of Georgia

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

Saturday, November 2, 2024

9 a.m. – 12 p.m.

Jekyll Island Club Resort

*Dress: Business Casual*

## AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
---------------	------------------	-----------------

### 1) ADMINISTRATION

- |  |                             |    |
|--|-----------------------------|----|
| a) Welcome and Call to Order .....     | Ivy N. Cadle .....          | 1  |
|  | President                   |    |
| b) Pledge of Allegiance .....          | Ryan W. English             |    |
|  | Houston Circuit             |    |
| c) Invocation .....                    | Hon. Charity R. Bridgewater |    |
|  | Clayton Circuit, Post 2     |    |
| d) Recognition of Special Guests.....  | Ivy Cadle                   |    |
| e) Roll Call .....                     | R. Javoyne Hicks .....      | 5  |
|  | Secretary                   |    |
| f) Future Meetings Schedule.....       | Ivy Cadle .....             | 9  |
| g) SOLACE Report .....                 | Hon. Render M. Heard        |    |
|  | Committee Cochair           |    |
| h) Young Lawyers Division Report ..... | Kenneth Mitchell, Jr.....   | 11 |
|  | YLD President               |    |
| i) Treasurer's Report.....             | William "Bill" Gentry.....  | 17 |
|  | Treasurer                   |    |

### 2) ACTION

- |  |                     |    |
|--|---------------------|----|
| a) Minutes of the 302 <sup>nd</sup> & 303 <sup>rd</sup> Meetings of..... | Javoyne Hicks ..... | 74 |
| the Board of Governors on June 7-8, 2024                                 |                     |    |

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
b) Proposed Rules and Sections Bylaws .....	William “Bill” NeSmith.....	84
Changes	Deputy General Counsel	
(1) Rule 10-106. Eligible Claims.....		85
(2) Section Bylaws		
(i) Alternative Dispute Resolution Section Bylaws (Amendments) .....		91
(ii) Antitrust Section Bylaws (Amendments).....		99
(iii) Franchise and Distribution Section Bylaws (New).....		108
(iv) Real Property Law Section Bylaws (Amendments) .....		115
c) Appointments to the Commission on .....	Ivy Cadle	
Continuing Lawyer Competency (CCLC)		
(1) Reappointment of Paul Painter III (2025-2027)		
(2) Appointment of Sarah “Sally” Akins (2025-2027)		
<b>3) LEGISLATION</b>		
a) Advisory Committee on Legislation .....	Rusty Sewell.....	123
New Legislative Proposals ( <b>action</b> )	Legislative Consultant	
(1) <i>Committee to Promote Inclusion in the Profession</i> .....		127
Budget Request for FY 2026 – Funding for Civil		
Legal Services Grants for Victims of Domestic Violence		
(2) <i>Fiduciary Law Section</i> – Amendments to Title 53 .....		131
and Related Code Sections		
b) Legislative Update .....	Rusty Sewell	
<b>4) INFORMATIONAL REPORTS</b>		
a) President’s Report.....	Ivy Cadle	
b) Executive Director’s Report .....	Damon Elmore	
	Executive Director	
c) Preview of Proposed Bylaws Amendments .....	Bill NeSmith .....	141
(1) Article I. Members. Section 1. Registration of Members .....		142
(2) Article I. Members. Section 2. Active Members and .....		146
Foreign Law Consultants		
(3) Article I. Members. Section 6. Affiliate Members and .....		148
Law Student Members		
d) Chief Justice’s Commission on .....	Karlise Y. Grier .....	152
Professionalism Report	Executive Director, CJCP	

5) WRITTEN REPORTS

a) Executive Committee Meeting Minutes	
(1) August 22, 2024.....	170
b) State Bar of Georgia Annual Report.....	176
c) Office of the General Counsel Report.....	228
d) ICLE Report.....	231
e) Law Practice Management Report .....	234
f) Media Report .....	238

6) 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	



*Board of Governors & Young Lawyers Division*

# 2024 FALL MEETING

**Jekyll Island Club Resort • Jekyll Island, Georgia • Nov. 1-3**

**Hotel Cut-off: Thursday, Oct. 10 • Registration Cut-off: Friday, Oct. 25**



 State Bar  
of Georgia

PHOTOS PROVIDED BY THE JEKYLL ISLAND CLUB RESORT

## Schedule of Events

### Friday, Nov. 1

9 a.m. – 7 p.m.

Registration

10 a.m. – 2 p.m.

State Disciplinary Board Meeting

(By invitation only)

1 – 3 p.m.

State Disciplinary Review Board Meeting

(By invitation only)

3 – 4 p.m.

CLE | YLD Presents—Social Media Smarts:

Ethical Hacks, Bar Rules and How to Stay Off  
the Disciplinary Radar

3 – 5 p.m.

Member Benefits Committee Meeting

4:30 – 5:30 p.m.

YLD General Session

6:30 – 9 p.m.

Board of Governors Dinner

### Saturday, Nov. 2

8 a.m. – 12 p.m.

Registration

9 a.m. – 12 p.m.

Board of Governors Meeting

11:30 a.m.

Georgia-Florida Tailgate Party in Jacksonville

3 – 7 p.m.

Hotel Tailgate Party at Jekyll Ocean Club Resort

### Attire

Business casual dress for all meetings.

## CLE, Social and Other Events

### CLE | YLD Presents—Social Media Smarts: Ethical Hacks, Bar Rules and How to Stay Off the Disciplinary Radar

Friday, Nov. 1 • 3 – 4 p.m.

○ 1 Ethics Hour

All attorneys are welcome to attend this free CLE; it's open to everyone, not just members of the YLD. Join us for Social Media Smarts, where we'll explore essential strategies for maintaining professionalism online. This engaging session covers the latest Bar rules, ethical hacks to manage your digital presence and practical tips to avoid disciplinary pitfalls.

### YLD General Session

Friday, Nov. 1 • 4:30 – 5:30 p.m.

All members are welcome! Join us as YLD officers, directors and committee members share exciting updates and reports on events and projects happening across the state. Don't miss this opportunity to stay connected and informed.

### Board of Governors Dinner

Friday, Nov. 1 • 6:30 – 9:30 p.m.

Please join us Friday evening for dinner and drinks on the Riverfront Lawn, offering a perfect opportunity to relax and network with fellow Board members and their guests. During dinner, everyone is invited to join the YLD for an exciting game of Glow Golf ([www.glowvibegolf.com](http://www.glowvibegolf.com)) with a chance to win a fantastic two-night stay at the Jekyll Island Resort!

### Georgia-Florida Tailgate Party in Jacksonville (Optional)

Saturday, Nov. 2 • 11:30 a.m.

**Don't delay—reserve your spot today!**

Join us for transportation and tailgating for the SEC rivalry classic, the Georgia-Florida game at EverBank Stadium! Even if you do not have tickets to the game, come on out to enjoy the atmosphere and other festivities.

We first travel by bus to Jacksonville with food, snacks and friends. We will then enjoy a full tailgate with lunch near EverBank Stadium. We will depart the Jekyll Island Club Resort promptly at 11:30 a.m. or 30 minutes after the Board of Governors meeting ends, whichever comes first; includes a return trip to the Jekyll Island Club but does not include tickets to the game.

### Hotel Tailgate Party at the Jekyll Ocean Club Resort (Optional)

Saturday, Nov. 2 • 3 – 7 p.m.

If you prefer a more laid-back approach to watching the game, we are hosting a tailgate and game-watching party at Jekyll Ocean Club Resort, complete with snacks and beverages. A shuttle will be available to transport attendees to the ocean club.

If football isn't your thing, we invite you to enjoy your free time and explore the island on your own. For information about area activities, visit [www.jekyllisland.com/activities](http://www.jekyllisland.com/activities).

## Hotel Accommodations

### Cut-off date is Thursday, Oct. 10

Jekyll Island Club Resort will be our host hotel offering discounted room rates of \$229 single/double plus applicable taxes and fees. We have also secured a small block of upgraded rooms at their beachfront property, the Jekyll Ocean Club at a rate of \$299 plus any state and local taxes and daily resort fees.



#### Jekyll Island Club Resort

371 Riverview Drive  
Jekyll Island, GA 31527  
912-635-5191

Check-in: 4 p.m. • Check-out: 11 a.m.

To book a room at the Jekyll Island Club Resort, visit <https://bit.ly/3M1Za3b>.



#### Jekyll Ocean Club Resort

80 Ocean Way  
Jekyll Island, GA 31527  
912-635-5191

Check-in: 4 p.m. • Check-out: 11 a.m.

To book a room at the Jekyll Island Ocean Club Resort, visit <https://bit.ly/4fARKlB>.

### Parking

A discounted rate of \$12 for valet parking and complimentary self-parking is available. Please be aware that Jekyll Island Club Resort is located inside Jekyll Island State Park, and there is a \$10 toll to get on the island. This fee is good for 24 hours, and after 24 hours you must pay the toll again if you exit the island and reenter.

#### Resort Shuttle Service

The resort shuttle runs between the Jekyll Ocean Club and the Jekyll Island Club with pickups every half hour at the designated locations. Island Club guests can hop on the shuttle outside the lobby under the porte cochère and out front of the lobby at the Ocean Club. The service is part of the resort fee and complimentary for resort guests.

#### Shuttle Schedule

**Every Day | 8 a.m. – 10 p.m.**

**Last Ocean Club Stop | 9:45 p.m.**

#### EV Charging Stations

Jekyll Island Club and Jekyll Ocean Club each feature two Tesla charging stations and one enviro spark universal charger to power guests' vehicles. At the Island Club, stations are located in the northwest corner of the Morgan Center parking lot and Ocean Club's can be found in the public parking lot at the south end of the hotel.



### Resort Service charges will apply, per room, per night and includes:

A discounted resort fee of \$20 to be applied at checkout;

Nightly s'mores at Jekyll Island Club pool;

Champagne sabering (Friday-Saturday);

Peloton bikes at each fitness center;

and more.

For more information on hotel amenities, please visit [www.jekyllclub.com/about/#amenities](http://www.jekyllclub.com/about/#amenities).

### Support Hand in Hand of Glynn

Join the YLD in supporting Hand in Hand of Glynn, a community of 60 tiny homes that house adults experiencing chronic homelessness. Hand in Hand of Glynn's program is built on the principles of housing first and permanent supportive housing. Meeting attendees are asked to donate personal hygiene or cleaning supplies, such as dish soap, paper towels, laundry detergent, shampoo, body wash and toilet paper. Donations will be accepted at the Fall Meeting registration table. To learn more about this organization, please visit Hand in Hand of Glynn, [handinhandofglynn.org](http://handinhandofglynn.org).

## 2024 Fall Meeting Registration Form

Please complete and remit the enclosed registration form by Friday, Oct. 25. Please use this form to register by checking all events you plan to attend. Registration is required for all events, including "no charge" functions.

### Attendee Information

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

Name \_\_\_\_\_

Nickname \_\_\_\_\_

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

Address \_\_\_\_\_

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

Phone/Fax \_\_\_\_\_

Email \_\_\_\_\_

### Special Needs

Dietary Restrictions \_\_\_\_\_

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

### Cancellation/Refund Policy

Cancellation of registration must be received in writing no later than Friday, Oct. 25. Cancellations will receive a full refund. Absolutely no refunds will be made after Friday, Oct. 25. Requests should be emailed to [gakiik@gabar.org](mailto:gakiik@gabar.org); mailed to the State Bar of Georgia, Attn: Gakii Kassamba, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; or faxed to 404-527-8717.

### Registration and Payment Information

Register online at [www.gabar.org](http://www.gabar.org). Visa, MasterCard and American Express are accepted. If paying by check, please make checks payable to State Bar of Georgia and mail to Gakii Kassamba, Director of Meetings, 2024 Fall Meeting, Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations will be processed on a first-come, first-served basis.

### Board of Governors Functions

Qty.

☐ BOG Dinner (Fri.) \_\_\_\_\_ \$120

☐ BOG Dinner—YLD Members\* (Fri.) \_\_\_\_\_ \$80

(\*The YLD member rate applies to Bar members who are 36 years of age or younger or within their first five years of practice in their first bar.)

☐ BOG Meeting (Sat.) \_\_\_\_\_ N/C

### CLE

☐ YLD Presents—Social Media Smarts (Fri.) \_\_\_\_\_ N/C

### YLD

☐ YLD General Session \_\_\_\_\_ N/C

### Saturday Tailgates

☐ Tailgate Party in Jacksonville \_\_\_\_\_ \$200

(Includes: transportation to and from Jacksonville, snacks and drinks on the bus, lunch and drinks at tailgate, and snacks after the game. The tailgate party does not include tickets to the game.)

☐ Tailgate Party at Jekyll Ocean Club Resort \_\_\_\_\_ \$85

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

### Credit Card Information

Please bill my ☐ Visa ☐ MasterCard ☐ AmEx

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

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

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

Signature \_\_\_\_\_

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

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



Thank you to our  
Corporate Sponsors

5 Gavel  MemberBenefits

1 Gavel 



# Board of Governors Attendance Record

	6-23 Friday Savannah/Zoom	6-23 Saturday Savannah/Zoom	10-23 Jekyll Island/Zoom	1-24 Buckhead/Zoom	4-24 Young Harris/Zoom	6-24 Friday Amelia Island/Zoom	6-24 Saturday Amelia Island/Zoom
Jonathan Lang Adams	n/a	*	*	*	*	*	*
Keith E. Adams	*	*	*	*	*	*	*
Mark W. Alexander	*	*	*	*	*	*	*
JaDawnya Cintelle Baker	*	*	e	*	*	*	*
Nina M. Baker	*	*	*	*	*	*	*
Eric A. Ballinger	n/a	n/a	*	*	n/a	*	*
Thua G. Barlay	u	*	n/a	n/a	*	*	*
Donna G. Barwick	n/a	*	*	*	*	*	*
John C. Bell Jr.	*	*	*	*	*	*	*
Tracee R. Benzo	*	*	*	*	*	*	*
N. John Bey	u	*	u	*	*	*	*
James D. Blich IV	u	*	u	u	*	*	*
Sherry Boston	*	*	*	*	*	*	*
Charly Reneatha Bridgewater	n/a	n/a	n/a	n/a	n/a	*	*
Ashley Mackin Brodie	*	*	*	*	*	*	*
Brittanie Browning	*	*	*	*	*	*	*
Stephanie D. Burton	*	*	*	*	*	*	*
Ivy Neal Cadle	*	*	*	*	*	*	*
Jerry Neal Cadle	n/a	*	*	*	*	*	*
Stacey McSwine Cameron	u	*	u	*	*	*	*
Richard D. Campbell	n/a	n/a	n/a	n/a	*	*	*
Tedra L. Cannella	u	*	u	u	*	*	*
David L. Cannon	u	*	u	*	*	*	*
Carl S. Canisano	u	*	u	u	*	*	*
Chris M. Carr	u	*	u	*	*	*	*
Vernon L. Chambliss	n/a	*	e	*	u	*	*
Kimberly A. Childs	n/a	n/a	*	*	*	*	*
Amanda Rourke Clark Palmer	*	*	*	*	*	*	*
Edward R. Collier	*	*	*	*	*	*	*
Daniel Jackson Connell III	u	u	*	*	*	*	*
Susan P. Coppedge	n/a	*	*	*	*	*	*
John Craig Cotton	n/a	*	e	*	*	*	*
Martin L. Cowen III	*	*	*	*	*	*	*
Gerald Davidson Jr.	*	*	*	*	e	*	*
J. Anderson Davis	*	*	*	*	e	*	*
William T. Davis	*	*	*	*	*	*	*
Howard Mark Delashmit	n/a	*	*	*	*	*	*
J. Antonio DelCampo	*	*	*	*	*	*	*
Joseph W. Dent	u	u	*	*	*	*	*
Miguel Angel Dominguez	n/a	n/a	n/a	n/a	n/a	n/a	*

\* - attended meeting  
 \* - attended virtually  
 e - excused absence  
 u - unexcused absence

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

# Board of Governors Attendance Record

	6-23 Friday Savannah/Zoom	6-23 Saturday Savannah/Zoom	10-23 Jekyll Island/Zoom	1-24 Buckhead/Zoom	4-24 Young Harris/Zoom	6-24 Friday Amelia Island/Zoom	6-24 Saturday Amelia Island/Zoom
George P. Donaldson, III	u	*	*	*	*	u	u
Danny L. Durham	*	*	*	*	*	*	*
Susan E. Edlein	*	*	*	*	*	*	*
Odeobong Ukpong "Oto" Ekpo	n/a	n/a	n/a	n/a	n/a	n/a	*
Ryan Welton English	*	*	*	*	*	*	*
Archibald A. Farrar	*	*	*	*	*	*	*
Gillian Brooks Fierer	n/a	n/a	n/a	n/a	n/a	n/a	*
Amanda Renee Flora	u	u	*	u	*	*	*
Harold Eugene Franklin Jr.	u	u	*	u	*	*	*
Keith E. Gammage	*	*	*	*	*	*	*
William C. Gentry	u	*	*	*	*	*	*
Michael G. Geoffroy	u	u	u	*	*	*	*
Patricia A. Gorham	*	*	*	e	*	*	*
Rebecca Holmes Liles Grist	*	*	*	*	*	*	*
Paul William Hamilton	*	u	*	*	*	u	u
Thomas B. "Britt" Hammond	*	*	*	*	*	*	*
Roger Brent Hatcher Jr.	n/a	*	*	*	*	*	*
John Haubenreich	*	*	*	*	*	*	*
Patrick H. Head	*	*	*	*	*	*	*
Render M. Heard Jr.	*	*	*	*	*	*	*
Amanda Nichole Heath	*	*	*	*	*	*	*
Matthew J. Hennesy	*	*	*	*	*	*	*
Thomas W. Hernan	u	u	u	*	*	u	u
R. Javoyne Hicks	*	*	*	*	*	*	*
Kimberly Wilkerson Higginbotham	*	*	*	*	*	*	*
Donna S. Hix	*	*	*	*	*	u	u
Norbert D. "Bert" Hummel IV	n/a	*	*	*	*	*	*
Stacey K. Hydrick	*	*	*	*	*	*	*
Shukura L. Ingram	*	*	*	*	*	*	*
James T. Irvin	*	*	*	e	*	*	*
Christopher Ross Jackson	*	*	*	*	*	*	*
Charles Michael Johnson	u	*	u	*	*	*	*
Lester B. Johnson, III	*	*	*	e	u	u	u
Shiriki L. Cavitt Jones	*	*	*	*	*	*	*
Maria Christene Mekras Justus	n/a	n/a	n/a	n/a	n/a	n/a	*
Zahra S. Karinshek	*	*	*	*	*	u	*
John F. Kennedy	u	u	u	*	*	u	u
Barry E. King	*	*	*	*	*	*	*
Judy C. King	*	*	*	*	*	*	*
Catherine Koura	*	*	*	*	*	*	*

\* - attended meeting  
 \* - attended virtually  
 e - excused absence  
 u - unexcused absence

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

# Board of Governors Attendance Record

	6-23 Friday Savannah/Zoom	6-23 Saturday Savannah/Zoom	10-23 Jekyll Island/Zoom	1-24 Buckhead/Zoom	4-24 Young Harris/Zoom	6-24 Friday Amelia Island/Zoom	6-24 Saturday Amelia Island/Zoom	
Rachel R. Krause								
Rhonda Bender Kreuziger	n/a							Rachel R. Krause
Edward B. Krugman								Rhonda Bender Kreuziger
Jeffrey R. Kuester								Edward B. Krugman
Anne Templeton LaMalva								Jeffrey R. Kuester
Rosten Dara Diya "Chinny" Law								Anne Templeton LaMalva
Allegra Lawrence-Hardy								Rosten Dara Diya "Chinny" Law
Nicole C. Leet								Allegra Lawrence-Hardy
Katie K. Leonard								Nicole C. Leet
Dawn Renee Levine								Katie K. Leonard
Joyce Gist Lewis								Dawn Renee Levine
Lisa Katsuko Liang								Joyce Gist Lewis
Thomas Fredrick Lindsay	n/a	n/a	n/a	n/a	n/a	n/a		Lisa Katsuko Liang
David S. Lipscomb								Thomas Fredrick Lindsay
John R. B. Long								David S. Lipscomb
Dax Eric Lopez								John R. B. Long
Ronald A. Lowry								Dax Eric Lopez
Lindsey Stephens Macon	n/a	n/a	n/a	n/a	n/a	n/a		Ronald A. Lowry
John Bell Manly								Lindsey Stephens Macon
Troy Windel Marsh Jr.	n/a	n/a	n/a	n/a	n/a	n/a		John Bell Manly
Edward T. McAfee	n/a	n/a	n/a	n/a	n/a	n/a		Troy Windel Marsh Jr.
Hugh J. McCullough								Edward T. McAfee
Graham Elliott McDonald								Hugh J. McCullough
Letitia A. McDonald								Graham Elliott McDonald
Brad J. McFall								Letitia A. McDonald
Michael D. McRae								Brad J. McFall
Terry L. Miller								Michael D. McRae
Kenneth Mitchell Jr.	n/a							Terry L. Miller
William J. Monahan								Kenneth Mitchell Jr.
Shondara Crews Morris								William J. Monahan
Stephen Russell Morris	n/a	n/a	n/a	n/a	n/a	n/a		Shondara Crews Morris
Joseph Kenneth Mulholland	n/a	n/a	n/a	n/a	n/a	n/a		Stephen Russell Morris
Laura J. Murphree								Joseph Kenneth Mulholland
Katrell Nash	n/a	n/a	n/a	n/a	n/a	n/a		Laura J. Murphree
Paul Wain Painter III								Katrell Nash
Joy Renea Parks								Paul Wain Painter III
Kathryn Drew Parrish Bennett	n/a							Joy Renea Parks
Kevin Charles Patrick	n/a	n/a	n/a	n/a	n/a	n/a		Kathryn Drew Parrish Bennett
Tabitha Edwina Payne								Kevin Charles Patrick
Brandon Lee Peak								Tabitha Edwina Payne

\* - attended meeting  
 \* - attended virtually  
 e - excused absence  
 u - unexcused absence

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

# Board of Governors Attendance Record

	6-23 Friday Savannah/Zoom	6-23 Saturday Savannah/Zoom	10-23 Jekyll Island/Zoom	1-24 Buckhead/Zoom	4-24 Young Harris/Zoom	6-24 Friday Amelia Island/Zoom	6-24 Saturday Amelia Island/Zoom
Edward Piasta	*	*	*	*	e	*	*
Kathryn Lauranne Powers	*	*	u	u	u	u	*
Michael Prieto	u	u	u	u	u	*	*
Philip Zachary Pritchard	n/a	n/a	n/a	n/a	n/a	n/a	*
Jill Pryor	*	*	*	*	*	*	*
Elizabeth Dalia Racine	n/a	n/a	n/a	n/a	n/a	*	*
William M. Ragland	*	*	*	*	*	*	*
Tina S. Roddenberry	*	*	*	*	u	*	*
Kevin W. Roper	n/a	*	*	*	*	*	*
Joseph Roseborough	*	u	*	*	*	u	*
Wesley Charles Ross	*	*	*	*	*	*	*
Claudia S. Saari	*	*	*	*	*	*	*
Alex Musole Shalishali	u	u	*	u	*	*	*
H. Burke Sherwood	*	*	*	*	*	*	*
Mitchell McKinley Shook	*	*	u	*	*	*	*
Robert H. Smalley, III	*	*	*	*	*	*	*
Philip C. Smith	*	*	*	*	u	*	*
R. Rucker Smith	*	*	e	*	*	*	*
Daniel B. Snipes	*	u	*	*	*	*	*
R. Gary Spencer	*	*	*	*	*	*	*
H. Craig Stafford	*	*	*	*	*	*	u
Lawton E. Stephens	*	u	e	*	*	*	*
Donna Coleman Stribling	*	*	*	*	*	*	*
Joseph C. Sumner, Jr.	u	*	*	*	*	u	*
Jason W. Swindle	u	*	*	u	u	u	*
Anita W. Thomas	u	*	*	*	*	u	*
Stephen Elliot Tillman	u	*	u	*	*	*	*
Edward D. Tolley	*	*	u	u	u	e	e
Clayton Tomlinson	u	*	*	*	*	*	*
Chris P. Twyman	*	*	*	*	*	*	*
Martin E. Valbuena	*	*	*	*	*	*	*
J. Henry Walker	*	*	*	*	*	*	*
Janice M. Wallace	*	*	*	*	*	*	*
Amy Carol Walters	*	*	*	*	*	*	*
Andrew Jackson Welch, III	n/a	n/a	n/a	n/a	n/a	n/a	*
Nancy J. Whaley	*	*	*	*	*	*	*
Paige Reese Whitaker	*	*	*	*	*	*	*
Martha Wilson Williams	*	*	*	*	*	*	*
Robert D. Wolf	u	*	*	*	*	*	*
Douglas Woodruff	*	*	u	*	*	*	*

\* - attended meeting  
 \* - attended virtually  
 e - excused absence  
 u - unexcused absence

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



# State Bar of Georgia

## Future Meetings Schedule

### Executive Committee

---

December 5, 2024		Executive Committee Meeting Reception w/Local Bar Association The Hotel at Avalon, Autograph Collection Alpharetta, GA (Contract Pending)
Feb. 20-21, 2025		Executive Committee Meeting Reception w/Local Bar Association Hotel Forty-Five, a Tribute Portfolio Hotel Macon, GA (Contract Pending)
April 25-26, 2025		Executive Committee Meeting Lunch w/Local Bar Association Swainsboro, GA Holiday Inn Express & Suites Vidalia, an IHG Hotel Vidalia, GA (Contract Pending)

### Board of Governors

---

Fall 2024	November 1-3, 2024	Jekyll Island Club Resort Jekyll Island, GA
Midyear 2025	January 9-12, 2025	JW Marriott Savannah Plant Riverside District Savannah, GA
Spring 2025	March 21-23, 2025	Hyatt Place Athens Hotel & The Classic Center Athens, GA (Contract Pending)
Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

### Young Lawyers Division

---

Fall 2024	November 1-3, 2024	Jekyll Island Club Resort Jekyll Island, GA In conjunction with the State Bar Fall Meeting
Midyear 2025	January 9-12, 2025	JW Marriott Savannah Plant Riverside District Savannah, GA In conjunction with the State Bar Midyear Meeting

(Updated 07.30.24)



# State Bar of Georgia

## Future Meetings Schedule

Spring 2025	March 28-30, 2025	Kimpton Aertson Hotel, Nashville, TN (Contract Pending)
Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

### American Bar Association Meetings

---

Annual 2025	August 6-12, 2025	Toronto, ON
-------------	-------------------	-------------

### Southern Conference of Bar Presidents Meetings

---

2024	Mississippi	October 24-26, 2024	Jackson, Mississippi
2025	South Carolina	October 5-7, 2025	Charleston, South Carolina
2026	Alabama		
2027	Maryland		

*(Updated 07/30/24)*



November 2, 2024

Dear Board of Governors,

It is my immense pleasure to report on the state of the Young Lawyer's Division. Since our establishment in 1947, the purpose of the Younger Lawyers Section was to further the goals of the State Bar, increase interest and participation of young lawyers, and foster the principles of duty and service to the public. This year we will build upon the successes of our predecessors by continuing as the service arm of the bar and provide resources to younger attorneys in the state of Georgia.

**Priorities:** During my first address to this esteemed body, I mentioned that my goals for this Bar year are to continue to make service our top priority, increase engagement with the YLD, and encourage young lawyers to develop their professional brand. In regard to service, we will continue to participate in the Legal Food Frenzy, Build a Better Georgia project, host moot court and mock trial competitions, and organize a number of service events and legal clinics in the local communities of our state. We will also increase engagement by encouraging members to attend our meetings, committee events, and CLE's, and utilizing technology and social media. Additionally, we will place an emphasis on empowering young lawyers to develop their professional brand by providing tools and resources that will prepare them for success. I believe these priorities will allow us to flourish professionally and personally.

In July 2024, we held the YLD Committee Chair Orientation at the Bar Center. During the orientation, young leaders brainstormed events and programs to begin the year on a strong front. Each committee presented its ideas and developed collaborated with different committees. In August 2024, the YLD Board of Directors and Executive Committee went to Lake Lanier for its planning meeting and Board members were assigned to the YLD special committees to act as a support. We discussed larger programming initiatives planned for the year including the 2025 Signature Fundraiser. The 2025 Signature Fundraiser beneficiary will be the Public Interest Internship Program, which had more than 70 applicants last year for only four scholarships. Given the uptick in interest and applications, we aim to support five total scholarships and ask for your support in this effort. Additionally, we also discussed the return of the YLD Mass Swearing-In that provides an opportunity for young lawyers to be sworn into Georgia's appellate courts.

Since orientation, the YLD Board of Directors and Committee chairs have already begun planning and hosting events for our members. We have encouraged new member involvement with "new" faces added to leadership of some of the YLD committees—which we have more than 30 different committees including a few new ones this year based on areas of interest. We continue to reach out to leaders to join our committees across the state of Georgia. I am also excited to announce that committees have scheduled activities each month to maintain engagement throughout the year. I encourage the Board to read the committee reports below on upcoming and past events and share those with young lawyers that you may know whether professionally or personally.

**Upcoming YLD meetings:** Our next YLD meeting will be the YLD Midyear meeting on January 9-11, 2025 in Savannah, Georgia. This will be in conjunction with the Board of Governor's Midyear meeting in Savannah. During the Midyear meeting, we will have our first YLD Leadership Academy session for the YLD Leadership Class of 2025. We will also have our General Session, CLE's, and an opportunity to be sworn in to the United States District Court for the Southern District of Georgia.

I wanted to give a special shoutout to YLD members: Lyddy O'Brien and Taylor Wilson who are our Community

Service chairs; Frank Gaddy, Javarus Gresham, Kayla Kudratt, Serreen Meki, Shannon Schoultz, and Terrell Thomas who will be spearheading our Signature Fundraiser planning; and Leadership Academy Co-Chairs James Banter, Samantha Mullis, and Kelsie Speight who are hard at work preparing for another great class with new programming and locations offered to meet members around the state. We have seen a record number of applicants for Leadership Academy and anticipate another successful year!

## **YLD COMMITTEES**

---

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

### **YLD Child Protection and Advocacy Committee**

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

The YLD Child Protection and Advocacy Committee will host a virtual panel during our monthly meeting on October 25 at 12 p.m. Panelists will discuss volunteer opportunities with organizations such as Appleseed and the Truancy Intervention Project.

In January, we will hold a networking event following the Child Protection & Advocacy Law Section's annual meeting. The event will occur near the Bar Center, with the exact date to be confirmed, likely in the latter half of January.

In March, we will collaborate with the Sports Law Committee for a kickball game during the Spring YLD meeting.

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

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

The YLD Community Service Projects Committee will organize a food bank volunteer day in Atlanta and Macon on November 16, 2024. Lyddy will coordinate activities in Atlanta, and Taylor will handle the Macon location. We encourage young lawyers to register in advance to volunteer for approximately three hours at designated food banks. Volunteers will assist with tasks such as inventory management, organization, and food preparation. We also request that volunteers bring at least one food item for donation. Our next steps include creating a flyer, developing an interest form, estimating volunteer numbers, and coordinating with food banks regarding volunteer space and time.

Additionally, we are exploring a one-day service opportunity with Trees Atlanta and local soup kitchens. We are also planning a donation drive in partnership with the high school mock trial team for children in foster care, though the start date is yet to be determined. Furthermore, we will follow up with several YLD committees, including judicial law clerk, child advocacy, and women in the profession, about co-sponsoring service events.

### **YLD Corporate Counsel Committee**

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

The YLD Corporate Counsel Committee held our first Committee Meeting on Wednesday September 11, 2024, at 12:30 PM via Zoom. During this meeting, there were introductions of the Co-Chairs and Committee members, a discussion of the events being planned for the year, and of what the committee members hoped to see prioritized this year. We will continue to have monthly meetings on the second Wednesday of each month at 12:30PM via zoom with the hope of incorporating a few in-person if possible. Events that are being planned include speakers during the meetings and/or virtual lunch and learns, a panel discussion, and



networking hours. The committee members expressed the desire for information on the process of moving into an in-house position, resources when doing so, and for more networking opportunities with other in-house counsel, so we intend to make that our focus for the year. The next event that is being planned is for a virtual speaker / Q&A session for November, with more specific details to come.

#### **YLD Criminal Law Committee**

***Shaniqua Christian and Devin Rafus, Co-Chairs***

The YLD Criminal Law Committee will co-host a social networking event titled "Judges Aren't So Scary" on October 23 at Arora Law Firm. The event will feature distinguished guests such as Justice Andrew Pinson, Judge Elizabeth McBath, Judge Sara Doyle, Judge Robert C.I. McBurney, Judge Scott McAfee, Judge Kimberly Childs, Judge Shondeana Morris, Judge Stacey K. Hydrick, Judge Ashley Drake, and Judge William S. Duffey.

#### **YLD Ethics and Professionalism Committee**

***Katie Rose Martin, Chair***

The YLD Ethics and Professionalism Committee has held two monthly meetings via Zoom. We have put out an August Rule of the Month on social media and will be posting a Rule of the Month on the third Wednesday of every month. At the Fall Meeting in Jekyll Island, there will be a CLE titled "Social Media Smarts: Ethical Hacks, Bar Rules and How to Stay Off the Disciplinary Radar," which will provide one Ethics credit.

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

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

The YLD Estate and Elder Law Committee will hold a Lunch and Learn featuring Cobb County Probate Court Hearing Officer Stephanie Carmen, who will provide an overview of the process for filing and obtaining Letters of Guardianship and/or Conservatorship for minor and adult wards. This event will be held on August 19 from 12 to 1 p.m. Written materials and/or CLE credit may be offered, pending confirmation. We will also be hosting a Lunch and Learn on September 16 from 12 to 1 p.m. Quinn Kasper, a magistrate court judge, will speak on the roles of court-appointed attorneys or guardians ad litem and logistics for serving in such roles within the Guardianship and Conservatorship processes.

#### **YLD Family Law Committee**

***Emily Long and Jonathan Stoye, Co-Chairs***

The YLD Family Law Committee is planning several events, including Supreme Court (date TBD), TPO Clinic (date TBD), and Lunch and Learn CLEs on jury trials in family law and hearing preparation. Dates for these events will be confirmed.

#### **YLD Federal Law Subcommittee**

***Chase Duvall, Chair***

The YLD Federal Law Subcommittee will conduct our first virtual committee meeting to discuss plans for a virtual CLE and networking events in September.

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

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

The YLD Inclusion in the Profession Committee held our monthly committee meeting via Zoom on August 15, 2024, at 6 p.m. We discussed the committee's vision, upcoming YLD meetings, and brainstormed event ideas. Our next meeting will be on September 19.

**YLD Intrastate Moot Court Competition Committee**  
***Chelsea Henderson and Megan Howerter, Co-Chairs***

The YLD Intrastate Moot Court Competition Committee will hold planning meetings on August 9 and September 13, both at 12:00 p.m. The competition will take place at the State Bar of Georgia on April 4-5, and we are seeking volunteers.

**YLD Judicial Law Clerk Committee**  
***Tate Crymes, Mallory Fleming, and Devon Holloway, Co-Chairs***

The YLD Judicial Law Clerk Committee plans to host a hike with the Wellness Committee in late September or early October, a judicial opinion writing CLE in January, and a park cleanup day with the Community Service Committee in April. We are also available to assist other committees with inviting judges to their events if needed.

**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 Litigation Committee**  
***Carlos Fernández, Morgan Lyndall, and Holly Stephens, Co-Chairs***

The YLD Litigation Committee's standing committee meetings are scheduled for the second Friday of each month from 9:00 to 9:15 a.m.

We will travel to Rome (location TBD) on October 17, 2024, to hear from North Georgia judges about ethics and professionalism in judicial decision-making.

We will partner with the YLD Criminal Law Committee and the Atlanta Bar Association's Criminal Law Section for a Halloween-themed "Judges Aren't So Scary" social hour on October 23, 2024, at 6:00 p.m. This event will take place at Arora Law Firm, 75 W Wieuca Rd NE, Atlanta, GA 30342.

We plan to hold an event on November 14, 2024, focusing on marketing strategies for young lawyers. This event, featuring Noy Media Group, will take place at Noy Media Group, 914 Howell Mill Rd NW, Atlanta, GA 30318, and will be followed by a networking happy hour at Culinary Dropout. Further details will be shared soon.

Our committee will also offer 3-4 virtual practical skills sessions throughout the Bar year, starting in November. These sessions will cover topics such as effective expert witness depositions, distinguishing oneself as an associate, preserving the record for appeal, and the path to the bench. We will announce dates, topics, and speakers as they are confirmed.

Finally, the Litigation Committee plans to collaborate with the Business Law Committee to host an event on business litigation in the spring. Additional information will be provided early next year.

**YLD Public Interest Internship Program Committee (PIIP)**  
***Arthur Bailin and Keona Blunt, Co-Chairs***

The YLD Public Interest internship Program Committee is currently planning the solicitation of scholarship applications for the Public Interest Internship Program.

#### **YLD Real Estate Law Committee**

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

The YLD Real Estate Committee held a meeting on August 29, where members discussed ideas for monthly meetings and potential partnerships with the Georgia Bar Real Estate Section for the midyear and annual meetings. No events are scheduled currently.

#### **YLD Solo Practice and Small Firm Committee**

***Colin Adebayo, Angie Holloway and Michael Thompson, Co-Chairs***

The YLD Solo Practice and Small Firm Committee is set up for a strong year this year. We have already added some new members from different parts of the state and different practice areas, and we hope to increase the membership through a mix of in-person and virtual events this coming year. Our goal is to develop and put forth a curriculum tailored to helping lawyers in solo or small firms in every facet of the business.

For September, we are having a virtual meeting that will include an introduction of the co-chairs, an outline of the programming for the year, fielding ideas from the committee members, and learning more about the needs of the membership.

For October, we are planning a virtual webinar that will center around the early stages of a new law firm's operation i.e. how to get the firm off the ground and set up for success. The panel will include a law firm consultant and one or two lawyers who have opened their own firm.

In November, the committee is partnering with the YLD Litigation Committee to host an in-person event focusing on personal branding in the legal profession. The panel is still being put together, but it almost certainly includes lawyers from a variety of practice areas, firm sizes, and backgrounds to discuss and examine the keys to marketing success and building a brand.

We plan to focus on health and wellness with our December event. For December, we are planning to have an in-person holiday lunch to bring everyone together, celebrate the year end, and discuss ways we can ensure we promote health and wellness for ourselves, our staff, and other lawyers. We intend to have one or two lawyers present regarding how they have focused on health and wellness in the culture and operation of their firms.

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

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

The YLD Sports Law Committee plans to organize a CLE event with the Atlanta Falcons this fall. In the spring, we will host a CLE on NIL with college administration from Georgia Tech or UGA. Additionally, we will hold our annual kickball game during the Spring YLD meeting in Nashville.

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

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

The YLD Women in the Profession Committee held our first committee meeting on September 3rd. We are in the process of planning a Meals that Heal event with Ronald McDonald in the first weeks of October. Other events that are in the works are:

- Mercer 5k for Lauren Giddings (November 16)
- Holiday Mixer (December)

- Valentine's Day – Teen Dating Violence (February)
- International Women's Day (March, likely co-sponsored with GAWL)
- Atlanta United Game (spring, date TBD)"

---

#### **YLD AFFILIATES**

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

---

#### **YLD MEETINGS**

##### **Fall Meeting | Nov. 1-3**

Jekyll Island Club Resort

Jekyll Island, Georgia

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

##### **Midyear Meeting | Jan. 9-11**

JW Marriott Savannah Plant Riverside District

Savannah, Georgia

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

##### **Spring Meeting | Mar. 28-30**

Kimpton Aertson Hotel

Nashville, Tennessee

##### **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,



Kenneth Mitchell Jr.  
2024-25 YLD President



# State Bar of Georgia

To: Bar Officers and Finance Committee  
From: Ron Turner *RT*  
Date: September 16, 2024  
Re: June 2024 Financial Statements-Bar Operations and Bar Center

Attached please find the June 2024 financial statements. **As June 30 is the year-end of the Bar, full departmental detail is attached. The amounts provided in the attached financial statements are subject to change due to the receipt of any additional invoices, if significant in nature, related to June 30, 2024 and the audit by the Bar's outside accountants.**

Line item variance explanations follow. Department managers are expected to specify savings elsewhere in their budgets when exceeding a line item, unless there was a budgeting error. Line item variances < **\$1,000** are not explained to conserve your time.

**New and revised items are highlighted in bold.**

Savings were realized in each department to offset any overages.

## Executive Summary

In total, the Bar budgeted a loss of \$610,661 for the year ended June 30, 2024. This total budgeted loss for the Bar was calculated as a budgeted loss for Bar operations of \$564,108 and a budgeted loss for the Bar Center of \$46,553. The Bar Center realized an actual loss of \$140,209 for the year. Bar operations realized a gain of \$544,085 instead of the budgeted loss of \$564,108. This difference of \$1,108,193 (calculated as the difference between the realized gain of \$544,085 and the budgeted loss of \$564,108) is comprised of the following components: (1) additional interest income and earnings due primarily to the write-up of the Bar's investments to fair market value. These income amounts totaled \$314,907 than what was budgeted. The write-up or write-down of investments to fair market value is a standard adjustment. However, since we normally do not sell investments we have a zero budget for both the realized and unrealized gains on investments (2) savings in salaries and related personnel costs of \$740,316, (3) savings in officer expenses of \$38,754, (4) savings in bond premium amortization and investment service fees of \$50,327 (5) savings associated with the Bar Journal of \$90,324 and (6) overall savings in meeting costs (Board of Governors and Members meetings, Supreme Court meeting costs and Executive Committee meetings costs) of \$28,529 (7) savings in subscriptions and books of \$30,538 and (8) savings in shared office expenses of \$118,053. The savings were offset by the following components: (9) an overage on membership software license costs of \$32,490 (10) additional costs for the State Disciplinary Board Panels of \$32,616 (11) additional website maintenance costs of \$25,264 (12) website redesign costs of \$275,105 and (13) Membership Database Project costs of \$57,911. These thirteen items total \$988,362.

### General Comments

The following comments relate to various departments across the Bar. Instead of providing the same comment in each applicable department, the comments are provided below in a summary form.

Salaries may have exceeded the budget in certain departments due to the following timing issues: (1) salaries are based upon the actual number of days in a particular reporting period (2) depending upon when an employee's vacation is taken (before June 30 in one year and after June 30 in another year), the ultimate vacation pay could be included in salaries in one year or included in taxes and benefits in another year and (3) certain salary adjustments were provided after the budgets were originally approved.

In certain cases, pensions may be slightly over budget due to the payment of salaries as noted in the comment above.

In all cases, shared office allocations exceeded the budgeted amount as two departments had employees when the budgets were prepared but for the 2023 – 2024 year, there were no employees in those departments. As such, the shared office allocations for those departments were allocated proportionally among all of the other remaining departments.

### Administration

Miscellaneous is in excess of the budget primarily due to two items which were not budgeted for. These two items were: (1) the costs of a bus and lunch for a tour of the Supreme Court for Bar employees and (2) the Bar's contribution to the retirement brunch for the Executive Director of the Georgia Bar Foundation.

Executive Director travel is over the amount budgeted primarily due to the following: (1) rising costs associated with hotels/venues for the current year as compared to prior years (2) in-person attendance at additional/one-off events in the current year (e.g. SCOG session in Waycross and visits to and meetings with Bars in 11<sup>th</sup> Circuit and Southern Conference) (3) a return to in-person participation at events that were not held in the year before or set as Zoom and (4) regular presence at SBOG satellite offices and with BOG members when in their area. Given the course and trend of the above items, we will review the budget for accuracy and may adjust accordingly in the future.

**Credit card discount and fees is over budget by \$33,678 primarily due to the increased use of credit cards for payments. This increased use was the result of more Bar members paying their dues by credit card in the current period than what was originally anticipated.**

Membership software license is in excess of the budget as there was a significant price increase in the cost of this license. The last time that this license was paid before the current year was more than five years ago. There was an increase factored into this from prior years, but the budgeted increase was not enough. We did not get notification of the increase until after the budget was established.

**Administration - Continued**

**Contract programming is over budget due to costs incurred by the meetings department to integrate the new iMIS EMS membership database platform with the various meetings that occur.**

**Office of General Counsel**

**Printing for OGC is over budget due to the printing of the Georgia Rules of Professional Conduct book. At the time of budget preparation, this cost was not anticipated.**

Subscriptions and books are in excess of the budget primarily due to the increasing costs associated with the Daily Report and due to additional licenses that were obtained for employee use.

Dues and memberships are in excess of the budget primarily due to the following two factors: (1) certain dues organizations increased their annual dues by as much as 25% and (2) additional individuals joined organizations in the 2023-2024 year that were not included in the prior year.

**Attorney and staff travel is over budget primarily due to the following reasons: (1) an additional person attended the annual meeting than what was originally budgeted for (2) additional nights were spent at the annual meeting for the initial person in attendance as compared to the budget and to prior years' (3) one more lawyer attended conferences in both Denver and in California than what was originally intended (4) a staff OGC lawyer is on the Board for the ABA Center for Professional Responsibilities and, as such, is making additional trips and (5) general travel costs (airfare, transportation, etc.) have increased.**

Investigator travel is over budget by **\$2,499** primarily because one additional investigator attended a conference than what was originally budgeted for.

Luncheons is in excess of the budget due to various luncheon meetings for continuing education purposes and to promote team building.

Computer software is in excess of the budget by \$2,806 primarily due to the following: (1) more individuals obtained an Adobe license in the current year than what was budgeted for and (2) there was a substantial increase in the price per license of approximately 40%. This substantial price increase was not anticipated at the time of budget preparation.

**Computer programming costs are in excess of the budget primarily due to costs incurred to connect OGC and CAP computer programs from being accessible only on a local network to instead be accessible from the cloud.**

State Disciplinary Board Panel costs are greater than the budget due to significantly increased hotel costs at the venues along with increased catering costs.

**Lexis online is over budget to additional costs associated with transactional searches beyond the normal monthly subscription amounts.**

Communications

**Taxes and benefits exceeded the budget due to a change in the type of health coverage of an employee.**

Website maintenance has exceeded the budget because of certain website maintenance costs that are related to the current website and other website maintenance costs related to the new website. All of these costs have been combined into this account. However, we are currently separating out the costs related to the current website and the new website and the costs associated with the new website will be reclassified to the appropriate category.

The Bar has incurred **\$275,105** 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.**

Fee Arbitration

Taxes and benefits are in excess of budget to the type of coverage for one employee in the department. Individual coverage was budgeted for while the actual expense was for family coverage.

Young Lawyers Division

**Attorney and staff travel is over the budget primarily for the following two reasons: (1) additional costs were incurred as the assistant traveled to more meetings out of the area than what was originally intended and (2) there were more site planning visits made to venues than what was originally budgeted.**

Unauthorized Practice of Law

**Taxes and benefits exceeded the budget due to a change in the type of health coverage of an employee.**

Savannah

Savannah salaries are in excess of the budget due to an increase given to an employee to bring that employee up to a salary comparable to other employees performing the same type of job function. That increase was not originally budgeted for.

**Taxes and benefits are in excess of budget due to the timing of vacation taken by an employee.**

**Attorney and staff travel is in excess of budget as it was originally budgeted for one person to attend the annual meeting, however, due to other people not able to attend the mid-year meeting, she also attended that meeting to assist.**

Computer hardware is over budget due to the purchase of clickshare. This purchase was not included in the budget.



#### Tifton

Facilities maintenance costs have exceeded the budget primarily due to costs associated with a new cleaning contract that was entered into after the budget was prepared. As such, these costs were not budgeted for.

#### High School Mock Trial

Costs for the National Mock Trial competition are in excess of the budget primarily due to the following two reasons: (1) more students than originally anticipated attended the national competition and (2) not as much money was raised by the parents of the students. As such, the Mock Trial program contributed additional resources.

#### Supreme Court Meetings

Costs associated with the Supreme Court meetings line item have exceeded the budget by approximately **\$39,000** primarily due to following unanticipated costs: (1) the hotel room costs were significantly more expensive per night in the current fiscal year as compared to prior fiscal years and what was anticipated when the budget was prepared; (2) two nights per person for the hotel were incurred in the current year where in the budget and in prior year's normally one night per person was incurred (3) because two nights were incurred, there were also two group dinners incurred instead of one group dinner and (4) costs were incurred at the Fall Board of Governors meeting wherein the prior year the Fall BOG meeting was virtual only. As such, for budget purposes it was anticipated that the Fall 2023 BOG would also be Zoom only, however that was not the case.

#### Membership Database Project

Similar to the Bar's website project, the Bar elected to update the membership database which was originally installed approximately 14 years ago. With this update, it is the intention to strengthen security to have this database in the cloud. A budget was not established intentionally as monies from unallocated cash will also be used to fund this expenditure. This project is anticipated to be completed in either spring or summer 2024.

#### Shared Office

**Computer software is over budget due to additional use of the Certify system for payments to employees for use of corporate credit cards along with reimbursement to employees for other non-corporate credit card purposes.**

**Furniture and equipment is in excess of the budget due to the purchase of tables and chairs for the kitchen area. This purchase was not originally budgeted for.**

#### Human Resources

**The Human Resources department is over budget by \$4,140 due to two Bar-wide seminars that were provided to employees that were not originally budgeted for.**

#### Sections

**Section salaries are in excess of the budget due to an increase given to an employee to bring that employee up to a salary comparable to other employees performing the same type of job function. That increase was not originally budgeted for.**

**Overtime for sections is over budgeted due to attendance at more events than what was budgeted for as many of the events occurred outside of the normal work hours.**

Supplies for sections are in excess of the budget by approximately **\$2,200** primarily due to the following reasons: (1) purchase of a canopy tent in the amount of approximately \$300. This tent will be used for outside events and was not originally included in the budget and (2) purchase of name badge holders, sign holders for QR codes, badge stock, and additional signs. The costs of these items have increased and Sections are also doing more programs.

#### Conference Center

Computer software is over budget due the purchase of access points for the conference center department itself. This purchase was not originally budgeted for.

Furniture repairs and maintenance is in excess of the budget due to an underbudget. The carpet cleaning for the sub-basement was inadvertently omitted from the budget when it was originally prepared.

Furniture and equipment is in excess of budget due to the purchase of a new ice machine for the third floor. The machine broke in the current year and it was not cost effective to have it repaired. The purchase was not included in the current year budget.

#### Other Bar Center Operations

**Investment Service Fee costs exceeded the budget primarily because the amount allocated to the Bar Center operations was higher than anticipated due to a greater portfolio value than what was originally anticipated.**

Museum and 1<sup>st</sup> floor exhibit are over budget as the costs to dismantle the exhibit and to discard items were greater than the amount originally budgeted for.

Audio and video equipment for the Bar is in excess of the budget by approximately \$216,100 primarily because the Bar incurred charges associated with an upgrade of the audio and video equipment on the conference floor. This upgrade was intentionally not included in the operating budget of the Bar Center as monies from unallocated cash will be used to fund this expenditure. This project was completed in January 2024.

### **Other Bar Center Operations - Continued**

The Bar incurred unbudgeted building rehab costs of **\$726,200**. The majority of these costs were incurred as a result of the following: (1) payment of approximately \$44,000 associated with work being performed on the doors to the front lobby. This work will improve handicap access to the building. (2) approximately **\$92,100** in costs paid for work to be done on electrical panels in order to prepare of the replacement of these panels in 2024-2025 (3) approximately **\$96,700** for a partial payment for the new front end building management system (4) approximately **\$274,100** for lease buildout and commission costs for a tenant occupying space on the 6<sup>th</sup> floor later this year (5) \$28,600 in costs associated with water damage (6) approximately **\$74,400** in general leasehold improvements to the 6<sup>th</sup> floor (7) **approximately \$11,200 in repairs to cards for the fire safety panel and (8) approximately \$56,800 for flooring for the 1<sup>st</sup> floor. This flooring was the first payment for worked performed prior to June 30, 2024. The remainder of the flooring will be completed in the 2024 – 2025 year.** The resources in unallocated cash are being used to fund these costs.

### **Rental**

Administrative taxes and benefits are over budget primarily due to a budget error by our property manager. The property manager inadvertently omitted the taxes and benefits of one administrative person assigned to our account.

Repairs and maintenance costs associated with plumbing have exceeded the budget by **\$5,278** due to costs incurred of \$9,923 associated with the replacement of cast iron pipes in a part of the building. These pipes rusted and broke. The cost of this repair was not budgeted.

**Repairs and maintenance for fire/life safety prevention are in excess of the budget due to additional trouble shooting costs incurred for a failure of a fire alarm test.**

**Repairs and maintenance for life safety contract are due to an unbudgeted replacement of computer mapnet cards in the fire panel.**

Repairs and maintenance costs for elevators is over budget due to a leak in the condenser room. This leak caused a motor in the freight elevators on the first floor to no longer work and as such, a repair was necessary.

**Rubbish removal costs are over budget due to an increase in the monthly costs that was not anticipated when the budget was originally prepared.**

Repairs and maintenance costs other for general building are over budget by approximately **\$4,300** primarily due to the installation of a new floor closer for a door at a cost of approximately \$1,700 **and additional signage at a cost of approximately \$1,900. These repairs were not budgeted for.**

**Rental - Continued**

Electric costs are in excess of the budget because over the last fiscal year the Bar has had to run two chillers over certain weekends when the temperatures have been warmer. Normally over a weekend only one chiller is running. However, if only one chiller is running over a warm weekend, the temperatures are too warm on Monday and security is very hot over the weekend.

**Parking**

**Office expense, invoicing expenses and credit card fees were all slightly over budget by \$1,000 each. This was due to a slight under budget amount in each category by our outside parking company.**

Cleaning for the parking deck is in excess of the budget primarily due to costs incurred that were not budgeted.

Incentive fees are over the budgeted amount as parking operations have been very profitable, the incentive fee has been earned each month. When the budget was prepared it was anticipated that this would be achieved for eight out of the 12 months.

**Shared Office Overhead**

Shared office allocations exceed actual shared office expense by approximately **\$118,100**. 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  
       Paula Frederick  
       Sarah Coole

State Bar of Georgia  
Consolidated Revenues and Expenditures  
Operations and Bar Center Combined  
For the Year To Date Period Ending June 30, 2024

	Year Ending 06/30/2023	Year To Date June 30, 2024	% of Budget	Year Ending 06/30/2024
	Actual	Actual		Annual Budget
<b>Membership Numbers</b>				
Active Members	41,628	42,194	100.61 %	41,940
Inactive Members	8,169	8,017	100.97 %	7,940
Provisional Members	26	18	8.00 %	225
Associates/Affiliates	11	14	116.67 %	12
Foreign Legal Consultants	9	10	142.86 %	7
Students	453	520	126.83 %	410
Emeritus	4,189	4,617	107.37 %	4,300
<b>Total Membership Numbers</b>	<b>54,485</b>	<b>55,390</b>	<b>101.01 %</b>	<b>54,834</b>
<b>Revenue</b>				
Dues Active	10,798,285	10,957,918	100.49 %	10,904,400
Dues Inactive	1,085,384	1,067,188	103.39 %	1,032,200
Dues Provisional	18,524	16,932	57.89 %	29,250
Dues Associates	1,050	1,750	145.83 %	1,200
Dues Foreign Legal Consultant	1,429	2,448	134.51 %	1,820
Dues Late Fees	252,825	256,000	102.40 %	250,000
Dues NSF Check Fee	220	120	40.00 %	300
Dues Prior Years	5,655	5,705	114.10 %	5,000
<b>Total License and Dues</b>	<b>12,163,372</b>	<b>12,308,061</b>	<b>100.69 %</b>	<b>12,224,170</b>
Program Registration Income	4,882,064	4,790,586	100.85 %	4,750,000
Section Expense Reimbursement	301,403	301,039	100.02 %	300,973
CSF Expense Reimbursement	73,000	73,000	100.00 %	73,000
Advertising and Sales	48,045	45,369	167.18 %	27,150
Membership Income	174,181	165,617	101.05 %	163,900
Credit Card Processing Fees	119,502	107,601	102.48 %	105,000
Interest Income	(33,332)	454,907	324.93 %	140,000
Miscellaneous Revenues	186,223	21,581	359.69 %	6,000
<b>Total Bar Revenue</b>	<b>17,914,458</b>	<b>18,267,781</b>	<b>102.68 %</b>	<b>17,790,193</b>
<b>Total Bar Expenses</b>	<b>16,229,190</b>	<b>17,723,696</b>	<b>96.56 %</b>	<b>18,354,301</b>
<b>SBG Net Gain (Loss)</b>	<b>\$ 1,685,268 \$</b>	<b>\$ 544,085</b>	<b>(96.45) % \$</b>	<b>(564,108)</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 June 30, 2024**

	Year Ending 06/30/2023	Year To Date June 30, 2024	% of Budget	Year Ending 06/30/2024
	Actual	Actual		Annual Budget
Total Bar Center Operations Revenue	2,972,797	3,314,107	125.62 %	2,638,200
Total Bar Center Operations Expenses	2,601,174	3,454,316	128.66 %	2,684,753
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 371,623 \$</b>	<b>(140,209)</b>	<b>301.18 % \$</b>	<b>(46,553)</b>
Combined Revenue	20,887,255	21,581,888	105.65 %	20,428,393
Combined Expenses	18,830,364	21,178,012	100.66 %	21,039,054
<b>Total Combined Net Income (Loss)</b>	<b>\$ 2,056,891 \$</b>	<b>403,876</b>	<b>(66.14) % \$</b>	<b>(610,661)</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 June 30, 2024**

	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	165
Gain/Loss Investment Interest Allocation	21,799	0.00 %	263,476	0.00 %	0	(263,476)	55,035
CCLC Contributions to Bar Center	893,988	68.77 %	1,393,988	107.23 %	1,300,000	(93,988)	1,400,630
Interest and Dividend Income	37,473	38.24 %	132,667	135.37 %	98,000	(34,667)	115,247
<b>Bar Center Income and Cash Receipts</b>	<b>\$ 953,260</b>	<b>68.18 %</b>	<b>\$ 1,790,131</b>	<b>128.03 %</b>	<b>\$ 1,398,200</b>	<b>\$ (391,931)</b>	<b>\$ 1,571,077</b>
<b>Bar Center Expenses and Cash Disbursements</b>							
Bond Premium Amortization	3,159	9.87 %	17,366	54.27 %	32,000	14,634	15,712
Investment Service Fees	6,601	30.01 %	24,138	109.72 %	22,000	(2,138)	26,697
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	850
Museum and 1st Floor Exhibit	0	0.00 %	6,453	129.07 %	5,000	(1,453)	0
Audio Video, Furniture and Equipment	0	0.00 %	219,552	6,272.91 %	3,500	(216,052)	18,990
Building Rehabilitation	344,065	0.00 %	726,161	0.00 %	0	(726,161)	47,347
2nd Floor Buildout	0	0.00 %	0	0.00 %	0	0	30,025
<b>Bar Center Expenses and Cash Disbursements</b>	<b>\$ 353,825</b>	<b>566.12 %</b>	<b>\$ 993,670</b>	<b>1,589.87 %</b>	<b>\$ 62,500</b>	<b>\$ (931,170)</b>	<b>\$ 139,621</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ 599,435</b>	<b>44.88 %</b>	<b>\$ 796,462</b>	<b>59.63 %</b>	<b>\$ 1,335,700</b>	<b>\$ 539,238</b>	<b>\$ 1,431,456</b>
<b>Conference Center Income and Expenses</b>							
Room Rentals and Various Charges	390	3.90 %	13,817	138.17 %	10,000	(3,817)	12,683
Conference Center Operating Expenses	38,021	7.79 %	477,025	97.69 %	488,316	11,291	444,934
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (37,631)</b>	<b>7.87 %</b>	<b>\$ (463,208)</b>	<b>96.84 %</b>	<b>\$ (478,316)</b>	<b>\$ (15,108)</b>	<b>\$ (432,251)</b>
<b>Rental Income and Expenses</b>							
Rental Income	77,193	8.39 %	926,110	100.66 %	920,000	(6,110)	919,520
Building Operating Expenses	177,141	9.71 %	1,692,176	92.76 %	1,824,302	132,126	1,683,844
<b>Rental Combined Net Cash Flow</b>	<b>\$ (99,948)</b>	<b>11.05 %</b>	<b>\$ (766,066)</b>	<b>84.71 %</b>	<b>\$ (904,302)</b>	<b>\$ (138,236)</b>	<b>\$ (764,324)</b>
<b>Parking Income and Expenses</b>							
Parking Income	52,501	16.94 %	584,050	188.40 %	310,000	(274,050)	469,518
Parking Deck Operating Expenses	22,773	7.35 %	291,446	94.13 %	309,635	18,189	332,775
<b>Parking Combined Net Cash Flow</b>	<b>\$ 29,728</b>	<b>8,144.67 %</b>	<b>\$ 292,603</b>	<b>80,165.28 %</b>	<b>\$ 365</b>	<b>\$ (292,238)</b>	<b>\$ 136,743</b>
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 491,584</b>	<b>(1,055.97) %</b>	<b>\$ (140,209)</b>	<b>301.18 %</b>	<b>\$ (46,553)</b>	<b>\$ 93,656</b>	<b>\$ 371,623</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 June 30, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Revenues</b>				
Dues - Active	\$ 10,957,918	\$ 10,904,400	100.49 %	\$ 10,798,285
Dues - Inactive	1,067,188	1,032,200	103.39 %	1,085,384
Dues - Provisional	16,932	29,250	57.89 %	18,524
Dues - Misc. Types	4,198	3,020	139.01 %	2,479
Dues - Late Fees	261,825	255,300	102.56 %	258,700
Total Dues & Licenses	12,308,061	12,224,170	100.69 %	12,163,372
Program Registration Income	4,790,586	4,750,000	100.85 %	4,882,064
Section Expense Reimbursement	301,039	300,973	100.02 %	301,403
CSF Expense Reimbursement	73,000	73,000	100.00 %	73,000
Advertising and Sales	45,389	27,150	167.18 %	48,045
Membership Income	76,992	71,500	107.68 %	82,506
Pro Hac Vice	410,525	420,000	97.74 %	429,175
Pro Hac Vice Contra	(321,900)	(327,600)	98.26 %	(337,500)
Credit Card Processing Fees	107,601	105,000	102.48 %	119,502
Interest Income	454,907	140,000	324.93 %	(33,332)
Miscellaneous Revenues	21,581	6,000	359.69 %	186,223
Total Revenues	18,267,781	17,790,193	102.68 %	17,914,458
<b>Expenses</b>				
Administration	2,772,737	2,778,073	99.81 %	2,600,791
General Counsel	4,688,270	4,864,802	96.37 %	4,484,235
Communications	1,176,662	979,185	120.17 %	946,247
Lawyer's Assistance Program	125,000	125,000	100.00 %	125,000
Fee Arbitration	544,647	597,465	91.16 %	531,755
Law Practice Management	455,563	501,979	90.75 %	447,850
Sections	306,746	301,039	101.90 %	249,355
Savannah Office	306,971	293,152	104.71 %	309,323
Tifton Office	164,659	169,011	97.42 %	146,352
Young Lawyers	420,015	446,807	94.00 %	360,884
Unauthorized Practice of Law	942,450	943,024	99.94 %	878,889
Law Related Education	420,300	442,118	95.07 %	386,937
High School Mock Trial	167,484	192,392	87.05 %	161,081
ICLE	3,848,996	4,150,477	92.74 %	3,493,090

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

Created on 09/12/2024  
State Bar of Georgia



State Bar of Georgia  
Income Statement YTD - Operations  
For the Year To Date Period Ending June 30, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	212,216	212,216	100.00 %	212,216
Fastcase	297,471	297,000	100.16 %	281,419
Officers' Expenses	79,023	101,470	77.88 %	43,727
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	857,373	903,925	94.85 %	648,423
Unallocated Services	(118,053)	0	0.00 %	(133,549)
Total Expenses	17,723,696	18,354,301	96.56 %	16,229,190
Net Income	\$ 544,085	\$ (564,108)	(96.45) %	\$ 1,685,268

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

Created on 09/12/2024  
State Bar of Georgia

State Bar of Georgia  
Supporting Schedule of Other Expenses - YTD  
For the Year To Date Period Ending June 30, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Other Expenses</b>				
BOG and Member Meetings	\$ 530,767	\$ 556,000	95.46 %	\$ 400,237
Supreme Court Meetings	79,023	40,000	197.56 %	46,661
Executive Committee Meetings	7,681	50,000	15.36 %	33,891
State Disciplinary Board Lawyers	30,000	34,000	88.24 %	30,000
Electronic Ballots	17,674	19,000	93.02 %	23,411
Dues Notice	34,148	42,825	79.74 %	34,806
Letters of Good Standing	1,713	2,300	74.50 %	2,210
Bar Membership Cards	9,728	8,800	110.54 %	10,671
50 Year Certificates	4,670	6,500	71.86 %	3,823
Membership Database Project	57,912	0	0.00 %	0
State Bar Committees	16,070	25,000	64.28 %	18,705
Georgia Diversity Program	10,000	10,000	100.00 %	10,000
ABA Delegate Breakfast	2,116	2,500	84.65 %	2,134
1st Floor Painting	0	5,500	0.00 %	2,600
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	22,811	67,500	33.79 %	9,750
Investment Service Fees	29,958	29,000	103.30 %	14,524
Access to Justice/Pro Bono	601	2,500	24.06 %	2,500
<b>Total Other Expenses</b>	<b>\$ 857,372</b>	<b>\$ 903,925</b>	<b>94.85 %</b>	<b>\$ 648,423</b>

State Bar of Georgia  
Status and Use of Cash and Investments  
For the Current Period Ending June 30, 2024

	Current Month (June 2024)	Ending of Prior Fiscal Year (June 2023)	Dollar Change	% Increase/ Decrease
<b>Cash and Investments - Bar</b>	<b>\$ 43,856,237</b>			
<b>Less:</b>				
CCLC Cash and Investments Included in Above Amount	(6,491,143)			
Change in Fair Market Value of Investments - Cash may not be realized	<u>(315,945)</u>			
<b>Net Cash Available for State Bar</b>	<b><u>37,049,149</u></b>			
<b>Use of Cash:</b>				
<b>Less:</b>				
Board Designated - See Separate Schedule Attached	(8,844,978)			
Donor Temporarily Restricted - See Separate Schedule Attached	<u>(2,971,090)</u>			
<b>Total Board Designated and Temporarily Restricted</b>	<b><u>(11,816,068)</u></b>			
<b>Other - Cash Allocated:</b>				
Collection of Outstanding Accounts Receivable	187,039			
Payment of Accounts Payable	(1,774,362)			
Payment of Accrued Vacation	(593,724)			
Deferred Income	(9,454,962)			
Payment of Credit Card Bill	(396,718)			
Payment of Accrued Salary	(347,139)			
Payment of Accrued Taxes	(26,556)			
Payment of Other Accrued Expenses (primarily pension)	(682,632)			
Payment to Client Security Fund	(2,782,908)			
Net Amount to be received from Related Entities	457,262			
<b>Total Other - Cash Allocated</b>	<b><u>(15,414,700)</u></b>			
<b>Estimated Cash and Investments - June 30, 2024 - Bar</b>	<b><u>9,818,381</u></b>	<b>10,327,559</b>	<b>(509,178)</b>	<b>-5%</b>
<b>Cash and Investments - Bar Center</b>	<b>202,616</b>			
<b>Less:</b>				
Change in Fair Market Value of Investments - Cash may not be realized	(263,476)			
<b>Other Cash Allocated - Bar Center:</b>				
Collection of Outstanding Accounts Receivable	62,519			
Payment of Accounts Payable	(12,066)			
Payment of Other Accrued Expenses	<u>(150,512)</u>			
<b>Total Other - Cash Allocated - Bar Center</b>	<b><u>(100,059)</u></b>			
<b>Estimated Cash and Investments June 30, 2024 - Bar Center</b>	<b><u>(160,919)</u></b>	<b>(65,038)</b>	<b>(95,881)</b>	<b>-147%</b>
<b>Total Estimated Cash Balance at June 30, 2024</b>	<b>\$ 9,657,462</b>	<b>\$ 10,262,521</b>	<b>(605,059)</b>	<b>-6%</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.

# SBG Unallocated Cash



Total Est. Unallocated Cash Balance at June 30, 2024

For the Period Ending

State Bar of Georgia  
Board-Designated and Donor Temporarily Restricted Net Assets  
For the Year To Date Period Ending June 30, 2024

	June 30, 2021	June 30, 2022	June 30, 2023	June 30, 2024
<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	300,000
Board Designated - Sections	3,431,439	3,677,156	3,664,312	3,745,183
YLD Meetings	116,852	88,929	77,999	49,795
<b>Total Board-Designated excludes ICLE</b>	<b>\$ 8,598,291</b>	<b>\$ 8,816,085</b>	<b>\$ 8,792,311</b>	<b>\$ 8,844,978</b>
<b>Donor Temporarily Restricted</b>				
Legislative	\$ 1,350,873	\$ 1,503,629	\$ 1,806,483	\$ 2,423,119
Law Related Education/Marshall fund	231,160	212,684	207,599	192,396
High School Mock Trial	15,482	18,617	15,299	17,481
Basics Program	119,460	115,094	116,951	121,963
Younger Lawyers	115,020	87,006	87,199	126,603
Lawyers Assistance	34,650	33,188	31,863	33,229
Georgia Diversity Program	55,807	46,528	13,555	6,374
Bar Media Conference	21,834	13,037	3,115	1,523
Justice Hunstein's Portrait	25,651	0	0	0
Law Day	6,516	6,266	6,212	6,317
Access to Justice	1,492	1,435	3,175	19,993
Promote Inclusion	13,285	8,842	8,701	5,924
State Bar of Georgia Foundation	3,134	0	0	0
Military Vet Pro Bono	14,807	14,240	14,481	15,101
Justice Portraits	0	1,006	1,022	1,066
<b>Total Donor Temporarily Restricted</b>	<b>\$ 2,009,171</b>	<b>\$ 2,061,572</b>	<b>\$ 2,315,655</b>	<b>\$ 2,971,089</b>
<b>Net Board Designated and Donor Temporarily Restricted</b>	<b>\$ 10,607,462</b>	<b>\$ 10,877,657</b>	<b>\$ 11,107,967</b>	<b>\$ 11,816,068</b>

**State Bar of Georgia**  
**Summary of Members and Voluntary Legislative Contributions**  
**With Contributions Paid Through June 30, 2024**

Dues	2024-25 Dues Season	2023-24 Dues Season	2022-23 Dues Season
<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	27,135	42,632	42,018
Inactive - Number Paid	4,616	8,237	8,341
<b>Total Number of Members With Dues Paid</b>	<b>31,751</b>	<b>50,869</b>	<b>50,359</b>
<b>Percent of Total Members With Dues Paid</b>	<b>63.4%</b>	<b>102.4%</b>	<b>101.9%</b>
Number of Members Who Made A Contribution	5,610	9,091	8,482
Percent of Members Who Made A Contribution	17.7%	17.9%	16.8%
<b>Total Contribution Amount</b>	<b>\$ 537,390</b>	<b>\$ 862,990</b>	<b>\$ 803,415</b>
<b>Average Amount Paid</b>	<b>\$ 96</b>	<b>\$ 95</b>	<b>\$ 95</b>

**Legislative Contribution Amounts by Dues Year**

2024 - 2025	<u>\$ 537,390</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 June 30, 2024**

<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	27,135	42,632	42,018
Inactive - Number Paid	4,616	8,237	8,341
<b>Total Number of Members With Dues Paid</b>	<b>31,751</b>	<b>50,869</b>	<b>50,359</b>
<b>Percent of Total Members With Dues Paid</b>	<b>63.4%</b>	<b>102.4%</b>	<b>101.9%</b>
Number of Members Who Made A Contribution	2,182	3,575	3,539
Percent of Members Who Made A Contribution	6.9%	7.0%	7.0%
<b>Total Contribution Amount</b>	<b>\$ 323,674</b>	<b>\$ 490,605</b>	<b>\$ 483,850</b>
<b>Average Contribution Amount</b>	<b>\$ 148</b>	<b>\$ 137</b>	<b>\$ 137</b>

**GLSP Contribution Amounts by Dues Year**

2024 - 2025	<u>\$ 323,674</u>
2023 - 2024	<u>\$ 490,605</u>
2022 - 2023	<u>\$ 483,850</u>
2021 - 2022	<u>\$ 478,287</u>
2020 - 2021	<u>\$ 436,815</u>
2019 - 2020	<u>\$ 366,674</u>
2018 - 2019	<u>\$ 295,454</u>
2017 - 2018	<u>\$ 312,251</u>
2016 - 2017	<u>\$ 276,487</u>
2015 - 2016	<u>\$ 264,492</u>

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

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

State Bar of Georgia  
Income Statement  
From July 1, 2023 Through June 30, 2024

July 1, 2023 Beginning Balance	\$ 1,806,483
Income:	
Interest and Dividend Income	38,388
Gain/Loss Investment Interest Allocation	80,513
Miscellaneous Income	864,950
Total Income	983,851
Expenditures:	
Staff and Contract Lobbyists	317,451
Grassroots Efforts	8,051
Travel	2,377
Legislative Guests/Meetings	10,422
Miscellaneous	28,914
Total Expenditures	367,215
Net Donor Temporarily Restricted Balance	\$ 2,423,119



**State Bar of Georgia**  
**Summary of Client Security Fund Activity**  
**For the Year To Date Period Ending June 30, 2024**

	2021	2022	2023	2024
	June 30	June 30	June 30	June 30, 2024
<b>Fund Balance, Beginning of Year</b>	<b>\$ 1,009,586</b>	<b>\$ 1,798,187</b>	<b>\$ 1,634,260</b>	<b>\$ 2,212,202</b>
<b>Income:</b>				
Interest and Dividend Income	17,568	26,218	33,117	44,364
Gain/Loss Investment Interest Allocation	(9,942)	(79,620)	19,577	92,242
Client Security Fund Assessments	78,279	77,590	751,680	760,050
Restitution Income	23,095	85,621	18,445	821
<b>Total Income</b>	<b>\$ 109,000</b>	<b>\$ 109,809</b>	<b>\$ 822,819</b>	<b>\$ 897,477</b>
<b>Transfer from Others</b>				
Operating Transfer In	1,000,000	0	0	0
<b>Total Transfer from Others</b>	<b>\$ 1,000,000</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 0</b>
<b>Expenses:</b>				
Restricted Expenses	73,000	73,000	73,000	73,000
Client Security Fund Claims Payments	238,713	186,737	159,879	239,968
Bond Premium Amortization	5,630	8,444	4,288	5,737
Investment Service Fees	3,056	5,555	7,710	8,066
<b>Total Expenses</b>	<b>\$ 320,399</b>	<b>\$ 273,736</b>	<b>\$ 244,877</b>	<b>\$ 326,771</b>
<b>Net Income</b>	<b>\$ 788,601</b>	<b>\$ (163,927)</b>	<b>\$ 577,942</b>	<b>\$ 570,706</b>
<b>Fund Balance, End of Period</b>	<b>\$ 1,798,187</b>	<b>\$ 1,634,260</b>	<b>\$ 2,212,202</b>	<b>\$ 2,782,908</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 70,307	5.42 %	\$ 1,234,436	95.15 %	\$ 1,297,320	\$ 62,884	\$ 1,198,492
Overtime	1,060	14.73 %	2,540	35.27 %	7,200	4,660	3,992
Taxes and Benefits	42,297	10.98 %	384,921	99.96 %	385,059	138	323,243
Pension	(1,410)	(1.42) %	89,593	90.25 %	99,276	9,683	93,904
<b>Total Personnel Services</b>	<b>112,254</b>	<b>6.28 %</b>	<b>1,711,490</b>	<b>95.68 %</b>	<b>1,788,855</b>	<b>77,365</b>	<b>1,619,631</b>
<b>Operating Expenses</b>							
Shared Office Allocation	57,080	11.10 %	528,259	102.77 %	514,013	(14,246)	503,989
Postage and Freight	310	6.32 %	4,754	97.02 %	4,900	146	4,235
Printing	149	148.60 %	149	148.60 %	100	(49)	108
Supplies	295	5.77 %	2,324	52.52 %	4,425	2,101	2,727
Telephone	375	10.42 %	4,500	125.00 %	3,600	(900)	4,500
Subscriptions and Books	0	0.00 %	4,674	110.77 %	4,220	(454)	2,097
Dues and Memberships	0	0.00 %	2,417	94.41 %	2,560	143	1,565
Licenses and Certifications	0	0.00 %	90	0.00 %	0	(90)	0
Seminars and Training	189	3.02 %	4,798	76.77 %	6,250	1,452	4,409
Miscellaneous	382	11.40 %	9,404	280.71 %	3,350	(6,054)	8,057
Attorney and Staff Travel	14,280	31.18 %	38,462	83.98 %	45,800	7,338	29,357
Executive Director Travel	2,989	17.58 %	23,476	138.10 %	17,000	(6,476)	16,890
Lunches	0	0.00 %	1,161	61.08 %	1,900	739	2,065
Bank Fees	2,789	14.30 %	2,789	14.30 %	19,500	16,711	11,369
Credit Card Discount and Fees	116,698	43.22 %	303,678	112.47 %	270,000	(33,678)	311,946
Computer Software	0	0.00 %	0	0.00 %	0	0	1,938
Membership Software License	7,173	8.44 %	117,490	138.22 %	85,000	(32,490)	71,539
Contract Programming	7,053	106.86 %	11,919	180.59 %	6,600	(5,319)	4,569
<b>Total Operating Expenses</b>	<b>209,722</b>	<b>21.20 %</b>	<b>1,060,344</b>	<b>107.19 %</b>	<b>989,218</b>	<b>(71,126)</b>	<b>981,160</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>904</b>	<b>0.00 %</b>	<b>0</b>	<b>(904)</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 321,976</b>	<b>11.59 %</b>	<b>\$ 2,772,738</b>	<b>99.81 %</b>	<b>\$ 2,778,073</b>	<b>\$ 5,335</b>	<b>\$ 2,600,791</b>

OGC & CAP

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 179,551	6.12 %	\$ 2,792,696	95.17 %	\$ 2,934,523	\$ 141,827	\$ 2,695,722
Salaries-Hourly PT	2,049	4.07 %	24,178	48.03 %	50,335	26,157	23,837
Overtime	1,230	28.59 %	2,962	68.88 %	4,300	1,338	1,771
Taxes and Benefits	105,836	12.99 %	748,392	91.85 %	814,837	66,445	645,290
Pension	8,295	4.25 %	187,255	95.92 %	195,229	7,974	195,326
<b>Total Personnel Services</b>	<b>296,961</b>	<b>7.43 %</b>	<b>3,755,483</b>	<b>93.91 %</b>	<b>3,999,224</b>	<b>243,741</b>	<b>3,561,946</b>
<b>Operating Expenses</b>							
Shared Office Allocation	67,353	11.10 %	623,340	102.77 %	606,531	(16,809)	562,142
Postage and Freight	1,119	6.99 %	13,972	87.32 %	16,000	2,028	14,032
Printing	2,085	417.12 %	2,364	472.66 %	500	(1,864)	56
Supplies	2,390	9.56 %	17,515	70.06 %	25,000	7,485	19,789
Telephone	150	4.05 %	2,580	69.73 %	3,700	1,120	3,934
Subscriptions and Books	904	4.31 %	23,482	111.82 %	21,000	(2,482)	20,075
Dues and Memberships	450	4.97 %	10,918	120.68 %	9,047	(1,871)	8,893
Seminars and Training	670	5.36 %	9,515	76.12 %	12,500	2,985	8,927
Miscellaneous	62	3.13 %	2,468	123.39 %	2,000	(468)	979
Recruitment Costs	0	0.00 %	0	0.00 %	2,000	2,000	0
Attorney and Staff Travel	24,291	48.58 %	62,685	125.37 %	50,000	(12,685)	38,045
Investigator Travel	341	7.59 %	6,999	155.53 %	4,500	(2,499)	3,402
Luncheons	485	37.29 %	3,338	256.78 %	1,300	(2,038)	578
Computer Hardware	0	0.00 %	2,746	91.55 %	3,000	254	2,795
Computer Software	0	0.00 %	8,306	151.01 %	5,500	(2,806)	5,043
Contract Programming	27,075	135.38 %	28,575	142.88 %	20,000	(8,575)	14,625
Receiverships	681	13.63 %	4,206	84.12 %	5,000	794	7,545
State Disciplinary Board Panel	22,437	44.87 %	82,616	165.23 %	50,000	(32,616)	64,886
Contract Special Master	0	0.00 %	0	0.00 %	0	0	124,628
Lexis Online	3,356	14.59 %	25,568	111.16 %	23,000	(2,568)	21,005
<b>Total Operating Expenses</b>	<b>153,849</b>	<b>17.88 %</b>	<b>931,193</b>	<b>108.21 %</b>	<b>860,578</b>	<b>(70,615)</b>	<b>921,179</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>1,594</b>	<b>31.88 %</b>	<b>5,000</b>	<b>3,406</b>	<b>1,110</b>
<b>Total Expenses</b>	<b>\$ 450,810</b>	<b>9.27 %</b>	<b>\$ 4,688,270</b>	<b>96.37 %</b>	<b>\$ 4,864,802</b>	<b>\$ 176,532</b>	<b>\$ 4,484,235</b>

Communications

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	22,481	7.73 %	288,693	99.30 %	290,716	2,023	276,098
Overtime	472	29.52 %	472	29.52 %	1,600	1,128	535
Taxes and Benefits	8,332	8.41 %	104,073	105.06 %	99,057	(5,016)	94,660
Pension	750	4.02 %	17,865	95.69 %	18,671	806	18,447
<b>Total Personnel Services</b>	<b>32,035</b>	<b>7.81 %</b>	<b>411,103</b>	<b>100.26 %</b>	<b>410,044</b>	<b>(1,059)</b>	<b>389,740</b>
<b>Expenses</b>							
Shared Office Allocation	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Postage and Freight	160	10.61 %	1,426	95.07 %	1,500	74	1,391
Supplies	0	0.00 %	607	60.72 %	1,000	393	80
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	40	0.66 %	3,604	59.13 %	6,095	2,491	4,192
Dues and Memberships	0	0.00 %	405	100.00 %	405	0	405
Seminars and Training	0	0.00 %	3,098	88.51 %	3,500	402	1,185
Miscellaneous	0	0.00 %	84	6.43 %	1,300	1,216	352
Attorney and Staff Travel	2,198	18.02 %	12,651	103.70 %	12,200	(451)	11,669
Luncheons	0	0.00 %	0	0.00 %	100	100	0
Credit Card Discount and Fees	8	0.00 %	321	0.00 %	0	(321)	292
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,104
Computer Software	0	0.00 %	1,458	91.10 %	1,600	142	1,458
Media Consultants	11,349	28.37 %	30,436	76.09 %	40,000	9,564	28,759
Website Maintenance	1,768	4.42 %	65,263	163.16 %	40,000	(25,263)	55,660
Website Redesign	50,864	0.00 %	275,105	0.00 %	0	(275,105)	0
Membership Certificates	312	15.60 %	2,574	128.71 %	2,000	(574)	1,845
<b>Subtotal</b>	<b>75,906</b>	<b>39.36 %</b>	<b>482,452</b>	<b>250.18 %</b>	<b>192,841</b>	<b>(289,611)</b>	<b>187,329</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Subtotal</b>	<b>107,941</b>	<b>17.90 %</b>	<b>893,556</b>	<b>148.21 %</b>	<b>602,885</b>	<b>(290,671)</b>	<b>577,068</b>
<b>Publications</b>							
Bar Journal	59,978	16.46 %	273,976	75.21 %	364,300	90,324	359,790
Supplemental Directory	0	0.00 %	9,130	91.30 %	10,000	870	8,451
Special Publications and Printing	0	0.00 %	0	0.00 %	2,000	2,000	937
<b>Total Publications</b>	<b>59,978</b>	<b>15.94 %</b>	<b>283,106</b>	<b>75.23 %</b>	<b>376,300</b>	<b>93,194</b>	<b>369,178</b>
<b>Total Communications</b>	<b>167,919</b>	<b>17.15 %</b>	<b>1,176,662</b>	<b>120.17 %</b>	<b>979,185</b>	<b>(197,477)</b>	<b>946,247</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 1,302	0.44 %	\$ 248,357	83.56 %	\$ 296,848	\$ 48,492	\$ 271,077
Overtime	0	0.00 %	22	1.48 %	1,500	1,477	0
Taxes and Benefits	8,177	8.37 %	108,623	111.15 %	97,730	(10,893)	77,095
Pension	(6,792)	(33.24) %	11,941	58.43 %	20,436	8,495	20,085
<b>Total Personnel Services</b>	<b>2,687</b>	<b>0.65 %</b>	<b>368,943</b>	<b>88.58 %</b>	<b>416,514</b>	<b>47,571</b>	<b>368,257</b>
<b>Operating Expenses</b>							
Shared Office Allocation	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Postage and Freight	190	2.43 %	4,404	56.46 %	7,800	3,396	5,408
Printing	0	0.00 %	1,706	53.32 %	3,200	1,494	2,444
Supplies	151	8.93 %	1,856	109.17 %	1,700	(156)	1,796
Subscriptions and Books	0	0.00 %	1,415	140.10 %	1,010	(405)	977
Dues and Memberships	0	0.00 %	310	77.50 %	400	90	305
Seminars and Training	0	0.00 %	0	0.00 %	400	400	0
Miscellaneous	700	58.33 %	740	61.65 %	1,200	460	71
Attorney and Staff Travel	2,845	113.80 %	3,145	125.80 %	2,500	(645)	0
Luncheons	699	27.93 %	1,928	77.11 %	2,500	572	1,317
Computer Hardware	0	0.00 %	680	68.03 %	1,000	320	680
Contract Labor	6,000	8.00 %	72,000	96.00 %	75,000	3,000	72,000
Contract Programming	3,000	150.00 %	3,000	150.00 %	2,000	(1,000)	963
<b>Total Operating Expenses</b>	<b>22,717</b>	<b>12.55 %</b>	<b>175,704</b>	<b>97.10 %</b>	<b>180,951</b>	<b>5,247</b>	<b>163,498</b>
<b>Total Expenses</b>	<b>\$ 25,404</b>	<b>4.25 %</b>	<b>\$ 544,647</b>	<b>91.16 %</b>	<b>\$ 597,465</b>	<b>\$ 52,818</b>	<b>\$ 531,755</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Consultation	\$ 281	28.13 %	\$ 2,171	217.05 %	\$ 1,000	\$ (1,171)	\$ 1,619
Publications	0	0.00 %	50	50.47 %	100	50	110
Vendor Directory	0	0.00 %	11,170	111.71 %	10,000	(1,170)	350
Miscellaneous Income	200	26.67 %	1,580	210.67 %	750	(830)	1,413
<b>Total Revenues</b>	<b>481</b>	<b>4.06 %</b>	<b>14,971</b>	<b>126.34 %</b>	<b>11,850</b>	<b>(3,121)</b>	<b>3,492</b>
<b>Personnel Services</b>							
Salaries	16,425	5.97 %	265,614	96.48 %	275,311	9,697	261,104
Overtime	446	8.92 %	1,772	35.43 %	5,000	3,228	1,921
Taxes and Benefits	3,659	3.39 %	90,307	83.71 %	107,883	17,576	82,615
Pension	(2,142)	(11.93) %	14,321	79.74 %	17,960	3,639	14,931
<b>Total Personnel Services</b>	<b>18,388</b>	<b>4.53 %</b>	<b>372,014</b>	<b>91.59 %</b>	<b>406,154</b>	<b>34,140</b>	<b>360,571</b>
<b>Operating Expenses</b>							
Shared Office Allocation	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Postage and Freight	113	5.64 %	1,122	56.09 %	2,000	878	1,069
Printing	0	0.00 %	200	20.03 %	1,000	800	372
Supplies	115	7.63 %	290	19.35 %	1,500	1,210	797
Telephone	75	8.33 %	900	100.00 %	900	0	0
Subscriptions and Books	33	0.51 %	2,798	43.04 %	6,500	3,702	3,872
Dues and Memberships	0	0.00 %	720	42.35 %	1,700	980	324
Seminars and Training	1,338	102.92 %	1,339	103.00 %	1,300	(39)	211
Miscellaneous	200	57.14 %	200	57.14 %	350	150	909
Attorney and Staff Travel	2,296	23.08 %	5,961	59.91 %	9,950	3,989	8,133
Luncheons	0	0.00 %	310	154.83 %	200	(110)	75
Credit Card Discount and Fees	99	0.00 %	345	0.00 %	0	(345)	116
Computer Software	356	5.06 %	4,706	66.90 %	7,034	2,328	4,899
<b>Total Operating Expenses</b>	<b>13,757</b>	<b>12.00 %</b>	<b>103,411</b>	<b>90.18 %</b>	<b>114,675</b>	<b>11,264</b>	<b>98,314</b>
<b>Total Expenses</b>	<b>32,145</b>	<b>6.17 %</b>	<b>475,425</b>	<b>91.28 %</b>	<b>520,829</b>	<b>45,404</b>	<b>458,885</b>
<b>Solo and Small Firm</b>	<b>(86)</b>	<b>(1.23) %</b>	<b>4,900</b>	<b>70.00 %</b>	<b>7,000</b>	<b>2,100</b>	<b>10,306</b>
<b>Showcase Programs</b>	<b>0</b>	<b>0.00 %</b>	<b>(10)</b>	<b>0.00 %</b>	<b>0</b>	<b>10</b>	<b>(2,763)</b>
<b>Net Income</b>	<b>\$ (31,750)</b>	<b>6.32 %</b>	<b>\$ (455,563)</b>	<b>90.75 %</b>	<b>\$ (501,979)</b>	<b>\$ (46,416)</b>	<b>\$ (447,850)</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	9,771	8.39 %	127,061	109.07 %	\$ 116,494	\$ (10,567)	\$ 110,778
Overtime	274	54.96 %	488	97.51 %	500	12	419
Taxes and Benefits	5,446	9.32 %	57,579	98.58 %	58,410	831	52,227
Pension	958	13.62 %	7,404	105.29 %	7,032	(372)	6,902
<b>Total Personnel Services</b>	<b>16,449</b>	<b>9.02 %</b>	<b>192,532</b>	<b>105.53 %</b>	<b>182,436</b>	<b>(10,096)</b>	<b>170,326</b>
<b>Operating Expenses</b>							
Shared Office Allocation	4,567	11.11 %	42,261	102.77 %	41,121	(1,140)	38,768
Printing	0	0.00 %	0	0.00 %	0	0	341
Supplies	12	1.82 %	322	45.94 %	700	378	49
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	72	2.88 %	1,856	74.27 %	2,500	644	1,984
Dues and Memberships	0	0.00 %	135	90.00 %	150	15	90
Seminars and Training	0	0.00 %	850	170.00 %	500	(350)	0
Attorney and Staff Travel	2,921	28.35 %	13,536	131.41 %	10,300	(3,236)	9,838
Credit Card Discount and Fees	2	0.00 %	29	0.00 %	0	(29)	25
Computer Software	0	0.00 %	729	91.10 %	800	71	729
Committee Brochures	0	0.00 %	0	0.00 %	9,200	9,200	8,987
President	2,831	14.16 %	14,446	72.23 %	20,000	5,554	10,544
President Elect	2,823	18.82 %	7,151	47.67 %	15,000	7,849	10,621
Immediate Past President	3,579	28.63 %	9,595	76.76 %	12,500	2,905	3,385
Treasurer	392	30.14 %	1,300	100.00 %	1,300	0	1,300
Secretary	367	28.27 %	1,300	100.00 %	1,300	0	1,300
Meetings	0	0.00 %	47,500	100.00 %	47,500	0	47,500
<b>Total Operating Expenses</b>	<b>17,641</b>	<b>10.77 %</b>	<b>141,910</b>	<b>86.65 %</b>	<b>163,771</b>	<b>21,861</b>	<b>136,361</b>
<b>Committees Activities</b>							
Committees Income	150	(6.00) %	(6,905)	276.20 %	(2,500)	4,405	(4,365)
Committees Expense	44,905	43.56 %	92,478	89.70 %	103,100	10,622	58,561
<b>Total Committees Activities</b>	<b>45,055</b>	<b>44.79 %</b>	<b>85,573</b>	<b>85.06 %</b>	<b>100,600</b>	<b>15,027</b>	<b>54,196</b>
<b>Total Expenses</b>	<b>\$ 79,145</b>	<b>17.71 %</b>	<b>\$ 420,015</b>	<b>94.00 %</b>	<b>\$ 446,807</b>	<b>\$ 26,792</b>	<b>\$ 360,884</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 43,515	7.62 %	\$ 566,639	99.24 %	\$ 570,971	\$ 4,332	\$ 541,658
Overtime	0	0.00 %	0	0.00 %	255	255	0
Taxes and Benefits	24,739	12.73 %	202,982	104.41 %	194,405	(8,577)	173,957
Pension	1,608	4.12 %	37,397	95.79 %	39,041	1,644	39,161
<b>Total Personnel Services</b>	<b>69,862</b>	<b>8.68 %</b>	<b>807,018</b>	<b>100.29 %</b>	<b>804,672</b>	<b>(2,346)</b>	<b>754,776</b>
<b>Operating Expenses</b>							
Shared Office Allocation	13,699	11.10 %	126,781	102.77 %	123,362	(3,419)	116,305
Postage and Freight	54	5.97 %	679	75.48 %	900	221	729
Printing	0	0.00 %	0	0.00 %	100	100	96
Supplies	7	0.72 %	1,457	145.67 %	1,000	(457)	760
Subscriptions and Books	0	0.00 %	669	78.71 %	850	181	546
Dues and Memberships	0	0.00 %	610	84.72 %	720	110	530
Seminars and Training	0	0.00 %	0	0.00 %	500	500	0
Miscellaneous	0	0.00 %	0	0.00 %	1,100	1,100	125
Attorney and Staff Travel	0	0.00 %	87	10.86 %	800	713	0
Investigator Travel	195	5.19 %	890	23.74 %	3,750	2,860	851
Luncheons	0	0.00 %	0	0.00 %	1,200	1,200	0
Lexis Online	687	16.88 %	4,259	104.84 %	4,070	(189)	4,171
<b>Total Operating Expenses</b>	<b>14,642</b>	<b>10.58 %</b>	<b>135,432</b>	<b>97.89 %</b>	<b>138,352</b>	<b>2,920</b>	<b>124,113</b>
<b>Total Expenses</b>	<b>\$ 84,504</b>	<b>8.96 %</b>	<b>\$ 942,450</b>	<b>99.94 %</b>	<b>\$ 943,024</b>	<b>\$ 574</b>	<b>\$ 878,889</b>



State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 8,685	8.72 %	\$ 113,667	114.12 %	\$ 99,605	\$ (14,062)	\$ 94,481
Overtime	0	0.00 %	0	0.00 %	250	250	0
Taxes and Benefits	8,117	14.27 %	59,331	104.26 %	56,905	(2,426)	51,917
Pension	1,087	18.10 %	6,588	109.76 %	6,002	(586)	5,855
<b>Total Personnel Services</b>	<b>17,889</b>	<b>10.99 %</b>	<b>179,586</b>	<b>110.34 %</b>	<b>162,762</b>	<b>(16,824)</b>	<b>152,253</b>
<b>Operating Expenses</b>							
Shared Office Allocation	2,283	11.11 %	21,130	102.77 %	20,560	(570)	19,384
Postage and Freight	0	0.00 %	5	3.27 %	150	145	17
Printing	0	0.00 %	0	0.00 %	100	100	445
Supplies	581	8.30 %	409	34.13 %	1,200	791	982
Telephone	0	0.00 %	6,989	99.84 %	7,000	11	8,179
Subscriptions and Books	0	0.00 %	192	106.89 %	180	(12)	174
Miscellaneous	10	0.25 %	10	0.25 %	4,000	3,990	4,679
Attorney and Staff Travel	1,736	78.91 %	3,990	181.35 %	2,200	(1,790)	2,471
Parking Savannah	0	0.00 %	0	0.00 %	0	0	1,110
Luncheons	0	0.00 %	0	0.00 %	100	100	0
Computer Hardware	0	0.00 %	1,922	0.00 %	0	(1,922)	0
Computer Software	0	0.00 %	0	0.00 %	100	100	0
Equipment Maintenance and Rental	1	0.02 %	1,328	57.73 %	2,300	972	1,459
Rent and Utilities	6,646	7.82 %	83,951	98.77 %	85,000	1,049	98,423
Facilities Maintenance	0	0.00 %	3,015	86.15 %	3,500	485	1,416
<b>Total Operating Expenses</b>	<b>11,257</b>	<b>8.91 %</b>	<b>122,941</b>	<b>97.27 %</b>	<b>126,390</b>	<b>3,449</b>	<b>138,739</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>4,444</b>	<b>111.09 %</b>	<b>4,000</b>	<b>(444)</b>	<b>18,331</b>
<b>Total Expenses</b>	<b>\$ 29,146</b>	<b>9.94 %</b>	<b>\$ 306,971</b>	<b>104.71 %</b>	<b>\$ 293,152</b>	<b>\$ (13,819)</b>	<b>\$ 309,323</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	4,876	7.62 %	\$ 63,510	99.24 %	\$ 63,998	\$ 488	\$ 60,707
Salaries-Hourly PT	1,852	8.15 %	20,837	91.73 %	22,715	1,878	11,699
Taxes and Benefits	2,282	11.24 %	19,960	98.39 %	20,287	327	18,355
Pension	(1,079)	(20.70) %	3,698	70.97 %	5,211	1,513	3,762
<b>Total Personnel Services</b>	<b>7,931</b>	<b>7.07 %</b>	<b>108,005</b>	<b>96.25 %</b>	<b>112,211</b>	<b>4,206</b>	<b>94,523</b>
<b>Operating Expenses</b>							
Shared Office Allocation	1,712	11.10 %	15,847	102.77 %	15,420	(427)	14,538
Postage and Freight	9	2.74 %	490	148.49 %	330	(160)	495
Printing	0	0.00 %	0	0.00 %	100	100	0
Supplies	304	12.16 %	2,111	84.44 %	2,500	389	2,025
Telephone	562	8.02 %	6,385	91.22 %	7,000	615	7,074
Subscriptions and Books	0	0.00 %	358	102.12 %	350	(8)	340
Miscellaneous	0	0.00 %	0	0.00 %	200	200	0
Attorney and Staff Travel	1,591	53.05 %	3,395	113.16 %	3,000	(395)	2,423
Luncheons	0	0.00 %	24	24.55 %	100	76	0
Computer Hardware	0	0.00 %	504	0.00 %	0	(504)	0
Computer Software	0	0.00 %	0	0.00 %	200	200	0
Equipment Maintenance and Rental	1	0.06 %	1,328	66.39 %	2,000	672	1,461
Rent and Utilities	1,973	9.30 %	20,622	97.27 %	21,200	578	19,928
Facilities Maintenance	716	37.68 %	4,188	220.42 %	1,900	(2,288)	785
<b>Total Operating Expenses</b>	<b>6,868</b>	<b>12.65 %</b>	<b>55,252</b>	<b>101.75 %</b>	<b>54,300</b>	<b>(952)</b>	<b>49,069</b>
<b>Furniture/Equipment</b>	<b>1,402</b>	<b>56.07 %</b>	<b>1,402</b>	<b>56.07 %</b>	<b>2,500</b>	<b>1,098</b>	<b>2,760</b>
<b>Total Expenses</b>	<b>\$ 16,200</b>	<b>9.59 %</b>	<b>\$ 164,659</b>	<b>97.42 %</b>	<b>\$ 169,011</b>	<b>\$ 4,352</b>	<b>\$ 146,352</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Miscellaneous Income	0	0.00 %	\$ 227	0.00 %	0	(227)	218
<b>Total Revenues</b>	<b>0</b>	<b>0.00 %</b>	<b>227</b>	<b>0.00 %</b>	<b>0</b>	<b>(227)</b>	<b>218</b>
<b>Personnel Services</b>							
Salaries	17,352	7.62 %	226,032	99.25 %	227,729	1,697	210,153
Overtime	0	0.00 %	0	0.00 %	500	500	0
Taxes and Benefits	10,672	8.43 %	111,763	88.29 %	126,581	14,818	96,057
Pension	639	4.11 %	14,900	95.77 %	15,557	657	15,469
<b>Total Personnel Services</b>	<b>28,663</b>	<b>7.74 %</b>	<b>352,695</b>	<b>95.23 %</b>	<b>370,367</b>	<b>17,672</b>	<b>321,679</b>
<b>Operating Expenses</b>							
Shared Office Allocation	6,849	11.10 %	63,390	102.77 %	61,681	(1,709)	58,153
Postage and Freight	0	0.00 %	0	0.00 %	50	50	45
Printing	0	0.00 %	0	0.00 %	1,500	1,500	1,527
Supplies	33	2.77 %	1,343	111.92 %	1,200	(143)	1,244
Subscriptions and Books	0	0.00 %	385	96.20 %	400	15	387
Seminars and Training	300	60.00 %	300	60.00 %	300	200	0
Miscellaneous	65	8.14 %	377	47.09 %	800	423	185
Attorney and Staff Travel	1,005	18.26 %	2,037	37.05 %	5,500	3,463	3,163
Luncheons	0	0.00 %	0	0.00 %	120	120	0
<b>Total Operating Expenses</b>	<b>8,252</b>	<b>11.50 %</b>	<b>67,832</b>	<b>94.54 %</b>	<b>71,751</b>	<b>3,919</b>	<b>64,704</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>772</b>
<b>Total Expenses</b>	<b>36,915</b>	<b>8.35 %</b>	<b>420,527</b>	<b>95.12 %</b>	<b>442,118</b>	<b>21,591</b>	<b>387,156</b>
<b>Net Income</b>	<b>\$ (36,915)</b>	<b>8.35 %</b>	<b>\$ (420,300)</b>	<b>95.07 %</b>	<b>\$ (442,118)</b>	<b>\$ (21,818)</b>	<b>\$ (386,938)</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Miscellaneous Income	0	0.00 %	337	67.41 %	500	163	505
<b>Total Revenues</b>	<b>0</b>	<b>0.00 %</b>	<b>337</b>	<b>67.41 %</b>	<b>500</b>	<b>163</b>	<b>505</b>
<b>Personnel Services</b>							
Salaries	5,492	7.62 %	71,531	99.24 %	72,080	549	71,086
Taxes and Benefits	2,482	5.93 %	33,990	81.23 %	41,845	7,855	36,898
Pension	194	4.48 %	4,165	96.14 %	4,332	167	0
<b>Total Personnel Services</b>	<b>8,168</b>	<b>6.91 %</b>	<b>109,686</b>	<b>92.75 %</b>	<b>118,257</b>	<b>8,571</b>	<b>107,984</b>
<b>Operating Expenses</b>							
Shared Office Allocation	2,283	11.11 %	21,130	102.77 %	20,560	(570)	19,384
Postage and Freight	0	0.00 %	115	11.47 %	1,000	885	66
Printing	0	0.00 %	0	0.00 %	0	0	56
Supplies	0	0.00 %	234	39.14 %	600	366	674
Subscriptions and Books	35	3.50 %	1,304	130.37 %	1,000	(304)	593
Dues and Memberships	0	0.00 %	0	0.00 %	200	200	200
Miscellaneous	700	175.00 %	768	191.88 %	400	(368)	58
Attorney and Staff Travel	2,026	73.64 %	2,485	90.37 %	2,750	265	2,003
Lunches	0	0.00 %	589	117.76 %	500	(89)	0
Credit Card Discount and Fees	0	0.00 %	6	0.00 %	0	(6)	14
Computer Software	0	0.00 %	0	0.00 %	0	0	364
<b>Total Operating Expenses</b>	<b>5,044</b>	<b>18.67 %</b>	<b>26,631</b>	<b>98.60 %</b>	<b>27,010</b>	<b>379</b>	<b>23,412</b>
<b>HSMT Events</b>							
Sponsorships	0	0.00 %	(10,000)	0.00 %	0	10,000	0
Law Academy	0	0.00 %	6,203	103.81 %	5,975	(228)	2,284
Regional Competition	(1,390)	(308.89) %	(7,458)	(1,657.20) %	450	7,908	(239)
State Competition	(426)	(2.63) %	16,754	103.42 %	16,200	(554)	6,481
National Competition	968	6.45 %	17,087	113.91 %	15,000	(2,087)	14,442
District Competition	0	0.00 %	8,938	89.38 %	10,000	1,062	7,220
2019 NHSMTC-Athens	0	0.00 %	(19)	0.00 %	0	19	0
<b>Total HSMT Events</b>	<b>(848)</b>	<b>(1.78) %</b>	<b>31,505</b>	<b>66.15 %</b>	<b>47,625</b>	<b>16,120</b>	<b>30,188</b>
<b>Total Expenses</b>	<b>12,364</b>	<b>6.41 %</b>	<b>167,822</b>	<b>87.00 %</b>	<b>192,892</b>	<b>25,070</b>	<b>161,585</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Net Income	(12,364)	6.43 %	(167,485)	87.05 %	(192,392)	(24,907)	(161,081)

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Program Revenue</b>							
Registration Revenue	440,375	8.81 %	4,827,097	96.54 %	5,000,000	172,903	4,890,539
Sponsorship	0	0.00 %	0	0.00 %	0	0	1,000
Program Discounts	9,000	(3.60) %	(33,421)	13.37 %	(250,000)	(216,579)	(15,585)
Other	0	0.00 %	(3,090)	0.00 %	0	3,090	6,110
<b>Total Program Revenue</b>	<b>449,375</b>	<b>9.46 %</b>	<b>4,790,586</b>	<b>100.85 %</b>	<b>4,750,000</b>	<b>(40,586)</b>	<b>4,882,064</b>
<b>Total Program Expenditures</b>	<b>261,262</b>	<b>17.13 %</b>	<b>1,773,059</b>	<b>116.27 %</b>	<b>1,525,000</b>	<b>(248,059)</b>	<b>1,619,046</b>
<b>Net Margin on Programs</b>	<b>188,113</b>	<b>5.83 %</b>	<b>3,017,527</b>	<b>93.57 %</b>	<b>3,225,000</b>	<b>207,473</b>	<b>3,263,018</b>
<b>Personnel Services</b>							
Salaries Full Time	76,434	6.58 %	1,060,131	91.33 %	1,160,740	100,609	908,053
Salaries Part Time	3,662	8.14 %	22,894	50.88 %	45,000	22,106	21,483
Overtime Pay	1,556	7.78 %	16,447	82.23 %	20,000	3,553	9,895
Taxes and Benefits	23,467	5.07 %	267,900	57.90 %	462,715	194,815	245,924
Pension	(10,743)	(16.13) %	50,293	75.53 %	66,585	16,292	42,570
<b>Total Personnel Services</b>	<b>94,376</b>	<b>5.38 %</b>	<b>1,417,665</b>	<b>80.78 %</b>	<b>1,755,040</b>	<b>337,375</b>	<b>1,227,905</b>
<b>Operating Expenses</b>							
Shared Office Allocation	41,097	11.10 %	380,343	102.77 %	370,087	(10,256)	348,916
Board and Committee Meetings	598	14.96 %	1,108	27.70 %	4,000	2,892	237
Dues and Memberships	0	0.00 %	4,705	67.22 %	7,000	2,295	3,411
Licenses and Certification	0	0.00 %	611	20.35 %	3,000	2,389	750
Seminars and Training	185	0.74 %	8,822	35.29 %	25,000	16,178	5,027
Attorney and Staff Travel	3,651	7.30 %	18,333	36.67 %	50,000	31,667	30,411
Supplies	84	0.42 %	19,568	97.84 %	20,000	432	6,456
Printing	0	0.00 %	0	0.00 %	2,500	2,500	444
Subscriptions and Books	4,040	3.85 %	77,830	74.12 %	105,000	27,170	89,505
Postage and Freight	0	0.00 %	30	3.95 %	750	720	174
Telephone	375	4.63 %	5,475	67.59 %	8,100	2,625	5,400
Internet Services	0	0.00 %	231	5.13 %	4,500	4,269	213
Computer Software	0	0.00 %	0	0.00 %	5,000	5,000	660
Contract Programming	0	0.00 %	0	0.00 %	25,000	25,000	1,037
Computer Hardware	0	0.00 %	11,670	77.80 %	15,000	3,330	14,078

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Miscellaneous	251	2.51 %	3,594	35.94 %	10,000	6,406	1,180
Professional Fees	0	0.00 %	0	0.00 %	12,500	12,500	4,800
Equipment Maintenance and Rental	0	0.00 %	0	0.00 %	1,000	1,000	0
Other Business Insurance (Not Group)	0	0.00 %	0	0.00 %	10,000	10,000	0
Credit Card Discount and Fees	4,915	3.45 %	105,783	74.23 %	142,500	36,717	115,005
Banking Fees	0	0.00 %	0	0.00 %	1,000	1,000	0
Lunches	358	8.96 %	4,058	101.45 %	4,000	(58)	4,136
Recruitment	0	0.00 %	0	0.00 %	2,500	2,500	0
Contract Labor	392	7.83 %	2,865	57.31 %	5,000	5,000	0
Volunteer Recognition	335	3.35 %	335	3.35 %	10,000	2,135	5,000
Marketing Materials						9,665	0
<b>Total Operating Expenses</b>	<b>56,281</b>	<b>6.63 %</b>	<b>645,361</b>	<b>76.06 %</b>	<b>848,437</b>	<b>203,076</b>	<b>631,840</b>
<b>Furniture and Equipment</b>							
Furniture and Equipment	0	0.00 %	2,505	50.09 %	5,000	2,495	0
<b>Total Expenses</b>	<b>150,657</b>	<b>5.78 %</b>	<b>2,065,531</b>	<b>79.19 %</b>	<b>2,608,477</b>	<b>542,946</b>	<b>1,859,745</b>
<b>Net Income Before Other Inc and Exp</b>	<b>37,456</b>	<b>6.08 %</b>	<b>951,996</b>	<b>154.41 %</b>	<b>616,523</b>	<b>(335,473)</b>	<b>1,403,273</b>
<b>Other Income and Expenses</b>							
Interest Income	11,679	38.93 %	132,063	440.21 %	30,000	(102,063)	86,605
Bond Premium Amortization	0	0.00 %	(588)	8.40 %	(7,000)	(6,412)	(4,868)
Investment Service Fees	(824)	8.23 %	(9,817)	98.17 %	(10,000)	(183)	(9,431)
<b>Total Other Income and Expenses</b>	<b>10,855</b>	<b>83.50 %</b>	<b>121,658</b>	<b>935.83 %</b>	<b>13,000</b>	<b>(108,658)</b>	<b>72,306</b>
<b>Net Income</b>	<b>\$ 48,312</b>	<b>7.67 %</b>	<b>\$ 1,073,654</b>	<b>170.55 %</b>	<b>\$ 629,523</b>	<b>\$ (444,131)</b>	<b>\$ 1,475,579</b>

# State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2024

Other Activities and Miscellaneous

## Other Activities

SBG President	15,478	42.99 %	22,075	61.32 %	36,000	13,925	19,437
SBG President Elect	3,299	15.00 %	22,000	100.00 %	22,000	0	6,447
SBG President Elect Elect	0	0.00 %	0	0.00 %	1,350	1,350	1,015
SBG Treasurer	1,105	27.64 %	3,758	93.96 %	4,000	242	3,800
SBG Secretary	948	23.71 %	4,000	100.00 %	4,000	0	1,995
SBG Immediate Past President	1,385	9.55 %	11,912	82.15 %	14,500	2,588	9,233
SBG Past President	1,134	70.04 %	1,620	100.00 %	1,620	0	1,800
Exec. Comm. - Jonathan Pannell	0	0.00 %	2,478	82.61 %	3,000	522	0
Exec. Comm. - R. Gary Spencer	1,106	36.85 %	2,259	75.31 %	3,000	741	0
Exec. Comm. - Shiriki Cavitt Jones	1,085	38.18 %	2,551	85.03 %	3,000	449	0
Exec. Comm. - David S. Lipscomb	1,106	36.85 %	2,305	76.81 %	3,000	696	0
Exec. Comm. - Martin E. Valbuena	680	22.67 %	1,066	35.54 %	3,000	1,933	0
Exec. Comm. - Javoyne Hicks	2,819	93.99 %	3,000	100.00 %	3,000	0	0

## Total Officer's Expenses

	30,145	29.71 %	79,024	77.88 %	101,470	22,446	43,727
--	--------	---------	--------	---------	---------	--------	--------

## Miscellaneous

BOG and Member Meetings	371,136	66.75 %	530,767	95.46 %	556,000	25,233	400,237
Supreme Court Meetings	15,078	37.70 %	79,023	197.56 %	40,000	(39,023)	46,661
Executive Committee Meetings	280	0.56 %	7,681	15.36 %	50,000	42,319	33,891
Lawyer's Assistance Program	0	0.00 %	125,000	100.00 %	125,000	0	125,000
Sections	32,512	10.80 %	306,746	101.90 %	301,039	(5,707)	249,356
State Disciplinary Board Lawyers	2,500	7.35 %	30,000	88.24 %	34,000	4,000	30,000
Elections	0	0.00 %	17,674	93.02 %	19,000	1,327	23,411
Dues Notice	12,457	29.09 %	34,148	79.74 %	42,825	8,676	34,805
Letters of Good Standing	82	3.57 %	1,713	74.50 %	2,300	587	2,211
Bar Membership Cards	0	0.00 %	9,727	110.54 %	8,800	(927)	10,671
50 Year Certificates	4	0.06 %	4,671	71.86 %	6,500	1,829	3,823
Fastcase	0	0.00 %	297,471	100.16 %	297,000	(471)	281,418
Membership Database Project	19,815	0.00 %	57,911	0.00 %	0	(57,911)	0
State Bar Committees	10,085	40.34 %	16,070	64.28 %	25,000	8,930	18,705
Georgia Diversity Program	0	0.00 %	10,000	100.00 %	10,000	0	10,000
ABA Delegate Breakfast	0	0.00 %	2,117	84.65 %	2,500	383	2,134
1st Floor Painting	0	0.00 %	0	0.00 %	5,500	5,500	2,600
Commitment to Equality Awards	0	0.00 %	2,500	100.00 %	2,500	0	2,500
Resource Center Contribution	0	0.00 %	55,166	100.00 %	55,166	0	55,166
Bond Premium Amortization	(3,537)	(5.24) %	22,811	33.79 %	67,500	44,689	9,750
Investment Service Fees	(13,334)	(45.98) %	29,957	103.30 %	29,000	(957)	14,524

Created on 09/12/2024

State Bar of Georgia



State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

Other Activities and Miscellaneous

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
	0	0.00 %	602	24.06 %	2,500	1,898	2,500
Access to Justice/Pro Bono							
Total Miscellaneous	447,078	26.58 %	1,641,755	97.60 %	1,682,130	40,375	1,359,363
Pro Bono	17,685	8.33 %	212,216	100.00 %	212,216	0	212,216
Total Other Activities	494,908	24.80 %	1,932,995	96.85 %	1,995,816	62,821	1,615,306
Unallocated Services	36,140	0.00 %	(118,053)	0.00 %	0	118,053	(133,549)
Grand Total	2,199,924	11.99 %	17,723,696	96.56 %	18,354,301	630,605	16,229,190

State Bar of Georgia  
Expenditure Statement - Operations  
For the Year To Date Period Ending June 30, 2024

	Current Month	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Shared Office Overhead</b>							
Telephone	(8,396)	(15.90) %	52,326	99.10 %	52,800	474	95,780
Computer Software	(286)	(6.22) %	6,854	148.99 %	4,600	(2,254)	5,126
Internet Services	10,170	41.09 %	24,868	100.48 %	24,750	(118)	0
Equipment Rental	1,384	2.31 %	55,738	92.90 %	60,000	4,262	54,525
Kitchen	964	4.19 %	21,953	95.45 %	23,000	1,047	22,320
Facilities Maintenance	1,236	7.27 %	13,423	78.96 %	17,000	3,577	12,007
Payroll Service	1,468	8.90 %	16,538	100.23 %	16,500	(38)	16,189
Audit	0	0.00 %	27,023	91.60 %	29,500	2,477	37,892
Building and Other Insurance (Not Group)	18,992	7.75 %	237,469	96.93 %	245,000	7,531	209,576
Furniture/Equipment	0	0.00 %	4,668	0.00 %	0	(4,668)	0
Supplies and Printing	8,481	17.67 %	47,494	98.95 %	48,000	506	47,880
<b>Subtotal</b>	<b>34,013</b>	<b>6.53 %</b>	<b>508,354</b>	<b>97.54 %</b>	<b>521,150</b>	<b>12,796</b>	<b>501,295</b>
<b>Other Services</b>							
Accounting	45,916	8.25 %	546,817	98.30 %	556,295	9,478	513,676
Human Resources	18,693	6.93 %	273,786	101.54 %	269,646	(4,140)	253,755
Mailroom	6,190	7.14 %	84,164	97.01 %	86,757	2,593	82,009
Receptionist	3,675	5.00 %	46,838	63.70 %	73,534	26,696	65,882
Information Technology	123,224	14.68 %	768,833	91.59 %	839,463	70,630	673,616
<b>Subtotal Other Services</b>	<b>197,698</b>	<b>10.83 %</b>	<b>1,720,438</b>	<b>94.23 %</b>	<b>1,825,695</b>	<b>105,257</b>	<b>1,588,938</b>
<b>Total Shared Office Overhead</b>	<b>231,711</b>	<b>9.87 %</b>	<b>2,228,792</b>	<b>94.97 %</b>	<b>2,346,845</b>	<b>118,053</b>	<b>2,090,233</b>
<b>Total Allocated Services</b>	<b>(195,570)</b>	<b>8.33 %</b>	<b>(2,346,845)</b>	<b>100.00 %</b>	<b>(2,346,845)</b>	<b>0</b>	<b>(2,223,782)</b>
<b>Unallocated Services</b>	<b>36,140</b>	<b>0.00 %</b>	<b>(118,053)</b>	<b>0.00 %</b>	<b>0</b>	<b>118,053</b>	<b>(133,549)</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Year To Date Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Related Organizations Shared</b>							
<b>Office Allocations</b>							
Georgia Bar Foundation	\$ 333	8.33 %	\$ 4,000	100.00 %	\$ 4,000	\$ 0	4,000
Continuing Legal Education	6,849	11.10 %	63,390	102.77 %	61,681	(1,709)	67,845
TILPP	(37,694)	(91.67) %	0	0.00 %	41,121	41,121	29,075
Pro Bono	4,292	8.33 %	51,503	100.00 %	51,503	0	49,598
Professionalism	333	8.33 %	4,000	100.00 %	4,000	0	4,000
Sections	6,850	11.11 %	63,391	102.77 %	61,681	(1,710)	58,153
<b>Subtotal</b>	<b>(19,037)</b>	<b>(8.50) %</b>	<b>186,284</b>	<b>83.17 %</b>	<b>223,986</b>	<b>37,702</b>	<b>212,671</b>
<b>State Bar Departments - Shared</b>							
<b>Office Allocations</b>							
Memberships	11,416	11.10 %	105,651	102.77 %	102,802	(2,849)	96,921
Meetings	4,567	11.11 %	42,261	102.77 %	41,121	(1,140)	38,768
Executives	41,097	11.10 %	380,347	102.77 %	370,090	(10,257)	368,300
General Counsel	67,354	11.10 %	623,340	102.77 %	606,531	(16,809)	562,142
Communications	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Fee Arbitration	9,133	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Law Practice Management	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Savannah Office	2,283	11.11 %	21,130	102.77 %	20,560	(570)	19,384
Tifton Office	1,712	11.10 %	15,847	102.77 %	15,420	(427)	14,538
Younger Lawyers	4,567	11.11 %	42,261	102.77 %	41,121	(1,140)	38,768
Unauthorized Practice of Law	13,699	11.10 %	126,781	102.77 %	123,362	(3,419)	116,305
Law Related Education	6,849	11.10 %	63,390	102.77 %	61,681	(1,709)	58,153
High School Mock Trial	2,284	11.11 %	21,130	102.77 %	20,560	(570)	19,384
ICLE	41,096	11.10 %	380,343	102.77 %	370,087	(10,256)	348,916
Conference Center	9,133	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Legislative Program	(18,847)	(91.67) %	0	(0.00) %	20,560	20,560	19,384
<b>Subtotal</b>	<b>214,607</b>	<b>10.11 %</b>	<b>2,160,561</b>	<b>101.78 %</b>	<b>2,122,859</b>	<b>(37,702)</b>	<b>2,011,111</b>
<b>Total Allocated Services</b>	<b>\$ 195,570</b>	<b>8.33 %</b>	<b>\$ 2,346,845</b>	<b>100.00 %</b>	<b>\$ 2,346,845</b>	<b>\$ 0</b>	<b>\$ 2,223,782</b>

Sections

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 14,029	8.55 %	\$ 176,522	107.63 %	\$ 164,011	\$ (12,511)	\$ 134,463
Overtime	1,284	183.46 %	2,383	340.38 %	700	(1,683)	500
Taxes and Benefits	4,835	9.24 %	41,158	78.63 %	52,343	11,185	36,274
Pension	627	7.94 %	7,858	99.61 %	7,889	31	7,059
<b>Total Personnel Services</b>	<b>20,775</b>	<b>9.24 %</b>	<b>227,921</b>	<b>101.32 %</b>	<b>224,943</b>	<b>(2,978)</b>	<b>178,296</b>
<b>Operating Expenses</b>							
Shared Office Allocation	6,850	11.11 %	63,391	102.77 %	61,681	(1,710)	58,153
Postage and Freight	74	24.64 %	639	213.01 %	300	(339)	868
Supplies	21	2.14 %	3,159	315.87 %	1,000	(2,159)	1,614
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	2,873	72.20 %	3,980	1,107	2,309
Dues and Memberships	0	0.00 %	0	0.00 %	135	135	0
Seminars and Training	0	0.00 %	0	0.00 %	1,000	1,000	0
Miscellaneous	424	42.32 %	493	49.27 %	1,000	507	541
Attorney and Staff Travel	4,293	95.42 %	4,793	106.51 %	4,500	(293)	3,880
Luncheons	0	0.00 %	0	0.00 %	0	0	75
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,448
Computer Software	0	0.00 %	0	0.00 %	0	0	729
Special Meetings	0	0.00 %	1,889	188.92 %	1,000	(889)	0
<b>Total Operating Expenses</b>	<b>11,737</b>	<b>15.55 %</b>	<b>78,137</b>	<b>103.50 %</b>	<b>75,496</b>	<b>(2,641)</b>	<b>70,517</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>688</b>	<b>114.59 %</b>	<b>600</b>	<b>(88)</b>	<b>543</b>
<b>Total Expenses</b>	<b>\$ 32,512</b>	<b>10.80 %</b>	<b>\$ 306,746</b>	<b>101.90 %</b>	<b>\$ 301,039</b>	<b>\$ (5,707)</b>	<b>\$ 249,355</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
After Hours Fees	180	2.57 %	9,633	137.61 %	\$ 7,000	\$ (2,633)	\$ 8,415
Beverage Service	0	0.00 %	524	52.40 %	1,000	477	518
Cleaning Fees	210	21.00 %	1,432	143.25 %	1,000	(433)	1,725
Audio Video Support	0	0.00 %	2,228	222.75 %	1,000	(1,228)	2,025
<b>Total Revenues</b>	<b>390</b>	<b>3.90 %</b>	<b>13,817</b>	<b>138.17 %</b>	<b>10,000</b>	<b>(3,817)</b>	<b>12,683</b>
<b>Personnel Services</b>							
Salaries	16,683	7.00 %	240,245	100.76 %	238,434	(1,811)	231,413
Overtime	0	0.00 %	4,257	37.02 %	11,500	7,243	5,881
Taxes and Benefits	9,167	9.82 %	91,014	97.49 %	93,357	2,343	81,281
Pension	686	4.57 %	14,456	96.24 %	15,021	566	14,797
<b>Total Personnel Services</b>	<b>26,536</b>	<b>7.41 %</b>	<b>349,972</b>	<b>97.67 %</b>	<b>358,312</b>	<b>8,341</b>	<b>333,372</b>
<b>Operating Expenses</b>							
Shared Office Allocation	9,132	11.10 %	84,520	102.77 %	82,241	(2,279)	77,537
Postage and Freight	0	0.00 %	2	0.00 %	0	(2)	0
Supplies	669	22.95 %	3,108	106.68 %	2,913	(195)	2,477
Subscriptions and Books	0	0.00 %	5,969	52.59 %	11,350	5,381	5,935
Miscellaneous	0	0.00 %	118	11.76 %	1,000	882	120
Attorney and Staff Travel	0	0.00 %	0	0.00 %	500	500	363
Luncheons	67	0.00 %	66	0.00 %	0	(66)	0
Credit Card Discount and Fees	4	0.00 %	114	0.00 %	0	(114)	138
Computer Software	0	0.00 %	1,338	0.00 %	0	(1,338)	0
After Hours Security	0	0.00 %	0	0.00 %	1,000	1,000	0
Contract Programming	0	0.00 %	0	0.00 %	500	500	312
Equipment Maintenance and Rental	8	0.18 %	4,043	89.85 %	4,500	457	4,606
Furniture Repairs and Maintenance	875	8.75 %	12,441	124.41 %	10,000	(2,441)	13,050
Kitchen	730	9.12 %	5,894	73.68 %	8,000	2,106	7,024
<b>Total Operating Expenses</b>	<b>11,485</b>	<b>9.41 %</b>	<b>117,613</b>	<b>96.40 %</b>	<b>122,004</b>	<b>4,391</b>	<b>111,562</b>
<b>Total Expenses</b>	<b>38,021</b>	<b>7.92 %</b>	<b>467,585</b>	<b>97.35 %</b>	<b>480,316</b>	<b>12,731</b>	<b>444,934</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>9,440</b>	<b>117.99 %</b>	<b>8,000</b>	<b>(1,440)</b>	<b>0</b>
<b>Net Income</b>	<b>\$ (37,631)</b>	<b>7.87 %</b>	<b>\$ (463,208)</b>	<b>96.84 %</b>	<b>\$ (478,316)</b>	<b>\$ (15,108)</b>	<b>\$ (432,251)</b>

Other Bar Center Operations

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Interest and Dividend Income	\$ 37,474	38.24 %	\$ 132,667	135.37 %	\$ 98,000	\$ (34,667)	\$ 115,246
Gain/Loss Investment Interest Allocation	21,798	0.00 %	253,476	0.00 %	0	(263,476)	55,035
Bar Center Assessments	0	0.00 %	0	0.00 %	200	200	165
CCLC Contributions to Bar Center	893,988	68.77 %	1,393,988	107.23 %	1,300,000	(93,988)	1,400,631
<b>Total Revenues</b>	<b>953,260</b>	<b>68.18 %</b>	<b>1,790,131</b>	<b>128.03 %</b>	<b>1,398,200</b>	<b>(391,931)</b>	<b>1,571,077</b>
<b>Operating Expenses</b>							
Bond Premium Amortization	3,159	9.87 %	17,366	54.27 %	32,000	14,634	15,712
Investment Service Fees	6,601	30.01 %	24,138	109.72 %	22,000	(2,138)	26,697
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	850
Museum and 1st Floor Exhibit	0	0.00 %	6,453	129.07 %	5,000	(1,453)	0
Audio Video, Furniture and Equipment	0	0.00 %	219,552	6,272.91 %	3,500	(216,052)	18,990
Building Rehabilitation	344,065	0.00 %	726,161	0.00 %	0	(726,161)	47,347
2nd Floor Buildout	0	0.00 %	0	0.00 %	0	0	30,025
<b>Total Operating Expenses</b>	<b>353,825</b>	<b>566.12 %</b>	<b>993,670</b>	<b>1,589.87 %</b>	<b>62,500</b>	<b>(931,170)</b>	<b>139,621</b>
<b>Total Expenses</b>	<b>353,825</b>	<b>566.12 %</b>	<b>993,670</b>	<b>1,589.87 %</b>	<b>62,500</b>	<b>(931,170)</b>	<b>139,621</b>
<b>Net Income</b>	<b>\$ 599,435</b>	<b>44.88 %</b>	<b>\$ 796,462</b>	<b>59.63 %</b>	<b>\$ 1,335,700</b>	<b>\$ 539,238</b>	<b>\$ 1,431,456</b>

Rental

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Income Rental Operations	\$ 77,193	8.39 %	\$ 926,110	100.66 %	\$ 920,000	\$ (6,110)	\$ 919,520
Total Revenues	77,193	8.39 %	926,110	100.66 %	920,000	(6,110)	919,520
Operating Expenses							
Equipment and Supplies	0	0.00 %	0	0.00 %	0	0	841
Personnel Management Salary	3,361	5.60 %	39,288	65.48 %	60,000	20,712	12,945
Administrative Taxes and Benefits	1,517	24.75 %	14,793	241.43 %	6,127	(8,666)	1,190
Travel	0	0.00 %	0	0.00 %	100	100	185
Supplies	49	49.89 %	322	322.27 %	100	(222)	0
Telephone Expense	253	16.82 %	2,491	166.06 %	1,500	(991)	5,894
Management Fees	5,537	7.91 %	65,476	93.54 %	70,000	4,524	63,569
Bank Fees	119	6.82 %	1,474	81.93 %	1,800	326	1,350
R&M Salaries	19,165	9.51 %	197,748	98.09 %	201,600	3,852	190,698
R&M Taxes and Benefits	6,446	7.33 %	69,992	79.54 %	88,000	18,008	64,992
R&M HVAC	(4,714)	(2.36) %	54,904	27.45 %	200,000	145,096	77,878
R&M Plumbing	4,673	61.49 %	17,354	228.34 %	7,600	(9,754)	101,417
R&M Fire/Life Prevention	8,688	72.85 %	19,135	160.46 %	11,925	(7,210)	10,753
R&M Electrical/Lamps	1,558	9.16 %	8,132	47.83 %	17,000	8,868	15,156
R&M Water Treatment	944	7.86 %	11,846	98.71 %	12,000	154	10,673
R&M Life Safety Contract	11,805	98.37 %	23,922	199.35 %	12,000	(11,922)	7,567
R&M Tools/Radios	0	0.00 %	791	31.64 %	2,500	1,709	0
R&M Elevators	2,201	7.34 %	33,577	111.93 %	30,000	(3,577)	24,966
R&M Pest Control	320	9.14 %	3,720	106.29 %	3,500	(220)	3,480
R&M Rubbish Removal	2,289	17.61 %	15,125	116.34 %	13,000	(2,125)	13,269
R&M Other: Locks and Keys	0	0.00 %	0	0.00 %	300	300	0
R&M Painting	5,379	59.77 %	5,379	59.77 %	9,000	3,621	6,555
R&M Other: General Building	2,892	85.08 %	7,673	225.69 %	3,400	(4,273)	51,959
R&M Lobby	0	0.00 %	1,701	56.68 %	3,000	1,299	0
Uniforms	0	0.00 %	1,167	116.68 %	1,000	(167)	696
Electric	56,966	17.26 %	402,894	122.09 %	330,000	(72,894)	327,738
Water	2,102	3.50 %	45,652	76.09 %	60,000	14,348	66,345
Gas	(1,715)	(5.36) %	72,74	72.74 %	87,000	8,723	30,932
Security Contract	27,418	7.35 %	367,294	98.47 %	373,000	5,706	340,602
Cleaning	13,131	7.06 %	175,964	94.60 %	186,000	10,036	176,181
Grounds Supplies and Maintenance	464	6.64 %	79,69	79.69 %	7,000	1,422	6,574
Insurance	6,293	7.78 %	75,507	93.39 %	80,850	5,343	67,439
Total Operating Expenses	177,141	9.71 %	1,692,176	92.76 %	1,824,302	132,126	1,683,844

Rental

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Total Expenses	177,141	9.71 %	1,692,176	92.76 %	1,824,302	132,126	1,683,844
Net Income	\$ (99,948)	11.05 %	\$ (766,066)	84.71 %	\$ (904,302)	\$ (138,236)	\$ (764,324)



Parking

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Monthly Parking Operations	\$ 11,605	17.85 %	\$ 115,838	178.21 %	\$ 65,000	\$ (50,838)	\$ 70,196
Daily Parking Operations	4,077	20.39 %	54,862	274.31 %	20,000	(34,862)	31,934
Special Events Parking Operations	36,819	16.36 %	413,350	183.71 %	225,000	(188,350)	367,388
<b>Total Revenues</b>	<b>52,501</b>	<b>16.94 %</b>	<b>584,050</b>	<b>188.40 %</b>	<b>310,000</b>	<b>(274,050)</b>	<b>469,518</b>
<b>Operating Expenses</b>							
Salaries	7,018	7.05 %	98,946	99.34 %	99,600	654	110,937
Payroll Taxes	987	7.05 %	13,856	98.97 %	14,000	144	15,467
Workers' Compensation	917	6.28 %	12,855	88.05 %	14,600	1,745	14,341
Medical Ins/Benefits	1,257	5.99 %	17,677	84.17 %	21,000	3,323	19,762
Signs	0	0.00 %	0	0.00 %	0	0	549
Uniforms	92	38.12 %	91	38.12 %	240	149	638
Repairs and Maintenance	811	3.22 %	24,913	98.86 %	25,200	287	27,667
Tickets	0	0.00 %	0	0.00 %	600	600	0
Cell Phone/Beeper	60	3.19 %	666	35.04 %	1,900	1,234	611
Office Expenses	3,470	37.43 %	10,290	111.00 %	9,270	(1,020)	26,939
Invoicing Expenses	446	10.42 %	5,344	125.00 %	4,275	(1,069)	4,721
Bank Charges	386	9.65 %	4,770	119.24 %	4,000	(770)	4,394
Credit Card Fees	665	9.78 %	7,836	115.25 %	6,800	(1,036)	8,722
Garage Insurance	1,148	10.07 %	12,110	106.22 %	11,400	(710)	10,367
Business License	0	0.00 %	873	72.73 %	1,200	327	1,004
Management Fee	350	8.33 %	4,200	100.00 %	4,200	0	4,200
Security	3,710	4.64 %	63,210	79.01 %	80,000	16,790	71,455
Payroll Processing	226	6.46 %	3,080	88.01 %	3,500	420	3,082
Equipment and Supplies	244	28.64 %	943	111.00 %	850	(93)	0
Miscellaneous	186	37.20 %	186	37.20 %	500	314	395
Cleaning	300	0.00 %	3,600	0.00 %	0	(3,600)	900
Fire Safety	0	0.00 %	0	0.00 %	2,500	2,500	1,633
Incentive Management Fees	500	12.50 %	6,000	150.00 %	4,000	(2,000)	4,991
<b>Total Operating Expenses</b>	<b>22,773</b>	<b>7.35 %</b>	<b>291,446</b>	<b>94.13 %</b>	<b>309,635</b>	<b>18,189</b>	<b>332,775</b>
<b>Total Expenses</b>	<b>22,773</b>	<b>7.35 %</b>	<b>291,446</b>	<b>94.13 %</b>	<b>309,635</b>	<b>18,189</b>	<b>332,775</b>
<b>Net Income</b>	<b>\$ 29,728</b>	<b>8,144.67 %</b>	<b>\$ 292,603</b>	<b>80,165.28 %</b>	<b>\$ 365</b>	<b>\$ (292,238)</b>	<b>\$ 136,743</b>

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Interest and Dividend Income	\$ 4,053	5.40 %	\$ 103,395	137.86 %	\$ 75,000	\$ (28,395)	\$ 73,050
Gain/Loss on Investments	0	0.00 %	(9,930)	0.00 %	0	9,930	(31,075)
Sponsor Fees	81,417	6.26 %	1,416,509	108.96 %	1,300,000	(116,509)	1,416,297
Late Penalties	80,164	17.81 %	691,968	153.77 %	450,000	(241,968)	715,723
Attorneys Fees	34,414	11.47 %	370,163	123.39 %	300,000	(70,163)	385,020
<b>Total Revenues</b>	<b>200,048</b>	<b>9.41 %</b>	<b>2,572,105</b>	<b>121.04 %</b>	<b>2,125,000</b>	<b>(447,105)</b>	<b>2,559,015</b>
<b>Personnel Services</b>							
Salaries	23,305	8.83 %	297,185	112.54 %	264,076	(33,109)	277,393
Overtime	0	0.00 %	0	0.00 %	5,000	5,000	0
Taxes and Benefits	7,319	8.68 %	87,751	104.03 %	84,354	(3,397)	80,396
Pension	464	2.59 %	16,932	94.25 %	17,964	1,032	19,356
<b>Total Personnel Services</b>	<b>31,088</b>	<b>8.37 %</b>	<b>401,868</b>	<b>108.21 %</b>	<b>371,394</b>	<b>(30,474)</b>	<b>377,145</b>
<b>Operating Expenses</b>							
Shared Office Allocation	6,849	11.10 %	63,390	102.77 %	61,681	(1,709)	67,845
Postage and Freight	27	0.68 %	869	21.74 %	4,000	3,131	1,516
Printing	0	0.00 %	0	0.00 %	150	150	0
Supplies	53	2.64 %	425	21.21 %	2,000	1,575	386
Telephone	75	7.50 %	900	90.00 %	1,000	100	900
Subscriptions and Books	0	0.00 %	192	32.07 %	600	408	175
Dues and Memberships	0	0.00 %	900	90.00 %	1,000	100	900
Seminars and Training	0	0.00 %	715	71.50 %	1,000	285	250
Miscellaneous	0	0.00 %	254	16.93 %	1,500	1,246	359
Attorney and Staff Travel	1,899	31.65 %	3,140	52.33 %	6,000	2,860	3,908
Lunches	2,447	81.55 %	3,132	104.40 %	3,000	(132)	1,760
Bank Fees	0	0.00 %	0	0.00 %	200	200	19
Credit Card Discount and Fees	3,148	10.49 %	37,903	126.34 %	30,000	(7,903)	39,360
Computer Software	0	0.00 %	714	357.00 %	200	(514)	350
Contract Programming	8,175	40.88 %	10,125	50.63 %	20,000	9,875	9,256
CLE Contribution to the Bar Center	893,988	68.77 %	1,393,988	107.23 %	1,300,000	(93,988)	1,400,631
Grants	0	0.00 %	50,000	20.00 %	250,000	200,000	200,187
Scholarships	1,450	14.50 %	5,720	57.20 %	10,000	4,280	3,840
Pro Bono Vouchers	0	0.00 %	30,000	100.00 %	30,000	0	30,000
Bond Premium Amortization	1,268	3.62 %	11,239	32.11 %	35,000	23,761	25,620

Note: CLE Contribution to the Bar Center is comprised of the following two items: (1) \$500,000 and (2) \$2 of every \$4 per credit hour paid by attorneys and/or sponsors.

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Investment Service Fees	0	0.00 %	19,823	99.11 %	20,000	177	19,192
Audit	0	0.00 %	4,500	100.00 %	4,500	0	4,500
Total Operating Expenses	919,379	51.60 %	1,637,929	91.92 %	1,781,831	143,902	1,810,954
Total Expenses	950,468	44.14 %	2,039,796	94.73 %	2,153,225	113,429	2,188,099
Net Income	\$ (750,420)	2,658.71 %	\$ 532,309	(1,885.95) %	\$ (28,225)	\$ (560,534)	\$ 370,916

State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	0	0.00 %	7,628	4.28 %	178,384	170,756	137,400
Overtime	0	0.00 %	0	0.00 %	2,000	2,000	0
Taxes and Benefits	0	0.00 %	2,634	6.41 %	41,082	38,448	29,305
Pension	(11,521)	(91.67) %	0	0.00 %	12,568	12,568	1,667
<b>Total Personnel Services</b>	<b>(11,521)</b>	<b>(4.92) %</b>	<b>10,262</b>	<b>4.38 %</b>	<b>234,034</b>	<b>223,772</b>	<b>168,372</b>
<b>Operating Expenses</b>							
Shared Office Allocation	(37,694)	(91.67) %	0	0.00 %	41,121	41,121	29,075
Postage and Freight	0	0.00 %	0	0.00 %	200	200	1
Printing	0	0.00 %	0	0.00 %	250	250	0
Supplies	0	0.00 %	0	0.00 %	1,300	1,300	49
Telephone	0	0.00 %	0	0.00 %	900	900	900
Subscriptions and Books	0	0.00 %	0	0.00 %	500	500	0
Dues and Memberships	0	0.00 %	0	0.00 %	1,000	1,000	455
Seminars and Training	0	0.00 %	0	0.00 %	1,000	1,000	620
Miscellaneous	0	0.00 %	0	0.00 %	1,000	1,000	0
Attorney and Staff Travel	0	0.00 %	0	0.00 %	9,500	9,500	3,971
Marshall Mentor Award	0	0.00 %	0	0.00 %	3,000	3,000	0
Luncheons	0	0.00 %	0	0.00 %	500	500	0
Computer Software	0	0.00 %	0	0.00 %	850	850	364
Contract Programming	0	0.00 %	0	0.00 %	2,500	2,500	650
<b>Total Operating Expenses</b>	<b>(37,694)</b>	<b>(59.25) %</b>	<b>0</b>	<b>0.00 %</b>	<b>63,621</b>	<b>63,621</b>	<b>36,085</b>
<b>Total Expenses</b>	<b>(49,215)</b>	<b>(16.53) %</b>	<b>10,262</b>	<b>3.45 %</b>	<b>297,655</b>	<b>287,393</b>	<b>204,457</b>
<b>Net Income</b>	<b>\$ 49,215</b>	<b>(16.53) %</b>	<b>\$ (10,262)</b>	<b>3.45 %</b>	<b>\$ (297,655)</b>	<b>\$ (287,393)</b>	<b>\$ (204,457)</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 25,975	14.06 %	\$ 38,643	20.91 %	\$ 184,782	\$ 146,139	\$ 151,438
Taxes and Benefits	2,671	5.15 %	3,474	6.70 %	51,854	48,380	47,866
Pension	(11,816)	(76.55) %	2,334	15.12 %	15,435	13,101	13,962
<b>Total Personnel Services</b>	<b>16,830</b>	<b>6.68 %</b>	<b>44,451</b>	<b>17.63 %</b>	<b>252,071</b>	<b>207,620</b>	<b>213,266</b>
<b>Operating Expenses</b>							
Shared Office Allocation	(18,847)	(91.67) %	0	(0.00) %	20,560	20,560	19,384
Postage and Freight	0	0.00 %	15	15.26 %	100	85	4
Supplies	0	0.00 %	0	0.00 %	250	250	147
Telephone	0	0.00 %	0	0.00 %	900	900	900
Subscriptions and Books	0	0.00 %	193	19.24 %	1,000	807	627
Dues and Memberships	0	0.00 %	150	15.00 %	1,000	850	715
Seminars and Training	0	0.00 %	0	0.00 %	1,000	1,000	300
Miscellaneous	536	8.93 %	506	506.36 %	100	(406)	0
Attorney and Staff Travel	16,113	107.42 %	2,377	39.63 %	6,000	3,623	5,993
Luncheons	0	0.00 %	16,114	107.42 %	15,000	(1,114)	17,093
Computer Software	0	0.00 %	0	0.00 %	0	0	175
Contract Programming	18,750	6.87 %	273,000	100.00 %	273,000	0	273,000
Guests/Meetings	7,232	144.64 %	10,421	208.44 %	5,000	(5,421)	5,601
Grassroots Program	6,471	64.71 %	8,052	80.51 %	10,000	1,948	509
Bond Premium Amortization	895	12.78 %	4,958	70.84 %	7,000	2,042	3,901
Investment Service Fees	1,869	37.39 %	6,978	139.56 %	5,000	(1,978)	6,783
<b>Total Operating Expenses</b>	<b>33,019</b>	<b>9.55 %</b>	<b>322,764</b>	<b>93.31 %</b>	<b>345,910</b>	<b>23,146</b>	<b>335,132</b>
<b>Total Expenses</b>	<b>\$ 49,849</b>	<b>8.34 %</b>	<b>\$ 367,215</b>	<b>61.41 %</b>	<b>\$ 597,981</b>	<b>\$ 230,766</b>	<b>\$ 548,398</b>

Accounting

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	28,124	7.63 %	366,346	99.32 %	\$ 368,836	\$ 2,490	\$ 348,176
Taxes and Benefits	15,854	12.47 %	127,917	100.63 %	127,113	(804)	109,872
Pension	1,126	4.67 %	23,214	96.34 %	24,096	882	24,427
<b>Total Personnel Services</b>	<b>45,104</b>	<b>8.67 %</b>	<b>517,477</b>	<b>99.51 %</b>	<b>520,045</b>	<b>2,568</b>	<b>482,475</b>
<b>Operating Expenses</b>							
Postage and Freight	154	12.82 %	1,447	120.57 %	1,200	(247)	1,558
Supplies	489	25.75 %	1,528	80.45 %	1,900	372	1,185
Subscriptions and Books	0	0.00 %	0	0.00 %	1,200	1,200	0
Seminars and Training	0	0.00 %	0	0.00 %	1,900	1,900	1,198
Miscellaneous	0	0.00 %	441	88.18 %	500	59	303
Attorney and Staff Travel	0	0.00 %	0	0.00 %	100	100	0
Luncheons	169	28.09 %	484	80.61 %	600	116	367
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,151
Computer Software	0	0.00 %	25,439	90.86 %	28,000	2,561	25,439
Contract Programming	0	0.00 %	0	0.00 %	250	250	0
<b>Total Operating Expenses</b>	<b>812</b>	<b>2.28 %</b>	<b>29,339</b>	<b>82.30 %</b>	<b>35,650</b>	<b>6,311</b>	<b>31,201</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>600</b>	<b>600</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 45,916</b>	<b>8.25 %</b>	<b>\$ 546,817</b>	<b>98.30 %</b>	<b>\$ 556,295</b>	<b>\$ 9,478</b>	<b>\$ 513,676</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 35,686	7.59 %	\$ 373,845	79.56 %	\$ 469,881	\$ 96,036	\$ 326,781
Overtime	0	0.00 %	113	22.66 %	500	387	186
Taxes and Benefits	22,595	15.23 %	117,049	78.92 %	148,321	31,272	94,967
Pension	1,038	4.29 %	23,194	95.96 %	24,171	977	16,835
<b>Total Personnel Services</b>	<b>59,319</b>	<b>9.23 %</b>	<b>514,201</b>	<b>79.98 %</b>	<b>642,873</b>	<b>128,672</b>	<b>438,769</b>
<b>Operating Expenses</b>							
Postage and Freight	0	0.00 %	261	173.81 %	150	(111)	78
Supplies	0	0.00 %	3,611	103.19 %	3,500	(111)	3,438
Unauthorized Access	0	0.00 %	15,159	0.00 %	0	(15,159)	92,154
Telephone	150	8.33 %	1,800	100.00 %	1,800	0	1,650
Subscriptions and Books	0	0.00 %	385	76.96 %	500	115	350
Dues and Memberships	0	0.00 %	0	0.00 %	500	500	0
Seminars and Training	0	0.00 %	6,188	93.80 %	6,590	402	4,130
Miscellaneous	0	0.00 %	0	0.00 %	2,000	2,000	206
Recruitment Costs	0	0.00 %	37,500	0.00 %	0	(37,500)	0
Attorney and Staff Travel	0	0.00 %	0	0.00 %	3,500	3,500	1,796
Luncheons	0	0.00 %	59	29.33 %	200	141	268
Computer Hardware	1,466	8.88 %	10,642	64.50 %	16,500	5,858	6,346
Computer Software	15,967	12.32 %	117,323	90.49 %	129,650	12,327	85,434
Contract Labor	2,105	12.84 %	8,590	52.38 %	16,400	7,810	25,227
Contract Programming	44,175	368.13 %	50,581	421.51 %	12,000	(38,581)	10,576
Internet Services	42	1.27 %	2,029	61.47 %	3,300	1,271	3,194
<b>Total Operating Expenses</b>	<b>63,905</b>	<b>32.51 %</b>	<b>254,128</b>	<b>129.27 %</b>	<b>196,590</b>	<b>(57,538)</b>	<b>234,847</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>504</b>	<b>0.00 %</b>	<b>0</b>	<b>(504)</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 123,224</b>	<b>14.68 %</b>	<b>\$ 768,832</b>	<b>91.59 %</b>	<b>\$ 839,463</b>	<b>\$ 70,631</b>	<b>\$ 673,616</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	13,616	7.65 %	177,354	99.60 %	\$ 178,066	\$ 712	\$ 168,808
Taxes and Benefits	4,674	7.41 %	60,491	95.85 %	63,111	2,620	59,907
Pension	546	4.51 %	11,627	96.18 %	12,089	462	8,167
<b>Total Personnel Services</b>	<b>18,836</b>	<b>7.44 %</b>	<b>249,472</b>	<b>98.50 %</b>	<b>253,266</b>	<b>3,794</b>	<b>236,882</b>
<b>Operating Expenses</b>							
Postage and Freight	0	0.00 %	126	83.98 %	150	24	195
Printing	0	0.00 %	0	0.00 %	50	50	0
Supplies	333	27.72 %	911	75.93 %	1,200	289	517
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	542	93.45 %	580	38	307
Dues and Memberships	0	0.00 %	244	61.00 %	400	156	229
Seminars and Training	0	0.00 %	7,688	512.55 %	1,500	(6,188)	1,967
Miscellaneous	0	0.00 %	0	0.00 %	500	500	110
Flexible Spending	(952)	0.00 %	354	0.00 %	0	(354)	(1,608)
Recruitment Costs	0	0.00 %	7,522	150.45 %	5,000	(2,522)	9,502
Background Checks	0	0.00 %	1,170	146.29 %	800	(370)	1,348
Engagement Committee	400	8.01 %	4,812	96.22 %	5,000	188	3,407
Lunches	0	0.00 %	0	0.00 %	300	300	0
Computer Software	0	0.00 %	46	0.00 %	0	(46)	0
<b>Total Operating Expenses</b>	<b>(144)</b>	<b>(0.88) %</b>	<b>24,315</b>	<b>148.44 %</b>	<b>16,380</b>	<b>(7,935)</b>	<b>16,874</b>
<b>Total Expenses</b>	<b>\$ 18,692</b>	<b>6.93 %</b>	<b>\$ 273,786</b>	<b>101.54 %</b>	<b>\$ 269,646</b>	<b>\$ (4,140)</b>	<b>\$ 253,755</b>



State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	3,462	8.05 %	32,453	75.49 %	\$ 42,989	\$ 10,536	\$ 40,615
Overtime	0	0.00 %	0	0.00 %	650	650	0
Taxes and Benefits	2,592	9.83 %	13,745	52.12 %	26,372	12,627	22,501
Pension	(2,404)	(91.67) %	0	0.00 %	2,623	2,623	2,517
<b>Total Personnel Services</b>	<b>3,650</b>	<b>5.02 %</b>	<b>46,198</b>	<b>63.60 %</b>	<b>72,634</b>	<b>26,436</b>	<b>65,633</b>
<b>Operating Expenses</b>							
Supplies	26	4.28 %	329	54.86 %	600	271	250
Seminars and Training	0	0.00 %	249	0.00 %	0	(249)	0
Miscellaneous	0	0.00 %	62	20.53 %	300	238	0
<b>Total Operating Expenses</b>	<b>26</b>	<b>2.85 %</b>	<b>640</b>	<b>71.08 %</b>	<b>900</b>	<b>260</b>	<b>250</b>
<b>Total Expenses</b>	<b>\$ 3,675</b>	<b>5.00 %</b>	<b>\$ 46,838</b>	<b>63.70 %</b>	<b>\$ 73,534</b>	<b>\$ 26,696</b>	<b>\$ 65,882</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	4,751	7.62 %	61,881	99.24 %	\$ 62,357	\$ 476	\$ 59,158
Overtime	0	0.00 %	0	0.00 %	350	350	11
Taxes and Benefits	744	4.10 %	16,747	92.37 %	18,131	1,384	17,748
Pension	148	3.93 %	3,603	95.60 %	3,769	166	3,667
<b>Total Personnel Services</b>	<b>5,643</b>	<b>6.67 %</b>	<b>82,231</b>	<b>97.19 %</b>	<b>84,607</b>	<b>2,376</b>	<b>80,584</b>
<b>Operating Expenses</b>							
Supplies	453	47.63 %	793	83.44 %	950	157	0
Miscellaneous	95	7.92 %	1,140	95.00 %	1,200	60	1,425
<b>Total Operating Expenses</b>	<b>548</b>	<b>25.47 %</b>	<b>1,933</b>	<b>89.89 %</b>	<b>2,150</b>	<b>217</b>	<b>1,425</b>
<b>Total Expenses</b>	<b>\$ 6,191</b>	<b>7.14 %</b>	<b>\$ 84,164</b>	<b>97.01 %</b>	<b>\$ 86,757</b>	<b>\$ 2,593</b>	<b>\$ 82,009</b>

Membership

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 22,567	6.83 %	\$ 302,814	91.71 %	\$ 330,189	\$ 27,375	\$ 313,333
Overtime	0	0.00 %	144	7.20 %	2,000	1,856	0
Taxes and Benefits	13,826	10.24 %	128,832	95.42 %	135,019	6,187	106,428
Pension	(2,004)	(9.28) %	17,778	82.38 %	21,580	3,802	21,201
<b>Total Personnel Services</b>	<b>34,389</b>	<b>7.04 %</b>	<b>449,568</b>	<b>91.98 %</b>	<b>488,788</b>	<b>39,220</b>	<b>440,962</b>
<b>Operating Expenses</b>							
Shared Office Allocation	11,416	11.10 %	105,651	102.77 %	102,802	(2,849)	96,921
Postage and Freight	226	5.02 %	4,134	91.87 %	4,500	366	3,955
Supplies	0	0.00 %	375	33.33 %	1,125	750	887
Subscriptions and Books	0	0.00 %	1,198	79.89 %	1,500	302	301
Miscellaneous	0	0.00 %	32	12.80 %	250	218	68
Attorney and Staff Travel	0	0.00 %	0	0.00 %	0	0	10
Luncheons	0	0.00 %	290	290.00 %	100	(190)	63
Credit Card Discount and Fees	116,698	43.22 %	303,676	112.47 %	270,000	(33,676)	311,946
Computer Software	0	0.00 %	0	0.00 %	0	0	874
Membership Software License	7,173	8.44 %	117,491	138.22 %	85,000	(32,491)	71,540
Contract Programming	675	33.75 %	675	33.75 %	2,000	1,325	1,200
<b>Total Operating Expenses</b>	<b>136,188</b>	<b>29.15 %</b>	<b>533,522</b>	<b>114.18 %</b>	<b>467,277</b>	<b>(66,245)</b>	<b>487,765</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>904</b>	<b>0.00 %</b>	<b>0</b>	<b>(904)</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 170,577</b>	<b>17.84 %</b>	<b>\$ 983,993</b>	<b>102.92 %</b>	<b>\$ 956,065</b>	<b>\$ (27,928)</b>	<b>\$ 928,727</b>

Meetings

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 13,176	7.73 %	\$ 169,478	99.46 %	\$ 170,395	\$ 917	\$ 162,943
Overtime	751	28.90 %	1,799	69.17 %	2,600	801	3,472
Taxes and Benefits	5,845	7.85 %	77,941	104.74 %	74,415	(3,526)	63,704
Pension	461	4.01 %	11,001	95.67 %	11,499	498	11,597
<b>Total Personnel Services</b>	<b>20,233</b>	<b>7.81 %</b>	<b>260,219</b>	<b>100.51 %</b>	<b>258,909</b>	<b>(1,310)</b>	<b>241,716</b>
<b>Operating Expenses</b>							
Shared Office Allocation	4,567	11.11 %	42,261	102.77 %	41,121	(1,140)	38,768
Postage and Freight	0	0.00 %	47	0.00 %	0	(47)	0
Supplies	0	0.00 %	1,134	56.72 %	2,000	866	474
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	710	177.40 %	400	(310)	0
Dues and Memberships	0	0.00 %	237	23.75 %	1,000	763	0
Seminars and Training	0	0.00 %	199	19.90 %	1,000	801	199
Miscellaneous	0	0.00 %	0	0.00 %	100	100	0
Attorney and Staff Travel	6,799	29.82 %	19,937	87.44 %	22,800	2,863	16,925
Luncheons	0	0.00 %	0	0.00 %	300	300	43
Credit Card Discount and Fees	0	0.00 %	1	0.00 %	0	(1)	0
Computer Software	0	0.00 %	0	0.00 %	0	0	349
Contract Programming	6,377	155.55 %	11,244	274.24 %	4,100	(7,144)	2,994
<b>Total Operating Expenses</b>	<b>17,818</b>	<b>24.17 %</b>	<b>76,670</b>	<b>104.00 %</b>	<b>73,721</b>	<b>(2,949)</b>	<b>60,652</b>
<b>Total Expenses</b>	<b>\$ 38,051</b>	<b>11.44 %</b>	<b>\$ 336,889</b>	<b>101.28 %</b>	<b>\$ 332,630</b>	<b>\$ (4,259)</b>	<b>\$ 302,368</b>

State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	\$ 34,564	4.34 %	\$ 762,144	95.66 %	\$ 796,736	\$ 34,592	\$ 722,216
Overtime	309	11.88 %	598	22.97 %	2,600	2,002	519
Taxes and Benefits	22,626	12.88 %	178,148	101.44 %	175,625	(2,523)	153,111
Pension	133	0.20 %	60,814	91.87 %	66,197	5,383	61,107
<b>Total Personnel Services</b>	<b>57,632</b>	<b>5.54 %</b>	<b>1,001,704</b>	<b>96.21 %</b>	<b>1,041,158</b>	<b>39,454</b>	<b>936,953</b>
<b>Operating Expenses</b>							
Shared Office Allocation	41,098	11.10 %	380,347	102.77 %	370,090	(10,257)	368,300
Postage and Freight	84	20.99 %	574	143.40 %	400	(174)	280
Printing	148	148.60 %	148	148.60 %	100	(48)	108
Supplies	236	19.65 %	815	62.68 %	1,300	485	1,366
Telephone	300	11.11 %	3,600	133.33 %	2,700	(900)	3,600
Subscriptions and Books	0	0.00 %	2,766	119.24 %	2,320	(446)	1,796
Dues and Memberships	0	0.00 %	2,180	139.71 %	1,560	(620)	1,565
Licenses and Certifications	0	0.00 %	90	0.00 %	0	(90)	0
Seminars and Training	189	3.60 %	4,599	87.60 %	5,250	651	4,210
Miscellaneous	382	12.73 %	9,372	312.39 %	3,000	(6,372)	7,989
Attorney and Staff Travel	7,481	32.53 %	18,525	80.54 %	23,000	4,475	12,422
Executive Director Travel	2,989	17.58 %	23,476	138.10 %	17,000	(6,476)	16,890
Lunchrooms	0	0.00 %	871	58.04 %	1,500	629	1,360
Bank Fees	2,789	14.30 %	2,789	14.30 %	19,500	16,711	11,368
Computer Software	0	0.00 %	0	0.00 %	0	0	714
Contract Programming	0	0.00 %	0	0.00 %	500	500	375
<b>Total Operating Expenses</b>	<b>55,716</b>	<b>12.43 %</b>	<b>450,152</b>	<b>100.43 %</b>	<b>448,220</b>	<b>(1,932)</b>	<b>432,743</b>
<b>Total Expenses</b>	<b>\$ 113,348</b>	<b>7.61 %</b>	<b>\$ 1,451,856</b>	<b>97.48 %</b>	<b>\$ 1,489,378</b>	<b>\$ 37,522</b>	<b>\$ 1,369,696</b>

**DRAFT**  
**STATE BAR OF GEORGIA**  
**BOARD OF GOVERNORS**  
**MEETING MINUTES**  
**Friday, June 7, 2024, 9:00 a.m.**  
**The Omni Amelia Island Resort**  
**Amelia Island, FL**  
**Hybrid Meeting**

The 302<sup>nd</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. President J. Antonio “Tony” DelCampo presided.

Pledge of Allegiance

Board of Governors Member Bert Hummel, Cobb Circuit, Post 7, and daughter, Mary Olivia, led the Pledge of Allegiance.

Invocation

Board of Governors Member R. Javoyne Hicks, Stone Mountain Circuit, Post 8, gave the invocation.

Special Recognition

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

Recognition of Retiring Executive Committee Members and Retiring Board Members

President Tony DelCampo recognized the following retiring Executive Committee and Board of Governors members: Sally Akins, Immediate Past President, 14 years; Ron Daniels, Immediate YLD Past President, 3 years; Frank Strickland, Atlanta Circuit, Post 22, 38 years; Mike Hobbs, Atlanta Circuit, Post 38, 14 years; Tony Askew, Atlanta Circuit, Post 26, 32 years; Carl Veline, Houston Circuit, 32 years; John Webb, Flint Circuit, Post 2, 22 years; Scott Watts, Clayton Circuit, Post 2, 20 years; Randy Davis, Cherokee Circuit, Post 1, 17 years; Chris Huskins, Ocmulgee Circuit, Post 3, 14 years; Lawton Heard, South Georgia Circuit, Post 1, 12 years; Kent Altom, Atlanta Circuit, Post 2, 9 years; Jen Jordan, Atlanta Circuit, Post 20, 8 years; Daniel Digby, Rockdale Circuit, 6 years; Ken Crawford, Douglas Circuit, 4 years; Ralph Van Pelt, Lookout Mountain Circuit, Post 3, 2 years.

Roll Call

Secretary Bill Gentry circulated the roll for signature for in-person attendees. Those attending virtually were marked present through a Zoom report. The list of those in attendance is attached as Exhibit A.

Future Meetings Schedule

President Tony DelCampo said Incoming President Ivy Cadle will review the Future Meetings Schedule at Saturday’s meeting.

Minutes of the 301<sup>st</sup> Meeting of the Board of Governors

The minutes of the Board of Governors meeting held April 20, 2024, were approved by majority vote as presented.

*Board of Governors Meeting adjourned, Members’ Meeting called to order.*

Proposed Amendments to the Bylaws of the State Bar of Georgia

*Article III Board of Governors. Section 11. Meetings.*

The purpose of the proposed change to this bylaw is to require that the Board of Governors hold a Spring meeting each year to align with the proposed revision to Article III Section 12 (below), which requires the

Board to adopt the budget at its Spring meeting. The current rules only require that the Board meet three times per year and the membership have at least one meeting at either the Annual or Midyear meeting.

The members of the State Bar of Georgia passed the proposed changes to Article III, Board of Governors, Section 11, Meetings, by majority vote.

*Article III Board of Governors. Section 12. Budget.*

The purpose of the proposed change to this bylaw is to change the timing of the approval of the annual budget from the annual meeting to the spring meeting. The advantage of changing the timing for approval would be as follows: (1) the approval of the dues and the budget in the same meeting (2) a reduction in committee meetings (3) assistance with the timing related to the new evaluation process and (4) create efficiencies within the Accounting Department.

The members of the State Bar of Georgia passed the proposed changes to Article III, Board of Governors, Section 12, Budget, by majority vote.

Awards and Presentations

The following awards and presentations were made:

Marshall-Tuttle Award

Jay Elmore, chair of the Military Legal Assistance Program Committee, presented the Marshall-Tuttle Award to Major General Bobby Lee Christine.

Judge Willie Lovett Award for Advancing the Field of Juvenile Law

Supreme Court Justice Charles Bethel presented the Judge Willie Lovett Award for Advancing the Field of Juvenile Law Award to Hon. Renata Deann Turner, presiding judge, Fulton County Juvenile Court.

Chief Justice Harris Hines Award for Outstanding Advocacy for Children in Dependency Proceedings

Supreme Court Justice Charles Bethel presented the Chief Justice Harris Hines Award for Outstanding Advocacy for Children in Dependency Proceedings Award to Tara Brodhead, Cherokee County Division of Family and Children Services (case manager), and Amber Walden, Family Law Office of Training and Education Services, LLC (lawyer).

Chief Justice Thomas O. Marshall Professionalism Awards

President Tony DelCampo presented the 23<sup>rd</sup> Chief Justice Thomas O. Marshall Professionalism Awards to William P. "Bill" Adams (ret.), State Court of Bibb County, Macon (judge); and C. Bradford "Brad" Marsh, Atlanta (lawyer).

Check Presentation to Georgia Legal Services Program (GLSP)

President Tony DelCampo presented a \$509,537 check to Susan Coppedge, GLSP Executive Director, representing Bar members' contributions to the 2023 GLSP "And Justice for All" Campaign.

Recognition of Corporate Sponsor

President Tony DelCampo recognized the Bar's Five-Gavel Corporate Sponsor, Member Benefits, Inc., and other section and company sponsors.

President Tony DelCampo presented the following Local and Voluntary Bar Awards:

Local and Voluntary Bar Awards

2024 Award of Merit: Newton County Bar Association (Under 50 members); Sandy Springs Bar Association (51 to 100 members); Georgia Association of Black Women Attorneys (501 members or more)

2024 Law Day Award of Achievement: Cobb County Bar Association (501 members or more)

2024 Best New Entry: DeKalb County Bar Association.

2024 Best Newsletter Award: Georgia Association of Black Women Attorneys (501 members or more).

2024 Best Website Award: Walton County Bar Association (51 to 100 members); DeKalb County Bar Association (251 to 500 members); and Georgia Association of Black Women Attorneys (501 members or more).

2024 President's Cup Award: Georgia Association of Black Women Attorneys.

President Tony DelCampo presented the following Section Awards:

Section of the Year: Construction Law, Peter Crofton, chair.

Section Awards of Achievement: Alternative Dispute Resolution, Scott Zucker, chair; Privacy & Technology, Amanda Witt, chair.

President Tony DelCampo recognized this year's 13<sup>th</sup> Annual Georgia Legal Food Frenzy winners: Habachy Law (Attorney General's Cup); GreenbergTraurig LLP (Bar President's Award); BakerHostetler (Large Firm); Coleman Talley LLP (Medium Firm); Troutman Pepper LLP (Medium Firm); Caplan Cobb (Small Firm); Durham Bray Law Firm, P.C. (Small Firm); Page Perry (Sole Proprietor); Chick-Fil-A Legal Department (Corporate, In-House Counsel); Serta Simmons Bedding, LLC (Corporate, In-House Counsel); Columbia Judicial Circuit (Judicial); Georgia Tech Office of the General Counsel (Legal Organization); Tifton Bar Association ((Legal Organization); Mercer Law (Law School).

President's Report

President Tony DelCampo delivered the President's Address (Exhibit B).

State of the Supreme Court of Georgia

Hon. Michael Boggs, Chief Justice of the Supreme Court of Georgia, delivered the State of the Supreme Court of Georgia address.

State of the Court of Appeals of Georgia

Hon. Amanda Mercier, Chief Judge of the Court of Appeals of Georgia, delivered the State of the Court of Appeals of Georgia address.

State of the Office of Governor

Executive Counsel Kristyn Long delivered the State of the Office of Governor on behalf of Gov. Brian Kemp.



Georgia General Assembly

Rep. Stan Gunter, chair of the House Judiciary Committee, reported on the activities of the House Judiciary Committee.

Sen. Brian Strickland, chair of the Senate Judiciary Committee, reported on the activities of the Senate Judiciary Committee.

Young Lawyers Division

Young Lawyers Division President Brittanie Browning reported on the activities of the YLD (Exhibit C).

Memorials

President Tony DelCampo presented the Memorials report.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

There were no announcements.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

There were no remarks, Q&A, comments or suggestions.

Adjournment

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

---

William C. Gentry, Secretary

Approved:

---

J. Antonio DelCampo, President

**DRAFT**  
**STATE BAR OF GEORGIA**  
**BOARD OF GOVERNORS**  
**MEETING MINUTES**  
**Saturday, June 8, 2024, 9:00 a.m.**  
**The Omni Amelia Island Resort**  
**Amelia Island, FL**  
**Hybrid Meeting**

The 303<sup>rd</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. President Ivy N. Cadle presided.

Pledge of Allegiance

Retired Sgt. Major Jeffrey Nail led the Pledge of Allegiance.

Invocation

Board of Governors Member Jerry N. Cadle, Middle Circuit, Post 2, 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.

Welcome to New Officers and Board Members

President Ivy N. Cadle recognized the new officers and Board of Governors members.

Roll Call

Secretary R. Javoyne Hicks circulated the roll for signature for in-person attendees. Those attending virtually were marked present through a Zoom report. The list of those in attendance is attached as Exhibit A. Guests are listed in Exhibit B.

Future Meetings Schedule

President Ivy N. Cadle reviewed the Future Meetings Schedule. He announced that all meetings during the 2024-2025 Bar year will be held in person without a hybrid option. While the meetings will be live streamed for viewing, there will be no opportunity for interactive comments or questions. Board of Governors members who choose to view meetings via livestream will not be able to vote and will not be marked present. The Fall Meeting will be held at Jekyll Island; the Midyear Meeting will be held in Savannah; the Spring Meeting will be in Athens; and the Annual Meeting will be at Ponte Vedra Beach, Florida.

President's Address

President Ivy N. Cadle delivered the President's Address (Exhibit C).

Approval of President's Appointments to the State Disciplinary Boards

The Board of Governors approved the following presidential appointments to the State Disciplinary Boards by majority vote:

State Disciplinary Board

Pamela F. Everett, Pooler (Southern District)  
Carl R. Varnedoe, Savannah (Southern District)

Formal Advisory Opinion Board

(1) Member-at-Large: Mary A. Prebula, Atlanta (2026)  
(2) Member-at-Large: Jeffrey H. Schneider, Atlanta (2026)

- (3) Member-at-Large: Letitia A. McDonald, Atlanta (2026)
- (4) Georgia Association of Criminal Defense Lawyers: Amanda R. Clark Palmer, Atlanta (2026)
- (5) District Attorneys Association of Georgia: Sherry Boston, Decatur (2026)
- (6) Emory University School of Law: Jennifer M. Romig, Atlanta (2026)
- (7) Georgia State University College of Law: Cassady V. Brewer, Atlanta (2026)
- (8) State Disciplinary Board: Sutton Connelly, Summerville (2025)

#### Approval of ICJE Board Appointment

The Board of Governors approved by majority vote the appointment of C. Bradford Marsh to the ICJE Board for a three-year term ending in 2027.

#### Approval of 2024-2025 Standing, Special & Program Committees and Boards

The Board of Governors approved the proposed 2024-2025 Standing, Special & Program Committees and Boards by majority vote.

#### Nominations to the Judicial Qualifications Commission (JQC)

Following a report by President Ivy N. Cadle, the Board of Governors, by majority vote, approved the following list of nominees to the Judicial Qualifications Commission: James Coursey, Patrick T. O'Connor and Daniel B. Snipes.

#### Proposed Policy and Rules Changes

##### *Standing Board Policy 1000*

The State Bar of Georgia maintains a specific stance on various matters, including the publication of articles, planning of programs, design, and execution of meetings, activities of committees and sections, and other issues that may not align with or exceed the mission and purposes of the State Bar of Georgia. This policy outlines the guidelines and boundaries for such activities, as per Rule 1-103 Purposes.

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

##### *Part VIII – Continuing Legal Education*

As a response to the Georgia Lawyer Competency Task Force Report and in conjunction with the Supreme Court of Georgia, Part VIII - Continuing Legal Education rules were reviewed and amended. Proposed rules changes include: consideration of an expanded compliance period; emphasizing updates to Georgia's law; placing an emphasis on legal ethics; placing an emphasis on the member's particular practice area; and easing the burden on lawyers overall. (Exhibit D)

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

#### Treasurer's Report

Treasurer Bill Gentry reported on the Bar's finances and investments. He referred the Board to the financials in the Board Book that are through March 31, 2024. The Legislative Fund and GLSP contributions have exceeded prior years. The combined audit is included in the Board book, and the Bar received a clean report with no audit revisions required.

The Board of Governors received copies of the Consolidated Revenues and Expenditures, Operations and Bar Center Combined, for the year-to-date period ending March 31, 2024; Total Bar Center Operations

Revenues and Expenditures Executive Summary for the year-to-date period ending March 31, 2024; Operations Income Statement for the year-to-date period ending March 31, 2024; Supporting Schedule of Other Expenses for the year-to-date period ending March 31, 2024; Status and Use of Cash Investments as of March 31, 2024; Board-Designated and Donor Temporarily Restricted Net Assets as of March 31, 2024; Summary of Members and Voluntary Legislative Contributions paid through March 31, 2024; Summary of Members and Voluntary Contributions to GLSP paid through March 31, 2024; Legislative Activity Report from July 1, 2023, through March 31, 2024; Summary of Clients' Security Fund Activity for the year-to-date period ending March 31, 2024; and SBG Management Summary Update of Unallocated Cash and Projects to be Completed as of March 31, 2024.

#### 2024-2025 State Bar Budget

Treasurer Bill Gentry presented the Fiscal Year 2024-2025 Proposed Consolidated Budget (Exhibit E), which the Board of Governors approved by majority vote. The proposed Consolidated Budget reflects the following:

- 1) Dues at \$264 for active members and \$132 for inactive and provisional members, an increase of \$4 for active members and \$2 for inactive members.
- 2) 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.

#### Financial Resolutions

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

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

- 3) That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2023-2024.

Election Schedule 2024-2025

The Board of Governors approved the proposed 2024-2025 Elections Schedule (Exhibit F) by majority vote.

Executive Committee Election

The Executive Committee election was held with the following results:

One-Year Term 2024-2025

Nominations for unexpired term of Hicks:

Candidate: Joyce Gist Lewis

Nominator: Sherry Boston

Seconded: Hon. Paige Reese Whitaker

Results:

Elected by majority ballot vote for one-year term

Candidate: John R.B. “Jack” Long

Nominator: Hon. Amanda Nicole Heath

Seconded: John Bell Manly

Was not elected

Two-Year Term 2024-2026

Nominations:

Candidate: R. Gary Spencer

Nominator: N. John Bey

Seconded: Susan Patricia Coppedge

Results:

Elected by majority ballot vote for two-year term

Candidate: Martin Enrique Valbuena

Nominator: Past President Darrell L. Sutton

Seconded: Hon. Dax Eric Lopez

Elected by majority ballot vote for a two-year term

Candidate: Norbert Daniel “Bert” Hummel IV

Nominator: Past President John C. Sammon

Seconded: Hon. Kathryn Powers

Elected by majority ballot vote for a two-year term

Candidate: John R.B. “Jack” Long

Nominator: Hon. Amanda Nicole Heath

Seconded: John Bell Manly

Was not elected

Georgia Legal Services Program Appointments

By majority vote, the Board of Governors approved the appointments of Seth Bruckner, Atlanta; Keishan Davis, Tucker; Laverne Lewis Gaskins, Augusta; Matthew Howell, Atlanta; Prof. Ishaq Kundawala, Macon; and Allison White, Atlanta to the GLSP Board of Directors.

Chief Justice’s Commission on Professionalism Appointment

By majority vote, the Board of Governors approved the appointment of Rizza O’Connor for a three-year term to the Chief Justice’s Commission on Professionalism.

Executive Director Election

The Board of Governors elected Damon Elmore as executive director for the 2024-2025 Bar year by majority vote.

#### Executive Director's Report

Executive Director Damon Elmore thanked the Board for their vote and confidence in re-electing him as the executive director of the State Bar of Georgia. He recognized the Bar staff for their hard work and dedication to the Bar. He reported that he will continue supporting President Ivy N. Cadle and the Executive Committee, attracting new tenants to the Bar building, and focusing on value and operations in the next Bar year. He said he was grateful for the important relationship with the Supreme Court liaisons and outgoing President Tony DelCampo.

#### Young Lawyers Division President's Report

YLD President Kenneth Mitchell Jr. reported that the YLD has a great plan for the year as the service arm of the Bar. He will continue the joint meetings with the Board of Governors and will encourage mentees and young lawyers to get engaged.

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

Executive Director Karlise Grier reported on the Chief Justice's Commission on Professionalism. She thanked Chief Justice Michael Boggs for his leadership. She said the CJCP grant application period is open through July 15. In May, the commission offered training on the grants program, and a recording of the training is on the website if additional help or guidance is needed. The commission is recruiting group leaders for the 2024 law school orientations, and she encouraged Board members to volunteer. Executive Director Grier announced upcoming professionalism CLEs and said that the 25<sup>th</sup> Benham Award nomination period will begin in September.

#### Legislative Report

President Ivy N. Cadle thanked outgoing ACL Chair Brandon Peak and welcomed incoming ACL Chair, Ceasar Mitchell. Legislative Consultant Rusty Sewell thanked Mark Middleton and Roy Robinson. He encouraged Board members to get involved with their senators and representatives. He said to reach out and form relationships with them so that when there's an issue, they have a trusted source they can rely on.

#### State Bar of Georgia Audit Report

The Board of Governors received a copy of the State Bar of Georgia Audit Report for the year-end 2023 and related auditor's letter regarding governance.

#### Executive Committee Minutes

The Board of Governors received a copy of the minutes of the Executive Committee meeting held on April 26, 2024.

#### Fee Arbitration Program

The Board of Governors received a written report from the Fee Arbitration Program.

#### Law Practice Management Program

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

#### Sections' Annual Reports

The Board of Governors received written reports from the following sections: Administrative Law Section; Aviation Law Section; Bankruptcy Law Section; Class Action Law Section; Construction Law Section; Consumer Law Section; Dispute Resolution Section; E-Discovery & the Use of Technology Law Section; Employee Benefits Law Section; Energy Law Section; Fiduciary Law Section; Insurance Law Section; Intellectual Property Law Section; Privacy & Technology Law Section; Real Property Law Section; Religious Liberty Law Section; School & College Law Section; and Taxation Law Section.

Institute of Continuing Legal Education

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

Unlicensed Practice of Law Program

The Board of Governors received a written report on the Formal Investigations undertaken by the Unlicensed Practice of Law Program.

State Bar of Georgia Satellite Office Reports

The Board of Governors received written reports from the Coastal Georgia Office in Savannah and the South Georgia Office in Tifton.

Communications Media Report

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

Old Business

There was no old business.

New Business

There was no new business.

Remarks/Q&A/Comments/Suggestions

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

Adjournment

There being no further business, the meeting was adjourned at 10:56 a.m.

---

R. Javoyne Hicks, Secretary

Approved:

---

Ivy N. Cadle, President



## EXECUTIVE SUMMARY

To: Board of Governors

From: Bill NeSmith

Date: November 1, 2024

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

---

Below is an executive summary of the proposed changes to the Clients' Security Fund Rule 10-106.

### Rules

1. **Rule 10-106. Eligible Claims.** This proposed change comes from the Clients' Security Fund Board of Trustees. This rule change corrects an oversight that seems to prohibit the Trustees from paying a claim if the lawyer is deceased or disabled and requires that the claimant cannot ask for relief unless the lawyer has a final disciplinary action from the Supreme Court of Georgia. This proposed change cleans up the rule, making it more concise.



1 Rule 10-106. Eligible Claims.

2 (a) The loss must be caused by the dishonest conduct of the lawyer and  
3 shall have arisen out of and because of a lawyer-client relationship, or a  
4 fiduciary relationship, between the lawyer and the claimant.

5 (b) As used in these Rules, “dishonest conduct” means wrongful acts  
6 committed by a lawyer ~~in the nature of~~ such as theft or embezzlement  
7 of money or the wrongful taking or conversion of money, property or  
8 other things of value.

9 (c) There must be a final disposition resulting in indefinite suspension,  
10 disbarment, ~~or voluntary surrender of license~~ voluntary surrender of  
11 license, or other circumstances such as the death or disability of the  
12 lawyer or after a diligent search, the lawyer cannot be located.

13 (d) The claim shall be filed no later than two years after the date of final  
14 disciplinary action by the Supreme Court of Georgia. ~~In the event. If~~  
15 disciplinary action cannot be prosecuted ~~due to the fact that~~ because  
16 the ~~attorney~~ lawyer is either deceased, disabled, or cannot be located,  
17 the claim shall be filed no later than five years after ~~the dishonest~~  
18 ~~conduct was first discovered by the applicant~~ the applicant discovered

19 the dishonest conduct; provided, however, the claim shall be filed no  
20 later than seven years after the dishonest conduct occurred.

21 (e) Except as provided by part (f) of this Rule, the following losses shall  
22 not be reimbursable:

23 (1) losses incurred by spouses, children, parents, grandparents, siblings,  
24 partners, associates, and employees of lawyer(s) causing the losses;

25 (2) losses covered by any bond, surety agreement, or insurance contract  
26 to the extent covered thereby, including any loss to which any bonding  
27 agent, surety, or insurer is subrogated, to the extent of that subrogated  
28 interest;

29 (3) losses incurred by any financial institution, which are recoverable  
30 under a "banker's blanket bond" or similar commonly available  
31 insurance or surety contract;

32 (4) losses incurred by any business entity controlled by the lawyer, or  
33 any person or entity described in part (e) (1) hereof;

34 (5) losses incurred by any governmental entity or agency;

35 (6) losses incurred by corporations or partnerships, including general or  
36 limited.

37 (f) In cases of extreme hardship or special and unusual circumstances,  
38 the Board may, ~~in~~at its discretion, recognize a claim that otherwise  
39 would be excluded under these Rules ~~in order to~~to achieve the purpose  
40 of the Fund.

41 (g) In cases where it appears that there will be unjust enrichment, or  
42 the claimant unreasonably or knowingly contributed to the loss, the  
43 Board, ~~in~~at its discretion, may deny the claim.

44 (h) The Board shall require the applicant to exhaust his or her civil  
45 remedies unless the Board determines that ~~the pursuit of~~pursuing the  
46 civil claim is not feasible or practical.

1 Rule 10-106. Eligible Claims.

2 (a) The loss must be caused by the dishonest conduct of the lawyer and  
3 shall have arisen out of and because of a lawyer-client relationship, or a  
4 fiduciary relationship, between the lawyer and the claimant.

5 (b) As used in these Rules, “dishonest conduct” means wrongful acts  
6 committed by a lawyer such as theft or embezzlement of money or the  
7 wrongful taking or conversion of money, property or other things of  
8 value.

9 (c) There must be a final disposition resulting in indefinite suspension,  
10 disbarment, voluntary surrender of license, or other circumstances such  
11 as the death or disability of the lawyer or after a diligent search, the  
12 lawyer cannot be located.

13 (d) The claim shall be filed no later than two years after the date of final  
14 disciplinary action by the Supreme Court of Georgia. If disciplinary  
15 action cannot be prosecuted because the lawyer is either deceased,  
16 disabled or cannot be located, the claim shall be filed no later than five  
17 years after the applicant discovered the dishonest conduct; provided,  
18 however, the claim shall be filed no later than seven years after the  
19 dishonest conduct occurred.

20 (e) Except as provided by part (f) of this Rule, the following losses shall  
21 not be reimbursable:

22 (1) losses incurred by spouses, children, parents, grandparents, siblings,  
23 partners, associates, and employees of lawyer(s) causing the losses;

24 (2) losses covered by any bond, surety agreement, or insurance contract  
25 to the extent covered thereby, including any loss to which any bonding  
26 agent, surety, or insurer is subrogated, to the extent of that subrogated  
27 interest;

28 (3) losses incurred by any financial institution, which are recoverable  
29 under a "banker's blanket bond" or similar commonly available  
30 insurance or surety contract;

31 (4) losses incurred by any business entity controlled by the lawyer, or  
32 any person or entity described in part (e) (1) hereof;

33 (5) losses incurred by any governmental entity or agency;

34 (6) losses incurred by corporations or partnerships, including general or  
35 limited.

36 (f) In cases of extreme hardship or special and unusual circumstances,  
37 the Board may, at its discretion, recognize a claim that otherwise would  
38 be excluded under these Rules to achieve the purpose of the Fund.

39 (g) In cases where it appears that there will be unjust enrichment or the  
40 claimant unreasonably or knowingly contributed to the loss, the Board,  
41 at its discretion, may deny the claim.

42 (h) The Board shall require the applicant to exhaust his or her civil  
43 remedies unless the Board determines that pursuing the civil claim is  
44 not feasible or practical.

45

## **BYLAWS**

### **ALTERNATIVE DISPUTE RESOLUTION SECTION STATE BAR OF GEORGIA**

#### **ARTICLE I**

##### **Name and Purpose**

**Section 1:** The name of this Section shall be the Alternative Dispute Resolution Section.

**Section 2:** The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to develop their knowledge and professional abilities in the utilization of best practices in alternative dispute resolution mechanisms and to render better services to their clients and to the public.

#### **ARTICLE II**

##### **Membership and Dues**

**Section 1:** Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues on the current year. Annual dues shall be set by the Section leadership and approved by the Board of Governors.

**Section 2:** Student Law Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except that of voting or holding office.

**Section 3:** The amount of annual dues for Section members and law student members may be changed in an amount determined by a majority vote of the

members of the Section, subject to the approval of the Board of Governors of the State Bar of Georgia.

### **ARTICLE III** **Officers**

**Section 1:** The Officers of the Section shall be a Chairperson (or President), a Vice-Chairperson (or Vice President), a Treasurer, and a Secretary, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section. The Secretary and Treasurer positions may be held by one person.

**Section 2:** All newly elected Officers shall hold office for a term of one (1) year beginning at the commencement of the fiscal year of the State Bar of Georgia following the election at which he or she is elected and ending at the close of the same fiscal year of the State Bar of Georgia or until his or her successor has been elected. If a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become Chairperson for the unexpired term. If a vacancy arises in the office of the Chairperson and there is also a vacancy in the office of the Vice-Chairperson, the President of the State Bar of Georgia shall appoint a successor Chairperson for the unexpired term. The Section Executive Committee may, by majority vote, fill any other vacancy in any other elected office for the balance of the unexpired term of such office.

**Section 3:** The Chairperson shall provide notice of the Section Executive Committee meetings and Section meetings. The Chairperson will preside over all meetings of the Section Executive Committee and of the Section, appoint appropriate committees to serve during his or her term as Chairperson, and plan and supervise the annual meeting of the Section. The Chairperson shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibility as may be prescribed by the Section or by the State Bar of Georgia.



**Section 4:** The Vice-Chairperson shall assist the Chairperson and, in the absence or disability of the Chairperson, shall perform the duties of the Chairperson.

**Section 5:** The Secretary shall be tasked to record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary, and perform such other duties as may be prescribed by the Chairperson.

**Section 6:** The Treasurer shall be tasked to keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chairperson. The Treasurer shall provide an accounting to the Section at its annual meeting or upon the Chairperson's request.

#### **ARTICLE IV**

##### **Meetings of the Section**

**Section 1:** A Section shall meet a minimum of twice per Bar year, including an annual meeting of the Section. Said meetings may occur personally or virtually. Said meetings may also be included as part of any program event sponsored by the Section. Other meetings of the Section may be held from time to time on the call of the Chairperson or Vice-Chairperson or any four members of the Section Executive Committee or any ten active members of the Section. The locations, if held personally, may be at a location selected by the Executive Committee.

**Section 2:** The Chairperson may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chairperson.

**Section 3:** At any meeting of the Section, ten Section members present and eligible to vote shall constitute a quorum (including the Executive Committee). Presence at a meeting can be in-person or virtually or by any electronic means of communication other than text messaging or email as set forth in Art. IV, Section 7 of these Bylaws.

**Section 4:** Except for administrative decisions made by the Officers or Section Executive Committee, all actions of the Section shall be by a majority vote of the

members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

**Section 5:** Parliamentary procedure at all meetings of the Section shall be governed by Roberts Rules of Order, Newly Revised, and by these Bylaws.

**Section 6:** Notice of Section meetings shall be given at least ten days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be given by email or mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

**Section 7:** If deemed prudent or necessary, the Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email (including but not limited to a virtual meeting). A Section may adopt internal rules to allow for email voting on noncontroversial matters, provided that the rule allows for any member to request verbal debate or discussion, which would stop all email voting. All internal rules must be approved by the Office of the General Counsel.

## **ARTICLE V**

### **Section Executive Committee**

**Section 1:** The Section Executive Committee shall consist of the Officers of the Section and other members of the Section appointed by and in the discretion of the Chairperson, whose term shall be co-existent with that of the Chairperson. Those "other" members shall be considered "At-Large" members of the Executive Committee or Section Board (to be used interchangeably).

**Section 2:** Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this provision shall be reported to the

members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

**Section 3:** All committees, except as otherwise provided herein, shall be appointed or removed by the Chairperson. Members of the Section Executive Committee, other than the Officers, and any other members of the Section may serve as Chairperson of appointed committees.

## **ARTICLE VI**

### **Elections**

**Section 1:** Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chairperson shall appoint three or more members of the Section to be a nominating committee which shall nominate one or more members of the Section as qualified to hold each of the offices of the Section for the ensuing terms of office. The nominating committee's report shall be made to the Secretary thereafter, who shall present the report to the Section at its next meeting, or by email or publication of a newsletter. Thereafter, and before the election of Officers, any member of the Section may nominate any other member of the Section for election to fill any of the vacant offices by transmitting said nomination to the Secretary. Nominations shall be closed ten days after the presentation of the report of the nominating committee.

**Section 2:** The Officers of the Section shall be elected by written or electronic ballot. Before each election, voting instructions will be provided to all voting members. Ballots providing selections of the duly nominated candidates for each office shall be delivered in person at a regular or called meeting, by U.S. mail or by other Section approved electronic voting methods. Voting shall take place no later than ten days after the close of nominations. Each member of the Section wishing to participate in the election shall complete his or her ballot by casting a vote for at least one candidate for each vacant office. Ballots shall be cast per the voting instructions for each election. Votes cast contrary to the prescribed voting instructions shall not be counted. Within five days of the due date for return of completed ballots, votes of Section members shall be tallied, and elected candidates shall be informed of their election. An election to any office requires a majority of the votes cast. If more than two candidates are nominated for any office and no candidate so nominated receives

a majority of the votes cast upon the first ballot, then the two candidates receiving the largest number of votes cast upon such first ballot shall be voted upon again in a second ballot, and the candidate receiving a majority of the votes cast upon such second ballot shall be declared to be elected to the particular office. A Special Meeting of the Section may be called by the Officers to otherwise modify the procedure governing any election.

## **ARTICLE VII**

### **Finances**

**Section 1:** Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by a member of the Section Executive Committee and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

**Section 2:** Funds of the Section shall be expended for such purposes related to the Section's activities as authorized by the Section's Executive Committee.

**Section 3:** Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. Reimbursement of expenditure will require a receipt of the expense incurred on behalf of the Section and submitted to the Sections Director. The Sections Director will report the expense to the Executive Committee, which will approve or deny the reimbursement.

**Section 4:** A financial report of the funds of the Section shall be reported by the Treasurer at each meeting of the Section upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

## **ARTICLE VIII**

### **Miscellaneous**

**Section 1:** The Section shall conduct continuing education programs at least once each Bar year. Continuing education programs that are six hours or more in credit hours shall be conducted through the Institute of Continuing Legal Education of the

State Bar of Georgia in the area of law and field of practice of this Section. Any continuing legal education program that is less than six hours may be conducted by the Section without the Institute of Continuing Legal Education of the State Bar of Georgia. All continuing education programs must be approved by the Commission on Continuing Lawyer Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

**Section 2:** The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit any proposed legislation to the Advisory Committee on Legislation for consideration by the Committee. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

**Section 3:** The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws, and standing policies of the State Bar of Georgia.

## **ARTICLE IX**

### **Effective Date and Amendment**

**Section 1:** These Bylaws shall become effective upon approval by the Board of Governors of the State Bar of Georgia.

**Section 2:** These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, provided the proposed amendment has first been approved by a majority of the Executive Committee.

**Section 3:** No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed and subscribed before the undersigned this the \_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
**CHAIRPERSON**

\_\_\_\_\_  
**SECTION SECRETARY**

## **AMENDED AND RESTATED BYLAWS**

### **ANTITRUST SECTION STATE BAR OF GEORGIA**

#### **ARTICLE I**

##### **Name and Purpose**

**Section 1:** The name of this Section shall be Antitrust Section of the State Bar of Georgia.

**Section 2:** The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to (1) develop their knowledge and professional abilities in the field of antitrust law; (2) render better services to their clients and the public; (3) sponsor the continuing education of members of the State Bar of Georgia in the field of antitrust law; (4) study, review, or initiate proposed legislation or administrative policy for the improvement of the law and practice in this field and to make recommendations thereon to the State Bar of Georgia; (5) recognize lawyers who have demonstrated (i) outstanding achievement in antitrust law, (ii) significant contributions to continuing legal education or State Bar of Georgia activities in antitrust law, (iii) a record of community service, and (iv) a personal commitment to excellence.

#### **ARTICLE II**

##### **Membership and Dues**

**Section 1:** Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues on the current year. Annual dues shall be set by the Section leadership and approved by the Board of Governors.

**Section 2:** Student Law Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except that of voting or holding office.

**Section 3:** The amount of annual dues for Section members and law student members may be changed in an amount determined by a majority vote of the members of the Section, subject to the approval of the Board of Governors of the State Bar of Georgia.

### **ARTICLE III** **Officers**

**Section 1:** The Officers of the Section shall be a Chair, a Chair-Elect, a Treasurer, a Secretary, and an Immediate-Past Chair, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section. The same person may serve as Secretary and Treasurer.

**Section 2:** The Chair and Chair-Elect shall hold office for a term of two (2) years and all other newly elected Officers shall hold office for a term of one (1) year, and a year shall begin at the commencement of the fiscal year of the State Bar of Georgia following the election at which he or she is elected and end at the close of the same fiscal year of the State Bar of Georgia or until his or her successor has been elected. If a vacancy arises in the office of the Chair, the Chair-Elect shall become Chair for the unexpired term. If a vacancy arises in the office of the Chair and there is also a vacancy in the office of the Chair-Elect, the Immediate-Past Chair shall become Chair for the unexpired term. If a vacancy arises in the offices of Chair, Chair-Elect, or Immediate-Past Chair, the President of the State Bar of Georgia shall appoint a successor Chair for the unexpired term. The Section Executive Committee may, by majority vote, fill any other vacancy in any other elected office for the balance of the unexpired term of such office.

**Section 3:** The Chair shall provide notice of the Section Executive Committee meetings and Section meetings. The Chair will preside over all meetings of the Section Executive Committee and of the Section, appoint appropriate committees to



serve during the Chair's term, and plan and supervise the annual meeting of the Section. The Chair shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibility as may be prescribed by the Section or by the State Bar of Georgia.

**Section 4:** The Chair-Elect shall assist the Chair and, in the absence or disability of the Chair, shall perform the duties of the Chair.

**Section 5:** The Secretary shall record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary, and perform such other duties as may be prescribed by the Chair.

**Section 6:** The Treasurer shall keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chair. The Treasurer shall provide an accounting to the Section at its annual meeting or upon the Chair's request.

**Section 7:** The Immediate-Past Chair shall serve on the Executive Committee and advise the Chair as requested. Upon completion of the Immediate-Past Chair's term, the Immediate-Past Chair shall become a Trustee of the Section.

#### **ARTICLE IV**

##### **Meetings of the Section**

**Section 1:** A Section shall meet a minimum of twice per Bar year. Other meetings of the Section may be held from time to time on the call of the Chair or Vice-Chair or any four members of the Section Executive Committee or any ten active members of the Section. An annual meeting of the Section shall be held each Bar year at a location of the Section's choosing.

**Section 2:** The Chair may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chair.

**Section 3:** At any meeting of the Section, five (5) members present and eligible to vote shall constitute a quorum. Presence at a meeting can be in-person or by any electronic means of communication other than text messaging or email as set forth in Art. IV, Section 7 of these Bylaws.

**Section 4:** Except for administrative decisions made by the Officers, Executive Committee, or Board of Trustees, all actions of the Section shall be by a majority vote of the members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

**Section 5:** Parliamentary procedure at all meetings of the Section shall be governed by Roberts Rules of Order, Newly Revised, and by these Bylaws.

**Section 6:** Notice of Section meetings shall be given at least five (5) days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be given by email or mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

**Section 7:** If deemed prudent or necessary, the Executive Committee, Board of Trustees, or Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email. For actions without a meeting, voting may occur by electronic means (including by e-mail), unless a request for debate is made, in which case the action must pass unanimously by those entitled to vote; if no request for debate is made, the action must pass by a majority of those entitled to vote. All internal rules must be approved by the Office of the General Counsel.

## **ARTICLE V**

### **Section Executive Committee**

**Section 1:** The Section Executive Committee shall consist of the Officers of the Section.

**Section 2:** A quorum of the Executive Committee shall consist of a majority of its members. Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this provision shall be reported to the members of the Board of Trustees and members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

**Section 3:** All other committees, except as otherwise provided herein, shall be appointed or removed by the Chair.

## **ARTICLE VI**

### **Board of Trustees**

**Section 1:** The Board of Trustees, as lead by the Chair, shall establish such policies of the Section as it may deem proper to perform the purpose of the Section and which are not inconsistent with any policy of the State Bar of Georgia. It shall hear all reports of the officers and committees of the Section and shall hear, consider, and act upon such resolutions and matters presented to it which pertain to the activities of the Section.

**Section 2:** The Board of Trustees shall act by majority vote of those present. A quorum of the Board of Trustees shall consist of a quorum of the Executive Committee.

**Section 3:** The Board of Trustees shall be composed of the members of the Executive Committee and may include up to ten (10) more members of the Section, not counting prior Chairs of the Section electing to serve as Trustees.

**Section 4:** The term of Trustees who are neither Officers, nor prior Chairs, shall be for one year. All prior Chairs of the Section may, at their discretion, elect to serve as Trustees of the Section indefinitely.

## ARTICLE VII

### Elections

**Section 1:** Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chair shall appoint three or more members of the Section to be a nominating committee which shall nominate one or more members of the Section as qualified to hold each of the offices of the Section for the ensuing terms of office. The nominating committee's report shall be made to the Secretary thereafter, who shall present the report to the Board of Trustees and Section at its next meeting, or by email or publication of a newsletter. Thereafter, and before the election of Officers, any member of the Section may nominate any other member of the Section for election to fill any of the vacant offices by transmitting said nomination to the Secretary. Nominations shall be closed five (5) days after the presentation of the report of the nominating committee.

**Section 2:** The Officers of the Section shall be elected by written or electronic ballot. Before each election, voting instructions will be provided to all voting members. Ballots providing selections of the duly nominated candidates for each office shall be delivered in person at a regular or called meeting, by U.S. mail or by other Section approved electronic voting methods. Voting shall take place no later than ten (10) days after the close of nominations. Each member of the Section wishing to participate in the election shall complete his or her ballot by casting a vote for at least one candidate for each vacant office. Ballots shall be cast per the voting instructions for each election. Votes cast contrary to the prescribed voting instructions shall not be counted. Within five (5) days of the due date for return of completed ballots, votes of Section members shall be tallied, and elected candidates shall be informed of their election. An election to any office requires a majority of the votes cast. If more than two candidates are nominated for any office and no candidate so nominated receives a majority of the votes cast upon the first ballot, then the two candidates receiving the largest number of votes cast upon such first ballot shall be voted upon again in a second ballot, and the candidate receiving a majority of the votes cast upon such second ballot shall be declared to be elected to the particular office. A Special Meeting of the Section may be called by the Officers to otherwise modify the procedure governing any election.

## **ARTICLE VIII**

### **Finances**

**Section 1:** Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by a member of the Section Executive Committee and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

**Section 2:** Funds of the Section shall be expended for such purposes related to the Section's activities as authorized by the Section's Executive Committee.

**Section 3:** Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. Reimbursement of expenditure will require a receipt of the expense incurred on behalf of the Section and submitted to the Sections Director. The Sections Director will report the expense to the Executive Committee, which will approve or deny the reimbursement.

**Section 4:** A financial report of the funds of the Section shall be reported by the Treasurer at each meeting of the Section or upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

## **ARTICLE IX**

### **Miscellaneous**

**Section 1:** The Section shall conduct continuing education programs at least once each Bar year. Continuing education programs that are six hours or more in credit hours shall be conducted through the State Bar of Georgia in the area of law and field of practice of this Section. Any continuing legal education program that is less than six hours may be conducted by the Section without the State Bar of Georgia. All continuing education programs must be approved by the Commission on Continuing Lawyer Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

**Section 2:** The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit any proposed legislation to the Advisory Committee on Legislation for consideration by the Committee. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

**Section 3:** The Section shall, as decided by the Board of Trustees, periodically present an award titled the “1890 Award of Excellence in Antitrust” to one or more lawyers who are members of the State Bar of Georgia or who are practicing law in Georgia who have demonstrated (i) outstanding achievement in antitrust law, (ii) significant contributions to continuing legal education or State Bar of Georgia activities in antitrust law, (iii) a record of community service, and (iv) a personal commitment to excellence.

**Section 4:** The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws and standing policies of the State Bar of Georgia.

## **ARTICLE X**

### **Effective Date and Amendment**

**Section 1:** These Bylaws shall become effective upon approval by the Board of Governors of the State Bar of Georgia.

**Section 2:** These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, provided the proposed amendment has first been approved by a majority of the Executive Committee or Board of Trustees.

**Section 3:** No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed and subscribed before the undersigned this the \_\_\_\_ day of

\_\_\_\_\_, 2024.

\_\_\_\_\_  
**CHAIR**

\_\_\_\_\_  
**SECTION SECRETARY**

## **BYLAWS**

### **FRANCHISE AND DISTRIBUTION LAW SECTION STATE BAR OF GEORGIA**

#### **ARTICLE I**

##### **Name and Purpose**

**Section 1:** The name of this Section shall be Franchise and Distribution Law Section.

**Section 2:** The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to develop their knowledge and professional abilities in franchise and distribution law and to render better services to their clients and to the public.

#### **ARTICLE II**

##### **Membership and Dues**

**Section 1:** Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues on the current year. Annual dues shall be set by the Section leadership and approved by the Board of Governors.

**Section 2:** Student Law Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except that of voting or holding office.

**Section 3:** The amount of annual dues for Section members and law student members may be changed in an amount determined by a majority vote of the



members of the Section, subject to the approval of the Board of Governors of the State Bar of Georgia.

### ARTICLE III

#### Officers

**Section 1:** The Officers of the Section shall be a Chairperson (or President), a Vice-Chairperson (or Vice President), a Treasurer, and a Secretary, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section. The secretary and treasurer positions may be held by one person.

**Section 2:** All newly elected Officers shall hold office for a term of one (1) year beginning at the commencement of the fiscal year of the State Bar of Georgia following the election at which he or she is elected and ending at the close of the same fiscal year of the State Bar of Georgia or until his or her successor has been elected. If a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become Chairperson for the unexpired term. If a vacancy arises in the office of the Chairperson and there is also a vacancy in the office of the Vice-Chairperson, the President of the State Bar of Georgia shall appoint a successor Chairperson for the unexpired term. The Section Executive Committee may, by majority vote, fill any other vacancy in any other elected office for the balance of the unexpired term of such office.

**Section 3:** The Chairperson shall provide notice of the Section Executive Committee meetings and Section meetings. The Chairperson will preside over all meetings of the Section Executive Committee and of the Section, appoint appropriate committees to serve during his or her term as Chairperson, and plan and supervise the annual meeting of the Section. The Chairperson shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibility as may be prescribed by the Section or by the State Bar of Georgia.

**Section 4:** The Vice-Chairperson shall assist the Chairperson and, in the absence or disability of the Chairperson, shall perform the duties of the Chairperson.

**Section 5:** The Secretary shall record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary, and perform such other duties as may be prescribed by the Chairperson.

**Section 6:** The Treasurer shall keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chairperson. The Treasurer shall provide an accounting to the Section at its annual meeting or upon the Chairperson's request.

#### **ARTICLE IV** **Meetings of the Section**

**Section 1:** A Section shall meet a minimum of twice per Bar year. Other meetings of the Section may be held from time to time on the call of the Chairperson or Vice-Chairperson or any four members of the Section Executive Committee or any ten active members of the Section. An annual meeting of the Section shall be held each Bar year at a location of the Section's choosing.

**Section 2:** The Chairperson may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chairperson.

**Section 3:** At any meeting of the Section, ten (10) members present and eligible to vote shall constitute a quorum. Presence at a meeting can be in-person or by any electronic means of communication other than text messaging or email as set forth in Art. IV, Section 7 of these Bylaws.

**Section 4:** Except for administrative decisions made by the Officers or Section Executive Committee, all actions of the Section shall be by a majority vote of the members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

**Section 5:** Parliamentary procedure at all meetings of the Section shall be governed by Roberts Rules of Order, Newly Revised, and by these Bylaws.

**Section 6:** Notice of Section meetings shall be given at least seven (7) days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be given by email or mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

**Section 7:** If deemed prudent or necessary, the Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email. A Section may adopt internal rules to allow for email voting on noncontroversial matters, provided that the rule allows for any member to request verbal debate or discussion, which would stop all email voting. All internal rules must be approved by the Office of the General Counsel.

## **ARTICLE V**

### **Section Executive Committee**

**Section 1:** The Section Executive Committee shall consist of the Officers of the Section and other members of the Section appointed by the Chairperson, whose term shall be co-existent with that of the Chairperson.

**Section 2:** Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this provision shall be reported to the members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

**Section 3:** All committees, except as otherwise provided herein, shall be appointed or removed by the Chairperson. Members of the Section Executive Committee, other than the Officers, and any other members of the Section may serve as Chairperson of appointed committees.

## ARTICLE VI

### Elections

**Section 1:** Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chairperson shall appoint three or more members of the Section to be a nominating committee which shall nominate one or more members of the Section as qualified to hold each of the offices of the Section for the ensuing terms of office. The nominating committee's report shall be made to the Secretary thereafter, who shall present the report to the Section at its next meeting, or by email or publication of a newsletter. Thereafter, and before the election of Officers, any member of the Section may nominate any other member of the Section for election to fill any of the vacant offices by transmitting said nomination to the Secretary. Nominations shall be closed seven (7) days after the presentation of the report of the nominating committee.

**Section 2:** The Officers of the Section shall be elected by written or electronic ballot. Before each election, voting instructions will be provided to all voting members. Ballots providing selections of the duly nominated candidates for each office shall be delivered in person at a regular or called meeting, by U.S. mail or by other Section approved electronic voting methods. Voting shall take place no later than **seven (7)** days after the close of nominations. Each member of the Section wishing to participate in the election shall complete his or her ballot by casting a vote for at least one candidate for each vacant office. Ballots shall be cast per the voting instructions for each election. Votes cast contrary to the prescribed voting instructions shall not be counted. Within five (5) days of the due date for return of completed ballots, votes of Section members shall be tallied, and elected candidates shall be informed of their election. An election to any office requires a majority of the votes cast. If more than two candidates are nominated for any office and no candidate so nominated receives a majority of the votes cast upon the first ballot, then the two candidates receiving the largest number of votes cast upon such first ballot shall be voted upon again in a second ballot, and the candidate receiving a majority of the votes cast upon such second ballot shall be declared to be elected to the particular office. A Special Meeting of the Section may be called by the Officers to otherwise modify the procedure governing any election.

## **ARTICLE VII**

### **Finances**

**Section 1:** Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by a member of the Section Executive Committee and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

**Section 2:** Funds of the Section shall be expended for such purposes related to the Section's activities as authorized by the Section's Executive Committee.

**Section 3:** Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. Reimbursement of expenditure will require a receipt of the expense incurred on behalf of the Section and submitted to the Sections Director. The Sections Director will report the expense to the Executive Committee, which will approve or deny the reimbursement.

**Section 4:** A financial report of the funds of the Section shall be reported by the Treasurer at each meeting of the Section upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

## **ARTICLE VIII**

### **Miscellaneous**

**Section 1:** The Section shall conduct continuing education programs at least once each Bar year. Continuing education programs that are six hours or more in credit hours shall be conducted through the Institute of Continuing Legal Education of the State Bar of Georgia in the area of law and field of practice of this Section. Any continuing legal education program that is less than six hours may be conducted by the Section without the Institute of Continuing Legal Education of the State Bar of Georgia. All continuing education programs must be approved by the Commission on Continuing Lawyer Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

**Section 2:** The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit any proposed legislation to the Advisory Committee on Legislation for consideration by the Committee. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

**Section 3:** The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws and standing policies of the State Bar of Georgia.

## **ARTICLE IX**

### **Effective Date and Amendment**

**Section 1:** These Bylaws shall become effective upon approval by the Board of Governors of the State Bar of Georgia.

**Section 2:** These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, provided the proposed amendment has first been approved by a majority of the Executive Committee.

**Section 3:** No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed and subscribed before the undersigned this the \_\_\_\_\_ day of \_\_\_\_\_, 2024.

\_\_\_\_\_  
**CHAIRPERSON**

\_\_\_\_\_  
**SECTION SECRETARY**

## **BYLAWS**

### **REAL PROPERTY LAW SECTION STATE BAR OF GEORGIA**

#### **ARTICLE I**

##### **Name and Purpose**

**Section 1:** The name of this Section shall be the “Real Property Law Section.”

**Section 2:** The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to develop their knowledge and professional abilities in the field of real property law and related subjects; to sponsor continuing education of the bar in this field; to promote cooperation with other professional and business groups engages in related activities; to study or review, proposed legislation, administrative policy or Advisory Opinions for the improvement of the law in this field and make appropriate recommendations to the State Bar of Georgia; all in conformity with the statutes, orders, bylaw, or other rules, regulations, or established policies governing the State Bar of Georgia; and to render better services to their clients and the public.

#### **ARTICLE II**

##### **Membership and Dues**

**Section 1:** Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues on the current year. The Annual section dues shall be set by the Section Executive Committee and approved by the Board of Governors.

**Section 2:** Student Law Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon

application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except that of voting or holding office.

### **ARTICLE III** **Officers**

**Section 1:** The Officers of the Section shall be a Chairperson, a Vice-Chairperson, a Secretary-Treasurer (a position held by one person), and an Immediate Past Chair, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section.

**Section 2:** At the annual meeting of the Section, an election shall be held for the offices of Vice Chairperson and Secretary-Treasurer. Upon election of the Vice Chairperson, the Vice Chairperson elected at the previous annual meeting of the Section shall become Chairperson. Each Officer shall hold office for a term of one (1) year beginning at the commencement of the fiscal year of the State Bar of Georgia following the election at which he or she is elected and ending at the close of the same fiscal year of the State Bar of Georgia or until his or her successor has been elected.

If a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become Chairperson for the unexpired term and shall also serve as Chairperson for the next succeeding term. If a vacancy arises in the office of the Chairperson and there is also a vacancy in the office of the Vice-Chairperson, the President of the State Bar of Georgia shall appoint a successor Chairperson for the unexpired term. The Section Executive Committee may, by majority vote, fill any other vacancy in any other elected office for the balance of the unexpired term of such office.

**Section 3:** The Chairperson shall provide notice of the Section Executive Committee meetings and Section meetings; shall preside over all meetings of the Section Executive Committee and of the Section; appoint appropriate committees to serve during his or her term as Chairperson; plan and supervise the program of the Section at its annual meeting; and shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibility as may be prescribed by the Section or by the State Bar of Georgia.



**Section 4:** The Vice-Chairperson shall assist the Chairperson and, in the absence, disability or resignation of the Chairperson, shall perform the duties of the Chairperson.

**Section 5:** In their role as Secretary, the Secretary-Treasurer shall record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary, and perform such other duties as may be prescribed by the Chairperson.

**Section 6:** In their role as Treasurer, the Secretary-Treasurer shall keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chairperson. The Treasurer shall provide an accounting to the Section at its annual meeting or upon the Chairperson's request.

#### **ARTICLE IV** **Meetings of the Section**

**Section 1:** A Section shall meet a minimum of twice per Bar year. Other meetings of the Section may be held from time to time on the call of the Chairperson or Vice-Chairperson or any four members of the Section Executive Committee or any ten active members of the Section. An annual meeting of the Section shall be held each Bar year at or about the first week of May; the date, time, and location and by any electronic means to be determined by the Chairperson.

**Section 2:** The Chairperson may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chairperson.

**Section 3:** At any meeting of the Section, twenty members present and eligible to vote shall constitute a quorum. Presence at a meeting can be in-person or by any electronic means of communication other than text messaging or email as set forth in Art. IV, Section 7 of these Bylaws.

**Section 4:** Except for administrative decisions made by the Officers or Section Executive Committee, all actions of the Section shall be by a majority vote of the members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

**Section 5:** Parliamentary procedure at all meetings of the Section shall be governed by Roberts Rules of Order, Newly Revised, and by these Bylaws.

**Section 6:** Notice of Section meetings shall be given at least ten days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be given by email or mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

**Section 7:** If deemed prudent or necessary, the Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email. A Section may adopt internal rules to allow for email voting on noncontroversial matters, provided that the rule allows for any member to request verbal debate or discussion, which would stop all email voting. All internal rules must be approved by the Office of the General Counsel.

## **ARTICLE V**

### **Section Executive Committee**

**Section 1:** The Section Executive Committee shall consist of the Officers of the Section, appointed by the Chairperson and whose term shall be co-existent with that of the Chairperson, and up to 22 members appointed by majority vote of the Executive Committee.

**Section 2:** Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this provision shall be reported to the

members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

**Section 3:** Standing Committees: There shall be the following standing committees of this Section, appointed by the Chairperson, upon consultation with the Executive Committee, to serve during the Chairperson's term of office:

(a) Title Standards Committee, the duties of which Committee shall be to maintain a continuing review of the existing title standards and to recommend amendments to the existing title standards for approval by the Section;

(b) Legislative and Governmental Relations Committee, the duties of which Committee shall be to seek to keep the Members of the Section informed as to legislation pending before or enacted by the General Assembly of Georgia or the Congress of the United States affecting real property law and other matters directly related to real property law, and to submit for approval by the Executive Committee legislative subjects to be presented to the State Bar Advisory Committee on Legislation; and

(c) Bylaws Committee, the duties shall be to maintain a continuing review of these bylaws and to recommend such amendments from time to time as may be appropriate.

All committees, except as otherwise provided herein, shall be appointed or removed by the Chairperson. Members of the Section Executive Committee, other than the Officers, and any other members of the Section may serve as Chairperson of appointed committees.

**Section 4:** The Chairperson shall appoint such other special committees as he or she may from time to time deem appropriate. The Chairperson shall also appoint a Nominating Committee as provided in Article VI, Section 1, of these bylaws.

## **ARTICLE VI**

### **Elections**

**Section 1:** Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chairperson shall appoint three or more members

of the Section to be a nominating committee which shall nominate one or more members of the Section as qualified to hold each of the offices of the Section for the ensuing terms of office and to fill vacancies for regular members of the Executive Committee whose term of office will expire at the next annual Bar year. The nominating committee's report shall be made to the Secretary-Treasurer thereafter, and the Chairperson shall present the report to the Section at its next meeting, or by email or publication of a newsletter. Thereafter, and before the election of Officers, any member of the Section present at the annual meeting may nominate any other member of the Section for election to fill any of the vacant offices.

**Section 2:** The names of all Members of the Section nominated for each office either by nominating committee or from the floor shall be submitted to the Section at its Annual Meeting and Ballots shall be cast to elect a designated Member to an office or position by majority vote. Voting shall be viva-voce or by written ballot, but only those Members appearing in person at the Annual Meeting may vote. A majority of the Members of the Section present and voting may require written secret ballots or otherwise modify the procedure governing the election.

## **ARTICLE VII**

### **Finances**

**Section 1:** Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by a member of the Section Executive Committee and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

**Section 2:** Funds of the Section shall be expended for such purposes related to the Section's activities as authorized by the Section's Executive Committee.

**Section 3:** Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. Reimbursement of expenditure will require a receipt of the expense incurred on behalf of the Section and submitted to the Sections Director. The Sections Director will report the expense to the Executive Committee, which will approve or deny the reimbursement.

**Section 4:** A financial report of the funds of the Section shall be reported by the Treasurer at each meeting of the Section upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

## **ARTICLE VIII**

### **Miscellaneous**

**Section 1:** The Section shall conduct continuing education programs at least once each Bar year. Continuing education programs that are six hours or more in credit hours shall be conducted through the Institute of Continuing Legal Education of the State Bar of Georgia in the area of law and field of practice of this Section. Any continuing legal education program that is less than six hours may be conducted by the Section without the Institute of Continuing Legal Education of the State Bar of Georgia. All continuing education programs must be approved by the Commission on Continuing Lawyer Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

**Section 2:** The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit any proposed legislation to the Advisory Committee on Legislation for consideration by the Committee. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

**Section 3:** The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws and standing policies of the State Bar of Georgia.

## **ARTICLE IX**

### **Effective Date and Amendment**

**Section 1:** These Bylaws shall become effective upon approval by the Board of Governors of the State Bar of Georgia.

**Section 2:** These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, provided the proposed amendment has first been approved by a majority of the Executive Committee.

**Section 3:** No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed, and subscribed before the undersigned this the \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
**CHAIRPERSON**

\_\_\_\_\_  
**SECTION SECRETARY**

**STATE BAR OF GEORGIA  
ADVISORY COMMITTEE ON LEGISLATION  
2024-2025  
MINUTES OF MEETING 1  
September 24, 2024**

***Hybrid Meeting***

In-person at the State Bar Conference Center & via Zoom

The first meeting of the 2024-2025 State Bar of Georgia Advisory Committee on Legislation (“ACL”) was held on Thursday, September 24, 2024 in a hybrid format.

**CALL TO ORDER**

ACL Chair Ceasar Mitchell called the meeting to order at 10:07 AM and welcomed members, liaisons, and other stakeholders and guests.

**KELLER REVIEW**

Paula Frederick, General Counsel of the State Bar of Georgia, presented a review of *Keller v. State Bar of California*, 496 U.S. 1 (1990). As a mandatory bar association, the State Bar of Georgia is subject to First Amendment free speech and free association scrutiny by its membership. Under *Keller*, mandatory bar dues may only be used towards activities germane to the scope and purposes of the mandatory bar. The Supreme Court found that the scope and purposes of the California Bar included (1) regulating the legal profession, and (2) improving the quality of legal services.

Paula explained that the purposes of the State Bar of Georgia are covered in Rule 1-103 and include: (1) fostering the principles of duty and service to the public among the members of the bar, (2) improving the administration of justice, and (3) advancing the science of law.

In 2018, the Supreme Court overturned *Abood v. Detroit Board of Education* in *Janus v. AFSCME*. The *Abood* case had served as the underpinning for the Court’s decision in *Keller*. Since 2018, a number of lawsuits have been filed against mandatory bar associations throughout the country challenging their activities as a violation of members’ free association rights. These claims have broadly applied the *Keller* standard to all activities of the mandatory bar, regardless of whether those activities are funded by compelled dues. These cases have been litigated and appealed up to the US Supreme Court, which has denied cert. in each case.

Circuit courts throughout the country have upheld certain legislative activity under the *Keller* standard. This includes funding for courts, funding for legal services, and improvements to the law that make it easier to use. But if the legislative activity is political or ideological, that activity is off limits under the *Keller* analysis.

Before the State Bar's Board of Governors, Executive Committee, or Advisory Committee on Legislation takes a position on any legislative matter, it must do a *Keller* vote.

## **NEW LEGISLATIVE PROPOSALS**

The ACL reviewed the following new proposals. Both proposals presented at the meeting were approved by the committee and will be considered by the Board of Governors at its Fall Meeting on November 2, 2024.

### **a. Committee to Promote Inclusion in the Profession – FY 2026 Budget Request – \$3.1 million to fund civil legal services grants for victims of domestic violence.**

LaQuaria Barton presented the proposal on behalf of the Committee to Promote Inclusion in the Profession. The State Bar has voted to support the Judicial Council's annual funding request for grants to legal services providers for representation of victims of domestic violence for over 20 years. The funding for these grants is appropriated by the General Assembly and administered to civil legal service organizations by the Administrative Office of the Courts (AOC). The AOC distributes the funds to each organization based on poverty population throughout the state. The Judicial Council has officially made its request for renewed funding of \$3 million, and the Committee to Promote Inclusion in the Profession has asked that the Bar support an increase of \$100,000, for a total of \$3.1 million.

The *Keller* vote was unanimous. The vote supporting this proposal was unanimous. The Board of Governors will consider this proposal on November 2, 2024.

### **b. Fiduciary Law Section – Amendments to Title 53 and Related Code Sections**

Nick Djuric presented the proposal on behalf of the Fiduciary Law Section. The Bar supported this proposal as part of its 2024 legislative package, but the bill did not pass due to end of session time constraints. The goal of the proposed legislation is to improve the provision of legal services relating to wills, trusts, and the administration of estates and trusts in the courts, especially probate courts. It proposes changes to Title 53 and related code sections, including the banking code, the Uniform Power of Attorney Act, and the Uniform Statutory Rule against Perpetuities Act. A large focus was placed on amending Title 53 and harmonizing provisions across the probate code and trust code as well as a comprehensive revision and modernization of heirship provisions in various code sections, including Title 53 and Title 19. One of the amendments replaces notice provisions added by HB 91 with a duty by the executor to notify beneficiaries of a testate estate of the probate of the will within six months after qualification as executor.

There was some discussion on whether this proposal meets the *Keller* standard. General Counsel Paula Frederick indicated that this proposal is neither controversial nor political and should not pose a threat. Nick Djuric emphasized the Fiduciary Law Section's stance that these changes would improve the administration of justice and advance the science of law.



The *Keller* vote passed by majority. The motion supporting this proposal passed by a majority vote. The Board of Governors will consider this proposal on November 2, 2024.

## INFORMATIONAL UPDATES

### a. Status of 2024 State Bar Legislative Initiatives

Legislative Consultant Rusty Sewell briefly reported on the status of State Bar proposals following the 2024 legislative session, which included the following:

- i. HB 947 (Judicial Compensation) – **DID NOT PASS**
- ii. HB 1218 (Probate Code) – **DID NOT PASS**
- iii. HB 1240 (Uniform Commercial Code) – **PASSED**
- iv. Proclamation Recognizing April 2024 as Legal Professionalism Month – **SIGNED**
- v. Judicial Council FY25 Grant Funding for Civil Legal Services
  - i. Medical Legal Partnership Grants – **FUNDED AT \$409,500**
  - ii. Domestic Violence Grants – **FULLY FUNDED AT \$3 million**
- vi. Georgia Resource Center – **FULLY FUNDED AT \$900,000**

### b. Election and Political Update

Legislative Consultant Mark Middleton gave a brief political update. He reported that there should not be much turnover in the Georgia General Assembly this election cycle. Due to the nature of the composition of districts, many of the current legislators ran unopposed and many races were resolved in the primaries, thus, only a handful will be contested in the fall. Many of the legislators this committee works closely with will return to their positions.

### c. Update from the Judiciary

Tracy Mason with the Administrative Office of the Courts reported that the Judicial Council of Georgia met in August and has not yet take action on any legislative items but will meet again in December to do so. The Council is focusing on digital takedown legislation, particularly authorizing digital takedown but maintaining the role of the court reporter in transcribing and certifying transcripts. Judicial compensation reform will also be a focus this year. The Council made eight superior judgeship recommendations and, following a recent policy change, now submits its list ranked by workload. The 2025 recommendation list includes: the Alapaha Circuit, the Douglas Circuit, the Augusta Circuit, the Gwinnett Circuit, the Northern Circuit, the DeKalb Circuit, the Tallapoosa Circuit, and the Northeastern Circuit.

## FUTURE MEETINGS

Chair Ceasar Mitchell announced that the committee will meet again on December 10, 2024. Members should expect a longer meeting due to a projected heavy volume of proposals for consideration.

**ADJOURNMENT**

With no further business before the committee, the meeting was adjourned at 11:18 AM.

**FORM B**

For proposals seeking State Bar support for appropriations and state funding.

*Name of Proposal:* **Domestic Violence Funding**

*Name of Section/Committee submitting this proposal:* **Committee to Promote Inclusion in the Profession**

1. Please provide (a) the purpose of the funding, (b) the requested amount, and (b) the name of the state agency that received and administers this funding from the legislature.

(a) **The purpose of the requested funding is to provide civil legal services to low-income victims of domestic violence.**

(b) **The requested amount is \$3.1 million.**

(c) **The agencies that receive and administer this funding are Georgia Legal Services and Atlanta Legal Aid.**

2. Please provide a brief background on this appropriations request, including whether the request seeks an increase from the previous fiscal year.

**The background of this appropriation request is as follows:**

**In 1998, the General Assembly appropriated \$2 million as part of the Georgia Supreme Court Chief Justice's budget to provide domestic legal services to the poor. This appropriation marked the first to support civil legal services to indigent Georgians. In the 2002-2003 fiscal year, the General Assembly increased this funding to \$2.2 million in response to the increase in domestic violence in Georgia.**

**In November 2002, The Women and Minorities in the Profession Committee, now known as The Committee to Promote Inclusion in the Profession, wrote a letter to the Advisory Committee on Legislation and requested \$2.3 million for Domestic Violence Funding was granted \$2.3 million, which marked a 4.5% increase in funding from the 2002-2003FY to the 2003-2004FY.**

**This appropriation has continued to receive significant support over the years. For fiscal years 2022 and 2023, the board approved support for the Domestic Violence Fund in the amount of \$3 million.**

3. Has the State Bar supported this appropriation in the past?

**Yes**

4. Provide a statement of the issues to be addressed by this appropriation. **This funding helps to provide the legal representation that will serve the needs of many low-income survivors of domestic violence. There are many rural areas in Georgia that have been referred to as legal deserts because of the lack of lawyers to represent survivors, including 59 rural counties that have less than 10 (ten) lawyers. Even in urban areas where lawyers are present, it is nearly impossible to find lawyers to represent low-income survivors without cost.**
5. Why should the State Bar take an official position to support or oppose this funding? **The State Bar of Georgia has been charged with serving both the public and the justice system needs in the State of Georgia. As a result, this proposal allows our unified Bar to fulfill that mission by providing low-income survivors of domestic violence with legal assistance in an effort to be protected and safe. Additionally, this proposal is cost-effective for the state of Georgia because studies show that for each \$1 spent on temporary protective orders, states save \$30.75 in avoided costs for law enforcement, hospital, incarceration, and other public costs.**
6. Describe how support for this appropriation (1) regulates the legal profession, or (2) improves the quality of legal services.<sup>1</sup>  
**Support for this appropriation improves the quality of legal services by increasing attorney efficiency, client outreach, access to technology and research, and access to justice in rural areas of Georgia (including travel).**

*Two hundred fifty dollars funds a day of office supplies for 10 Georgia Legal Services offices, five hundred dollars funds a day's worth of internet and remote access for 10 offices so attorneys can serve clients in rural areas, seven hundred fifty dollars funds a month of travel for attorneys in one (1) Georgia Legal Services office, helping them get to court, attend community meetings and meet clients where clients are most comfortable.*

**See Georgia Legal Services Program, Make A Donation at <https://secure.givelively.org/donate/georgia-legal-services-program-inc/and-justice-for-all-2024>.**

7. Are there any potential proponents or opponents of this appropriation, including, but not limited to, other State Bar sections, specialty bar associations, governmental entities, and outside interest groups? If so, please list them here.  
**Potential proponents of this appropriation are the GABWA, Georgia Association of Black Women Attorneys, GAWL, Georgia Association of Woman Lawyers, Gate City Bar, DeKalb Bar Association, Stonewall Bar Association, Georgia Hispanic Bar, and Georgia Asian Pacific American Bar Association.**

---

<sup>1</sup> The State Bar reviews all proposals for compliance with the standard set out by the United States Supreme Court in *Keller v. State Bar of California*, 496 U.S. 1 (1990).

**There are no known opponents (potential or otherwise) of this appropriation.**

8. Which other State Bar committees or sections may have an interest in this appropriation?  
**This committee recommends that all Diversity Bar organizations and the Indigent Defense, Access to Justice, and Children and Courts committees receive this request.**

a. Have you provided interested State Bar committees/sections with a copy of this request?

If so, have they provided any comments?

**This committee has not provided or forwarded the proposal with a copy of this request.**

9. What is the recommendation that your section/committee wishes to be adopted by the State Bar?

**This committee respectfully recommends that the State Bar increase funding by 3.3% from \$3 million to \$3.1 million.**

10. Please attach any additional information that the committee may find helpful in assessing this request.

**This committee has no additional information at this time.**

September 16, 2024

Director of Governmental Affairs  
State Bar of Georgia  
104 Marietta Street N.E.  
Atlanta, GA 30303

RE: Legislative Proposal – Domestic Violence Funding

To Whom It May Concern:

The Committee to Promote Inclusion in the Profession ("CPIP") is seeking the State Bar of Georgia's endorsement for legislation that would allocate funds for civil legal services to low-income victims of domestic violence. Each year, CPIP requests the State Bar of Georgia's endorsement of this legislation, which aims to provide funding to non-profit organizations offering civil legal services to low-income Georgians. Our Committee is hopeful that the State Bar of Georgia will support the endorsement of this legislation for the upcoming fiscal year, as the proposal needs to be renewed before the advisory Committee on Legislation. Therefore, our Committee is proposing an appropriation of \$3.1 million for the Domestic Violence grant award. Additionally, we are aware that the Judicial Council is also making this request in their budget, and we kindly ask for the State Bar Advisory Committee on Legislation's support for this request.

This funding helps to provide the legal representation that serves a need that would otherwise go unmet. Many rural areas in Georgia have been referred to as legal deserts because of the lack of lawyers to represent survivors, including 59 rural counties with less than ten (10) lawyers. Even in urban areas where lawyers are present, it is nearly impossible to find lawyers to represent low-income survivors without cost. <https://www.law.com/dailyreportonline/2020/07/28/rural-georgias-legal-deserts-are-further-stressed-by-pandemic/?slreturn=20200726112651>

Not only is representation important for survivors, but studies show that for each \$1 spent on temporary protective orders, states save \$30.75 in avoided costs for law enforcement, hospital, incarceration, and other public expenses. (*Hawkins, N. Perspectives on Civil Protective Orders in Domestic Violence Cases, NIJ Journal, No. 266, p.8*).

The Committee to Promote Inclusion in the Profession is not aware of opposition to this proposal for the appropriation for this fiscal year; however, we are aware of the competing funding needs, and we ask that the Bar fully fund the Family Violence grant and prioritize this legislation.

Our Committee understands that we do not need to submit the specific language for the legislation because this is a budget item. Furthermore, this proposal satisfies the *Keller* criteria because it is within the scope and purposes of the State Bar of Georgia to advance the administration of justice. It also is consistent with past actions by the Board of Governors in support of access to legal services by people experiencing poverty. If you have any questions, please get in touch with us for further information.

Thank you for your consideration.

Respectfully,

**LaQuaria Barton** Digitally signed by LaQuaria Barton  
Date: 2024.09.16 19:48:01 -0400  
Adobe Acrobat version: 2024.003.20054

LaQuaria S. Barton, Co-Chair  
Committee to Promote Inclusion in the Profession

# Advisory Committee on Legislation (ACL) 2024-2025 Legislative Proposal Form

## FORM A

For proposed legislation drafted by a State Bar committee or section and  
lobbied by the State Bar's legislative team.

\*\*\*\*\*PROPOSALS SUBMITTED UNDER THIS FORM MUST ATTACH A DRAFT OF THE  
PROPOSED LEGISLATION AS IT WOULD APPEAR IN THE GEORGIA CODE\*\*\*\*\*

*Name of Proposal:* **Amendments to Title 53 and Related Code Sections**

*Name of Section/Committee submitting this proposal:* **Fiduciary Law Section**

1. **Provide a statement of the issues to be addressed by the proposed bill, including why this proposed revision is needed in Georgia.**

Over the past 25 years, the General Assembly has made significant changes to the law of wills, probate, administration of estates, guardianships, trusts, and powers of attorney in Georgia. The Probate Code was revised in 1998, the Guardianship Code was revised in 2005, the Trust Code was revised in 2010, and the Uniform Power of Attorney Act was adopted in 2017. Since that time, the Code Revision Committee of the Fiduciary Law Section has continued to examine Title 53 and related Code sections and draft legislation to make changes to the Code based on the experience of fiduciary lawyers and court decisions arising out of the original Code revisions. Amendments to Title 53 and related Code sections drafted by the Code Revision Committee were adopted by the General Assembly in 2018 and 2020. This proposal includes additional changes. Some of the changes should have been made to conform existing law to the original Code revisions, some of the changes correct mistakes in drafting, and some of the changes address problems that became obvious only after years of experience with the original Code revisions. In addition, the proposed legislation also makes some reforms to the Code based on the

recommendations of lawyers practicing fiduciary law in Georgia.

2. **Is this a model bill from the Uniform Law Commission, American Law Institute, or another entity that drafts model legislation?**    ~~YES~~ or NO

- a. **Please include relevant information on the model act, including when it was created and other states that have adopted it.**

The proposed legislation is not a uniform act, but some of the provisions in the proposed legislation are modeled on provisions in the Uniform Prudent Investor Act (1994), Uniform Electronic Transactions Act (1999), Uniform Trust Code (2000), and Uniform Electronic Estate Planning Documents Act (2022)

3. **Give a brief summary of the existing law on this issue, including citations to applicable case law addressed in the proposed legislation.**

A draft of a bill (LC 48 1057) was prepared by the Office of Legislative Counsel for introduction in the 2024 session of the General Assembly, but no bill was introduced. For the 2025 session of the General Assembly, the Fiduciary Law Section is proposing a bill based on LC 48 1057, with additional changes based on the recommendations of the Code Revision Committee.

A section-by-section analysis of LC 48 1057 and the proposed changes to LC 48 1057 is attached.

4. **Does this proposal seek to codify current case law or seek to modify a statute based on a recent appellate decision?**

See above description of the proposed legislation.

5. **Will this proposed legislation have a fiscal impact on the state?**



No, not to the knowledge of the Fiduciary Law Section.

**6. Describe how the pending or proposed legislation (1) regulates the legal profession, or (2) improves the quality of legal services.<sup>1</sup>**

The proposed legislation is designed to improve the provision of legal services relating to wills, trusts, and administration of estates, and to the administration of estates and trusts in the courts, especially the probate courts.

**7. Has another group attempted to pass similar legislation in the past? Is there another interest group that may be suited to lobby this bill?**

No, not to the knowledge of the Fiduciary Law Section

Section 50 of the proposed bill replaces provisions of the Probate Code that were added by HB 91 (effective July 1, 2023). A version of these changes was incorporated in HB 1218, which passed the House of Representatives by a vote of 168-0 in the 2024 session, but was tabled in the Senate. One of the cosponsors of HB 91 was the sponsor of HB 1281.

**8. Why should the State Bar use its resources to lobby this proposal on behalf of the legal profession?**

The State Bar used its resources to lobby passage of the revised Probate Code of 1998, the revised Guardianship Code of 2005, the revised Trust Code of 2010, Revised Uniform Fiduciary Access to Digital Assets Act, the Uniform Power of Attorney Act revisions in 2018, and the revisions to Title 53 and related Code sections in 2018 and 2020. The State Bar should use its resources to lobby this proposed legislation because it makes changes to Title 53 and related Code sections that are based on the experience of

---

<sup>1</sup> The State Bar reviews all proposals for compliance with the standard set out by the United States Supreme Court in *Keller v. State Bar of California*, 496 U.S. 1 (1990).

fiduciary lawyers and court decisions arising out of the original Code revisions, in addition to reforms to the Code based on the recommendations of lawyers practicing fiduciary law in Georgia.

- 9. Are there any potential proponents or opponents of the proposal or pending legislation, including, but not limited to, other State Bar sections, specialty bar associations (ie- the trial lawyers or real estate closing attorneys), governmental entities, and outside interest groups? If so, please list them below.**

No, not to the knowledge of the Fiduciary Law Section.

- 10. Have you circulated this legislative proposal to all of the members of your own section or committee? If so, have they provided any comments?**

The proposed bill was circulated to the Fiduciary Law Section and discussed at the Fiduciary Law Institutes held in July 2022, July 2023, and July 2024, and the Estate Planning Institute held in February 2024. All comments received have been addressed or incorporated into changes to the proposal.

- 11. Which other State Bar committees or sections may have an interest in the legislation or proposal?**

The Elder Law Section and the probate judges will have an interest in the proposed legislation.

- a. Have you provided interested State Bar committees/sections with a copy of this proposal? If so, have they provided any comments?**

Most of this proposal was circulated to the State Bar as part of the Fiduciary Law Section's submissions to the ACL in December 2022

and September 2023. No comments were received by the Fiduciary Law Section. This proposal will also be circulated to a committee of probate judges with whom the Fiduciary Law Section has worked on prior legislation.

**12. What is the recommendation that your section or committee wishes to be adopted by the State Bar?**

The Fiduciary Law Section wishes the State Bar to support the proposed legislation.

## DRAFT 2025 FIDUCIARY LAW SECTION BILL

### Introduction

Over the past 25 years, the General Assembly has made significant changes to the law of wills, probate, administration of estates, guardianships, trusts, and powers of attorney in Georgia. The Probate Code was revised in 1998, the Guardianship Code was revised in 2005, the Trust Code was revised in 2010, and the Uniform Power of Attorney Act was adopted in 2017. Since that time, the Code Revision Committee of the Fiduciary Law Section has continued to examine Title 53 and related Code sections and draft legislation to makes changes to the Code based on the experience of fiduciary lawyers and court decisions arising out of the original Code revisions. Amendments to Title 53 and related Code sections drafted by the Code Revision Committee were adopted by the General Assembly in 2018 and 2020.

This proposal includes additional changes. Some of the changes should have been made to conform existing law to the original Code revisions, some of the changes correct mistakes in drafting, and some of the changes address problems that became obvious only after years of experience with the original Code revisions. In addition, the proposed legislation also makes some reforms to the Code based on the recommendations of lawyers practicing fiduciary law in Georgia.

The bill is not a uniform act, but some of the provisions in the proposed legislation are modeled on provisions in the Uniform Prudent Investor Act (1994), Uniform Electronic Transactions Act (1999), Uniform Trust Code (2000), and Uniform Electronic Estate Planning Documents Act (2022).

A draft of a bill (LC 48 1057) was prepared by the Office of Legislative Counsel for introduction in the 2024 session of the General Assembly, but no bill was introduced. For the 2025 session of the General Assembly, the Fiduciary Law Section is proposing a bill based on LC 48 1057, with additional changes based on the recommendations of its Code Revision Committee.

In the following section-by-section analysis of the bill, sections that appear only in the changes proposed by the Code Revision Committee and not in LC 48 1057, as well as sections that have been substantially changed in the changes proposed by the Code Revision Committee, are marked with an asterisk.

### Section-by-Section Analysis of LC 48 1057 and Changes Proposed by Code Revision Committee

Section	O.C.G.A.	Comment/Status
1	7-1-223	Harmonizes Banking Code with changes to Trust and Probate Codes
2	7-1-242	
3	7-1-322	
4	7-1-324	
5	7-1-333	
6	7-1-334	
7	10-6B-3	Provides that the requirements of the Uniform Power of Attorney Act do not apply to delegations of powers by fiduciaries under wills or trust instruments or Title 53
8	10-6B-81	Clarifies the retroactive effect of the Uniform Power of Attorney Act on powers of attorney created before July 1, 2018
9	19-7-1	Amendments to Title 19 (Domestic Relations) as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance
10	19-7-21	

11	19-7-22	involving nonmarital children, and assisted reproduction (including in vitro fertilization)
12	19-7-40	
13	19-7-43	
14	19-7-54	
15	19-11-82	
16	19-11-192	
17	24-12-21	Amendments to Title 24 (Evidence) as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance involving nonmarital children, and assisted reproduction (including in vitro fertilization)
18	29-6-1	Corrects inconsistent provision in Guardianship Code
19	29-9-15	Clarifies the provision.
20	31-10-9	Amendments to Title 31 (Health) as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance involving nonmarital children, and assisted reproduction (including in vitro fertilization)
21	43-34-37	Amendments to Title 43 (Professions and Businesses) as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance involving nonmarital children, and assisted reproduction (including in vitro fertilization)
22	44-5-37	Corrects incorrect references to sections in Title 53 in Property Code
23	44-6-203	Harmonizes provisions of the Uniform Statutory Rule against Perpetuities with recent amendments to the Trust Code
24	44-6-204	
25	44-6-205	
26	44-6-207	
27	44-15-3	Harmonizes the provisions of the Uniform Prudent Management of Institutional Funds Act with recent amendments to Georgia's Uniform Prudent Investment Act
28	44-15-4	
29	44-15-5	
30	51-4-2	Amendments to Title 51 (Torts) as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance involving nonmarital children, and assisted reproduction (including in vitro fertilization)
31	53-1-9	Clarifies that provisions of the Probate and Trust Codes are enacted against the background of the common law, which remains in effect.
32*	53-2-2	Amendments to Probate Code as part of comprehensive revision and modernization of provisions relating to determination of heirs, inheritance involving nonmarital children, and assisted reproduction (including in vitro fertilization)
33*	53-2-3	
34*	53-2-4	
35	53-2-5	
36	53-2-9	
37	53-2-20	
38	53-2-21	
39	53-2-22	
40	53-2-23	
41	53-2-24	
42	53-2-25	
43	53-2-26	
44	53-2-27	
45	53-2-28	

46	53-2-40	Harmonizes provision relating to a guardian ad litem appointed to represent the estate of a deceased heir under 53-11-2
47	53-2-51	Harmonizes escheat procedures with general Probate Code procedures
48	53-4-5	Clarifies that a written statement or list disposing of a testator's tangible personal property will not be deemed to be the testator's will
49	53-4-20	Provides for the validity of wills executed in the electronic presence of witnesses under the emergency executive order that was in effect during the Covid-19 pandemic
50*	53-5-8	Notice provisions added by HB 91 (effective July 1, 2023) are replaced with a duty by the executor to notify beneficiaries of a testate estate of the probate of the will and the name and mailing address of the executor within six months after qualification as executor (a version of these changes was incorporated in HB 1218, which passed the House of Representatives by a vote of 168-0 in the 2024 session, but was tabled in the Senate)
51	53-6-1	Harmonize provisions regarding corporate fiduciaries with the Banking Code
52	53-6-50	
53	53-6-60	
		This amendment and amendments to 53-7-68 and 53-7-69.1 attempt to limit the beneficiaries who must consent to a personal representative's compensation and who must receive annual returns and periodic reports
54	53-7-1	Harmonizes provision relating to a guardian ad litem appointed to represent the estate of a deceased heir under 53-11-2
55	53-7-5	Removes any requirement for delegation of powers to a cotrustee to meet the requirements of the Uniform Power of Attorney Act
56	53-7-32	Clarifies the procedures for relieving the personal representative of the duty to make inventory
57*	53-7-41	Clarifies the provisions relating to failure of creditors to give notice of claims
58	53-7-50	Clarifies the provisions relating to a petition for discharge of personal representative
59*	53-7-68	See section 50 above
60*	53-7-69.1	Provides a judicial procedure for requiring periodic reports; also, see section 50 above
61*	53-12-2	Adds a new defined term "donor," which is then used in other provisions, and clarifies the status of a charitable organizations as qualified beneficiaries
62	53-12-3	Clarifies that the Trust Code is enacted against the background of the common law of trusts
63	53-12-8	Permits a qualified beneficiary who is a remainder beneficiary to represent contingent successor remainder beneficiaries and clarifies that the representation provisions may apply to any matter involving a trust under both the Trust Code and the provisions of a trust instrument
64	53-12-9	Clarifies that a nonjudicial settlement agreement cannot be used to modify a trust during the settlor's lifetime only if the modification is based on 53-12-61(b)
65	53-12-22	Separates provisions regarding in terrorem clauses from the general statement that a trust can be created from any lawful purpose, which caused confusion in a recent Court of Appeals decision
66	53-12-29	
67*	53-12-46	Clarifies that the trustee of a revocable trust owes duties only to the settlor (or to other current beneficiaries when the settlor is incapacitated), but provides a mechanism for enforcement of the trustee's duties to the settlor if the settlor is incapacitated

68*	53-12-61	Provides for the representation of all beneficiaries of a trust in a modification under 53-12-61(b) and adds a provision preventing modification of trusts that disqualifies or reduces a charitable deduction
69*	53-12-62	Clarifies that a trust decanting can include both principal and undistributed income; replaces the term “invade” with “distribute”; provides a limitation on the power to decant a non-grantor trust during donor’s lifetime
*	53-12-80	Clarifies provisions by replacing “settlor” with the new defined term “donor”
*	53-12-81	
70	53-12-82	
*	53-12-83	
71*	53-12-172	Clarifies the application of the cy pres doctrine to charitable trusts
72	53-12-200	Harmonizes provision regarding corporate fiduciaries with the Banking Code
73*	53-12-201	Changes the provisions relating to vacancies in a trusteeship and the methods of filling vacancies (based on provisions in the Uniform Trust Code)
74	53-12-221	Provides standards for the judicial removal of a trustee (based on provisions in the Uniform Trust Code) to replace “good cause,” which is the current standard
75	53-12-243	Clarifies when and to which beneficiaries a trustee must account
76*		
77	53-12-248	Adds a new provision to address a trustee’s fiduciary duties when the trustee also holds a power of appointment over a trust in an individual capacity and reverses the result in <i>Peterson v. Peterson</i> , 352 Ga. App. 675
78	53-12-261	Clarifies certain powers of a trustee relating to borrowing and guaranteeing debt, and removes any requirement for employment of advisors to meet the requirements of the Uniform Power of Attorney Act
79*	53-12-262	Clarifies provisions regarding powers of corporate fiduciaries
80	53-12-264	Removes provision relating to granting powers to trustees as obsolete and unnecessary given the ability of qualified beneficiaries to modify trusts
81	53-12-270	Clarifies and expands the savings provisions limiting the powers of a trustee who is a beneficiary or was appointed by a beneficiary to prevent adverse gift and estate tax consequences for the beneficiary
82	53-12-301	Clarifies the right of a settlor to enforce the charitable purposes of a mixed trust
83*	53-12-307	Changes the statute of limitations for breach of trust actions to two years from the date on which a document disclosing the existence of a claim is sent to a trust beneficiary (as opposed to the date on which a document was received), which harmonizes this provision with new Article 19, which provides for how notice and documents may be sent to a trust beneficiary for purposes of the Trust Code
84*	53-12-320	Clarifies provisions relating to foreign entities serving as fiduciaries
85	53-12-321	
86*	53-12-323	
87*		
88	53-12-362	Clarifies that petitions relating to a unitrust conversion can be brought in Article 6 probate courts
89*	53-12-500	Clarifies that a representative of a beneficiary appointed by a trust instrument is not a trust director
90*	53-12-501	Corrects a mistake in the 2020 amendment ( <u>This amendment is still being worked on by the Code Revision Committee because Legislative Counsel refuses to use the word “must”.</u> )
91*	53-12-506	Expands the provisions of Article 11 that apply to trust directors and provides that a partnership or limited liability company may serve as a trust director if all

		of the partners or members are individuals who have joint and several liability for all liabilities of the partnership or limited liability company
92*	Article 19 53-12-510 53-12-511 53-12-512 53-12-513	Adds Article 19 to the Trust Code; 53-12-510 provides definitions for the provisions in Article 19; 53-12-511 provides for how notice or a record may be sent to a person for purposes of the Trust Code or a trust instrument, including sending by electronic mail or an electronic portal; 53-12-512 and 53-12-513 allow for documents relating to trusts—with the exception of a writing creating a trust—to be in electronic form and signed by electronic signature; these amendments are modeled on the Uniform Electronic Transactions Act (2000) and the Uniform Electronic Estate Planning Documents Act (2020)
93		General repealer

If you would like to see a copy of the full code with proposed changes, please reach out to Megan Jones at [meganj@gabar.org](mailto:meganj@gabar.org).





## EXECUTIVE SUMMARY

To: Board of Governors

From: Bill NeSmith

Date: November 1, 2024

Re: Preview of Proposed Amendments to the Bylaws of the State Bar of Georgia

---

Below is a brief explanation of the proposed amendments to the bylaws of the State Bar of Georgia. These matters will be an action item on the agenda for the Midyear Meeting of members of January 2025.

**Article I. Members. Section 1. Registration of Members.** Bar Counsel recommends this proposed amendment after discussing it with the Bar President. The proposed changes take a long paragraph, break it into subparts, and simplify the language.

**Article I. Members. Section 2. Active Members and Foreign Law Consultants.** Bar counsel recommends this proposed amendment after discussing it with the Bar President. The proposed change is a housekeeping amendment, adding “good standing” language and enabling rule for foreign law consultants.

**Article I. Members. Section 6. Affiliate Members and Law Student Members.** The Membership Department brought this proposed amendment to Bar Counsel’s attention. The change would make the bylaw match Rule 1-206.1 by removing the requirement that a law student member attend a law school in Georgia and making other housekeeping changes.

1 ARTICLE I MEMBERS

2 Section 1. Registration ~~of Members, Initial Dues, and Assessments.~~

3 ~~Persons~~ 1.1 Registration Requirement: All persons admitted by the  
4 courts to ~~the practice of law shall,~~ must register with the State Bar of  
5 Georgia within 60 days ~~after of~~ admission to the ~~bar of the~~ Superior  
6 Court, ~~register with the State Bar of Georgia and,~~

7  
8 1.2 Initial Dues Payment: Newly admitted members must pay a  
9 monthly pro-rated dues amount ~~calculated~~ from the date of their  
10 admission to the Superior Court ~~admission through~~ until the  
11 ~~remainder end~~ of the State Bar of ~~Georgia's~~ Georgia's fiscal year. ~~If the~~  
12 ~~date of admission is~~

13  
14 1.3 Dues Exemption: Members admitted on or after May 15, ~~the~~  
15 ~~member shall not be required to pay any~~ are exempt from dues ~~or and~~  
16 assessments for the remainder of that fiscal year. ~~Those members~~

17  
18 1.4 Mandatory Assessments for Exam-Admitted Members: Members  
19 admitted by examination ~~shall~~ must begin ~~making the~~ paying mandatory

20 assessments ~~outlined in Rules~~ in the second full fiscal year following  
21 their admission.

22

23 1.5 Mandatory Assessments for Members Admitted by Motion:

24 Members admitted by motion must begin paying mandatory

25 assessments upon their admission.

1 ARTICLE I MEMBERS

2 Section 1. Registration, Initial Dues, and Assessments.

3 1.1 Registration Requirement: All persons admitted by the courts to  
4 practice law must register with the State Bar of Georgia within 60 days  
5 of admission to the Superior Court.

6

7 1.2 Initial Dues Payment: Newly admitted members must pay a  
8 monthly pro-rated dues amount from the date of their admission to the  
9 Superior Court until the end of the State Bar of Georgia's fiscal year.

10

11 1.3 Dues Exemption: Members admitted on or after May 15 are exempt  
12 from dues and assessments for the remainder of that fiscal year.

13

14 1.4 Mandatory Assessments for Exam-Admitted Members: Members  
15 admitted by examination must begin paying mandatory assessments in  
16 the second full fiscal year following their admission.

17

- 18 1.5 Mandatory Assessments for Members Admitted by Motion:
- 19 Members admitted by motion must begin paying mandatory
- 20 assessments upon their admission.

1 Section 2. Active Members and Foreign Law Consultants.

2 (a) Only active members of the State Bar of Georgia in good  
3 standing are entitled to give legal advice and otherwise practice law.

4 (b) Only foreign law consultants, admitted pursuant to State  
5 Bar Rule 1-202 (c). are entitled to give legal advice as authorized by  
6 their license.

1 Section 2. Active Members and Foreign Law Consultants.

2 (a) Only active members of the State Bar of Georgia in good  
3 standing are entitled to give legal advice and otherwise practice law.

4 (b) Only foreign law consultants, admitted pursuant to State  
5 Bar Rule 1-202 (c), are entitled to give legal advice as authorized by  
6 their license.

1 Article I. Section 6. Affiliate Membership and Law Student  
2 Membership.  
3  
4 In addition to the classes of membership provided in Rule 1-202,  
5 Organization of the State Bar and Admissions, the Board of Governors  
6 or the Executive Committee may consider and approve or disapprove  
7 applications for Affiliate or Law Student membership with the State  
8 Bar of Georgia. Affiliate and Law Student members shall have the right  
9 to attend State Bar of Georgia meetings and receive ~~State Bar~~ official  
10 publications. Neither Affiliate nor Law Student members may hold  
11 office, vote, or have any other rights and privileges incident to the  
12 membership classes set forth in Rule 1-202 with the State Bar of  
13 Georgia. Affiliate or Law Student members shall not hold themselves  
14 out or imply to the public, courts, or members of the legal profession  
15 that they are members of the State Bar of Georgia as defined in Rule 1-  
16 202 of the State Bar of Georgia. The State Bar retains the right to deny  
17 or revoke the membership privileges of any Affiliate or Law Student  
18 member who violates this Section.

19 (a) Affiliate Membership. The application form for an Affiliate shall  
20 include a recommendation signed by an active member in good standing  
21 of the State Bar of Georgia. Affiliate membership may be renewed each



22 Bar year without additional application. The Board of Governors may  
23 set an amount of annual dues or fees for Affiliate membership. Affiliate  
24 membership shall be approved only when the applicant is a Domestic  
25 Lawyer who is in good standing in all jurisdictions in which he or she is  
26 licensed, is an employee of the government, the armed services, a  
27 private or commercial institution, or a law school, and is not otherwise  
28 authorized to practice law in Georgia.

29 (b) Law Student Membership. The application form for a Law Student  
30 member shall include a certification by the applicant that he or she is a  
31 student ~~in good standing at an ABA accredited law school in Georgia,~~  
32 currently enrolled in a law school approved by the American Bar  
33 Association or any law school approved by the Georgia Board of Bar  
34 Examiners, and is in good standing. Law Student membership may be  
35 renewed each Bar year by certifying to the Membership Department of  
36 the State Bar of Georgia that the student is currently enrolled in and  
37 attending law school and is in good standing. The Board of Governors  
38 may set annual dues or fees for Law Student membership.

39

1 Article I. Section 6. Affiliate Membership and Law Student  
2 Membership.

3

4 In addition to the classes of membership provided in Rule 1-202,

5 Organization of the State Bar and Admissions, the Board of Governors

6 or the Executive Committee may consider and approve or disapprove

7 applications for Affiliate or Law Student membership with the State

8 Bar of Georgia. Affiliate and Law Student members shall have the right

9 to attend State Bar of Georgia meetings and receive official

10 publications. Neither Affiliate nor Law Student members may hold

11 office, vote, or have any other rights and privileges incident to the

12 membership classes set forth in Rule 1-202 with the State Bar of

13 Georgia. Affiliate or Law Student members shall not hold themselves

14 out or imply to the public, courts, or members of the legal profession

15 that they are members of the State Bar of Georgia as defined in Rule 1-

16 202 of the State Bar of Georgia. The State Bar retains the right to deny

17 or revoke the membership privileges of any Affiliate or Law Student

18 member who violates this Section.

19 (a) Affiliate Membership. The application form for an Affiliate shall

20 include a recommendation signed by an active member in good standing

21 of the State Bar of Georgia. Affiliate membership may be renewed each

22 Bar year without additional application. The Board of Governors may  
23 set an amount of annual dues or fees for Affiliate membership. Affiliate  
24 membership shall be approved only when the applicant is a Domestic  
25 Lawyer who is in good standing in all jurisdictions in which he or she is  
26 licensed, is an employee of the government, the armed services, a  
27 private or commercial institution, or a law school, and is not otherwise  
28 authorized to practice law in Georgia.

29 (b) Law Student Membership. The application form for a Law Student  
30 member shall include a certification by the applicant that he or she is a  
31 student, currently enrolled in a law school approved by the American  
32 Bar Association or any law school approved by the Georgia Board of Bar  
33 Examiners and is in good standing. Law Student membership may be  
34 renewed each Bar year by certifying to the Membership Department of  
35 the State Bar of Georgia that the student is currently enrolled in and  
36 attending law school and is in good standing. The Board of Governors  
37 may set annual dues or fees for Law Student membership.

38



# 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  
Smarfit Westrock  
Atlanta, Georgia

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

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

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

Professor Tonja Jacobi  
Emory University School of Law  
Atlanta, Georgia

Mr. Francys 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:** November 2, 2024

**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 September 26, 2024, is as follows.

## NOMINATIONS FOR THE 25TH ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Chief Justice's Commission on Professionalism, in partnership with the Georgia Legal History Foundation (GLHF), will host the 25th Annual Justice Robert Benham Awards for Community Service (CSA25). The Commission is accepting **nominations** for CSA25 from **Monday, September 16, 2024, until 11:59 p.m. on Monday, November 11, 2024**. Judges and lawyers meet the criteria for these awards if they have combined a professional career with outstanding service and dedication to their communities through voluntary participation in community organizations, government-sponsored activities, or humanitarian work outside of their professional practice or judicial duties. **Judge Joy Lampley Fortson** chairs the Benham Awards Selection Committee and **Attorney LaToya Simone Williams** chairs the Benham Awards Planning Committee. The Commission and the GLHF will hold the awards ceremony on **Tuesday, April 15, 2025, from 5:30 p.m. – 7:30 p.m.** at the Nathan Deal Judicial Center. **Please save these dates.** Also, please share the flyer attached as "Exhibit A" and visit <http://cjcpga.org/nominationsbenhamcsa/>.

For more information on the nomination eligibility criteria or to nominate a deserving lawyer or judge, please watch the video prepared by **Chief Justice Michael P. Boggs** at the QR code here:



#### **REPORT REGARDING MAINTAINING JUDICIAL PROFESSIONALISM: REFLECTIONS FROM THE BAR**

On July 18, 2024, from 3:15 p.m. to 4:30 p.m., the Commission hosted a free to attend CLE entitled ***Maintaining Judicial Professionalism: Reflections from the Bar*** via Zoom. According to the Zoom report generated for the CLE, the CLE was attended by 683 “Unique Viewers.” The CLE was approved for one hour of professionalism CLE credit. The Commission reported attendance for 644 Georgia attorneys for CLE credit to the State Bar of Georgia’s Commission on Continuing Legal Education Department. Commission member, **Judge Rhonda Kreuziger**, Griffin Judicial Circuit Superior Court, moderated the panel during the CLE. The CLE panel members were as follows: **Charles “Chuck” Boring**, Robbins Alloy Belinfante Littlefield LLC; **Edward “Eddie” Chase III**, Chief Assistant District Attorney, DeKalb County District Attorney’s Office; **Molly Barrett Gillis**, Partner, The Gillis Law Firm, LLC; **Francys Johnson**, Partner, Davis Bozeman Johnson Law P.C.; and **Randal “Randy” McGinley**, District Attorney, Alcovy Judicial Circuit District Attorney. During the CLE, the panelists discussed their thoughts on judicial professionalism. To view the evaluations from the CLE, visit: [https://www.surveymonkey.com/results/SM-XikvT0QgJivCdZvyqblAsA\\_3D\\_3D/](https://www.surveymonkey.com/results/SM-XikvT0QgJivCdZvyqblAsA_3D_3D/). To view the written materials, the list of planning team members, and the speaker biographies for the CLE, please visit: <https://cjcpga.org/maintaining-judicial-professionalism-2024/>.

**For more information** regarding the ***Maintaining Judicial Professionalism: Reflections from the Bar*** CLE, visit the Commission’s website at: <https://cjcpga.org/maintaining-judicial-professionalism-2024/>.



#### **REPORT REGARDING DIMINISHED CAPACITY CLE**

On September 6, 2024, from 8:15 a.m. to 4:45 p.m., the Commission hosted, in-person at the State Bar of Georgia in Atlanta and virtually via Zoom, a low-cost CLE entitled ***Diminished Capacity, Ethics, and Professionalism: How to Effectively Advocate For and Communicate With Individuals With Diminished Capacity***. The Commission had 96 in-person CLE attendees. According to the Zoom report generated for the CLE, the CLE was attended by 157 “Unique Viewers.” **Mr. Kevin Tanner**, the Commissioner for the Georgia Department of Behavioral Health and Developmental Disabilities, provided opening remarks. The CLE Program Chair was Commission Member **Lauren Shubow**, Public Defender, Atlanta Circuit Public Defender’s Office. The Program Vice Chair was **Brenda Woodard**, General Counsel, Georgia Department of Behavioral Health and Developmental Disabilities. The Commission’s Executive Director, Karlise Y. Grier and the Commission’s Administrative and Communications specialist, Zaria Page, assisted with staff support for the CLE. To view the CLE evaluations visit [https://www.surveymonkey.com/results/SM-DqzUa5482KGG390p7AwwXg\\_3D\\_3D/](https://www.surveymonkey.com/results/SM-DqzUa5482KGG390p7AwwXg_3D_3D/).

**For more information** regarding the ***Diminished Capacity*** CLE, including the CLE brochure, the list of planning team members, and the speaker biographies, visit [https://cjcpga.org/09-06-24\\_cjcp\\_cle\\_re\\_diminished\\_capacity/](https://cjcpga.org/09-06-24_cjcp_cle_re_diminished_capacity/).



**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.

**2024 LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM**

The Commission funds in part and provides staff support for the Committee's work on the Law School Orientations on Professionalism. The orientations are designed to provide incoming first-year law students with their first introduction to professionalism. Georgia judges and lawyers 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. Of the 162 total number of Group Leaders, 142 were "unique" lawyers or judges because eighteen Group Leaders served on two different dates at two different schools. One Group Leader, Court of Appeals of Georgia judge, **Honorable Christopher J. McFadden** served at three of the law schools. **Ms. Maria Waters** is Chair of the Law School Orientations on Professionalism sub-committee and **Ms. Samantha Beskin-Schemer** is Vice Chair of the sub-committee. The sub-committee 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.

2024 Law Schools Orientations on Professionalism Summary Chart				
Name of School	Date	# of Students	# Group Leaders	Professionalism Speaker
Atlanta's John Marshall Law School	August 3, 2024	124	28	Judge Eric Richardson State Court of Fulton County
Emory University Law School	August 15, 2024	280	55	Judge Elizabeth L. Branch United States Court of Appeals Eleventh Circuit
Georgia State University Law School	August 13, 2024	235	23	Justice Andrew A. Pinson Supreme Court of Georgia
Mercer University Law School	August 16, 2024	147	20	Judge Shondeana Crews Morris Superior Court of DeKalb County
University of Georgia School of Law	August 15, 2024	204	36	Dean Andrea Dennis Assoc. Dean for Academic Affairs
<b>Totals</b>		<b>990</b>	<b>162</b>	

Neither the Committee, the law schools nor the Commission could offer this wonderful program without our hundreds (literally) of attorneys and judges who volunteer to serve as group leaders and professionalism plenary speakers. In addition, the support of our law school partners is invaluable to the Committee and the Commission.

To each and every one of our Group Leaders, professionalism plenary speakers, and law school partners, both the Committee and the Commission say thank you!

**For additional information** regarding the **Law School Orientations on Professionalism**, including the **complete list of Group Leaders Group Leader photographs** for each school, and the student and group leader evaluation results for each school, please visit <http://cjcpga.org/law-school-orientations-on-professionalism-2024/>.



#### 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. For the second year in a row, the Connect With A Colleague sub-committee received a **Proclamation from Governor Brian Kemp**, proclaiming April as Legal Professionalism Month in Georgia! In conjunction with the Gubernatorial Proclamation naming April 2024 as Legal Professionalism Month, the Connect With A Colleague sub-committee, held a Connect With A Colleague Contest from April 1, 2024 – April 30, 2024. The sub-committee asked Georgia attorneys to submit up to five entries; one for each separate lunch, dinner or coffee connection with a colleague outside the attorney's office, firm, or legal organization that occurred between April 1, 2024 – April 30, 2024. The Commission congratulates the winners of the Connect With A Colleague Contest as follows: **Mr. Steven Berne** (Grand Prize Winner of \$500 in gift cards and Atlanta Hawks tickets) and **Mr. Stephen Johnson** (2<sup>nd</sup> Prize Winner of \$350 in gift cards and Atlanta United tickets). For more information about the 2024 Connect With A Colleague Contest, visit the Commission's website at <https://cjcpga.org/cwac2024/>. The Connect with A Colleague prizes were funded by donations from **Kevin Patrick** (Atlanta United Tickets) and **Cathy Hampton** (Atlanta Hawks Tickets). The gift cards were funded by Committee CLE registration fees from the *Significant Lawyer* program in January 2024.



Pictured in the photo from Left to Right are: **Carlos Vilela**; **Kevin Patrick** (prize donor), **Steven Berne** (Grand Prize Winner); **Cathy Hampton** (prize donor); **Karlise Y. Grier**, **Stephen Johnson** (2nd Place Winner), and **Michael Herskowitz** (Committee on Professionalism Chair).

### **REPORT REGARDING LAW DAY 2024**

The State Bar's 2024 Law Day initiative was a joint project of the State Bar of Georgia's Committee on Professionalism and the State Bar's Local and Voluntary Bars Committee. The leaders for the State Bar's 2024 Law Day initiative were **Judge Ashley Palmer and Attorney Denise Warner**. 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 American Bar Association's 2024 Law Day theme was "Voices of Democracy." The Law Day sub-committee contacted lawyers and judges in the ten Georgia Judicial Districts and encouraged them to speak to students and adults in their schools, civic organizations, places of worship or other similar groups. 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. In addition, under the leadership of **Attorney Marlan Eller**, the Law Day sub-committee drafted talking points for the judges and lawyers who presented about the 2024 Law Day theme. Additional information about Law Day 2024 are in the May 2024 Georgia Bar Journal Article written by Denise Warner at the link here: <https://tinyurl.com/yc34kx37>. The lawyers and the judges who participated are as follows:

- |                          |   |
|--------------------------|---|
| First Judicial District  | <b>Attorney Alec Chappell and the Savannah Young Lawyers Division</b> celebrated the role of law with students at Savannah Early College High School  |
| Third Judicial District  | <b>Attorney Brittney Bennett</b> discussed the importance of the judicial branch with students at Houston County High School  |
| Fourth Judicial District | <b>Judge Kimberly A. Alexander</b> participated at Clarkson Community Center by uplifting voices of our democracy, when she spoke with The Leaders of Tomorrow.   |
| Fifth Judicial District  | <b>Attorney Shariff Jones and the Fulton County Juvenile Court Education Advocacy Unit</b> held Law Day celebrations throughout the month of May by hosting a Book Donation Drive, and then organizing a "Reading Day" for court staff and other lawyers to read to children at Dunbar Elementary School.<br><b>Judge Belinda Edwards</b> spoke about the role and importance of the judiciary at Ben Hill United Methodist Church's Law Day Program. GSU College of Law Professor Emerita <b>Bernadette Hartfield</b> served as the program's moderator. The program was organized by Attorney Karlise Y. Grier as Chair of the BHUMC Legal Ministry.              |
| Eighth Judicial District | <b>Oconee Circuit Superior Court Judicial Staff Attorney Marlan Eller joined Oconee Circuit Superior Court Judge C. Michael Johnson, Dodge County Probate Court Judge Al McCranie and Dodge County Magistrate Court Judge Tom Cranford</b> at the Lions Club of Eastman, Georgia for a Law Day presentation. <b>Oconee Circuit Superior Court Judge Howard Kaufold, Jr.</b> had the pleasure of encouraging confidence in our judicial system when he met with the Hawkinsville Rotary Club, and <b>Oconee Circuit Juvenile Court Judge Stephanie Burton</b> spoke to 5th graders at Dodge County Elementary School about the role and importance of the judiciary. |
| Ninth Judicial District  | <b>Attorney Lisamarie Bristol</b> gave students a deeper understanding of law at Trickum Middle School.   |
| Tenth Judicial District  | <b>Judge Cheveda McCamy, Alcovy Judicial Circuit</b> , celebrated Law Day by helping to organize a Pro Bono Day for the public and a free CLE for local attorneys.  |





Oconee Circuit Superior Court Judge Howard Kaufold, Jr. speaks with 5<sup>th</sup> graders at Dodge County Elementary school in Eastman, Georgia, about the role and importance of the judiciary.



Participants at the Dunbar Elementary School's "Reading Day" program organized by Sheriff Jackson Jones, Esq., Supervising Attorney and Education Advocate for the Fulton County Juvenile Court had a wide selection of books to choose from to help educate children about the role and importance of the judiciary and judicial elections.



DeKalb State Court Judge Kimberly A. Alexander had a great time celebrating Law Day 2024 with The Leaders of Tomorrow program at Clarkston Community Center. This program enables students to discover leadership through learning about the voting process, engaging in their community, and understanding how to provide resources to their community through advocacy. (A media release is on file with Leaders of Tomorrow).

The Commission thanks all of the judges and lawyers who participated in the Bar's 2024 Law Day initiative! ***As you plan your May 2025 calendars***, please consider blocking out some time for a 2025 Law Day activity on a date and at a time and place of your choosing. The State Bar's Law Day sub-committee will send you suggested talking points for the **2025 Law Day Theme**, which is **The Constitution's Promise: Out of Many, One**.

#### **ETHICS AND PROFESSIONALISM DURING CAREER TRANSITIONS – PART 2**

The State Bar of Georgia Committee on Professionalism, with staff support from the Commission, will present a CLE via Zoom on **Friday, October 25, 2024**, entitled ***Ethics and Professionalism During Career Transitions – Part 2***. The planning team for the CLE includes the Speakers and Writers Bureau Sub-Committee co-chairs, **Mr. Kevin Patrick** and **Mr. Michael Perez**, and Karlise Y. Grier. The Commission will provide a complete report regarding the CLE at the Fall Board of Governors meeting.

#### **THE LAWYER AS WITNESS IN CRIMINAL LAW CASES CLE – DECEMBER 2024**

The Commission will host a free to attend CLE in December 2024 with the working title ***The Lawyer As A Witness in Criminal Law Cases***. Please visit the Commission's website at [www.cjcpga.org](http://www.cjcpga.org) for additional information as it becomes available. The current planning team for this upcoming CLE is as follows: **Trish McCann Bertram**, Professional Development Director, Georgia Public Defender Council; **Marie G. Broder**, District Attorney, Griffin Judicial Circuit; **Elicia Hargrove**, Assistant United States Attorney, Middle District of Georgia, Albany Criminal Division; **Lauren Shubow**, Public Defender, Atlanta Circuit Public Defender's Office; **Robert W. Smith, Jr.**, General Counsel, Prosecuting Attorney's Council; **LaToya Simone Williams**, Managing Attorney, East Metro Alternate Defender Office, Georgia Public Defender Council; and the Commission's Executive Director, Karlise Y. Grier.

#### **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 **May 2024** Georgia Bar Journal

Professionalism Page entitled “*Looking Back at the Contributions of Two Professionalism Leaders*” is attached as “Exhibit B.” The August 2024 Georgia Bar Journal Professionalism Page entitled “*24<sup>th</sup> Annual Justice Robert Benham Awards for Community Service*” is attached as “Exhibit C.” Many of the Commission’s Professionalism Page articles are available on the Commission’s website at the link here: <https://cjcpga.org/georgia-bar-journal-articles/>.

#### **COMMISSION MEMBER APPOINTMENTS**

On July 1, 2024, the Commission welcomed two new Commission members as follows: **Ms. Rizza O'Connor**, to serve an initial three-year term on the Commission, as a lawyer representative actively engaged in the practice of law and appointed by the Board of Governors, and **Judge Benjamin S. Richardson**, to serve an initial two-year term as the designee of the Council of Superior Court Judges. In addition, **Mr. Ivy Cadle** and **Mr. Kenneth Mitchell, Jr.** were appointed to serve on the Commission ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively. The Commission welcomed back for an additional term Commission members **Judge Elizabeth D. Gobeil**, as the designee of the Court of Appeals of Georgia; and **Professor Patrick E. Longan**, as the designee of the Mercer University School of Law. A complete list of Commission members as of July 1, 2024, is on the Commission’s website at <http://cjcpga.org/commission-members-2024-2025/>.

#### **COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS**

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

#### **COMMISSION WEBSITE AND SOCIAL MEDIA**

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

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

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

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

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

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

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



# EXHIBIT A



**THE 25<sup>TH</sup> ANNUAL**  
**Justice Robert Benham**  
**AWARDS FOR COMMUNITY SERVICE**  
**NOMINATIONS OPEN**  
through Monday, November 11, 2024

FOR MORE INFORMATION OR TO SUBMIT A NOMINATION VISIT:  
<https://cjcpga.org/nominationsbenhamcsa/>

The Chief Justice's Commission on Professionalism is accepting nominations for the 25th Annual Justice Robert Benham Awards for Community Service from September 16 – November 11, 2024

The awards will be presented at a special ceremony to be held on Tuesday, April 15, 2025, at the Nathan Deal Judicial Center in partnership with the Georgia Legal History Foundation



# EXHIBIT B



## Looking Back at the Contributions of Two Professionalism Leaders

As we pause to reflect on the 35th year of the Chief Justice's Commission on Professionalism, A. James Elliott and Avarita L. Hanson deserve recognition for their dedication to ensuring justice, not only for those with easy access, but also for those that could not afford it.

BY KARLISE Y. GRIER



**This year, 2024, marks the 35th anniversary of the Chief Justice's Commission on Professionalism (Commission).** The Supreme Court of Georgia established the Commission, the first body of its kind in the nation in February 1989.<sup>1</sup> Normally, reflections on such a milestone would inspire broad reflections on the many individuals who worked to build and strengthen the professionalism movement in Georgia. In this case, however, this article will reflect on only two individuals who were instrumental in Georgia's professionalism movement. The legal community lost these two lawyers—Professor A. James Elliott and Professor Avarita L. Hanson—on different dates in January 2024. In processing these losses, I reviewed some of the historical

(Left to right) Avarita L. Hanson, R. William "Bill" Ide and A. James Elliott at the Chief Justice's Commission on Professionalism 25th Anniversary Celebration.

PHOTO BY DON MORGAN PHOTOGRAPHY

records from the Commission's 35-year history, and I was struck by some documents and photographs I found taken in 2014. As part of the Commission's 25th anniversary commemorations, Avarita Hanson, who was then the executive director of the Chief Justice's Commission on Professionalism, planned a celebration of this Commission milestone by honoring one of the Commission's co-founders, Jim Elliott.<sup>2</sup> The event was so successful, Hanson reported, that it raised \$44,000 for the Georgia Legal Services Program. Hanson began her 11 years of service as the third executive director of the Chief Justice's Commission on Professionalism in May 2006, under the leadership of former Chief Justice Leah Ward Sears. Elliott shared at a 2023 Commission CLE that he was one of the first attorneys that former Chief Justice Thomas O. Marshall had contacted when Marshall, Justice Harold Clarke and Justice Charles L. Weltner (whom Elliott had sometimes been heard to affectionately, irreverently and humorously refer to as "the three musketeers") decided that they needed to do something about professionalism in Georgia. Elliott assisted the justices in organizing a consultation on professionalism in 1988,<sup>3</sup> which subsequently led to the Court's formation of the Commission the following year. The Commission was only one of several innovative ideas for which Elliott provided leadership. For example, he was also a co-founder of the Georgia Legal Services Program (formerly known as Georgia Indigent Legal Services) and an architect of Georgia's Interest On Lawyer's Trust Accounts (IOLTA) program. Former American Bar



PHOTO COURTESY OF GEORGIA LEGAL SERVICES PROGRAM

Officers and staff of Georgia Indigent Legal Services (GILS) meeting with Family and Children Services Director Kim Parham and Deputy Director Herschel Saucier, in the GILS office in Atlanta. (Left to right) John Myer, John Cromartie, Phil Heiner, Nancy Cheves, Kim Parham, Bill Ide, Betsey Neely, Herschel Saucier, Bettye Kehrer, Jim Elliott and Ben Shapiro (with back to the camera).

Association President R. William "Bill" Ide recalled:

"As a co-founder of Georgia Legal Services, Jim's humor, intellect and big heart helped further an innovative vision to make Georgia the first statewide bar association to sponsor legal services program in the United States. From that innovation as a young lawyer, over the following decades, his thought leadership moved the Georgia legal profession to be a leader in furthering justice for all. Many wonderful milestones his legacy leaves for the greater good."

When Hanson decided to honor Elliott as part of the Commission's 25th anniversary, her notes showed she wanted to highlight "Jim's 3 Legacies: a) CJCP; b) Georgia Legal Services Program and IOLTA Funding; [and] c) Inclusion in the Profession." Hanson knew it was impor-

tant to recognize Elliott for inclusion in the profession, in addition to the other two accomplishments noted above, in part, because he was the first president of the State Bar of Georgia to appoint an African American female lawyer to the State Bar of Georgia Board of Governors—Marva Brooks. Attorney Tom Sampson, another of Elliott's colleagues, also shared at a 2023 Signature Profes-

#### **BUSINESS VALUE NEEDED?**

- Divorce?
- Estate Plan?
- Business Sale?
- Gift Taxes?
- Lawsuit Damages?
- Employee Stock?
- Owners Break-up?
- Buy-Sell Plan? Or...?

**\$349 For Instant Answers**  
**www.WorthMetrix.com**

sionalism Commission CLE how Elliott, as a young partner at Alston, Miller & Gaines (now Alston & Bird), was instrumental in the hiring of Sampson's former law partner John Kennedy as the first African American associate at the firm. Kennedy's hiring was the first time an African American attorney had been hired at any large Atlanta law firm. Hanson's decision to use the Commission's 25th anniversary to honor Elliott was memorable for many reasons, one of which was because Hanson was a luminary in her own right within Georgia's legal community. For example, she served as the fourth president of the Georgia Association of Black Women Attorneys (GABWA) in 1985. She founded the Legal Ministry at her former church, Ben Hill United Methodist Church, where she served on its Board of Trustees and Property Committee. In 1991, when Hanson served as the president of the Gate City Bar Association, her administration earned the State Bar of Georgia's top local bar award. She was also a former member of the Board of Directors of the Georgia Legal Services Program and the Atlanta Legal Aid Society. Hanson's work to promote professionalism was also noteworthy. For example, in 2008, she was an invited speaker at the Chief Justice of Ontario's Advisory Committee on Professionalism's 10th Colloquium in Ottawa, Canada. There, she presented excerpts from her paper, "Professionalism and the Judiciary: Lessons Learned as Georgia Approaches 20 Years of Institutionalizing Professionalism." On the national front, Hanson chaired the American Bar Association's Consortium on Professionalism from 2011 to 2014, bringing Georgia's professionalism issues and programs to the forefront. She also coordinated, chaired, moderated and presented several professionalism CLE programs for the 2014 Annual Convention of the National Bar Association in Atlanta, Leadership Institute for Women of Color Attorneys and assisted with two ABA award-winning Law Day programs. She also authored a chapter

on "Reputation," for the ABA publication, *Essential Qualities of the Professional Lawyer* (2013) and for that publication's *Instructors Manual* (2017) and the *National Bar Journal*. Within GABWA, Hanson was affectionately called "Mama Rita" by three generations of attorneys who benefited from her leadership and generous mentorship. In 2014, the Black Law Students Association at Atlanta's John Marshall Law School had already been named in her honor for many years. Terrica Ganzy, one of Hanson's mentees and a participant in the Commission's 25th Anniversary celebration, observed:

"Perhaps Avarita Hanson's most enduring legacy lies in her role as a mentor. I was one of countless aspiring lawyers who found in her not just a guide, but a guardian—a steadfast presence in a world often fraught with uncertainty. Avarita invested not only in our professional development but also in our personal growth, nurturing talent with patience, grace and an unwavering belief in our potential. Through her mentorship, she empowered generations of lawyers to pursue greatness, instilling in them the confidence to navigate the complexities of the legal profession with grace and resilience. Avarita was a woman of unparalleled strength and generosity of spirit, and all of us who were fortunate enough to know her will carry her light in our hearts."

In a closing paragraph of Elliott's biography in the 25th anniversary program book are words that although written about *him*—perhaps by Hanson—apply to *both* of these outstanding attorneys; so, I chose to paraphrase to include these great role models of professionalism as a closing tribute.

It is clear that Jim Elliott and Avarita Hanson were champions for justice and

professionalism. Each of their life's purposes was to uplift justice. Both were dedicated to ensuring justice, not only for those with easy access, but also for those who could not afford it. These outstanding lawyers were esteemed practitioners, leaders, community servants and law professors who lived a lifetime of purpose that positively affected thousands of Georgians. Sometimes the power of one and the use of that power makes changes for many. In Georgia, we were fortunate to have both Elliott and Hanson in our lawyer ranks, and we all owe both of them a wealth of gratitude for their courage, efforts, purpose and direction. ●



**Karlise Y. Grier**  
Executive Director  
Chief Justice's Commission  
on Professionalism  
kygrier@cjcpga.org

## Endnotes

1. See Chief Justice's Commission on Professionalism, Historical Documents, *Order Establishing the Chief Justice's Commission on Professionalism*, [https://lj9362.p3cdn1.secureserver.net/wp-content/uploads/2023/01/1989-Commission-Order-February-Establishing-CJCP-20180129\\_11231513-copy.pdf](https://lj9362.p3cdn1.secureserver.net/wp-content/uploads/2023/01/1989-Commission-Order-February-Establishing-CJCP-20180129_11231513-copy.pdf) (Last visited April 3, 2024). See generally Chief Justice's Commission on Professionalism, Historical Documents, [https://cjcpga.org/historical\\_documents/](https://cjcpga.org/historical_documents/) (Last visited April 3, 2024).
2. See Chief Justice's Commission on Professionalism, Historical Documents, *25th Anniversary Celebration Program Book* <https://cjcpga.org/wp-content/uploads/2024/04/25thAnnivProgramBooklet.pdf> (Last visited April 3, 2024).
3. See Chief Justice's Commission on Professionalism, Historical Documents, *1988 Consultation on the Practice of Law*, <https://lj9362.p3cdn1.secureserver.net/wp-content/uploads/2021/02/1988-ConsultationOnProf.pdf> (Last visited April 3, 2024).



# EXHIBIT C



## 24th Annual Justice Robert Benham Awards for Community Service

The awards ceremony was held in April at the Nathan Deal Judicial Center in Atlanta.

BY KARLISE Y. GRIER



### **There is an irony about the Justice**

Robert Benham Awards for Community Service that some members of the Benham Awards Selection Committee have periodically discussed. The irony is the fact that Georgia is fortunate to have many outstanding lawyers who provide extraordinary service to their communities; however, following in their footsteps sometimes appears unattainable. In fact, Justice Benham was heard to remark at 24th Annual Justice Robert Benham Awards for Community Service (CSA24), that he was unsure he would have been selected to receive the award named after him, if he had been nominated for the 2024 awards. I doubt, however, that knowing he might never receive an award for his service would have prevented Justice Benham from living a life of service.

Each year, when I personally work to learn details about the service of the award recipients, I am amazed by the volume and quality of their accomplishments. I believe the award recipients are

Chief Justice Michael P. Boggs, Supreme Court of Georgia, and Justice Robert Benham.

PHOTO BY DON T. MORGAN, DON MORGAN PHOTOGRAPHY

truly remarkable—and sometimes intimidating—individuals when I consider the impacts of their accomplishments. Nevertheless, as you read this article and contemplate the volunteer service of the award recipients, I ask you to think about your unique gifts, talents and treasures, and ask yourself what one small thing can I do to serve my community because inspiring other attorneys to community service is in fact one of the most important purposes of the community service awards.

In this article, I have highlighted some of the “bigger” accomplishments of the award recipients, but I ask you to think about some of the “smaller” aspects of service of the award recipients that are perhaps within the reach of us (myself included) mere mortals. I can’t cook much at all, especially not like Judge Kathy Palmer can, but I know there are several attorneys among my acquaintance that can cook and perhaps make meals for their church members or bake cakes for children baptized in their church. Perhaps you won’t be a legislative advocate like Vickie Kimbrell, but if you love animals, maybe you can help care for a pet for a victim of domestic violence who can’t take their pet with them to a shelter. Perhaps you can’t chair the board of an organization for at-risk children, like Judge Cheveda McCamy, but maybe you can read to an at-risk child in an organized program once per year. We can’t all be like Sam Olens and help steer the passage of hate crime legislation, but maybe we can encourage folks in our networks to participate in the Legal Food Frenzy. I cannot even begin to imagine accomplishing a fraction of what the 2024 Lifetime Award Recipient Jeff Smith has accomplished. For example, I would not have the knowledge or skills to

## THANK YOU, SPONSORS

The Commission is grateful to the 46 sponsors who made the awards ceremony possible since no Commission professionalism monies are used to fund the awards ceremonies.

### Diamond

Greenberg Traurig, LLP

### Platinum

Troutman Pepper Hamilton  
Sanders LLP

### Gold

Malone Law

### Silver

Dentons  
Kilpatrick Townsend & Stockton LLP  
Krevolin & Horst, LLC  
Smith, Gambrell & Russell, LLP

### Bronze

Drew Eckl & Farnham LLP  
Gentry Law Firm LLC  
Georgia Trial Lawyers Association  
Giddens, Mitchell & Associates, P.C.  
Hall Booth Smith, P.C.  
Johnson & Freeman, LLC  
Major, Lindsey & Africa  
Miller & Martin PLLC  
Nelson Mullins Riley  
& Scarborough LLP  
C. L. Scarver & Associates, LLC  
Sutton Law Group, LLC

### Bronze (Nonprofit and Government)

City of Atlanta Law Department led  
by City Attorney Nina Hickson  
Georgia Asian Pacific American  
Bar Association

Georgia Association of Black  
Women Attorneys  
Georgia Defense Lawyers Association

### Patron

Akerman LLP  
Alston & Bird LLP  
Arnall Golden Gregory LLP  
Barnes Law Group, LLC  
Ann Baird Bishop  
Hon. Brenda C. Cole  
Atlanta Bar Association  
Litigation Section  
Bondurant, Mixson & Elmore, LLP  
Jena G. Emory  
Anissa D. Floyd  
Fried Goldberg LLC  
Gate City Bar Association  
Georgia Legal Services Program  
Gilbert, Harrell, Sumerford & Martin  
Karlise Yvette Grier  
Hasty Pope, LLP  
Alvin Kendall  
Scott & Patricia Killingsworth  
King & Spalding LLP  
Knowles Gallant Timmons LLC  
Brad Marsh & Betty Obenshain  
Kevin Patrick Law  
Adwoa Ghartey-Tagoe Seymour  
Swift, Currie, McGhee & Hiers, LLP

### Friend

Oliver Maner LLP



(Front row, left to right) Vicky Ogawa Kimbrell; Hon. Kathy Stephens Palmer; Justice Robert Benham; Nell Benham; Hon. Cheveda McCamy. (Back row, left to right) Chief Justice Michael P. Boggs, Supreme Court of Georgia; Karlise Y. Grier, executive director, Chief Justice's Commission on Professionalism; Jeffrey M. Smith; Samuel S. Olens.

coordinate a pro bono life-saving endeavor for a Tibetan Buddhist nun, but when I look at everything he's done, I realize I can perhaps donate an item—like sports or concert tickets—to a charity auction.

We don't each have to volunteer in the same way or to the same extent that the CSA24 award recipients have served. I do hope, however, that reading about their service inspires you to look for that one thing that matches your unique gifts, talents and treasure—and passions—and leads you to do at least one thing during the remainder of 2024 and another one thing during 2025 to serve our Georgia communities.

By the time you receive this article about the CSA24, the Benham Awards Selection Committee and the Benham Awards Planning Committee will have begun to make preparations for the milestone 25th Annual Justice Robert Benham Awards for Community Service. Therefore, I also want to share some information about the history and the purpose of the Benham Awards. In 1997,

the Executive Committee of the State Bar of Georgia created an annual award to honor lawyers and judges who have made outstanding contributions in the area of community service. Soon thereafter, the awards were named in honor of then Chief Justice Robert Benham, who during his term as chief justice of the Supreme Court of Georgia from 1995 to 2001, focused the attention of lawyers and judges on the community and public service aspects of professionalism. Justice Benham once said:

The public impression of the legal profession is not shaped just in the courtroom. *It is shaped in all kinds of activities. When lawyers are involved in community activities, people will see them as neighbors, swimming team coaches, baseball coaches, house builders and a whole host of other community servants.* And if lawyers are also community servants, people will see the legal profession as a community-spirited profession.

Such an impression can't help but benefit the profession and increase the understanding of the role of the law and lawyer. (emphasis added)

The awards were created with the following objectives:

1. To recognize that volunteerism remains strong among Georgia lawyers;
2. To encourage all lawyers to become involved in serving their communities;
3. To improve the quality of life of lawyers through the satisfaction they receive from helping others; and
4. To raise the public image of lawyers.

The inaugural Justice Robert Benham Awards for Community Service were presented at the State Bar of Georgia Annual Meeting on June 18, 1998, in Atlanta.

The CSA24 awards ceremony was a tremendous success because of the hard work of many individuals who I would like to thank. First, the Commission appreciates the work of the Benham Awards

selection committee members who determined the award recipients. The CSA24 Selection Committee members were: Hon. Joy Lampley-Fortson, U.S. Department of Justice, committee chair, Atlanta; Hon. Joshua Clark Bell, Bell/Payne, LLC, Whigham; John Michael Dugan, DRL Law LLC, Greensboro; Jena G. Emory, Morris, Manning & Martin, LLP, Atlanta; Terrica Redfield Ganzy, Southern Center for Human Rights, Atlanta; Laverne Lewis Gaskins, Law Office of Laverne Lewis Gaskins, P.C., Augusta; Michael Hobbs, Troutman Pepper Hamilton Sanders LLP, Atlanta; Hon. Chung H. Lee, The Law Office of Lee & Associates PC, Duluth; William J. Liss, WXIA-TV/11Alive, Atlanta; Jennifer Mock, The Mock Law Firm, LLC, Statesboro; Hon. Herbert E. Phipps, Court of Appeals of Georgia (Retired), Albany; Cindy Wang, Georgia Department of Juvenile Justice, Decatur; Hon. Brenda Carol Youmas, Macon.

In addition to the Selection Committee, members of the Benham Awards Planning Committee assisted with organizing and fundraising for the awards ceremony with the assistance of the Commission's fundraising partner, the Georgia Legal History Foundation. The CSA24 Planning Committee members were: LaToya Simone Williams, Georgia Public Defender Council, and Christopher J. Chan, founder, Christopher J. Chan IP Law, served as the co-chairs for the planning committee. The planning committee also included: Hon. William P. "Bill" Adams, Middle Georgia Justice, Macon; Hon. Phinia Aten, Rockdale County Magistrate Court, Conyers; Ann Baird Bishop, Hall Booth Smith, P.C., Atlanta;

William C. "Bill" Gentry, Gentry Law Firm, LLC, Marietta; Cathy Hampton, The Hampton Firm, Atlanta; Norbert D. "Bert" Hummel IV, Hummel Trial Law, Kennesaw; Gerond Julian Lawrence, Greenberg Traurig, LLP, Atlanta; Kenneth A. Mitchell, Giddens, Mitchell & Associates, P.C., Decatur; Alan G. Poole, Troutman Pepper Hamilton Sanders LLP, Atlanta; Shinnay Richards, 3L, Atlanta's John Marshall Law School, Atlanta; Cathy L. Scarver, C. L. Scarver & Associates, LLC, Atlanta; Cathy Clark Tyler, AtkinsRéalis, Atlanta.

Finally, volunteers and program participants who assisted during the evening of the awards ceremony were as follows: Hon. William P. "Bill" Adams, Atlanta Music Project (AMP) Junior Youth Choir and AMP staff, Ann Baird Bishop, Christopher Brock, Christopher J. Chan, Jena G. Emory, Gerond J. Lawrence, Paula Myrick, Jasmine Smith Reeves, Hon. Tabitha Ponder, Shinnay Richards, Cathy L. Scarver, LaToya S. Williams and Raneé Zilton.

I also wish to thank Chief Justice Michael P. Boggs, Justice Andrew A. Pinson and Justice Robert Benham for their example and continuing support and guidance regarding professionalism. Thank you to Thérèse "Tee" Barnes, Sgt. Dexter Harden, Mike Harkness, Anita Harrison, Marti Head, Bob McAteer, Tia C. Milton, Ashley Rankins, Lynnita Terrell and all of the staff of the Supreme Court of Georgia who helped to make this event possible. In addition, thank you to the Commission's fundraising partner, the Georgia Legal History Foundation and in particular John C. Bell, Kathie N. Daniel and Gregory K. Smith for their

assistance. I also thank Zaria Page, the Commission's administrative and communications specialist, for her work. Finally, I am grateful that the members, advisors and liaisons of the Commission who continue to understand the role and importance of the awards ceremony in the Commission's work to promote and enhance professionalism among Georgia's lawyers and judges.

In conclusion, I ask two things of you. First, ask yourself, "Where do I see myself plugging into my community as a community servant?" Second, consider who you might nominate for the 25th Annual Justice Robert Benham Awards for Community Service. Nominations will open after Labor Day 2024, and information about the eligibility criteria and nomination process will be available on the Commission's website at [cjcpga.org](http://cjcpga.org).

For more information regarding the 24th Annual Justice Robert Benham Awards for Community Service, including an enhanced digital version of the Program Book that includes detail biographies of the award recipients, videos about the award recipients, photographs from the awards ceremony, and the eligibility criteria and nomination process for the milestone 25th Annual Justice Robert Benham Awards for Community Service, visit [cjcpga.org/benhamcsa24](http://cjcpga.org/benhamcsa24). ●



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

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

**August 22, 2024, 11:15 a.m.  
Cloudland at McLemore Resort  
Rising Fawn, GA**

Members Participating

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

Members Absent

Martin Valbuena

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; 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 11:15 a.m. The members of the Executive Committee in attendance are indicated above. President Cadle welcomed the new members of the Executive Committee: YLD President-Elect Veronica Cox, Executive Committee Member Bert Hummel, and Executive Committee Member Joyce Gist Lewis.

Future Meetings Schedule

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

Executive Committee Orientation

Chief Financial Officer Ron Turner, General Counsel Paula Frederick and General Counsel Designate Russ Willard reviewed policies and rules that apply to serving on the Executive Committee. Those include (1) Officer and Non-Officer Executive Committee Expense and Reimbursement Policy; (2) Standing Board Policy 600 (Conflicts of Interest); (3) Standing Board Policy 800 (Confidentiality); (4) Keller Considerations; (5) Standing Board Policy 1000 (Positions, Articles, Programs, Meetings, Activities of Committees and Sections); (6) Standing Executive Committee Policy 1200 (Endorsement of Political or Judicial Candidates); and (7) Responding to Communication Regarding the Disciplinary Process.

Executive Committee Minutes

Secretary Javoyne Hicks presented for approval the minutes of the April 26, 2024, and May 21, 2024, Executive Committee meetings, which were passed as presented by unanimous vote.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous vote: Samuel Hyun Ahne-016110; Bonnie Meredith Baer-003030; Arlen

Eric Bee-046790; Frank Leslie Bessenger, III-055789; Patricia H. Blumberg-064510; Prudence June Bolden-141804; Beth Davis Brown-086423; John C. Childs-854763; Alison Corinne Clements-151030; Judith Ann Cline-170524; Russell Dean Covey-621679; Curtis Andrew Cox-192378; Miranda Willis Cox-192630; Jack Criswell-196660; Paul Marshall Cushing-202790; Matthew Daren Danielson-476288; Connie K. Darbyshire-205205; Kevin Douglas Demer-217560; Michelle A. Dexter-220330; Nacha Dixit-312033; Randolph H. Donatelli-225625; Donald William Driscoll-435108; David Edward Duclos-231660; Sarah Vickers Elliott-727430; Donna Lisa Felker-401567; Morgan Fiander-661877; Terry E. Freeman-276337; Barbara Miller Goetz-299009; Cem Samin Goral-301913; Francis Grab-303765; Carol A. Hammell-095779; Deborah D. Heald-219669; James Joseph Hennigan-347270; Sharon N. Hill-354560; David Mark Hilliard-335526; James Glenn Hufford-940556; Clinton S. Janes, III-389445; Amy Victoria Johnson-392210; Thomas F. Jones-403750; Anne Andrews Juntunen-104106; Rosemary Keenan-297380; Kenneth Ethan Kellner-412341; Ryan Foley Kelly-302319; Elise Kirban-422490; Andrea C. Langsfeld-115615; Joel S. Langsfeld-436659; Robert Russell Lawrence-439880; Priscilla Kent Lawson-440436; Edith Lindsay-452983; Mark Allen Loeffler-755701; Corrie Patricia Long-003680; Michael Spencer Love-141973; Joseph Andrew Marlar-470940; Douglas Paul Martyn-474952; Robert Ashley Meynardie-503890; Angela Tyree Miller-721180; David K. Montgomery-517175; William Walker Moss-130700; Dinh Xuan Nguyen-542545; George William Norris, Jr.-545835; Brian Francis O'Connor-548910; Rafael Ignacio Pardo-956795; Mary Huhta Payson-376800; Teri D. Smith Poduval-512278; Angela Lynne Porter-924605; Margaret S. Prickett-587878; John David ReVeal-103251; Blanche Quinn Richey-591354; Jennifer Rossi-615398; Sylvia E. Russell-347612; Suzanne Massey Schemm-476135; Paul Alan Schwartz-651055; Thomas P. Scott, III-632215; Steven Jay Silver-646672; Andrew Jubal Smith-654154; Seeta Sookdeo-667028; Elizabeth Dawn Sorrell-409227; Brian William Spainhour-668927; Karen Beth Stearns-445055; Wendy Ann Strassner-686715; Juliette Suzanne Sturla-394115; Kimberly Tesarek-937004; Margaret Kane Thies-330531; Joy Lindsay Tornillo-714756; Celestia Price Toure-206730; James Durward Walker, III-732252; Dabney Dale Ware-737511; Lynn Warren-277701; L. James Weil, Jr.-745920; Donald R. Westfall-749718; James Herbert Wilson-768429; Mark W. Wortham-777065.

#### Members Requesting Disability

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

#### Petition to Rescind Resignation from the Bar

The Executive Committee approved one request to withdraw a petition for resignation by unanimous vote.

#### President's Report

President Ivy N. Cadle reported that he asked senior Bar staff to provide a list of rules or bylaws that have language that needs to be changed or rules or bylaws that need substantive changes or cleanup. He also asked for a draft of governance rules regarding the appropriate actions of lawyers who volunteer for the mandatory bar. He said that the Executive Committee and Board of Governors are accountable for 55,000 lawyers who practice law in Georgia. He would like governance rules that reflect accountability, due process, etc., when being a leader of a mandatory bar. During his presidency, he would like to use this time as an opportunity to share and discuss these changes and suggestions and work on exciting and essential issues.

### Executive Director's Report

Executive Director Damon Elmore reported that the Bar is operating well. He said attention has been turned to the planning and execution of the 2024-2025 year, managing the operations of the Bar and assets of our building, and focusing on the upcoming 2025-26 budget season with an emphasis on the fiscal responsibilities of the unallocated cash. Executive Director Elmore said there will be more discussion at the October Executive Committee meeting, and the long-range financial plan and recommendations related to license fees will be shared. The work that was set out in the 2023-2024 unallocated cash plan has either been done or is in process: work on audio/visual on the third floor, upgrades to the breakroom, completely overhauled new website, South Georgia Office furniture upgrades, membership database, and flooring throughout the building. He said there is always a focus on ICLE and continual change and improvement in that department. There are upcoming personnel changes with retirements and the need for additional staff to ensure the grievance process runs smoothly. He said that there will be a shift in the reporting structure in the upcoming months, with the Office of the General Counsel reporting to the Executive Director. He continues to reorganize and reshape the UPL department as well. He thanked the Executive Committee for their guidance, understanding, and work.

### Proposed Rules and Bylaws Changes (first read, discussion only)

1. Article I. Members. Section 1. Registration of Members. Bar Counsel recommends this proposed amendment after discussing it with the Bar President. The proposed changes take a long paragraph, break it into subparts, and simplify the language.
2. Article II. Members. Section 2. Active Members and Foreign Law Consultants. Bar Counsel recommends this proposed amendment after discussing it with the Bar President. The proposed change is a housekeeping amendment, adding "good standing" language and citing the enabling rule for foreign law consultants.
3. Article I. Members. Section 6. Affiliate Members and Law Student Members. The Membership Department recommends this proposed amendment. The change would make the bylaw match Rule 1-206.1 by removing the requirement that a law student member attend a law school in Georgia and making other housekeeping changes.
4. Article III. Board of Governors. Section 13. Standing Board Policies. This is a new bylaw that provides authority for Standing Board Policies. While Roberts Rules allows for "standing rules," this proposed change enables all Board Standing policies, providing clarity.

The Executive Committee asked that the general counsel's office review the Standing Board and Standing Executive Committee policies to determine how each is classified and whether any should be converted to bylaws.

5. Article IV. Executive Committee. Section 1. Members. This is a rewrite of the Executive Committee Election bylaw, designed to clarify and simplify the process.

The Executive Committee asked that the order of voting on the expired and unexpired posts be added to the proposed changes. They also asked if the Executive Committee member-at-large positions should be notated as posts, like the Board of Governors.

6. Article IV. Executive Committee. Section 3. Standing Executive Committee Policies. This



is a new bylaw that has the same effect as Article III. Section 13, which provides enabling language in the bylaws for Executive Committee Standing Policies.

7. Article VIII. Committees - Generally. Section 5. Authority to Establish Internal Rules. Bar counsel recommends this new bylaw based on some issues from two committees. The purpose of this new bylaw is to provide explicit authority for a committee to establish its operation or procedural rules. While Roberts Rules allow for standing rules, a statement in the bylaws will provide explicit authority.

The Executive Committee asked that a letter (F) be added that says, “All internal rules and procedures shall be posted on the Bar website.”

8. Article VIII. Committees - Generally. Section 6. Quorum. Some State Bar committees have a large number of members who rarely attend meetings, making it difficult to establish a quorum. This bylaw is required to lower the Roberts Rules quorum requirement of 50% +1 to 33% of the committee membership. This can only be accomplished via a bylaw change.
9. Rule 1-302. Composition. This is a rewrite of the rule that defines the composition of the Board of Governors. This proposed change is designed to simplify and remove old, archaic language that is no longer relevant and make the rule more understandable.

The Executive Committee discussed the size of the Board of Governors. An Executive Committee member also commented that very few would run against a sitting judge and asked if separate judicial districts should be added to the Board of Governors.

10. Rule 1-501. License Fees. The Membership Department requested this proposed rule change to simplify the process for challenging a proposed suspension for nonpayment of license fees. The proposed amendment would also reduce the termination date from five years to three years, which matches the Office of Bar Admissions rules.

This item has been tabled until the next meeting.

11. Rule 1-501.1 License Fees—Late Fee. The Membership Department requested this proposed change, which removes the escalating late fee and sets it at \$100. It also eliminates any waiver of payment of late fees.

This item has been tabled until the next meeting.

12. Rule 10-106. Eligible Claims. This proposed change comes from the Clients’ Security Fund Board of Trustees. This rule change corrects an oversight that seems to prohibit the Trustees from paying a claim if the lawyer is deceased or disabled and requires that the claimant cannot ask for relief unless the lawyer has a final disciplinary action from the Supreme Court of Georgia.

This item has been tabled until the next meeting.

13. Standing Executive Committee Policy 1300 (Removal of officers, board members, committee members, section leadership, and volunteers). The Executive Committee and the Bar President requested this proposed standing policy to address how to remove persons

in leadership positions who may have engaged in misconduct.

This item has been tabled until the next meeting.

#### Governance Rules

General Counsel Paula Frederick presented sample governance rules for discussion: (1) Anti-Discrimination and Anti-Harassment Policy, and Reporting Procedures; (2) ABA Model Rule 8.4: Misconduct; and (3) Code of Conduct (to be used as a reminder in meeting brochures and posted at meetings, etc.). The Executive Committee was asked to review the proposed governance rules and Code of Conduct, which will be discussed further at the October Executive Committee meeting.

#### Treasurer's Report

Treasurer Bill Gentry referred the Executive Committee to the May 2024 financials provided. He also brought their attention to the memo on variances exceeding \$1,000 and announced that the financial audit would begin the week after Labor Day.

#### Office of the General Counsel Report

General Counsel Paula Frederick welcomed General Counsel Designate Russ Willard to his first Executive Committee meeting. She reported that since the portal to submit online grievances was launched, grievances have increased by 33%. While most of them aren't viable grievances, they all must be processed. She said she would give a full litigation report at the next Executive Committee meeting.

#### Committee Updates

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

#### YLD Report

YLD President Kenneth Mitchell reported that the YLD had its first board meeting, and the members had good attendance and discussions on the work of the YLD. He announced that the Leadership Academy applications open on August 23 with a deadline of Sept. 20. He reminded the Executive Committee that the YLD Fall Meeting will be in conjunction with the Board of Governors in Jekyll Island. The YLD service project will benefit Hand in Hand of Glynn, where they will collect personal hygiene products and cleaning supplies. He also announced that the YLD will hold a CLE at the Fall Meeting, with OGC Assistant General Counsel Jim Lewis presenting a program on ethics in the use of artificial intelligence. Everyone is invited to attend.

#### BASICS Program

President Ivy N. Cadle said he spoke with BASICS Chair Hon. Shondeana Morris and committee member Seth Kirshenbaum and told them the Executive Committee would not take a position on the program until the October Executive Committee Meeting, which they were both invited to attend and discuss the program and its future.

#### Special Committee on Artificial Intelligence

President Ivy N. Cadle announced he is creating a Special Committee on Artificial Intelligence that will (1) Explore all ethical implications for AI and other technology, as considered by the current GRPC; (2) Evaluate the need for revisions to the GRPC based upon the committee findings; (3) Support the Office of the General Counsel with an initial formal advisory opinion regarding

the use of artificial intelligence or other technological tools; and (4) Develop ideas and best practices for the State Bar assisting practitioners implementing AI into their practices. He asked that Executive Committee members provide names of those they thought would be good committee members and share additional ideas about what the committee should explore.

#### Supreme Court of Georgia Committee on Limited Scope Legal Practice

President Ivy N. Cadle reported that Chief Justice Michael Boggs is creating a Committee on Limited Scope Legal Practice. The Limited Scope Practice would allow non-lawyers to practice in a limited subject matter to help those in rural areas without lawyer representation. He has given the State Bar five appointments to the committee. President Cadle asked that Executive Committee members provide names of members who would make beneficial contributions to the committee.

#### Center for Lawyer Wellbeing

Secretary Javoyne Hicks announced that the Center for Lawyer Wellbeing has created a proposed list of leadership, which was provided in the materials and to President Ivy N. Cadle, who appointed the recommended slate of officers. The center's executive committee voted to recommend an individual membership fee of \$40. They have discussed what the membership will include: discounts on CLEs, special access to wellness events, etc. She has invited predecessors of the Wellness Committee, Ken Hodges and Bob Kauffman, to serve on a special advisory committee. She reminded the Executive Committee that it was the last day to register for the Wellness Retreat CLE, to be held Sept. 5-8 at Callaway Gardens.

#### Old Business

There was no old business.

#### New Business

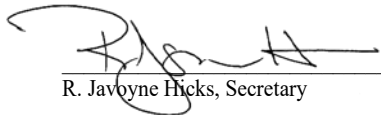
President Ivy N. Cadle reminded the Executive Committee that the Board of Governors Scholarship/Reimbursement application period closed on Aug. 31.

#### Announcements

President Ivy N. Cadle thanked everyone for coming and participating in the discussions.

#### Adjournment

There being no further business, the meeting was adjourned at 3:55 p.m.



R. Javoyne Hicks, Secretary

Approved:



Ivy N. Cadle, President

# STATE BAR OF GEORGIA 2023-24 ANNUAL REPORT



ATLANTA



SAVANNAH



TIFTON



# TABLE OF CONTENTS

President's Report .....3

About the Bar .....3

Executive Director's Message .....4

Member Benefits .....5

Membership Services.....6

    Bar Conference Center | Atlanta .....6

    Communications .....7

        Social Media.....7

        Lawyers Living Well .....8

    Continuing Legal Education Regulation .....9

    Fee Arbitration .....10

    Finance .....11

    Georgia Diversity Program .....12

    Georgia High School Mock Trial Competition .....13

    Governmental Affairs | Legislative Program .....14

    Institute of Continuing Legal Education .....15

    Law Practice Management .....16

    Law-Related Education .....17

    Lawyer Assistance Program .....18

    Meetings.....19

    Membership.....19

    Satellite Offices .....20

        Coastal Georgia Office | Savannah .....20

        South Georgia Office | Tifton .....21

Sections .....22

    Transition Into Law Practice Program .....23

    Unlicensed Practice of Law .....24

    Young Lawyers Division .....25

        YLD Newsletter—*The YLD Review* .....26

        YLD Signature Fundraiser .....26

        YLD Leadership Academy.....26

Board Action Items .....27

Report of the Office of the General Counsel.....29

State Bar of Georgia Staff .....47

## PRESIDENT'S REPORT



HON. J. ANTONIO  
"TONY" DELCAMPO  
2023-24 PRESIDENT

Hon. J. Antonio "Tony" DelCampo served as the 61st president of the State Bar of Georgia for the 2023-24 Bar year. At the beginning of his presidency, he outlined his three main priorities: improving the infrastructure of the Bar building; implementing a new website; and continuing to focus on attorney well-being.

The first priority was on the State Bar building in Atlanta. The Executive Committee and Board of Governors prepared a four-year plan that placed emphasis on the Bar Center's critical infrastructure, and expenses for updates and repairs. These projects—funded in part by unallocated cash—included adding a Siemens building management system, replacing the front doors for better accessibility, upgrading the audio and video equipment in Conference Center meeting rooms, and improving tenant areas.

Another priority for the year was the creation of a new Bar website. Once Matrix Group was chosen as the web design and development team, Bar members of all stripes were consulted to determine which features and changes they would most like to see. The Board of Governors were able to see a preview of the site at the Annual Meeting

in June, and the new [www.gabar.org](http://www.gabar.org) officially launched in September. The new Bar website offers users a better, more streamlined experience, including cleaner navigation, events prominently featured on the homepage and an enhanced member portal. The Office of the General Counsel (OGC) now has a dedicated landing page so that information regarding that office is centralized and its programs can be highlighted effectively.

The 2023-24 Bar year saw some change in the OGC. Deputy General Counsel Jenny Mittelman announced her retirement after a 34-year career at the Bar. While hers were big shoes to fill, Andreea Morrison was promoted from assistant general counsel. Not long after, General Counsel Paula Frederick announced her retirement, having worked at the State Bar of Georgia for 36 years. An exhaustive search led to the selection of Russ Willard, who worked in the Georgia Department of Law, to take over the OGC reins.

Finally, the Bar's continued focus on attorney well-being saw the creation of the Center for Lawyer Well-Being. The Center's bylaws were approved and its work has begun, highlighting the programs and benefits offered to Bar members: the Lawyer Assistance Program, the peer-to-peer Lawyers Helping Lawyers program, the Suicide Awareness Campaign and the #UseYour6 campaign to ensure that members are aware that they are entitled to six prepaid clinical sessions per calendar year. For more information about these vital programs and benefits, visit [www.gabar.org/well-being](http://www.gabar.org/well-being). ●



### ABOUT THE BAR

The State Bar of Georgia exists to foster among the members of the Bar of this state the principles of duty and service to the public; to improve the administration of justice; and to advance the science of law. All persons authorized to practice law in this state are required to be members.

The Bar has strict codes of ethics and discipline that are enforced by the Supreme Court of Georgia through the State Bar's Office of the General Counsel. Membership license fees and other contributions help the Bar provide programs that are mutually beneficial to its members and the general public. ●

#### TOTAL # OF STAFF

106

FULL TIME  
EMPLOYEES

8

PART TIME  
EMPLOYEES

2023-24 ANNUAL REPORT

**LICENSE FEE** FOR ACTIVE MEMBERS **\$264**

#### TOTAL # OF BAR MEMBERS

55,787

Georgia's license and other mandatory fees rank **7th** lowest among 33 mandatory bar associations.

## EXECUTIVE DIRECTOR'S MESSAGE



**DAMON E. ELMORE**  
EXECUTIVE DIRECTOR

Dear Members,

We are thrilled to present our third annual, comprehensive report on the complete operations of the State Bar of Georgia. It is with great pride that we offer a broad snapshot of our hard work, showcasing the immense value to you as members. Our mission is to provide you with insights into the benefits and options available, along with addressing the common questions we frequently hear from lawyers across the state.

We made the commitment to build on this report each year, ensuring it is filled with clear, easy-to-read transparent, relevant and robust data and statistics. We are grateful to our managers and to our Communications Department for gathering the tracked data and presenting it in this format.

Your feedback is invaluable to us. If there is something significant that we may have overlooked, let us know. We are dedicated to continuous improvement, and your insights will help us further refine our efforts.

We are grateful for the leadership, influence and support of our 2023-24 President Hon. J. Antonio "Tony" DelCampo, the Board of Governors and our volunteer leaders in accomplishing our goals. The results on the next several pages and our momentum going forward reflect the underlying strength, commitment and unwavering dedication of our staff and volunteers. We remain laser focused on protecting the public, advancing the science of the law, and improving the administration of justice and quality of legal services.

We will take this momentum into the new Bar year to support President Ivy N. Cadle and his goals of building connections, issue spotting and proposing rules and bylaws changes to address governance issues.

We are equally grateful to all of our other volunteer leaders, as well as our liaisons with the Supreme Court of Georgia—Justice Sarah Warren and Justice Charlie Bethel—for their influence and guidance, too. We embrace the challenges that may lie ahead and remain resolute in our pursuit of becoming better with each passing day. DEE ●

Sincerely,

A handwritten signature in blue ink, appearing to read "Damon Elmore".

# MEMBER BENEFITS

## VLEX FASTCASE LEGAL RESEARCH

vLex Fastcase is provided free to all members and includes a comprehensive, national law library on your computer/tablet/smartphone, with online access to cases, statutes, regulations, court rules and bar publications. ●

## STATE BAR PARKING DECK

Free parking is available to all Bar members and is open Monday-Friday from 7 a.m. to 5 p.m. Free parking is also available on nights and weekends with a Bar card. ●

## VENDOR DIRECTORY

[gabar.org/vendor-directory](http://gabar.org/vendor-directory)

The online Vendor Directory provides a listing of practice-related products and services; many offer discounts to Bar members. ●

**MEMBER BENEFITS, INC.**  
[gabar.memberbenefits.com](http://gabar.memberbenefits.com)

**MB** | MemberBenefits

Member Benefits, Inc., is the recommended broker of the State Bar of Georgia, Health, Dental & Vision Plans, plus Long-Term Disability & Long-Term Care. From July 1, 2023, through June 30, 2024,

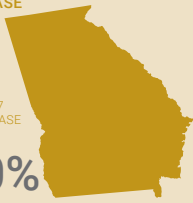
AVERAGE # OF VLEX FASTCASE  
USERS PER MONTH

**2,584**

GEORGIA IS THE MOST ACTIVE OF 47  
STATE BARS OFFERING VLEX FASTCASE  
AS A MEMBER BENEFIT

MORE THAN HALF OF  
OUR MEMBERS HAVE  
USED VLEX FASTCASE

**>50%**



## RELIAGUIDE

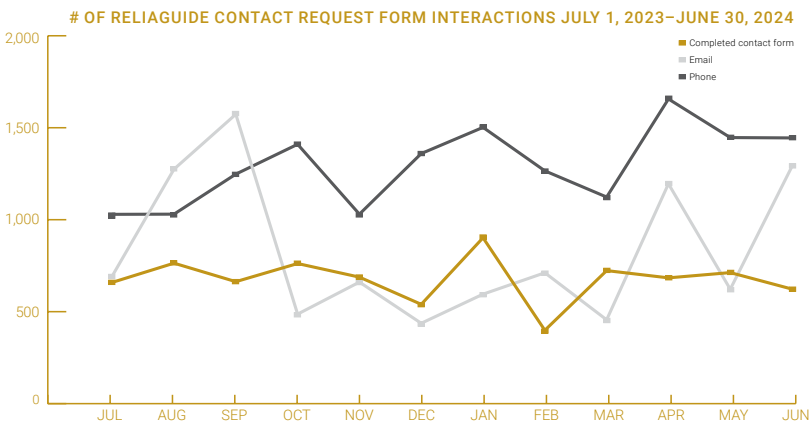
[gabar.reliaguide.com/home](http://gabar.reliaguide.com/home)

**RELIAGUIDE**<sup>SM</sup>

ReliaGuide with its FindaLawyer directory serves as the Bar's enhanced member directory that offers members the ability to create a profile with a photo, up to three practice areas, education, contact and license information at no cost. An expanded profile

there were 697 total enrollments in various individual insurance products and 1,028 enrollments in employer insurance products in the past year. ●

(Profile Plus) is available for only \$15 a month. From July 1, 2023, through June 30, 2024, interactions with member profiles totaled 489,387, including 101,855 profile views, 8,131 completed contact forms and 25,515 clicks on lawyer phone numbers and emails. ●







# MEMBERSHIP SERVICES

The State Bar of Georgia offers a wide range of services and programs that benefit Bar members. Members are encouraged to familiarize themselves with these services and programs, and are welcome to contact the staff members listed for further information. For more information on these programs and services, please visit [www.gabar.org](http://www.gabar.org).

## BAR CONFERENCE CENTER | ATLANTA

404-419-0155 | [conferencecenter@gabar.org](mailto:conferencecenter@gabar.org)

The State Bar of Georgia Conference Center is available for use by Bar members and legal organizations. With the recent increase in the request for hybrid and virtual offerings, the Conference Center is well-equipped to handle set-up for a number of virtual platforms (webinars, Zoom meetings, etc.), in addition to more traditional meeting formats.

### TOTAL # OF UNIQUE MEETING ROOMS

13



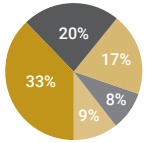
CAN HOST 2-200 ATTENDEES

### MONTHLY AVERAGE # OF ATTENDEES

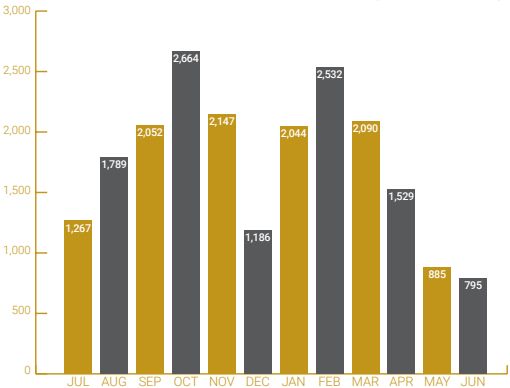
1,748

### AVERAGE MONTHLY USAGE BY EVENT TYPE

- Client meetings and depositions (33%)
- Bar departments, boards and committees (20%)
- Seminars, CLEs and trainings (17%)
- Mediations, arbitrations and hearings (8%)
- Law-related education, mock trials and focus groups (9%)



### # OF CONFERENCE CENTER VISITORS JULY 1, 2023-JUNE 30, 2024



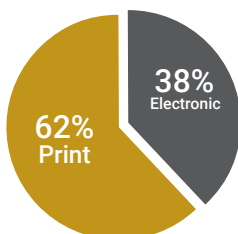
## COMMUNICATIONS

404-527-8761 | [communications@gabar.org](mailto:communications@gabar.org)

The Bar's publications and media relations are coordinated by this department and various committees. This department is also responsible for maintaining the State Bar of Georgia website. The *Georgia Bar Journal* is published quarterly. The department also handles a majority of the social media content for the Bar, coordinates the annual awards program and provides staff support for the Attorney Wellness Committee. ●

## www.gabar.org WEBSITE STATISTICS

### GEORGIA BAR JOURNAL Distribution



**Desktop**  
78.3%

**Mobile**  
20.8%

**Tablet**  
0.9%

**Average Session Duration**  
2 minutes 16 seconds**Total Sessions | 1,800,199**

- > Home | **657,706 (36.5%)**
- > Member Search | **261,109 (14.5%)**
- > Member Search Results | **82,358 (4.6%)**
- > Member Login | **54,911 (3.1%)**
- > Georgia Rules of Professional Conduct | **21,921 (1.2%)**
- > Continuing Legal Education | **11,355 (0.6%)**

**Top Three Public Pages Visited**

- > Find a Lawyer
- > Legal Aid
- > File a Complaint

## SOCIAL MEDIA

### BY THE NUMBERS

#### # OF FOLLOWERS

**FACEBOOK**  
**7.8K**  
+100 since 2022-23

**INSTAGRAM**  
**2,224**  
+217 since 2022-23

**LINKEDIN**  
**8,523**  
+911 since 2022-23

*LinkedIn: 63.4% of followers are from the greater Atlanta area and are primarily those in the law practice or legal services fields. Facebook audience is split 65% women to 35% men and consists of 7,800+ followers.*

CONNECT WITH THE STATE BAR

- [www.gabar.org](http://www.gabar.org)
- [@statebarofgeorgia](https://www.facebook.com/statebarofgeorgia)
- [@statebarofga](https://www.instagram.com/statebarofga)
- [@/state-bar-of-georgia](https://www.linkedin.com/company/state-bar-of-georgia)
- [flickr.com/statebarofgeorgia](https://www.flickr.com/photos/statebarofgeorgia/)
- [@StateBarOfGeorgia](https://www.youtube.com/@StateBarOfGeorgia)

# GEORGIA LAWYERS LIVING WELL

The State Bar of Georgia established Lawyers Living Well to promote health and wellness among members and staff, identify factors that impact the physical and emotional well-being of attorneys, develop work-life balance CLE programs, increase awareness of existing Bar programs that deal with such issues, and accumulate information and educate members about wellness issues and resources. Attorney Wellness Committee members are actively dedicated to achieving the goals of the wellness initiative and, in the process, seek to assist all Bar members in their wellness journey.

The Attorney Wellness Committee supports attorneys by providing a space for lawyers to manage their well-being through the resources offered by the physical, mental and social well-being subcommittees. These programs are promoted through the State Bar's social media platforms with content from the Media and Print Subcommittee. ●



American Foundation  
for Suicide  
Prevention



OUT OF THE  
DARKNESS  
Community Walks

## \$5,240

In 2023, the State Bar of Georgia Lawyers Living Well Team helped sponsor the annual Out of the Darkness Walk in Atlanta, and raised \$5,240. Every dollar raised through the community walks allows the American Foundation for Suicide Prevention to invest in life-saving research, education, advocacy and support for those impacted by suicide.

## WELL-BEING BY THE NUMBERS

### SOCIAL MEDIA POSTS

53

### GEORGIA BAR JOURNAL ARTICLES

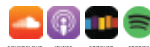
4

### ENEWS POSTS

11

### PODCASTS RECORDED

3



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

This program operates under the Commission on Continuing Lawyer Competency and assists attorneys with keeping track of their CLE hours through an online CLE transcript that can be viewed by the attorney any time at [www.gabar.org](http://www.gabar.org). The CLE requirement is designed to enhance members' professional competence as lawyers. Active lawyers are required to keep current on the law by attending a minimum of 12 hours of education each year. Of these 12 total

hours, at least 1 hour must be in ethics, 1 hour must be in professionalism and, for trial attorneys, 3 hours must be in litigation. Attorneys can complete these 12 CLE hours by an approved CLE program attended either in-person or through a distance learning format. In addition to CLE programs, attorneys can receive CLE hours each year for coaching or judging a high school mock trial team, authoring a published legal article or observing a trial. ●

## IN 2023-24

 447,993 hours of CLE were attended by Georgia lawyers. -1,408 since 2022-23

 892 CLE providers submitted courses for CLE approval.

# OF CLE COURSES  
APPROVED FOR CLE CREDIT

18,957



0.1% were suspended for noncompliance.



## FEE ARBITRATION

404-527-8750 | [feearbitration@gabar.org](mailto:feearbitration@gabar.org)

The Fee Arbitration Program provides a convenient mechanism for resolving fee disputes between attorneys and clients. It also provides for the resolution of fee disputes between lawyers resulting from a partnership dissolution, sharing of fees or the withdrawal of a lawyer from a partnership.

The program is administered by the Committee on the Arbitration of Attorney Fee Disputes, which includes six lawyer members and three public members who each serve a three-year term.

To initiate the process, a petition form supplied by the staff must be completed. A majority of the petitions are filed by the client, however a lawyer may also initiate the process. Every case is reviewed by the committee to determine whether to accept jurisdiction for a hearing.

Hearings are held across the state by a panel of three volunteer arbitrators comprised of two lawyers and one public member. Each panel hears multiple cases with most arbitrators serving an entire day.

Since the first arbitration award was entered on Oct. 17, 1980, the program has been involved in thousands of fee disputes, arbitrating many and facilitating settlement by the parties in many other cases. To a great extent, the program's success is attributable to the dedicated efforts and sound judgment of hundreds of lawyer and public members throughout the state who have volunteered to serve without compensation as arbitrators under the program. ●

## JULY 1, 2023 – JUNE 30, 2024



**793** petitions mailed

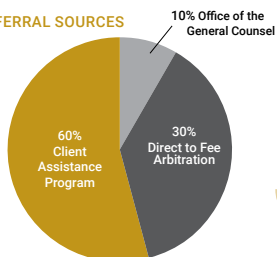
**-449** since 2022-23

*The Petition for Fee Arbitration was accessible online beginning in March 2024, resulting in fewer requests to mail petitions.*



Some fee disputes received via phone were resolved informally by the Fee Arbitration staff without the filing of a Petition.

### REFERRAL SOURCES



Petitions are filed in many fields of law with the following producing the most cases:

**Criminal Law | 49%**  
**Family Law | 27%**



The largest award for the 2023-24 Bar year was **\$260,000**. The average award amount was **\$37,820**.

## FINANCE

404-527-8748 | [ront@gabar.org](mailto:ront@gabar.org)



### FY 2024 FINANCIAL SUMMARY

The State Bar achieved a financial surplus during the Bar year ended June 30, 2024. The State Bar's net assets are estimated to be in the range of **\$35 million to \$37 million**. The Bar's year end is June 30, and as such, this amount is estimated. The State Bar operates without any debt. ●



### APPROVED FY 2024 BUDGET

The State Bar Board of Governors approved a budget with a deficit for the year ended June 30, 2024, of **\$610,661**. ●



### MANAGEMENT'S RESPONSIBILITY

The State Bar of Georgia's management is responsible for the information provided in the Financial Report. The basic financial statements and related notes are audited by an independent accounting firm in accordance with auditing standards generally accepted in the United States of America. ●

**\$509,537**

Amount raised by Georgia lawyers for the "And Justice for All" State Bar Campaign for Georgia Legal Services Program.

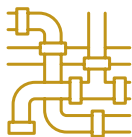
April 1, 2023 – March 31, 2024



## GEORGIA DIVERSITY PROGRAM

404-219-8174 | [gadiversityprogram@gmail.com](mailto:gadiversityprogram@gmail.com)

The Georgia Diversity Program (GDP) promotes diversity in the legal profession throughout Georgia. The program provides CLEs, pipeline programs and other programs that ensure lawyers can thrive regardless of their race, ethnicity, gender, national origin, sexual orientation or status as having a disability. GDP is made up of corporate legal departments, law firms and government entities who pay annual dues and drive our programming. In addition to the programming, GDP meets every other month to plan events and discuss diversity issues in the law. ●



### 2023 HIGH SCHOOL PIPELINE PROGRAM

This Bar year, GDP had a very successful high school pipeline program where 19 students spent eight business days in June developing skills that can apply to a potential career in law. The students met daily at Atlanta's John Marshall Law School. Each morning, they worked on their writing skills, including writing a resume and a personal statement. For lunch, the students went to a law firm or corporate legal department to hear from lawyers there. For example, Equifax's legal department presented "Credit 101," and Swift Currie discussed social media with the scholars. Other lunch hosts included Parker Hudson, Akerman, Baker Hostetler, JAMS, the City of Atlanta Department of Law, and more. In the afternoon, scholars engaged in Lincoln Douglas debate where they analyzed, researched and presented the pros and cons of various issues. The program culminated in a speech and debate competition attended by parents and law students. The program teachers were a lawyer and a high school guidance counselor. GDP appreciates Atlanta's John Marshall Law School, the teachers, the lunch hosts, the scholars and all who contributed to the program.

*Programming is supported by Georgia Diversity Program member firms. We are grateful to these firms, a list of which can be found at [www.gabar.org/diversity](http://www.gabar.org/diversity), for their continued support and acknowledge that without their dedication, the work of the program would not be possible.*

## GEORGIA HIGH SCHOOL MOCK TRIAL COMPETITION

404-527-8779 | [mocktrial@gabar.org](mailto:mocktrial@gabar.org)

The Georgia High School Mock Trial (HSMT), one of the strongest in the nation, oversees an annual statewide competition of more than 130 teams from 110 schools (1,800+ students in 2024). Participating teams come from every region of Georgia, Valdosta to Dalton and Savannah to Columbus. Mock trial develops and enhances vital life skills such as public speaking, critical thinking and teamwork, while teaching participants about our legal system. The competition relies on many thousands of volunteer hours by members of the State Bar and especially the Young

Lawyers Division. Volunteer lawyers coach teams, coordinate and run the competition, write the case and staff the panels that judge rounds.

The program also conducts Law Academy, a three-day program each September, designed to empower the top 45-50 mock trial students statewide with trial practice and leadership skills they can take back to their teammates. The faculty of Law Academy consists of highly experienced judges and trial lawyers. ●

### MOCK TRIAL BY THE NUMBERS

[www.georgiamocktrial.org](http://www.georgiamocktrial.org)

#### 2024 Season (our 36th)

- 1,845 students (+281 since 2023)
- 137 schools (+17 since 2023) in 38 counties
- 445 coaches (+91 since 2023): judges, attorneys, teachers

#### Districts

- 54 teams
- 9 locations across the state
- 150+ judges and attorneys on judging panels

#### Regions

- 136 competing teams (+26 since 2023)
- 17 locations across the state
- 500+ judges and attorneys on judging panels

#### State Finals

- 18 teams
- 75+ attorneys and judges on judging panels
- Five rounds over three days (+1 since 2023) to crown one State Champion.

The 2024 State Champion, **Decatur High School**, represented Georgia at the National High School Mock Trial Championship in Wilmington, Delaware. Decatur finished **10th** of 48 competing teams.

Georgia State Champion Court Artist **Katie Smith** from Washington County **won** the National Court Artist Competition.

#### CONNECT WITH HSMT



@GeorgiaMockTrial

2023-24 ANNUAL REPORT







## GOVERNMENTAL AFFAIRS | LEGISLATIVE PROGRAM

[www.gabar.org/LEG](http://www.gabar.org/LEG)

The State Bar's Legislative Program advocates legislation at the Georgia General Assembly that regulates the legal profession and improves the quality of legal services. Beginning in September 2023 and continuing through early January 2024, the State Bar's sections and committees presented legislative proposals to the Advisory Committee on Legislation and the Board of Governors to vet and approve the State Bar's legislative package.

During the 2024 legislative session, the Legislative Program successfully lobbied to pass the **Uniform Commercial Code Modernization Act (HB 1240)**, modernizing various statutes in the commercial code relating to commercial transactions and establishing commercial law for transactions including digital assets, in addition to a proclamation by the governor recognizing April 2024 as **Legal Professionalism Month**.

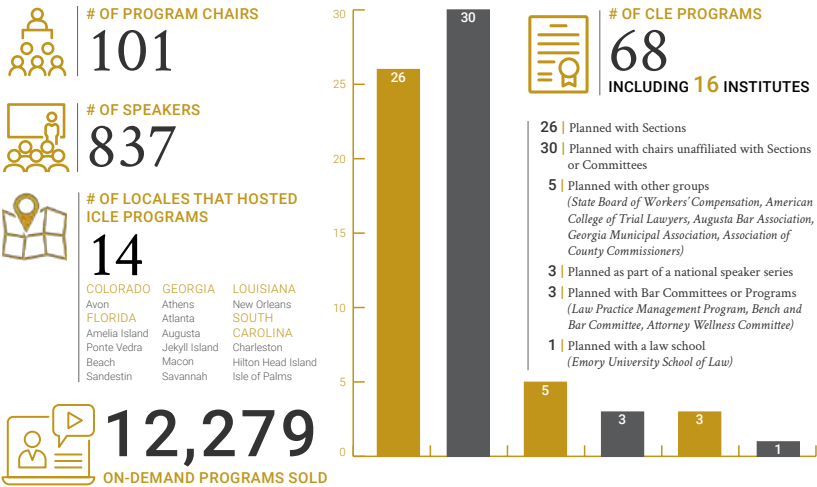
The State Bar also supported enhanced appropriations for civil legal services grants for medical legal partnerships (**\$409,500**), legal aid grants for victims of domestic violence (**\$3 million**) and the Georgia Appellate Practice and Educational Resource Center (**\$900,000**).

The State Bar's legislative consultants shared feedback from section experts with members of the General Assembly to proactively improve legislation in highly specialized areas of the law. For more information about the 2024 legislative session, including an overview of the State Bar Legislative Agenda, visit [www.gabar.org/LEG](http://www.gabar.org/LEG). ●

*The State Bar of Georgia's Legislative Program is exclusively funded by voluntary contributions from our members. Any official position by the State Bar of Georgia, including its sections and committees, must follow the process outlined in Standing Board Policy 100, [www.gabar.org/SBP100](http://www.gabar.org/SBP100), and meet the standards set out by the U.S. Supreme Court in Keller v. State Bar of California. The State Bar and affiliated entities cannot take an official position on legislation without following these policies and standards.*

INSTITUTE OF CONTINUING LEGAL EDUCATION  
678-529-6688 | icle@gabar.org

The Institute of Continuing Legal Education of the State Bar of Georgia (ICLE) was established to promote a well-organized, properly planned and adequately supported program of continuing legal education by which members of the legal professional may enhance their skills, keep abreast of developments in the law, ethics and professionalism, engage in the study and research of the law, and disseminate the knowledge thus obtained. For more information about upcoming CLE programs, please visit [icle.gabar.org](http://icle.gabar.org).



FOLLOW  
**ICLE** >>>>



@iclega



@statebargaicle

## LAW PRACTICE MANAGEMENT

404-527-8770 | [lpn@gabar.org](mailto:lpn@gabar.org)

The Law Practice Management Program provides Georgia lawyers with the strategy and support they need to start, scale or shut down their law practice with less stress. Through our resource library, vendor directory, toolkits, webinars, consultations and Take Charge! Solo & Small Firm Conference, we help lawyers and their teams leverage technology, data and strategy to run a modern, successful and sustainable law practice. Our dedicated team is committed to providing you with the tools you need to practice well. ●

## IN 2023-24 ...

139

STARTUP KITS  
DISTRIBUTED

63 attorneys attended the  
2023 Take Charge!  
Solo and Small Firm Summit.

1,427

books in the  
Resource  
Library.



# OF MEMBERS SERVED

526

+37 since 2022-23



# OF SPEAKING  
ENGAGEMENTS

8

TOTAL # OF  
CONSULTATIONS

33

# OF GENERAL  
CONSULTATIONS

12

# OF CORRECTIVE ACTION  
CONSULTATIONS

4

# OF TECHNOLOGY  
CONSULTATIONS

17

CONNECT WITH LPM



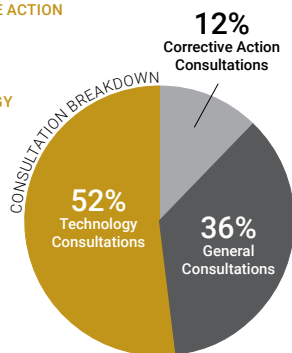
[bit.ly/lpnnewsletter](mailto:lpn@gabar.org)



[/law-practice-management](https://www.linkedin.com/company/law-practice-management)



[@gabarlpn](https://www.instagram.com/gabarlpn)



LAW-RELATED EDUCATION

404-527-8785 | lre@gabar.org

The Law-Related Education (LRE) Program offers K-12 teachers a wide variety of strategies for including LRE in their social studies, law, business and public safety curricula, as well as suggestions for relating LRE to language arts, science and math curricula. The program also offers the free interactive field trip known as Journey Through Justice (JTJ) for students in grades 4-12; maintains the Virtual Museum

um of Law at [www.thelawmuseum.org](http://www.thelawmuseum.org); provides lesson plans, classroom resources and links to current events on more than 60 legal topics via online LiveBinders at [www.livebinders.com/s/175847](http://www.livebinders.com/s/175847); conducts teacher workshops; presents at teacher and parent conferences; and sponsors the ABA Civics and Law Honor Roll for Georgia high school students. ●

# OF JTJ FIELD TRIPS IN 2023-24

104  
-7% since 2022-23

# OF STUDENT PARTICIPANTS IN JTJ IN 2023-24

5,114  
-37% since 2022-23

VIRTUAL MUSEUM OF LAW | TOP 5 VIDEOS BASED ON NUMBER OF VIEWS

VIDEO	# OF VIEWS	CHANGE FROM '23
"Brown v. Board of Education"	463,315	↑ 8%
"Marbury v. Madison"	306,054	↑ 11%
The Lizzie Borden Case	131,019	↑ 17%
The Amistad Case	102,316	↑ 9%
The Scopes "Monkey" Trial	98,605	↑ 16%



TOTAL # OF VIEWS OF ALL VIRTUAL MUSEUM OF LAW VIDEOS TO DATE

1,922,315  
+13% since 2022-23



TOTAL # OF VIEWS OF ALL LIVEBINDERS TO DATE

178,274  
+47% since 2022-23

LIVEBINDERS | TOP 5 LIVEBINDERS BASED ON NUMBER OF VIEWS

LIVEBINDER	# OF VIEWS	CHANGE FROM '23
"Hands Up, Don't Shoot" Free Press or Fair Trial	11,051	↑ 8%
First Amendment: Freedom of Speech, Press and Assembly	7,630	↑ 45%
University of California v. Bakke	6,167	---
The Lizzie Borden Case	5,014	↑ 45%
General Cruel and Unusual Punishment Resources	4,896	↑ 31%



# LAWYER ASSISTANCE PROGRAM

Confidential Hotline | 800-327-9631

The Lawyer Assistance Program (LAP) provides a broad range of confidential helping services to members seeking assistance with depression, anxiety, stress, alcohol/drug misuse, family problems, workplace conflicts, psychological and other issues. Members may contact LAP for confidential assistance 24 hours a day, 7 days a week, by calling 800-327-9631.



Lawyers Helping Lawyers is a volunteer peer support program created by the LAP to give additional tools to members who might benefit from a peer to talk to about the difficulties in their lives. Peer support generally involves people sharing similar experiences with an illness or condition. Drawing on the unique shared experience of practicing law, others may volunteer as well. Bar members who volunteer to become a peer can receive CLE credit for their training. ●

## UTILIZATION STATS (JULY 1, 2023-JUNE 30, 2024)

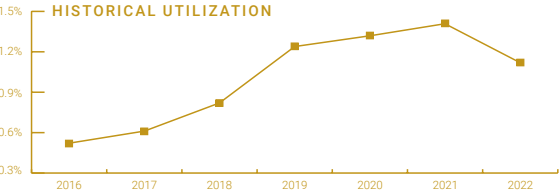
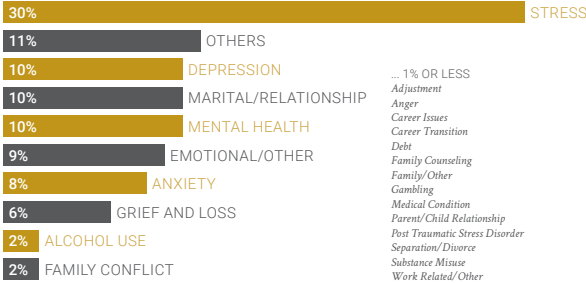
EAP CASE COUNT	ACTIVITIES	HOURS
437*	3,177**	1,405.72***

\*Includes the total number of files, organizational services, information calls, etc., that have an open/service date that falls between (and includes) the reporting period date range.

\*\*The total activities (contacts) from files, organizational services, information calls, etc., that have an activity date that falls between (and includes) the reporting period date range.

\*\*\*The total duration from all activities that have an activity date that falls between (and includes) the reporting period date range.

## PRIMARY PRESENTING PROBLEMS (AS REPORTED BY CALLER)



## MEETINGS

404-527-8713 | meetings@gabar.org

The Board of Governors holds at least four meetings each year—Fall, Midyear, Spring and Annual. At the Midyear Meeting in January and the Annual Meeting in June, Georgia attorneys can take part in networking, educational programs and professional development. CLE presentations and meetings of committees, sections, alumni and law-related organizations are held, and exhibits by law-related vendors are included. The Meetings Department also plans and executes monthly Executive Committee Meetings, including an annual joint meeting with the Supreme Court of Georgia. ●

## 2023-24 BOARD OF GOVERNORS MEETINGS

FALL 2023 | OCT. 27-29

JEKYLL ISLAND, GEORGIA

154 Attendees

MIDYEAR 2024 | JAN. 11-13

ATLANTA, GEORGIA

613 Attendees

SPRING 2024 | APRIL 19-21

YOUNG HARRIS, GEORGIA

241 Attendees

ANNUAL 2024 | JUNE 6-9

FERNANDINA BEACH, FLORIDA

731 Attendees

## MEMBERSHIP

404-527-8777 | membership@gabar.org

The Membership Department's mission is to meet the needs of Bar members by providing quality service, either by interacting on the phone, email or in person. To handle all of the assigned membership activities, approximately 75 calls and 60 emails are received and responded to each day.

The primary key to quality service is the timely and accurate maintenance of the database containing the information for all attorneys. Changes to the database can be done by the member online or by submitting any changes to the Membership Department. The information is utilized to respond to questions regarding this information from both the general public and the members. ●



In a typical year, more than  
**16,000** changes are  
processed in the database.

200 Photo IDs are  
processed per year.

Bar cards provided average  
around 1,200 annually.

Approximately 1,100  
enrollment packages  
are processed yearly.

Approximately 3,500  
Letters of Good Standing  
are ordered annually.

# OF ANNUAL MEMBERSHIP LICENSE FEES  
INVOICED AND PROCESSED EACH YEAR

**50,211** (approximately)



The department is staffed with five individuals  
dedicated to meeting the needs of our core base  
of **54,800** members.

CORE MEMBERSHIP CATEGORIES INCLUDE {ACTIVE, INACTIVE, EMERITUS}

and grows at a rate of approximately 1,000 new  
members each year.

In addition to the categories indicated above, the department  
provides service to other membership categories such as  
**Affiliate, Disabled, Disbarred, Provisional, Resigned, Retired,  
Student, Suspended and Terminated.** These membership  
categories make up an additional 7,052 members.

# OF ACTIVE MEMBERS

**42,194**

+566 since 2022-23

# OF EMERITUS MEMBERS

**4,617**

+428 since 2022-23

# OF INACTIVE MEMBERS

**8,017**

-152 since 2022-23

# OF NEW MEMBERS

**959**

+8 since 2022-23

(based on the February  
and July Bar Exam  
pass lists)

## ANNUAL BOARD OF GOVERNORS ELECTION

Staff oversee the election process for 153 candidates; are responsible  
for verifying petitions; creating the ballots; providing information to  
the Communications Department to post and share on the website  
and through email; and ensuring all votes are cast by the deadline. The  
assistant director serves as the Elections Committee staff liaison and runs  
periodic committee meetings to modify elections rules when needed.



## SATELLITE OFFICES

### COASTAL GEORGIA OFFICE | SAVANNAH

912-239-9910 | 877-239-9910 | kindallh@gabar.org

The Coastal Georgia Office of the State Bar of Georgia provides Savannah-Metro Area attorneys more direct access to the Bar. Our facility is often used to provide space for CLE opportunities, depositions, mediations and client meetings. Our facility is a popular "halfway" meeting point for attorneys from Southeast Georgia, South Carolina or Florida to meet with those from Atlanta and other areas. Mediators like using this office because of its neutrality—mediations of varied sizes are frequently scheduled here.

Many solo practitioners enjoy having an impressive space to use when meeting with their clients. Our members also benefit from the ability to use video-conferencing and other available technologies as a means to conduct business with distant offices. These technologies allow more access to various meetings without additional travel and/or overhead costs. Some of the local bar associations, the Savannah Bar and the Port City Bar specifically, have occasionally used our facility for their monthly meetings or other events, such as meet and greets or awards ceremonies. One of our main activities is assisting public consumers by phone. Whether it is directing them to the Bar's website for attorney referrals, or transferring them to the appropriate department, in the Atlanta office, that can best assist them with their requests. We are very often the first interaction a member of the public has with the State Bar of Georgia. ●

### MEMBERS SUPPORTED INCLUDE THOSE FROM:

ALPHARETTA ATLANTA BRUNSWICK  
CANTON CARTERSVILLE CEDAR PARK (TX)  
CORDELE DECATUR ELBERTON HAZLEHURST  
HINESVILLE JOHNS CREEK LAWRENCEVILLE  
LEXINGTON MACON NEW ORLEANS (LA)  
PEMBROKE ROSWELL SAVANNAH  
STATESBORO SYLVANIA TALLAHASSEE (FL)  
TEMPLE THOMASTON TUCKER VALDOSTA  
VIDALIA WASHINGTON (DC)



### COASTAL GEORGIA OFFICE STATISTICS JULY 2023 TO JUNE 2024

	Year Total	Yearly %	% Change from 22-23
Client/Miscellaneous Meetings*	38	32%	↑ 90%
Depositions	35	29%	↓ 21%
Mediation/Arbitration	35	29%	↑ 35%
Walk-ins	8	7%	↓ 60%
CLE Opportunities/Training	4	3%	↓ 20%
Total Events	120	100%	↑ 24%
Total # People Using Facility	704		↑ 27%

\*Note: Miscellaneous Meetings include video conferences, hearings and focus groups.



### TELEPHONE ENGAGEMENT

643 inbound | 592 answered  
Data captured July 2023 through June 2024

## SOUTH GEORGIA OFFICE | TIFTON

229-387-0446 | 800-330-0446 | lacarar@gabar.org

The South Georgia Office located in Tifton serves more than 600 guests annually. Attorneys from across the state utilize the office for depositions, mediations, hearings, client meetings and continuing legal education programs. The space is also used for small receptions, socials, business meetings and other law-related training. The office is a well-liked meeting space because of its location, as Tifton is a connecting point for several major transportation routes including I-75 and several U.S. highways.

The Tifton office has two conference rooms equipped with Aver IP-based video conferencing systems and other technology to offer a broad array of virtual conferencing options. One unit is permanently fixed in our main conference room, with two mobile units for use in the small conference room and as a backup. An office serves as a dedicated workspace for attorneys and a private space to meet with clients.

Our staff accommodates space requests and works diligently responding to inquiries and correspondence from both lawyers and consumers by phone, mail and in person. We also work closely with the Tift Judicial Circuit Bar Association organizing meetings and events and engaging with the community. The South Georgia Office is committed to providing excellent customer service and helping members foster greater connection with the State Bar of Georgia. ●

## MEMBERS SUPPORTED INCLUDE THOSE FROM:

ADEL ALBANY ATHENS ATLANTA BUCKHEAD  
BRUNSWICK COLUMBUS CORDELE DALLAS (TX)  
DOUGLAS HOMERVILLE JACKSONVILLE (FL)  
JONESBORO LAWRENCEVILLE MACON MONROE  
MOULTRIE NEW ORLEANS (LA) NEW YORK (NY)  
PEACHTREE CORNERS POOLER ST. SIMONS  
SAVANNAH SYLVESTER TALLAHASSEE (FL)  
THOMASVILLE **TIFTON** VALDOSTA  
WATKINSVILLE WAYCROSS



### SOUTH GEORGIA OFFICE STATISTICS JULY 2023 TO JUNE 2024

	Year Total	Yearly %	% Change from 22-23
Client/Miscellaneous Meetings*	19	8%	⬆️ 36%
Depositions	47	20%	⬆️ 7%
Mediation/Arbitration	9	4%	⬆️ 80%
Walk-ins	154	67%	⬆️ 29%
CLE Opportunities/Training	2	1%	⬆️ 50%
Total Events	231	100%	⬆️ 24%
Total # People Using Facility	644		⬆️ 29%

\*Note: Miscellaneous Meetings include video conferences, hearings and focus groups.



**TELEPHONE ENGAGEMENT**  
1,028 inbound | 790 answered  
Data captured July 2023 through June 2024



## SECTIONS

404-527-8782 | [sections@gabar.org](mailto:sections@gabar.org)

Sections are voluntary, non-appointed groups within the State Bar. Sections provide specialized services and information to their members in their respective areas of the law. Section leaders determine and plan educational, community service and networking programs. Leadership is responsible for disseminating pertinent information about such events to their members. The sections team can assist in all these areas. Sections are as active as their memberships demands. All members in good standing of the State Bar of Georgia are eligible for membership upon annual payment of section dues, which vary by section. It is important to note, however, that only active members of the State Bar of Georgia are entitled to nominate a member for office or hold office in a section.

Sections produce both accredited and non-accredited CLE programs for their members at a reduced fee. ●

### # OF STATE BAR SECTIONS

# 52

Throughout the 2023-24 Bar year, there were **118 CLE** accredited hours offered through the various sections. Along with general hours of credit earned, specialty credits were also offered. Approximately **2,808** members were able to meet their continuing legal education requirements.



While the majority of the 52 sections stay active throughout the Bar year, the largest sections continue to be consistently active:

- > **Real Property Law** | **3,195 members** (-7 since 2023)
- > **Insurance Law** | **2,600 members** (+207 since 2023)
- > **Corporate Counsel** | **1,960 members** (+95 since 2023)
- > **General Practice & Trial Law** | **1,946 members** (+62 since 2023)
- > **Family Law** | **1,921 members** (-38 since 2023)
- > **Business Law** | **1,760 members** (+3 since 2023)
- > **Criminal Law** | **1,502 members** (+48 since 2023)
- > **Labor & Employment Law** | **1,378 members** (+40 since 2023)
- > **Intellectual Property Law** | **1,266 members** (+13 since 2023)
- > **Fiduciary Law** | **1,232 members** (+36 since 2023)

## TRANSITION INTO LAW PRACTICE PROGRAM

404-527-8704 | [tilpp@gabar.org](mailto:tilpp@gabar.org)

The Transition Into Law Practice Program (TILPP) is the mentoring and continuing legal education program for lawyers newly admitted to the State Bar of Georgia, unless exempted. The goal of TILPP is to afford beginning lawyers with meaningful access to experienced lawyers equipped to teach the practical skills, seasoned judgment, and sensitivity to ethical and professionalism values necessary to practice law in a highly competent manner.

Lawyers enrolled in TILPP satisfy the mentoring component by enrolling in one of three types:

### 1 Inside Mentoring

For an attorney who works in a law firm or organization and has a mentor within that firm or organization.

### 2 Outside Mentoring

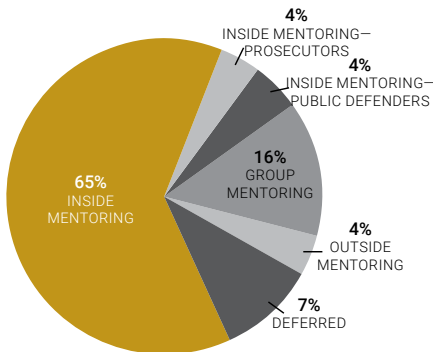
For an attorney who is a sole practitioner with a mentor from another firm or organization.

### 3 Group Mentoring

For an attorney who is employed in a non-legal setting, unemployed or who otherwise does not have an individual mentor. ●

New lawyers must also complete 12 hours of CLE. Most will attend the Beginning Lawyers Program to fulfill 6 of those hours and their choice for the additional 6 hours. Lawyers who are prosecutors or public defenders must attend their applicable training, which will satisfy their CLE requirement for the year.

## TILPP BY THE NUMBERS JULY '23 – JUNE '24



The State Bar of Georgia was the first in the country to have a mandatory mentoring program for lawyers.

# OF LAWYERS ENROLLED  
IN TILPP IN 2023-24

813



## UNLICENSED PRACTICE OF LAW

404-527-8769 | [upl@gabar.org](mailto:upl@gabar.org)

The Unlicensed Practice of Law (UPL) Department acts at the direction of a statewide Standing Committee and ten District Committees representing each of the judicial districts in Georgia. All UPL committees are directly appointed by the Supreme Court of Georgia and are comprised of both lawyer and nonlawyer members, the latter of which must make up a majority of each committee. UPL committees are charged with the consideration of complaints received, processed, and thoroughly investigated by the UPL Department. The Standing Committee additionally considers requests for advisory opinions. Most UPL investigations result in subjects either agreeing to comply without the need for further action or voluntarily executing cease and desist affidavits when requested by committee. Cases not resolved at the District Committee level are often referred for criminal prosecution, while others have resulted in the filing of injunctive relief actions when approved by the Standing Committee.

A registry of subjects who have either been permanently enjoined from engaging in the practice of law by court order or have voluntarily executed a cease and desist affidavit within the last two years may be found on the Bar's website. ●

## UPL BY THE NUMBERS SINCE JANUARY 2023



# OF INVESTIGATIONS INITIATED

304

+27 since 2022-23



# OF SUBPOENAS PROCURED AND RESPONSES RECEIVED

26



# OF ATTORNEYS INELIGIBLE TO PRACTICE\* EXAMINED TO DATE

250+

*\*due to CLE noncompliance or unpaid license fees*



# OF NOTARY LISTINGS ON HIGH-TRAFFIC WEBSITES REVIEWED

500+

## YOUNG LAWYERS DIVISION

404-527-8778 | yld@gabar.org

The Young Lawyers Division is responsible for aiding and promoting the advancement of the younger members of the State Bar by providing a program of activities and projects which serve the profession and the public. All members who have not yet reached their 36th birthday or who have been admitted to their first Bar less than five years are automatically a member.

The Young Lawyers Division provides service, networking and leadership opportunities through 30 committees and 10 affiliate organizations from around the state. With almost 10,000 active young lawyers, committees and affiliates offer local opportunities for young lawyers to be involved in their community. ●

SAVANNAH HAS THE  
**SECOND  
HIGHEST**  
CONCENTRATION OF  
YOUNG LAWYERS  
OUTSIDE OF  
METRO-ATLANTA

**241**

SAVANNAH YOUNG  
LAWYERS FOLLOWED  
BY MACON (165)



## 2023-24 YLD MEETINGS

FALL 2023 | NOV. 10-12  
📍 CHARLESTON, SC  
MIDYEAR 2024 | JAN. 11-13  
📍 ATLANTA, GA

SPRING 2024 | APRIL 19-21  
📍 YOUNG HARRIS, GA  
ANNUAL 2024 | JUNE 6-9  
📍 FERNANDINA BEACH, FL

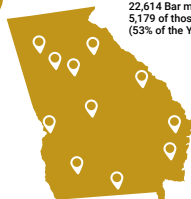
2023-24 ANNUAL REPORT

DID YOU KNOW?

THERE ARE  
**9,815**  
TOTAL YLD MEMBERS



OF THE BAR IS  
UNDER THE AGE  
OF 36



22,614 Bar members are women;  
5,179 of those are YLD members  
(53% of the YLD is female)



- YLD metro-Atlanta (5 counties)—5,789 or 59%
- Bar members Out-of-State—14,771 or 27%
- YLD members Out-of-State—1,933 or 20%

## YLD NEWSLETTER

State Bar of Georgia Young Lawyers Division

# THE YLD REVIEW

Volume 65

Working for the Profession and the Public

# OF ISSUES	# OF ARTICLES	# OF AUTHORS	# OF SUBSCRIBERS
4	54	31	16,054

## YLD SIGNATURE FUNDRAISER

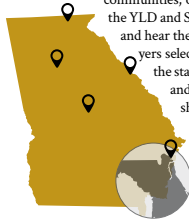
The 17th Annual Signature Fundraiser benefiting the YLD Public Interest Internship Program was held on Jan. 12, 2024, at The Westin Buckhead in Atlanta, Georgia. ●

# \$36,000

RAISED FOR THE YLD PUBLIC  
INTEREST INTERNSHIP PROGRAM

## YLD LEADERSHIP ACADEMY

The YLD Leadership Academy is a six-month cohort that begins in January each year and ends with a graduation ceremony at the State Bar of Georgia Annual Meeting. The program began in 2006 with 32 academy participants. The selected participants go through a competitive application process. Applicants must be YLD members who have a history of involvement and leadership in their communities, offices and/or profession; who want to become more involved in the YLD and State Bar; and who want to network with state and national leaders and hear their perspectives on effective lawyering and leadership. Young lawyers selected for the Leadership Academy attend monthly sessions around the state, which include CLE programming, a community service project and networking. To date, the program boasts more than 600 Leadership Academy alumni members, many of whom went on to leadership positions within the State Bar of Georgia. ●



### 2024 LEADERSHIP ACADEMY SESSION LOCATIONS:

ATLANTA AUGUSTA FERNANDINA  
BEACH (FL) MACON YOUNG HARRIS

## CONNECT WITH THE YLD



[georgiayld.org](http://georgiayld.org)



[@georgiayld](https://www.instagram.com/georgiayld)



[@GeorgiaYLD](https://www.facebook.com/GeorgiaYLD)



[/georgiayld](https://www.linkedin.com/company/georgiayld)

# BOARD ACTION ITEMS

## 2023-24 Bar Year

The following action items were taken by the Board of Governors of the State Bar of Georgia during the 2023-24 Bar year.

## 2023 ANNUAL MEETING | JUNE 9

The Board approved appointments to the State Disciplinary Boards and the Formal Advisory Opinion Board; the 2023-24 Committees; the nominations to the JQC; the 2023-24 State Bar Budget and the Financial Resolutions; the Executive Director election; the 2023-24 Election Schedule; the Executive Committee election; the Georgia Legal Services Program appointments; and the Chief Justice's Commission on Professionalism appointments.

### PROPOSED RULES AND BYLAWS CHANGES

- Article IX of the Bylaws, Creation of the Center for Lawyer Well-Being | YES, majority.
- Rule 1-706. Center for Lawyer Well-Being | YES, majority.
- Center for Lawyer Well-Being Bylaws | YES, majority.
- Rule 1-207. Official Address and Change of Address | YES, majority.
- Rule 4-214. Report of the Special Master | YES, majority.
- Rule 4-402. The Formal Advisory Opinion Board | YES, majority.
- Sections Model Bylaws | YES, majority.

## 2023 FALL MEETING | OCT. 28

The Board approved appointments to the Commission of Continuing Lawyer Competency (CCLC), the Formal Advisory Opinion Board; and approved the proposed new Energy Law Section.

### PROPOSED RULES AND BYLAWS CHANGES

- Rule 4.2. Communication With Person Represented by Counsel | YES, majority.
- Rule 4-201. State Disciplinary Board | YES, majority.
- Rule 4-203.1. Uniform Service Rule | YES, majority.
- Rule 4-209.1. Coordinating Special Master | YES, majority.
- Rule 4-221.1. Confidentiality of Investigations and Proceedings | YES, majority.

### NEW LEGISLATIVE PROPOSALS

- Fiduciary Law Section—Amendments to Title 53 and Related Code Sections | YES, majority.
- Business Law Section—Amendments to O.C.G.A. Title 11 | YES, majority.

## 2024 MIDYEAR MEETING | JAN. 13

The Board approved the following: the proposed White Collar Law Section; the new DocketAlarm benefit to the Fastcase subscription; appointments to the Commission on Lawyer Competency; nominations to the Georgia ABA delegate posts; and nominations of the State Bar officers for the 2024-25 Bar year.

### PROPOSED RULES AND BYLAWS CHANGES

- Rule 1.8. Conflict of Interest: Prohibited Transactions | YES, majority.
- Article VIII, Committees—Generally, Sections 1 and 2 | YES, majority.

## 2023-24 ANNUAL REPORT



#### NEW LEGISLATIVE PROPOSALS

- Professionalism Committee—Support for a Resolution of the General Assembly Recognizing April 2024 as Legal Professionalism Month | YES, majority.
- Indigent Defense Committee—Support for the Judicial Council's Budget Request for FY 2025—Increased Funding for the Georgia Resource Center | YES, majority.
- Committee to Promote Inclusion in the Profession—Support for the Judicial Council's Budget Request for FY 2025—Funding for Civil Legal Services Grants for Victims of Domestic Violence | YES, majority.
- Access to Justice Committee—Support for the Judicial Council's Budget Request for FY 2025—Increased Appropriations for Medical Legal Partnerships | YES, majority.
- Advisory Committee on Legislation—Support for the Judicial Council's Judicial Compensation Reform Proposal | YES, majority.

#### 2024 SPRING MEETING | APRIL 20

##### 2024-25 LICENSE FEES | YES, MAJORITY.

- Recommendations of the Executive Committee.
  - Active Fees \$264. (\$4 increase from 2023-24.)
  - Inactive Fees \$132. (\$2 increase from 2023-24.)
- Approval of Other Bar License Fee Statement Items.
  - Sections Dues (\$10 to \$50 opt-in).
  - Clients' Security Fund (\$15/year per member per Bar Rule 1-506).
  - Professionalism Fee (\$11/year).
- Other Contributions.
  - Legislative and Public Education Fund Contribution (\$100 optional contribution).
  - Georgia Legal Services Program Donation (\$400 suggested individual contribution/\$100 suggested contribution for YLD).

#### 2024 ANNUAL MEETING | JUNE 7-8

The Board approved appointments to the State Disciplinary Boards and the Formal Advisory Opinion Board; the ICJE Board; the 2024-25 Committees; the nominations to the JQC; the 2024-25 State Bar Budget and the Financial Resolutions; the Executive Director election; the 2024-25 Election Schedule; the Executive Committee election; the Georgia Legal Services Program appointments; and the Chief Justice's Commission on Professionalism appointments.

#### PROPOSED AMENDMENTS TO THE BYLAWS, POLICIES AND RULES

- Article III Board of Governors. Section 11. Meetings | YES, majority.
- Rule 1-706. Center for Lawyer Well-Being | YES, majority.
- Center for Lawyer Well-Being Bylaws | YES, majority.
- Rule 1-207. Official Address and Change of Address | YES, majority.
- Rule 4-214. Report of the Special Master | YES, majority.
- Rule 4-402. The Formal Advisory Opinion Board | YES, majority.
- Sections Model Bylaws | YES, majority. ●

# CLIENT ASSISTANCE PROGRAM OF THE OFFICE OF THE GENERAL COUNSEL

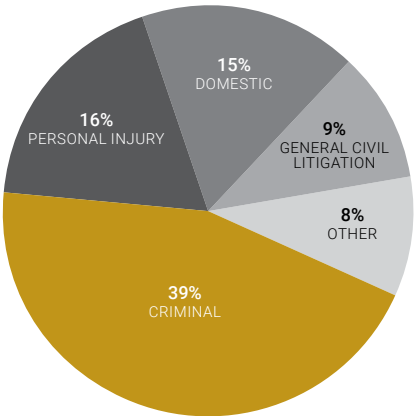
BY MERCEDES BALL, DIRECTOR

The Client Assistance Program of the Office of the General Counsel (CAP) is the first point of contact for a member of the public who has a problem with their lawyer. CAP seeks to resolve communication issues between attorneys and their clients outside of the formal grievance process. Each year, CAP receives thousands of complaints via telephone calls, letters and emails. By facilitating direct communication between attorneys and their clients, CAP is able to resolve approximately 80% of the complaints it receives without members of the public having to utilize the formal grievance process. ●

## CAP CONTACTS



### TOP FIVE TYPES OF MATTERS HANDLED BY CAP



Additionally, 6% of the complaints received were about issues in wills/estates, 4% involved issues in real estate, 2% involved issues in workers' compensation, 1% involved bankruptcy, 0.75% immigration, 0.4% involved collections and 0.2% involved Social Security.

### TOTAL # OF NEW COMPLAINTS

8,125

### # OF TELEPHONE CALLS

11,089

### # OF LETTERS AND EMAILS

2,402

### # OF ENGLISH-SPANISH AND SPANISH-ENGLISH TRANSLATIONS

199



# STATE DISCIPLINARY BOARD

BY JENNIFER ELIZABETH DUNLAP, CHAIR

The State Disciplinary Board is charged with investigating grievances for potential violations of the Georgia Rules of Professional Conduct, issuing confidential discipline and determining whether there is probable cause to bring formal charges against an attorney. The work of the Board is an essential part of the State Bar of Georgia's regulatory function. As the chair of the State Disciplinary Board, I would like to thank each Board member for their service.

The 2023-24 State Disciplinary Board consisted of two ex-officio members—the president-elect of the State Bar of Georgia and the president-elect of the Young Lawyers Division; 12 investigating members—four lawyers from each of the three federal judicial districts of Georgia; and four non-lawyer, public members. During the 2023-24 Bar year, the Board held 10 meetings and managed eight in-person gatherings (Americus, Atlanta, Augusta, Jekyll Island, Macon, Savannah and Amelia Island, Florida). The remaining meetings were virtual.

The Bar received fewer grievance forms this year (2,361) than last year (2,501). After review and screening by the Office of General Counsel, 2,093 grievances were closed or dismissed for their failure to state facts sufficient to invoke the jurisdiction of the State Bar (the number includes some grievances that were pending when the fiscal year began). A total of 185 grievances contained allegations which, if true, would amount to violations of one or more of the Georgia Rules of Professional Conduct (10 more than last year). Each of those grievances was referred to one of the district Board members for further investigation.

Investigating members of the Board handled an average of 15 cases during the Bar year. Members worked diligently and efficiently to report each case within 180 days. Each case required investigation and time away from the Board member's law practice, without compensation other than reimbursement of travel expenses. At the conclusion of each investigation, the Board member made a report and recommendation to the full Board. The Board dismissed 58 grievances, 24 of those with a letter of instruction to educate and inform the lawyer about the Rules of Professional Conduct. One hundred and fifty-three cases met the "probable cause" standard and were returned to the Office of the General Counsel for prosecution.

In matters that met the standard for probable cause, 30 respondents received confidential discipline in the form of Formal Letters of Admonition or State Disciplinary Board Reprimands. In more serious cases, the Board issued a Notice

of Discipline for some level of public discipline, or made a referral to the Supreme Court of Georgia for a hearing before a special master.

The State Disciplinary Board took the following action during the 2023-24 Bar year:

ACTION TAKEN	# OF CASES
Confidential Reprimands	13
Formal Letters of Admonition	17
Cases Dismissed with Letters of Instruction	24

Public discipline imposed by the Supreme Court of Georgia is further described in the Annual Report of the State Disciplinary Review Board of the State Bar of Georgia.

It has been a privilege to work with such an outstanding group of volunteers to accomplish this important work on behalf of the State Bar of Georgia. I would like to recognize those members of the State Disciplinary Board who have unselfishly devoted so much of their personal and professional time to this necessary task. They are as follows:

### Lawyer Members

Patricia Fortune Ammari  
C. Sutton Connelly  
John Herbert Cranford  
Jeffrey W. DeLoach  
Jennifer Elizabeth Dunlap  
Robert Giannini  
Taylor H. Haley  
Jeffrey R. Harris  
William H. Noland  
Brandon Peak  
Margaret S. Puccini  
Christian J. Steinmetz III

Finally, I want to recognize and thank the four non-lawyer members appointed by either the Supreme Court or the president of the State Bar of Georgia, and the ex-officio members:

Jill Cardenas  
Noemi de Miguel Mota  
Jennifer D. Ward  
Elizabeth Peyton Williams  
Ivy N. Cadle (ex-officio)  
Kenneth Mitchell Jr. (ex-officio) ●

# STATE DISCIPLINARY REVIEW BOARD

BY JOHN R. B. LONG, CHAIR

The State Disciplinary Review Board plays an important role in our disciplinary system and serves several functions. Under the Bar Rules, the Review Board offers an additional level of appellate review after a disciplinary case has been heard by a special master. The parties may elect to file exceptions and request review by the Review Board before the case is filed with the Supreme Court. In these cases, the Review Board considers the complete record, reviews the findings of fact and conclusions of law, and determines whether a recommendation of disciplinary action will be made to the Supreme Court of Georgia. The Board has the discretion to grant oral argument if requested by either party. The Supreme Court may follow the Review Board's recommendation, but may also render an opinion that modifies the recommendation in some way.

In addition, the Review Board reviews all cases involving reciprocal discipline. If a Georgia lawyer has been disciplined in another jurisdiction resulting in a suspension or disbarment, the lawyer is subject to reciprocal discipline in Georgia. The Review Board is charged with reviewing the record from the foreign jurisdiction and recommending the appropriate reciprocal disciplinary result in Georgia. These cases present many interesting issues for the Board and can be challenging when the lawyer objects to reciprocal discipline. In all cases, the Board must consider whether the case is in the correct procedural posture to be reviewed, whether the lawyer was afforded due process in the underlying disciplinary proceeding, whether the misconduct would result in similar discipline under our rules, and recommend discipline which would be substantially similar to the discipline imposed in the foreign jurisdiction. The Review Board also issues Review Board Reprimands when directed by the Supreme Court, and makes recommendations in reinstatement cases which involve suspensions with conditions for reinstatement as directed by the Supreme Court. The Board also provides input on amendments to the Bar Rules involving the disciplinary process.

The Supreme Court approved amendments to the disciplinary rules which became effective July 1, 2018. Under these rules, the former Review Panel was renamed the State Disciplinary Review Board, and the size of the Board was reduced from 15 to 11 members. In particular, the number of lawyer members who serve on the Board from around the state was reduced from nine to seven. The Review Board is currently composed of two lawyers from each of the three federal judicial districts in Georgia, one at-large lawyer member and two non-lawyer members. These members are appointed in alternate years by the Supreme Court of Georgia and the president of the State Bar. Two ex-officio members also serve on the Board in their capacity as officers of the State Bar.

The following is a brief summary of public disciplinary action taken by the Supreme Court of Georgia during the period from July 1, 2023, to June 30, 2024:

FORM OF DISCIPLINE	CASES	LAWYERS
Disbarment/Voluntary Surrender	20	14
Suspension	31	27
Public Reprimand	3	3
Review Board Reprimand	0	0

The foregoing summary does not begin to reflect the important issues that were carefully considered by the Review Board over the past year. In addition to attending regular meetings, each Board member must review material for each case prior to the meeting in order to make a fair and well-reasoned decision. This represents a major commitment of time and energy on the part of each Board member, all of whom acted with the highest degree of professionalism and competency during their terms.

I would like to recognize the members of the Board who have unselfishly devoted so much of their time to the implementation of the disciplinary system of the State Bar of Georgia. ●

## Non-Lawyer Members

Susan Leger-Boike, Cordele 2024  
LaShekia Hughes, Macon 2025

## Lawyer Members

*Northern District*  
Norbert D. Hummel IV, Kennesaw 2025  
William H. Thomas Jr., Atlanta 2026

*Middle District*  
Caroline W. Herrington, Macon 2025  
Alfreda L. Sheppard, Albany 2023

*Southern District*  
Paul Threlkeld, Savannah 2025  
John R. B. Long, Augusta 2023

## At-Large Member

D. Pearson Beardsley, Atlanta 2024

## Ex-Officio Members

Sarah B. "Sally" Akins, Savannah 2024  
Ronald Edward Daniels, Eastman 2024

# CLIENTS' SECURITY FUND

BY WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL AND STAFF LIAISON TO THE CLIENTS' SECURITY FUND

The legal profession is one of the few professions in which members create and maintain a means for clients to recover losses in rare instances of trust monies being misappropriated. Every U.S. state, including Georgia and Canadian provinces, has a fund for client protection.

The State Bar of Georgia Clients' Security Fund is a public service of the legal profession in Georgia. Its purpose is to repay clients who have lost because of a lawyer's dishonest conduct. Every lawyer admitted to practice in Georgia, including those admitted as a foreign law consultant or those who join the State Bar of Georgia without taking the Georgia Bar examination, contributes to this Fund.

It is a pleasure to present the 2023-24 Clients' Security Fund Annual Report on behalf of the Trustees of the Fund. The Trustees are proud of the efforts made to maintain the integrity of the legal profession.

## Creation of the Fund

The Board of Governors of the State Bar of Georgia created the Clients' Security Fund by resolution on March 29, 1968. The Fund was formed "for the purpose of promoting public confidence in the administration of justice and maintaining the integrity and protecting the good name of the legal profession by reimbursing, to the extent deemed proper and feasible by the Trustees of the Fund, losses caused by the dishonest conduct of members of the State Bar of Georgia." In 1991, the Supreme Court of Georgia adopted the Clients' Security Fund rules (Part X), making it an official part of the rules of the State Bar of Georgia. That same year, pursuant to the rules, the Board of Governors assessed each State Bar member to fund and stabilize the Fund fully. The Clients' Security Fund rules have subsequently been amended to better fulfill the purpose of the Fund.

## Administration of the Fund

The Clients' Security Fund Board of Trustees perform all acts necessary and proper to fulfill the purposes of and effectively administer the Fund. The rules, issued by order of the Supreme Court of Georgia, establish a Board of Trustees consisting of six-lawyer members and one non-lawyer member appointed to staggered terms by the President of the State Bar of Georgia. Trustees of the Fund receive no compensation or reimbursement for their service. The Trustees select the Chair and Vice-chair to serve as officers for the Fund. Pursuant to Bar Rule 10-104, the Trustees serve a term of three years.

The Deputy General Counsel and Senior Paralegal for the Bar Counsel unit of the Office of the General Counsel of the State Bar of Georgia assist the Board of Trustees in the administration of the Clients' Security Fund. The Deputy General Counsel serves as the staff liaison to the Clients' Security Fund and provides guidance and advice regarding all aspects of the Fund. The Senior Paralegal assists the Board of Trustees in a wide range of duties, including but not limited to receiving Clients' Security Fund applications, processing and investigating claims, communicating with claimants and lawyers, preparing meeting materials, facilitating and attending meetings, taking meeting minutes, processing the payment of claims and the disbursement of funds to claimants, maintaining records and preparing annual reports.

## Trustees for the 2023-24 Bar Year

- Tyronia Monique Smith, Atlanta
- Robert J. Kauffman, Douglasville
- Michael G. Geoffroy, Covington
- R. Javoyne Hicks, Decatur
- Karl David Cooke Jr., Macon
- LaToya Simone Williams, Atlanta
- Sammy Strode, Savannah (*non-lawyer member*)

The Trustees strive to meet at least quarterly during the year. If circumstances warrant, special meetings may be called to ensure that claims are processed promptly. These Trustees have served tirelessly, and their dedication to this program is greatly appreciated.

## Funding

Members of the State Bar of Georgia provide the primary funding for the Clients' Security Fund. On Jan. 28, 2022, the Supreme Court of Georgia amended Bar Rules 1-506 and 10-103, providing an annual assessment of \$15 to all license fee-paying Bar members. The amendment also changed the maximum payout of \$500,000 per year to an amount not to exceed the total amount received through the annual assessment in a Bar year.

The Trustees of the Clients' Security Fund maintain all monies held in the name of the Fund and exclusively control the disbursement of the funds.

## Loss Prevention Efforts

A crucial role of the Trustees of the Fund is to promote and endorse rules and educational programs designed to prevent losses. Two significant programs exist to avoid lawyer theft of clients' funds.



GETTYIMAGES.COM/BAONA

**Overdraft Notification**

In November 1992, the Board of Trustees joined the Investigative Panel of the State Disciplinary Board in urging the Board of Governors to approve amendments to Disciplinary Standard 65 to create a trust account overdraft notification program. On Aug. 22, 1995, the Supreme Court of Georgia approved the amendment to Standard 65, which became effective Jan. 1, 1996. The primary purpose of the overdraft notification rule is to prevent the misappropriation of clients' funds by providing a mechanism for the early detection of improprieties in the handling of attorney trust accounts. Standard 65 was subsequently replaced with Rule 1.15(III) with the Supreme Court's adoption of the Georgia Rules of Professional Conduct on Jan. 2, 2001 ([www.gabar.org/handbook](http://www.gabar.org/handbook)).

**Payee Notification**

During the 1993 legislative session, with the urging of the Board of Trustees, the Board of Governors endorsed legislation specifically designed to prevent lawyer theft of personal injury settlement funds. As a result of these efforts, the "payee notification rule" was approved as an amendment to the Insurance Code. This statute requires insurers to send notice to the payee of an insurance settlement when the check is mailed to the payee's attorney. This places the client on notice that the attorney has received settlement funds. Adopting this procedure has substantially reduced claims involving the theft of insurance funds.

**Claims Process**

Before the Clients' Security Fund pays a claim, the Trustees must determine that the loss arose out of the client-lawyer or fiduciary relationship and was caused by the lawyer's dishonest conduct. The rules define "dishonest conduct" as acts "committed by a lawyer like theft or embezzlement of money, or the wrongful taking or conversion of money, property, or other things of value." The lawyer's "dishonest" conduct must result in their disbarment, indefinite suspension or voluntary surrender of their license. The final disposition does not need to result from a filed memorandum of grievance but can be attained when credible information is presented from any source without a memorandum of grievance being filed. Claimants are responsible for providing sufficient documentation to support their claims.

Claims filed by corporations or partnerships, government entities, and certain members of the attorney's family are typically denied.

The Fund also does not reimburse losses covered by insurance or resulting from malpractice or financial investments.

Below is the Statement of Fund Balance, Income and Expenses for the period ending June 30, 2024.

ANNUAL FINANCIAL STATISTICS	2022-23	2023-24
Balance on July 1, 2022	\$1,634,260	\$2,212,202
Income to Fund		
Assessments	\$751,680	\$760,050
Restitution	\$18,445	\$821
Interest	\$33,117	\$32,090
Gain/Loss Investment Assessment	\$19,577	\$85,102
Distributions from Fund		
Claims Paid	\$159,879	\$239,968
Restricted Expenses	\$73,000	\$73,000
Bond Premium Amortization	\$4,288	\$4,703
Investment Service Fee	\$7,710	\$5,903

**Summary of Claims Activity**

The following summarizes claims activity beginning July 1, 2023, and ending June 30, 2024. ●

ACTIVITY	2022-23	2023-24
Recorded Application Requests	40	52
Claims Filed	32	53
Claims Considered	43	38
Claims Approved	20	18
Claims Denied	18	3
Claims Tabled	5	6
Claims Reconsidered	10	3
Claims Administratively Closed	0	11
Claims Withdrawn	0	0
Claims Pending	48	54
Inactive Claims	3	5
Number of Attorneys Involved in Paid Claims	11	16

# FORMAL ADVISORY OPINION BOARD

BY JOHN J. SHIPTENKO, SENIOR ASSISTANT GENERAL COUNSEL

The Bar Counsel Department's Senior Assistant General Counsel and Senior Paralegal (Bar Counsel) serve as support staff for the Formal Advisory Opinion Board (Board) and administer formal advisory opinion requests and opinions.

## Formal Advisory Opinion Request Process

Requests for formal advisory opinions are submitted to Bar Counsel, who assesses the requests to determine the best way to handle the requestor's ethical issue. If the request is submitted to the Board, Bar Counsel prepares the request for the Board's consideration by creating a file, assigning a Formal Advisory Opinion (FAO) request number, and creating the heading and question presented. Bar Counsel then researches the ethical issue to determine how the Georgia Rules of Professional Conduct (GRPC) apply to the issue, whether a current FAO addresses the issue and whether other jurisdictions have addressed the issue. OGC staff attorneys are also provided with a copy of the request and asked to share their thoughts about the underlying ethical issue. If necessary, Bar Counsel will contact the requestor to gain a better understanding of the underlying ethical issue.

Bar Counsel informs the requestor of the status of the request from its receipt to the conclusion of the matter.

## Board Meetings

The Board works throughout the year considering and researching the ethical issues presented in FAO requests and drafting proposed opinions. The Board generally meets quarterly to discuss FAO requests and proposed opinions and analyze how amendments to the GRPC impact current FAOs. During the 2023-24 Bar year, the Board conducted three meetings.

If the Board accepts a request for the drafting of an FAO, the Board assigns one or more Board members to draft a proposed opinion. Bar Counsel supports the Board throughout the drafting process. If a request is rejected, the Board specifies the reason for rejecting the request and Bar Counsel informs the requestor in writing of the Board's decision.

During the 2023-24 Bar year, the Board received the following requests for a formal advisory opinion:

## Formal Advisory Opinion Request No. 23-R1

Received on or about July 1, 2023

- 1. If the insurer through its vendor requires the attorney to provide only the name of the medical provider or other non-party from whom records are needed along with a description of the records to be obtained, is it ethically proper for the vendor to then prepare, process, serve and follow up on the Request for Production of Documents without a review or any oversight from the attorney whose name is placed on the Request for Production of Documents by the vendor?*
- 2. If the insurer requires the use of a vendor to obtain documents using a Request for Production of Documents, is it ethically proper to use the vendor if the attorney provides the vendor with the form language to be used and then reviews the Request for Production of Documents drafted by the vendor and then signs (or causes an electronic signature to be applied by the attorney's office) to the Request for Production of Documents and then allows the vendor to serve and follow up administratively with the non-party from whom the records are being requested?*
- 3. Is it ethically appropriate for a lawyer to engage a third-party vendor to obtain records using the vendor to serve and administratively follow up on a non-party Request for Production of Documents which has been prepared and signed by the attorney so long as any dispute or enforcement is handled by the attorney or employees of the law firm supervised by the attorney?*

At its Sept. 26, 2023, Board meeting, the Board accepted the request for the drafting of a formal advisory opinion and appointed a drafting subcommittee to prepare a proposed opinion for the Board's consideration. On May 24, 2024, the drafting subcommittee presented a draft proposed opinion for the Board's consideration. The subcommittee amended the question presented to read as follows:

*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?*

Upon review of the draft proposed opinion and extensive discussion, the Board asked the drafting subcommittee to modify the proposed opinion to address questions and comments raised during the meeting discussion. The drafting of a proposed opinion is ongoing.

#### **Formal Advisory Opinion Request No. 24-R1**

Received on or about June 6, 2024

*Is it ethically permissible for a lawyer to threaten a former (or current) client with felony criminal prosecution for Theft of Services for the nonpayment of claimed fees due by the attorney when the client disputes the attorney's claimed fees and refuses to pay?*

This request is pending the Board's review to determine whether to accept or decline the request for the drafting of a formal advisory opinion.

#### **Consideration of Proposed Opinions**

Once a proposed opinion is drafted, the Board considers the draft to determine whether to approve the proposed opinion as drafted for first publication or modify it. Bar Counsel assists the Board as needed.

#### **Approval of a Proposed Opinion**

Once the Board approves a proposed opinion for first publication, it determines whether to post the publication on the State Bar of Georgia website or in the *Georgia Bar Journal* in accordance with Bar Rule 4-403.

#### **First Publication of the Proposed Opinion**

The first publication process offers State Bar members an opportunity to review the proposed opinion and submit comments to the Board through the Office of the General Counsel. When the first publication of a proposed FAO occurs, Bar Counsel drafts the publication notice and submits the publication to the State Bar's Communications Department and State Bar president. Bar Counsel reviews all comments regarding the proposed opinion and if necessary, conducts additional research related to information in the comments. The comments, any research materials and feedback from the OGC staff attorneys are provided to the Board. The Board reviews the proposed opinion in light of the comments and other information received and decides whether to modify the proposed opinion. If the proposed opinion is modified and the Board determines the modifications are substantive, the first publication process is repeated.

#### **Final Approval and Second Publication of the Proposed Opinion; Filing of Proposed Opinion with the Supreme Court of Georgia**

Once the Board makes a final determination to approve and issue the opinion, it is published for a second publication and filed with the Supreme Court of Georgia. The Board decides whether to post the publication on the State Bar's website or in the *Georgia Bar Jour-*

*nal* in accordance with Bar Rule 4-403. When the second publication of an FAO occurs, Bar Counsel facilitates the publication with the State Bar Communications Department and president, and files the opinion with the Supreme Court of Georgia.

#### **Formal Advisory Opinion No. 22-1**

*Under Georgia Rule of Professional Conduct 5.5, may a Domestic Lawyer or Foreign Lawyer provide legal services by remote means from Georgia while residing in Georgia, when the services have no relationship with Georgia other than the lawyer's physical location?*

The Board approved this opinion for second publication at its Sept. 26, 2023, meeting. The OGC published FAO No. 22-1 on the State Bar's website and filed it with the Supreme Court of Georgia on Jan. 16, 2024.

On Feb. 2, 2024, the OGC filed a petition for discretionary review in accordance with Bar Rule 4-403 (d). On April 11, 2024, the Supreme Court of Georgia issued an order granting review and directing the State Bar and all interested parties to submit briefs addressing whether FAO No. 22-1 should be approved. Following the briefing schedule set forth in Supreme Court Rule 10, the OGC filed its brief on April 26, 2024.

On June 11, 2024, the Supreme Court of Georgia issued an order approving FAO No. 22-1. According to Bar Rule 4-403 (e), FAO No. 22-1 is binding on all members of the State Bar of Georgia, and the Supreme Court shall accord it the same precedential authority given to regularly published judicial opinions of the Court.

#### **Proposed Formal Advisory Opinion No. 23-1**

*Can a lawyer fulfill his or her duties of "presence" at a real estate closing as required by Formal Advisory Opinion No. 00-3 and of overseeing and participating in the execution of instruments conveying title and being in control of the closing process from beginning to end as required by Formal Advisory Opinion No. 13-1 when using video conference?*

During the 2022-23 Bar year, the Board issued Proposed FAO No. 23-1 and approved it for first publication on the State Bar of Georgia's website. Proposed FAO No. 23-1 was published for first publication on the State Bar of Georgia's website pursuant to Bar Rule 4-403 (c). The Board learned that the state legislature planned to consider proposed legislation during its 2024 legislative session that could impact this opinion. Accordingly, the Board tabled further action on Proposed FAO No. 23-1. The proposed legislation failed to pass before the end of the 2024 legislative session. The Board discussed this issue at its May 24, 2024, meeting, and decided to postpone further consideration of the proposed opinion until the Board's next meeting.

### Discretionary Review

Following the final approval and filing of the opinion, the Board decides whether to recommend that the OGC seek discretionary review of the opinion with the Supreme Court of Georgia. If the Board opts for discretionary review, Bar Counsel assists in this process by drafting the petition and filing it with the Supreme Court of Georgia, ensuring that all comments are provided to the Court.

#### Formal Advisory Opinion No. 22-1

*Under Georgia Rule of Professional Conduct 5.5, may a Domestic Lawyer or Foreign Lawyer provide legal services by remote means from Georgia while residing in Georgia, when the services have no relationship with Georgia other than the lawyer's physical location?*

During the 2023-24 Bar year, the State Bar of Georgia petitioned the Supreme Court of Georgia for discretionary review of this opinion. This opinion is discussed above.

### Issuance of Formal Advisory Opinion

FAOs are either issued by the Board (if no petition for discretionary review is sought or the Supreme Court declines to review the opinion) or the Supreme Court of Georgia (if the Court grants discretionary review and approves the opinion). When an FAO is issued, Bar Counsel drafts a notice of the issuance of an FAO, which is published in an official publication of the State Bar along with the opinion. Bar Counsel also facilitates the placement of the opinion in the Handbook on the State Bar's website and updates the FAO indexes.

#### Formal Advisory Opinion No. 22-1

*Under Georgia Rule of Professional Conduct 5.5, may a Domestic Lawyer or Foreign Lawyer provide legal services by remote means from Georgia while residing in Georgia, when the services have no relationship with Georgia other than the lawyer's physical location?*

During the 2023-24 Bar year, the Supreme Court of Georgia issued FAO No. 22-1. This opinion is discussed above.

### Other Pending Formal Advisory Opinion Board Matters

#### Proposed Amendments to Bar Rule 4-402

The behind the proposed amendments to Bar Rule 4-402 are to more clearly address when a Board member's term expires and remove the language that restructured the Board since such language is merely historical and no longer relevant or applicable, and its goal was accomplished. The current structure, including staggering appointments, remains.

The proposed amendment to Bar Rule 4-402 was filed with the Supreme Court of Georgia on Jan. 16, 2024, (Motion 2023-2) and remains pending with the Court.

### Formal Advisory Opinion Board

The Board consists of active members of the State Bar who are appointed by the president of the State Bar, with the approval of the Board of Governors. For the 2023-24 Bar year, the Board was comprised of the following lawyers:

Members-at-Large	Term
Mary A. Prebula, Chair, Duluth	2022 – 2024
Martin A. Levinson, Atlanta	2023 – 2025
Jeffrey Hobart Schneider, Atlanta	2022 – 2024
Letitia A. McDonald, Atlanta	2022 – 2024
Edward B. Krugman, Atlanta	2023 – 2025
Georgia Trial Lawyers Association	
C. Andrew Childers, Atlanta	2023 – 2025
Georgia Defense Lawyers Association	
Jacob Edward Daly, Atlanta	2023 – 2025
Georgia Association of Criminal Defense Lawyers	
Amanda Rourke Clark Palmer, Vice Chair, Atlanta	2022 – 2024
Georgia District Attorney's Association	
Sherry Boston, Decatur	2022 – 2024
Young Lawyers Division	
Franklin Thomas Gaddy, Macon	2023 – 2025
Emory University	
Professor Jennifer Murphy Romig, Atlanta	2022 – 2024
University of Georgia	
Professor David N. Lefkowitz, Athens	2023 – 2025
Mercer University	
Professor Patrick E. Longan, Macon	2023 – 2025
Georgia State University	
Professor Cassidy V. Brewer, Atlanta	2022 – 2024
Atlanta's John Marshall Law School	
Professor Jeffrey Alan Van Detta, Atlanta	2023 – 2025
State Disciplinary Board	
Christian J. Steinmetz III, Savannah	2023 – 2024
State Disciplinary Review Board	
John R. B. Long, Augusta	2023 – 2024
Executive Committee	
R. Gary Spencer, Atlanta	2023 – 2024

### Bar Rules

The Formal Advisory Opinion Board is governed by Bar Rules 4-223, 4-401, 4-402, 4-403 and 4-404, and its own internal rules. Bar Counsel periodically reviews these rules, advises the Board regarding whether it should consider amending the rules and suggests proposed amendments.

Formal advisory opinions, opinion indexes and rules governing the Board are located on the State Bar's website at [www.gabar.org/advisory-opinions](http://www.gabar.org/advisory-opinions). ●

# PRO HAC VICE PROGRAM

BY NARIAH DANCY, PRO HAC VICE ADMINISTRATOR

Attorneys seeking to appear *pro hac vice* in State and Superior Courts and before the State Board of Workers' Compensation and the Georgia State-wide Business Court must comply with Uniform Superior Court Rule 4.4. Attorneys seeking to appear *pro hac vice* in Magistrate Court must comply with Uniform Magistrate Court Rule 7.5. Attorneys seeking to appear before the Supreme Court of Georgia must comply with Supreme Court of Georgia Rule 4 (8) (b) (iii). Pursuant to both rules, attorneys applying for *pro hac vice* admission in Georgia must serve a copy of their application for admission on the State Bar of Georgia's Office of the General Counsel (OGC). Senior Assistant General Counsel John J. Shiptenko and *Pro Hac Vice* Administrator Nariah Dancy manage the application process and duties for the OGC.

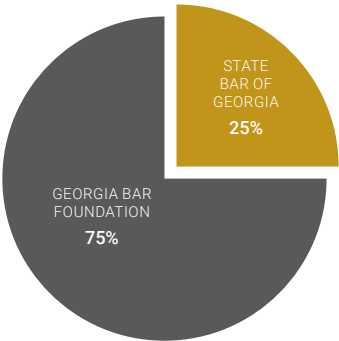
Applicants can submit their application and fees (check, money order or credit card) via mail or the online portal on the State Bar's website. The *pro hac vice* administrator reviews the applications and determines whether the attorney submitted the annual and application fees. After the contents of the application are entered into the *pro hac vice* database, information verified and the fees are received, the *pro hac vice* paralegal drafts a letter to the Court, which the Senior Assistant General Counsel reviews, regarding the status of the application. Occasionally, the Senior Assistant General Counsel may find the attorney is not eligible for *pro hac vice* admission pursuant to the rule and file a Response stating the same. Additionally, the *pro hac vice* administrator reconciles fee payments with the State Bar's Finance Department and provides them with a monthly report showing the number of applications processed, fees collected and the division of the fees.

On average, the *pro hac vice* administrator mails approximately 93 letters monthly to the courts, regarding compliance with the rule, and to the attorney, requesting additional information or fees. The *pro hac vice* administrator responds to a significant number of emails, voicemail messages and calls from attorneys, their staff and court staff regarding general *pro hac vice* questions, troubleshooting issues with the State Bar's online application form, and the status of specific applications. Below is a chart reflecting the number of calls and emails received regarding pending *pro hac vice* applications.

AVERAGE MONTHLY CALLS AND EMAILS	
Average Monthly Incoming Calls	65
Average Monthly Incoming Emails	100
Average Monthly Voicemails	30
Average Monthly Outgoing Calls	40
Average Monthly Outgoing Emails	100

The rules state that any domestic or foreign lawyer granted admission *pro hac vice* must pay an annual fee of \$200 on or before Jan. 15 for each subsequent calendar year of admission. If the annual fee is not received by Jan. 15, Georgia Rule of Professional Conduct 5.5(l) requires applicants to submit a late fee of \$100, along with the annual fee, by March 1. In December 2023, the *pro hac vice* administrator sent 2,498 annual fee notice emails and 379 annual fee notice letters to applicants (and a copy to their sponsor), which included a payment link and information regarding how to notify the OGC if the applicant is no longer admitted *pro hac vice*. In response to the notices, the *pro hac vice* administrator responded to approximately 800 emails and approximately 200 phone calls regarding annual fees.

From July 1, 2023, through June 30, 2024, the OGC reviewed 1,118 *pro hac vice* applications. The fees are divided between the State Bar of Georgia and the Georgia Bar Foundation. The State Bar of Georgia received \$106,425 from the total collected. The Georgia Bar Foundation received \$311,600 from the total collected. ●



### TOTAL PRO HAC VICE FEES RECEIVED

The State Bar of Georgia (SBG) collected a total of \$418,025 for *pro hac vice* fees. The fees were divided between the SBG and the Georgia Bar Foundation (GBF). The SBG received \$106,425 from the total collected. The GBF received \$311,600 from the total collected.



# OVERDRAFT NOTIFICATION PROGRAM

BY REGINA PUTMAN, TRUST ACCOUNT OVERDRAFT NOTIFICATION COORDINATOR

Rule 1.15 of the Georgia Rules of Professional Conduct mandates and the lawyer disciplinary system enforces the standard of safekeeping of client property as a fundamental fiduciary obligation of lawyers. The dishonor of drafts for insufficient funds drawn from client trust accounts is an early warning that a lawyer is engaging in conduct likely to injure clients. The Overdraft Notification Program acts to significantly reduce the level of lawyer misappropriations. Financial institutions that maintain lawyer trust accounts are required to notify the State Bar of Georgia's Office of the General Counsel of overdrafts, which enables the Bar to intervene before major losses occur and a significant number of clients and third parties are harmed. Participation by financial institutions is a prerequisite to their continued eligibility to hold lawyer trust accounts. Rule 1.15 also enables the Office of the General Counsel to counsel errant lawyers to take corrective action before the lawyer's misconduct becomes so egregious as to mandate serious sanction, including disbarment.

The Overdraft Notification Program received 190 overdraft notices from financial institutions approved as depositories for Georgia attorney trust accounts. Of the total number of notices received, five notices were received on the trust accounts of two deceased lawyers, three notices were received on the trust accounts of two disbarred lawyers, one notice was received in error on a non-IOLTA bank account and one notice was received in error on a trust account maintained by a lawyer licensed in another state. A total of 150 files were dismissed based on the receipt of satisfactory responses following the initial State Bar inquiry, eight files were referred to the Law Practice Management Program, two files were referred to the Unlicensed Practice of Law Department and 15 files were forwarded to the State Disciplinary Board for possible disciplinary action. (Several attorney overdraft files

contained more than one overdraft notice regarding the same IOLTA account number. Some overdraft files opened during the latter part of FY 2023-24 remain open, pending final review and disposition.)

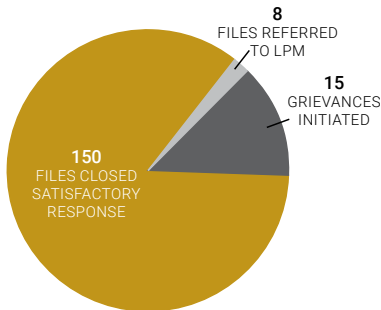
### Financial Institutions Approved as Depositories for Attorney Trust Accounts

The number of financial institutions approved as depositories for attorney trust accounts is affected by bank failures, bank mergers and a bank's willingness to execute the Office of the General Counsel's overdraft reporting agreement and the Georgia Bar Foundation's interest rate comparability agreement. Currently, 193 banks and credit unions are reflected on the State Bar of Georgia's List of Approved Financial Institutions, which can be found on the State Bar's website at [www.gabar.org/banks](http://www.gabar.org/banks).

### The Supreme Court of Georgia's Amendment to Rule 1.15 (III) of the Georgia Rules of Professional Conduct

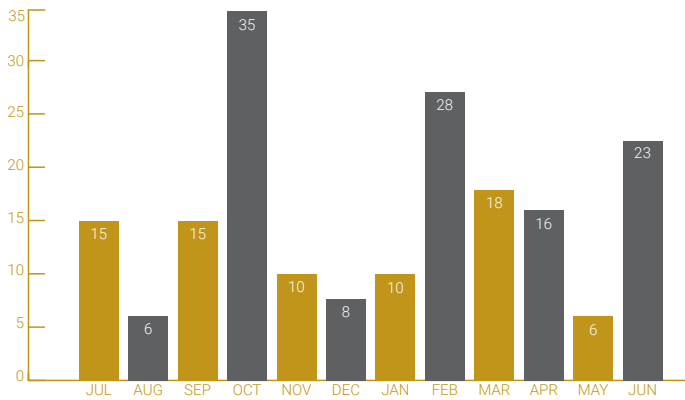
On May 14, 2021, the Supreme Court of Georgia issued an order amending Rule 1.15 (III) of the Georgia Rules of Professional Conduct, which eliminates the three-day grace period it previously granted banks to report overdrafts to the State Bar of Georgia. Accordingly, the Office of the General Counsel has obtained new trust account reporting agreements from banks currently listed as depositories approved for Georgia attorney trust accounts. The elimination of the three-day grace period will create a more effective loss prevention tool to identify trust accounting problems that could otherwise be masked in a lawyer's IOLTA account because of a steady stream of trust account deposits and disbursements. Moreover, the Office of the General Counsel will now be alerted sooner regarding trust account issues in order to provide discipline and/or corrective measures. ●

### TRUST ACCOUNT OVERDRAFT FILE DISPOSITION | FY 2023-24



A total of 150 files were dismissed based on the receipt of satisfactory responses following the initial State Bar inquiry, eight files were referred to the Law Practice Management Program and 15 files were forwarded to the State Disciplinary Board for possible disciplinary action.

#### ACTUAL NUMBER OF BANK OVERDRAFT NOTICES RECEIVED | FY 2023-24



MONTH 2023-24	ACTUAL # NOTICES RECEIVED	FILES CLOSED/ ADEQUATE RESPONSE	FILES CLOSED/ LPMP	GRIEVANCES INITIATED	TOTAL CLOSED
July	15	3	1	1	5
August	6	19	0	2	21
September	15	9	2	1	12
October	35	6	0	2	8
November	10	16	1	0	17
December	8	16	0	2	18
January	10	10	0	0	10
February	28	8	2	1	11
March	18	21	0	3	24
April	16	24	1	2	26
May	6	6	1	0	7
June	23	12	0	1	13
TOTAL	190	150	8	15	172
PERCENTAGE		91%	0.63%	8.59%	

# RECEIVERSHIPS

BY WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

Every year, the Office of the General Counsel handles calls concerning “absent lawyers.” According to Rule 4-228 of the Georgia Rules of Professional Conduct, an absent lawyer is “[a] member of the State Bar of Georgia (or a domestic or foreign lawyer authorized to practice law in Georgia) who has disappeared, died, been disbarred, disciplined or incarcerated, become so impaired as to be unable to represent clients properly or who poses a substantial threat of harm to clients or the public that it is necessary for the Supreme Court of Georgia to appoint a receiver.” While most receiverships involve disbarred lawyers, many involve lawyers who have died without a successor or anyone to manage their firm’s affairs or clients. Often, these receiverships involve hundreds to thousands of files.

Whenever the State Bar of Georgia receives a call indicating a receiver is necessary to protect an absent lawyer’s clients, the Bar Counsel unit for the Office of the General Counsel attempts to locate a local lawyer to accept an appointment as receiver. A local lawyer generally better understands the community and courts affected by the receivership. However, this is often not an option due to the nature or condition of the absent lawyer’s practice. When no lawyer agrees to help, a petition is filed to appoint a lawyer from the Office of the General Counsel as receiver. Typically, this lawyer is the Deputy General Counsel for the Bar Counsel unit.

Whenever a lawyer from the Office of the General Counsel is appointed receiver by the Supreme Court of Georgia, the first order of business is to gain access to the client files. Once access has been obtained, a moving company is typically employed to move the files under the supervision of Bar Counsel staff. All files are inventoried once they arrive at the State Bar of Georgia headquarters. Bar staff catalogs the files by type, client name and if the file is pending in court. The staff also identifies to whom the files belong. A copy of the receivership order is sent to any affected court

in pending matters. After handling pending matters, Bar Counsel staff begins carefully reviewing each file to determine completeness and if any original documents or other client property should be returned to a client. On numerous occasions, original wills and real estate deeds that were never filed are discovered. State Bar rules allow the receiver to file wills with the appropriate probate court; however, real estate deeds and mortgage cancellations must be returned to the client for filing. Every effort is made to contact the absent lawyer’s clients to return client files to the client and protect the client’s and the public’s interests. Client files are returned after the client completes an affidavit of ownership or to a lawyer who presents a letter of representation of the client.

During the 2023-24 Bar year, the State Bar of Georgia filed seven petitions for the appointment of a receiver with the Supreme Court of Georgia. Deputy General Counsel William D. NeSmith III was appointed receiver in six of the seven petitions. The Office of the General Counsel handled 28 receiverships, with Deputy General Counsel William D. NeSmith III serving as the receiver. Approximately 1,806 file boxes containing approximately 12,456 files are stored at State Bar headquarters. In the next Bar year, Bar Counsel anticipates shredding files to reduce these numbers. As files are evaluated, letters are sent out by the receiver to the client about their file. Additionally, Bar Counsel and staff handle hundreds of phone calls from clients, courts and others inquiring about receiverships and absent lawyers. Bar Counsel received 11 inquiries about a possible need for receivership.

In addition, State Bar members have been appointed receivers and are currently handling 25 active receiverships. Bar Counsel monitors appointed receivers and checks their progress to protect the client’s interests. Once the outside receivers have fulfilled their duties, Bar Counsel arranges the removal of the remaining files and their storage at State Bar headquarters.



Whether outside receivers or Bar Counsel handled them, all files are cataloged and monitored by age. Files that are unclaimed and are more than six years old are scheduled for shredding. Once enough files are ready for destruction, Bar Counsel arranges for a shredding company to come onsite and remove the files for proper destruction. ●



# OF BOXES STORED AT THE STATE BAR

1,806



# OF FILES CONTAINED

12,456



# OF ACTIVE RECEIVERSHIPS HANDLED  
BY BAR MEMBERS

25



GETTYIMAGES.COM/DNY59

## AMENDMENTS TO BAR RULES & BYLAWS

BY WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

Requests for amendments to the Rules and Regulations for the Organization of the State Bar of Georgia may come from State Bar officers, committees, sections or any Bar member. If a member of the State Bar requests an amendment, the request is typically submitted to the General Counsel, the Executive Director, a State Bar officer, the governing committee associated with the particular rule(s), or the Deputy General Counsel (Bar Counsel) who will prepare a draft of the proposed rule amendment; however, Bar members may also provide their draft of a proposed opinion. Rule amendments are facilitated and processed by the Deputy General Counsel and the Senior Paralegal for the Bar Counsel section of the Office of the General Counsel.

Bar Counsel typically circulates the draft of a proposed rule amendment amongst interested parties until it meets with general approval; it is then forwarded to the Executive Committee for their review. Pursuant to Article IV, Section 2 of the State Bar of Georgia Bylaws, the Executive Committee has the power to exercise all the powers of the Board of Governors between meetings of the Board and shall report to each meeting of the Board. Accordingly, the Executive Committee reviews the proposed amendment before it is presented to the Board of Governors. If approved, the proposed amendment is submitted to the Board of Governors for review and approval. If the Executive Committee does not approve a proposed amendment, it is typically not submitted to the Board of Governors. However, no specific rule states that a proposed amendment needs to be presented to or approved by the Executive Committee. Proposed amendments can be submitted directly to the Board of Governors by a member of the Board of Governors as a new agenda item.

After the Board of Governors approves the proposed amendment, the Office of the General Counsel (Bar Counsel) prepares a Notice

of Motion to Amend the Rules of the State Bar of Georgia. Bar Counsel publishes the Notice in the *Georgia Bar Journal* or on the State Bar of Georgia website pursuant to Bar Rule 5-101. At the same time the Notice of Motion to Amend is published, a copy of the notice is filed with the Supreme Court of Georgia. At least 30 days after the publication date of the Notice, a Motion to Amend the Rules of the State Bar of Georgia and a Brief in Support of the Motion to Amend the Rules of the State Bar of Georgia may be filed with the Supreme Court of Georgia and published in accordance with Rule 5-101.

Pursuant to Bar Rule 5-102, Bar members are allowed to file comments or written objections to any motion to amend the Rules of the State Bar of Georgia. All objections shall be filed with the Clerk of the Supreme Court of Georgia by a designated date, with a copy served upon the General Counsel of the State Bar of Georgia. Each objection shall contain the grounds on which the objection is based. If desired, a request for oral argument on the proposed amendment may be requested. According to Bar Rule 1-503, the Supreme Court of Georgia, at its sole discretion, may grant or deny a request for oral argument. The Clerk of the Supreme Court of Georgia shall notify the General Counsel of the State Bar of Georgia and the person seeking oral argument of the date of any oral argument granted under the provisions of Rule 23 (b) of the Rules of the Supreme Court of Georgia.

If the Supreme Court approves or modifies and approves the amendment to the rules, Bar Counsel notifies the entity requesting the amendment of the Supreme Court's decision and publishes a notice of the amended rule on the State Bar's website. The State Bar's Handbook is also updated accordingly. The State Bar Handbook is only available in electronic form and is found on the State Bar of Georgia website.

Following is a summary of actions taken during the 2023-24 Bar year regarding proposed amendments to the Rules and Regulations for the Governance of the State Bar of Georgia:

#### Proposed Rule Amendments Pending with the Supreme Court of Georgia

##### **MOTION 2023-1**

During the 2022-23 Bar year, proposed amendments to Part 7 – Information About Legal Services were filed with the Supreme Court of Georgia. The proposed amendments constitute a complete reorganization of the current advertising rules, encompassing Rules 7.1 through 7.5.

During the 2023-24 Bar year, the Supreme Court ordered oral arguments regarding the proposed amendments to Part 7 and placed the matter on their February 2024 oral argument calendar. Oral arguments were held on Feb. 6, 2024. Motion 2023-1, as it relates to the proposed amendments to Part 7, remains pending with the Supreme Court.

##### **MOTION 2023-2**

During the 2023-24 Bar year, the following proposed rule amendments were filed with the Supreme Court of Georgia under Motion 2023-2 on Jan. 18, 2024. Motion 2023-2, as it relates to the following proposed rule amendments, remains pending with the Supreme Court.

##### **Bar Rule 1-207. Official Address and Change of Address**

The proposed amendments to Bar Rule 1-207 modernize the rule by adding a requirement that a Bar member provide an email address as part of their official address with the State Bar of Georgia. The proposed rule change also reminds members of the potential adverse consequences they may face if they do not keep their official addresses up-to-date.

##### **Bar Rule 4-214. Report of the Special Master**

The proposed amendment to this rule permits the Coordinating Special Master to grant either a Respondent or the State Bar of Georgia an extension of up to 15 days to file or respond to exceptions to the Report of Special Master in a disciplinary case.

##### **Bar Rule 4-402. The Formal Advisory Opinion Board**

The proposed amendments to this rule intend to eliminate outdated language regarding the organization of the Formal Advisory Opinion Board and provide a clearer explanation of the staggered terms of office for Board members and the process for their appointment.

##### **Rule 4.2. Communication with Person Represented by Counsel**

The proposed amendments to this rule clarify that a lawyer acting pro se is prohibited from engaging in communications regarding that specific matter with an individual known to be represented by another lawyer in the same matter unless the lawyer obtains consent from the other lawyer or is legally authorized to do so by law or court order.

##### **Bar Rule 4-201. State Disciplinary Board**

The proposed amendment to this rule adds two additional members to the State Disciplinary Board to facilitate the expeditious handling of disciplinary matters. The request is for two new investigating members, chosen at-large, with one member appointed by this Court and the other by the president of the State Bar of Georgia.

##### **Bar Rule 4-203.1. Uniform Service Rule**

The proposed amendment to this rule incorporates the proposed changes to Bar Rule 1-207 by including email to ensure that respondent lawyers receive actual notice of disciplinary proceedings against them.

Also, references to the service of a summons by a sheriff, the Georgia Civil Practice Act, and the prerequisite of Non-Est Inventus as proof of service are eliminated. Instead, the chair of the State Disciplinary Board or a duly appointed representative may authorize individuals to effectuate service upon Georgia lawyers.

Additionally, explicit guidelines delineate the circumstances under which service by publication is deemed appropriate and the methodology through which it is executed.

Finally, a new subsection is added to this rule creating procedures for serving disciplinary documents upon a Georgia lawyer whose official address is outside the territorial boundaries of the United States.

#### **Bar Rule 4-409.1. Coordinating Special Master**

The proposed amendment to this rule seeks to remove the aspirational language suggesting that a Special Master's term should not exceed five years in an effort to retain trained and experienced Special Masters.

#### **Bar Rule 4-221.1. Confidentiality of Investigations and Proceedings**

The proposed amendments to this rule define the categories of courts and agencies to whom the Office of the General Counsel may release confidential information pertaining to disciplinary investigations and proceedings.

### **Proposed Rule Amendments Approved by the Supreme Court of Georgia**

#### **MOTION 2023-1**

In an order dated Sept. 25, 2023, the Supreme Court of Georgia approved amendments to the following Georgia Rules of Professional Conduct:

##### **Rule 1.0. Terminology and Definitions**

The amendment to this rule adds a definition for "Willful Blindness. The term is later found in a rule amendment to Rule 1.2 (see below).

##### **Rule 1.2. Scope of Representation and Allocation of Authority Between Client and Lawyer**

The amendments to this rule are designed to help eliminate illicit money laundering activities, including adding a recommendation requiring lawyers in the Financial Action Task Force (FATF)

member countries to report clients' suspicious activities to law enforcement authorities.

#### **Rule 1.5. Fees**

The amendments to this rule mandate that a lawyer who enters into agreements to arbitrate fee disputes or disputes over payment of expenses must obtain written informed consent from the client in advance. Additionally, fee contracts must disclose the existence of an arbitration agreement.

#### **Rule 1.8. Conflict of Interest: Prohibited Transactions**

The amendments to this rule incorporate language from the amendment to Rule 1.5 (see above) and provide that clients give informed consent in writing before agreeing to an arbitration provision in a fee contract or agreement.

#### **MOTION 2023-2**

In an order dated June 6, 2024, the Supreme Court of Georgia approved the following rule, effective June 20, 2024:

#### **Bar Rule 1-706. Center for Lawyer Well-Being**

This new rule establishes the Center for Lawyer Well-Being, which serves as an umbrella organization for members' wellness and health programs and initiatives.

### **Proposed Rule Amendments Pending Filing with the Supreme Court of Georgia**

#### **MOTION 2024-1**

The Board of Governors of the State Bar of Georgia approved the proposed amendments to the following rules. Notice of the proposed amendments is pending publication and filing with the Supreme Court of Georgia:

##### **Bar Rule 4-102. Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct**

This proposed amendment removes the word "Terminology" from the title, which will now read "Preamble and Scope." The word "Terminology" is being removed from the title because Terminology and Definitions are contained in Rule 1.0. This amendment is not substantive.

##### **Rule 9.4. Jurisdiction and Reciprocal Discipline**

The proposed amendment to this rule creates better continuity and organization of the filings in a reciprocal discipline matter.

**Rule 1.8.**

The proposed amendment to this rule would adopt a recent American Bar Association Model Rules amendment that will allow lawyers to provide modest gifts to certain pro bono and indigent clients. However, lawyers are still not allowed to financially support a lawsuit or administrative proceeding on behalf of their client.

**MOTION 2024-2**

The Board of Governors of the State Bar of Georgia approved the proposed amendments to the following rules. Notice of the proposed amendments was published on the State Bar of Georgia's website on July 17, 2024, and is pending filing with the Supreme Court of Georgia:

**Part 8. Continuing Legal Education**

Comprehensive changes to Part 8. Continuing Legal Education is proposed to enhance and update the rules, including expanding the compliance period, emphasizing updates to Georgia's law, emphasizing legal ethics, placing an emphasis on the member's particular practice area, and easing the burden on lawyers overall. Other changes are proposed to clean up and make other parts of the rules concise.

**Approved Amendment to the Bylaws of the State Bar of Georgia****Article III, Section 11. Meetings**

The amendment to this bylaw requires the Board of Governors to conduct a Spring meeting each year to align with the proposed revision to Article III, Section 12 (see below).

**Article III, Section 12. Budget**

The amendment to this bylaw changes the timing of the approval of the annual budget from the annual meeting to the Spring meeting. This change allows for the approval of the dues and the budget at the same meeting and reduces committee meetings. It also assists with the timing related to the new evaluation process and creates efficiencies within the State Bar's Accounting Department.

**Article VIII, Sections 1 and 2**

The amendment to these bylaws clarifies voting and quorum requirements for committees. The amendment specifically allows ex officio members to vote, and their presence counts towards a quorum. Further, the amendment makes clear that liaisons and advisory members are not granted voting rights, and their presence does not count towards a quorum. ●



GETTYIMAGES.COM/CHINNAPONG





# DISCIPLINARY ORDERS OF THE SUPREME COURT OF GEORGIA

BY KATHYA S. JACKSON, CLERK, STATE DISCIPLINARY BOARDS

**Public Reprimands**

<i>Date of Order</i>	<i>Respondent</i>
Nov. 7, 2023	Tamorra A. Boyd
Feb. 6, 2024	Coulter Clauzell Henry Jr.
May 29, 2024	Ephraim L. Michael

**Suspensions**

<i>Date of Order</i>	<i>Respondent</i>
----------------------	-------------------

**Indefinite Suspensions**

Aug. 16, 2023	Andrew Matteson
Nov. 7, 2023	Walter Douglas Adams
Nov. 7, 2023	W. McCall Calhoun Jr.
Nov. 7, 2023	Carl Lawrence Collins
Feb. 20, 2024	Cheryl Joyce Brazier
March 5, 2024	Shaquandra A. Woods
June 11, 2024	William Avriett Green
June 11, 2024	Emily C. Williams

**Emergency Suspensions**

April 16, 2024	Bryan Matthew Pritchett
June 11, 2024	Mandi Deyerle McDonough

**Definite Suspension**

Sept. 19, 2023	Robert Mallory Crawford
----------------	-------------------------

**Interim Suspensions**

Aug. 24, 2023	Andrew Thurston Murphy
Aug. 24, 2023	Kathleen Strang
Oct. 30, 2023	Nathaniel Watson Cochran
Oct. 30, 2023	Tessie Deleana Edwards
Nov. 22, 2023	Charles V. Loncon
Nov. 22, 2023	Mandi Deyerle McDonough
Jan. 9, 2024	Charles Bruce Singleton Jr.
Jan. 12, 2024	Isaiah Gregory
Jan. 17, 2024	Sean Raymond Campbell-Champion
Jan. 17, 2024	Christopher Casey Taylor
Jan. 17, 2024	Brittany Renee Turner

March 12, 2024	Kerry Eston Hand
March 12, 2024	Amanda Nichole Moyer
April 23, 2024	Michael Frederick Greene
April 23, 2024	Mandi Deyerle McDonough
June 6, 2024	Craig S. Bonnell

**Interim Suspensions Lifted**

Nov. 1, 2023	Nathaniel Watson Cochran
Nov. 7, 2023	Tessie Deleana Edwards
Nov. 27, 2023	Charles V. Loncon
Nov. 29, 2023	Mandi Deyerle McDonough
Jan. 22, 2024	Sean Raymond Campbell-Champion
Jan. 22, 2024	Isaiah Gregory
Jan. 22, 2024	Christopher Casey Taylor
Feb. 5, 2024	Charles Bruce Singleton Jr.
Feb. 29, 2024	Brittany Renee Turner
March 15, 2024	Amanda Nichole Moyer

**Disbarments/Voluntary Surrenders**

<i>Date of Order</i>	<i>Respondent</i>
July 5, 2023	Richard H. Middleton Jr.
July 13, 2023	Keith Chance Hardy
Aug. 16, 2023	Susan Janette Lopez
Oct. 11, 2023	Ryan Curtis Cleveland
Nov. 7, 2023	Cory Howerton Fleming
Dec. 19, 2023	Ashutosh S. Joshi
Dec. 19, 2023	Steven Ryan Webster
Jan. 17, 2024	Derric Crowther
Jan. 17, 2024	R. Dale Perry
Feb. 6, 2024	Timothy Orman McCalep
Feb. 20, 2024	Deirdre Maria Stephens
March 5, 2024	Andrea Jo Anne David-Vega
May 14, 2024	James W. Davis III
June 11, 2024	Diana Y. McDonald

## STATE BAR OF GEORGIA STAFF

### Executive Office

**Damon Elmore** | Executive Director  
damone@gabar.org

**Sarah Coole** | Chief Operating Officer  
sarahc@gabar.org

**Ron Turner** | Chief Financial Officer  
ront@gabar.org

**Paula Frederick** | General Counsel  
paulaf@gabar.org

**Russ Willard** | General Counsel Designate  
russw@gabar.org

**Megan Jones** | Executive Administrative Assistant  
meganj@gabar.org

### Coastal Georgia Office

**Kindall Harville** | Office Manager  
kindallh@gabar.org

**Erica Dean** | Administrative Assistant  
ericad@gabar.org

### Communications

**Jennifer Mason** | Director  
jenniferm@gabar.org

**Stephanie Wilson** | Assistant Director  
stephaniew@gabar.org

**Ashley Stollar** | Coordinator  
ashleys@gabar.org

**Jada Pettus** | Administrative Assistant  
jadap@gabar.org

### Conference Center

**Kyle Gause** | Conference Center Manager  
kyleg@gabar.org

**Matthew Ficocelli** | AV Manager  
matthewf@gabar.org

**Mark Brayfield** | AV Administrative Assistant  
markb@gabar.org

**Conroy Jackson** | Day Porter

### Continuing Legal Education Regulation

*(Commission on Continuing Lawyer Competency)*

**Dee Dee Worley** | Director  
deedeew@gabar.org

**Amy Smith** | Assistant Director  
amys@gabar.org

**Crystal Richards** | Senior Administrator  
crystalr@gabar.org

**Emily Rodriguez** | Administrator  
emilyr@gabar.org

### Fee Arbitration

**Donna Davis** | Director  
donnad@gabar.org

**Guianina Sheridan** | Senior Coordinator  
guianinas@gabar.org

**Jodi Lipsitz** | Coordinator  
jodil@gabar.org

**Kaia Saldana** | Administrator  
kaias@gabar.org

### Finance

**Ron Turner** | Chief Financial Officer  
ront@gabar.org

**Bernice Robinson** | Senior Accountant  
bernicer@gabar.org

**Vivian Powell** | Senior Accountant  
vivianp@gabar.org

**Marsha Sinyard** | Senior Accountant  
marshas@gabar.org

**Becky Taylor** | Senior Accountant  
rebeccat@gabar.org

### Governmental Affairs

**Jenn McNeely** | Director  
jennm@gabar.org

### High School Mock Trial Program

**Rich Harris** | Director  
richardh@gabar.org



### Human Resources

**Sandra Dixon | Director**  
sandrads@gabar.org

**Marie Doyrin | HR/Payroll Specialist**  
maried@gabar.org

### Information Technology

**Jon Wyche | Director**  
jonw@gabar.org

**Kevan Lewis | Assistant Director**  
kevanl@gabar.org

**Alexander Inthavong | Database Analyst**  
alexanderi@gabar.org

**Amber Lane | Desktop Support Technician**  
amberl@gabar.org

### Institute of Continuing Legal Education

**Julia Neighbors | Director**  
julian@gabar.org

**Becky Hall | Associate Director**  
beckyh@gabar.org

**Alista Hubbard | Programs Manager**  
alistah@gabar.org

**Nicholas Pratt | Program Coordinator**  
nicholasp@gabar.org

**Natalie Brown | Program Coordinator**  
natalieb@gabar.org

**Styron Pennywell | Content Manager**  
styronp@gabar.org

**Michael Scearce | LMS Administrator**  
michaels@gabar.org

**Daisy Yue | Publishing Content Specialist**  
daisy@yue@gabar.org

**Terie Latala | Senior Administrator**  
teriel@gabar.org

**Eva Buteau | Senior Administrator**  
evab@gabar.org

**Jamal Parker | Administrator**  
jamalp@gabar.org

**Kinsey Clubb | Administrator**  
kinseyc@gabar.org

## Law Practice Management

**Nkoyo Effiong** | Director  
nkoyoe@gabar.org

**Kim Henry** | Resource Advisor  
kimh@gabar.org

**Sheila Baldwin** | Member Benefits Coordinator  
sheilab@gabar.org

## Law-Related Education

**Deborah Craytor** | Director  
deborahcc@gabar.org

**Shannon Jenkins** | Elementary Curriculum Coordinator  
shannonj@gabar.org

**Julie Dean** | Program Assistant  
shannonj@gabar.org

## Meetings

**Gakii Kassamba** | Director  
gakiki@gabar.org

**Xavier Johnson** | Coordinator  
xavierj@gabar.org

## Membership

**Amanda Draper** | Director  
amandad@gabar.org

**Karen Nix** | Assistant Director  
karenn@gabar.org

**Gabrielle Dupiche** | Senior Administrator  
gabrielled@gabar.org

**Rachel Williams** | Administrator  
rachelw@gabar.org

**Angela Short** | Administrator  
angelas@gabar.org

## Office of the General Counsel

**Paula Frederick** | General Counsel  
paulaf@gabar.org

**Russ Willard** | General Counsel Designate  
russw@gabar.org

**Andreea Morrison** | Deputy General Counsel  
andreeam@gabar.org

**Bill NeSmith** | Deputy General Counsel  
billn@gabar.org

**John Shiptenko** | Senior Assistant General Counsel  
johns@gabar.org

**Lori Anderson** | Assistant General Counsel  
loria@gabar.org

**Mercedes Ball** | Assistant General Counsel/CAP Director  
mercedesb@gabar.org

**Leigh Burgess** | Assistant General Counsel/Grievance Counsel  
leighb@gabar.org

**Billy Hearnburg** | Assistant General Counsel  
wvhearnburg@gabar.org

**Jim Lewis** | Assistant General Counsel  
jimlewis@gabar.org

**Adrienne Nash** | Assistant General Counsel/Grievance Counsel  
adriennn@gabar.org

**Wolanda Shelton** | Assistant General Counsel  
wolandas@gabar.org

**Kathy Jackson** | Clerk, State Disciplinary Boards  
kathyj@gabar.org

**Regina Putman** | Trust Account Overdraft Notification Coordinator  
reginap@gabar.org

**Len Carlin** | Senior Paralegal  
leonardc@gabar.org

**Betty Derrickson** | Senior Paralegal  
bettyd@gabar.org

**Estella Lewis** | CAP Senior Paralegal  
estellal@gabar.org

**Carolyn Williams** | Senior Paralegal  
carolynw@gabar.org

**Zany Dunlap** | Paralegal  
zanyd@gabar.org

**Amber Galloway** | CAP Paralegal  
amberg@gabar.org

**Toussant Jackson** | Paralegal  
toussantj@gabar.org

**Justin Lasseter** | Paralegal  
justinl@gabar.org

**Javonne Williams** | CAP Paralegal  
javonnew@gabar.org

**Lamar Jackson** | Staff Investigator  
lamarj@gabar.org



**Deborah Grant** | Senior Legal Assistant  
deborahg@gabar.org

**Cathe Payne** | Legal Assistant  
cathep@gabar.org

**Nariah Dancy** | *Pro Hac Vice* Administrator  
nariahd@gabar.org

**Isamar Reyes** | Legal Assistant  
isamarr@gabar.org

**Tatyana Hunt** | CAP Legal Assistant  
tatyana@gabar.org

**Karen Cooper** | Receivership Administrator  
karenc@gabar.org

#### Office Management

**Mary McAfee** | Office Manager  
marym@gabar.org

**Lesly Lopez** | Mailroom Coordinator  
leslyl@gabar.org

#### Sections

**Mary Jo Sullivan** | Director  
maryjos@gabar.org

**Lane Sosebee** | Senior Coordinator  
lanes@gabar.org

**Challie Smith** | Coordinator  
challies@gabar.org

#### South Georgia Office

**LaCara Reddick** | Office Manager  
lacara@gabar.org

**Christie Johnson** | Office Assistant  
christiej@gabar.org

### Transition Into Law Practice Program

**Dee Dee Worley | Director**  
deedeew@gabar.org

**Amy Smith | Assistant Director**  
amys@gabar.org

### Unlicensed Practice of Law

**Steve Kaczowski | Director**  
stevek@gabar.org

**John Marty | Assistant Director**  
johnm@gabar.org

**Tom Porter | Staff Investigator**  
tomp@gabar.org

**Robert Tyson | Staff Investigator**  
robertt@gabar.org

**Lesley Gillard | Legal Secretary**  
lesleyg@gabar.org

### Young Lawyers Division

**Jessica Oglesby | Director**  
jessicaog@gabar.org

**Jamie Goss | Administrative Assistant**  
jamieg@gabar.org

## HEADQUARTERS

104 Marietta St. NW, Suite 100  
Atlanta, GA 30303-2743  
404-527-8700  
800-334-6865  
Fax 404-527-8717

## COASTAL GEORGIA OFFICE

7402 Hodgson Memorial Drive, Suite 105  
Savannah, GA 31406-2562  
912-239-9910  
877-239-9910  
Fax 912-239-9970

## SOUTH GEORGIA OFFICE

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

[WWW.GABAR.ORG](http://WWW.GABAR.ORG)



State Bar  
of Georgia



Memorandum to: Members, Board of Governors  
From: Paula Frederick  
Date: September 27, 2024  
Re: Report of the Office of the General Counsel

I am pleased to report on the activity of the Office of the General Counsel for the period since the Annual meeting.

Discipline: The long-awaited portal for online filing of grievances opened in the Spring. The impact was immediate—between March and April the number of grievances that the office received more than doubled! The numbers appear to be leveling off (119 filed in March, 282 in April, 350 in May, 297 in June, 262 in July and 232 in August) and we have not yet determined the impact on the State Disciplinary Board or the volume of cases that reach the probable-cause stage.

Rule Changes: By Order of June 6, 2024 the Supreme Court adopted rules creating the Center for Lawyer Wellbeing. The Center is beginning to provide programming and is organizing pursuant to its bylaws.

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.
- A proposed amendment to Rule 4.2 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.
- The proposed amendment to Rule 4-209.1 will remove language that suggests special masters should only serve for five years, allowing for longer service.
- Changes to the procedural rules for disciplinary cases add two new investigating at-large members to the State Disciplinary Board (Rule 4-201), clarify who may grant extensions for filing exceptions to the State



Disciplinary Review Board (Rule 4-214), allow the use of an email address for service of disciplinary process (Rule 4-203.1), and allow the release of confidential information to courts or related agencies in other jurisdictions to aid their investigation of a lawyer or judge (Rule 4-221.1).

Formal Advisory Opinion Board: The Formal Advisory Opinion Board met on February 2, 2024, May 25, 2024, and September 18, 2024. It is considering the following requests:

- FAO Request No. 24- R2 - May a lawyer reveal the identity of their client, former client, or prospective client to a third party without consent? This request is pending with the Board.
- Proposed FAO No. 23-R1 - 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? On September 18, 2024, the Board approved the proposed advisory opinion for 1st publication.
- Proposed FAO 23-1 - Can an attorney fulfill his or her duties of “presence” at a real estate closing as required by Formal Advisory Opinion No. 00-3 and of overseeing and participating in the execution of instruments conveying title and being in control of the closing process from beginning to end as required by Formal Advisory Opinion No. 13-1 when using video conference? On September 18, 2024, the Board amended a previously published proposed version of this advisory opinion and approved the amended version of the proposed opinion for 1st publication (after determining the amendments to the proposed opinion were substantive).

Receiverships: Bar staff are currently serving as receiver in seven active matters. State Bar members are handling another 25 receiverships for deceased or disbarred lawyers.

Clients’ Security Fund: The Fund Trustees have a meeting planned for early October. There are 21 claims for review.

**Year-to-Date Report on Lawyer Regulation  
July 1, 2024 through August 31, 2024**

Grievance forms sent back to Office of General Counsel for screening.....	493
Grievances pending as June 30, 2024.....	491
 *TOTAL.....	 984
 Grievances referred to State Disciplinary Board members .....	 41
Grievances being screened by Grievance Counsel (GC) .....	426
Grievances closed by Grievance Counsel .....	516
Grievances moved to moot status by OGC after attorney was disbarred.....	1
 TOTAL.....	 984

**Regulatory Action July 1, 2024 through August 31, 2024**

<b>ACTION</b>	<b>ATTORNEYS</b>	<b>CASES</b>
Letters of Admonition Accepted	4	5
Confidential Reprimands Administered	5	5
Review Board Reprimands	0	0
Public Reprimands	0	0
Suspensions	5	5
Disbarments/Voluntary Surrenders	0	0
<b>TOTAL</b>	<b>14</b>	<b>15</b>
Reinstatements Granted	0	0
Reinstatements Denied	0	0

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

To: ICLE Advisory Board Members

From: Julia Neighbors, ICLE Director

Date: September 30, 2024

Re: Institute of Continuing Legal Education

---

I am pleased to present the following report for your review of the Institute of Continuing Legal Education's activities.

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.

### **Annual Data (July 1, 2023 – June 30, 2024)**

- 14 - Locales ICLE Hosted Programs
  - Athens; Atlanta; Amelia Island, FL; Augusta; Avon, CO; Charleston, SC; Hilton Head, SC; Isle of Palm, SC; Jekyll Island; Macon; New Orleans, LA; Ponte Vedra Beach, FL; Sandestin, FL; Savannah
- 16 – Programs/Institutes Hosted Outside of Metro Atlanta
- 66 - CLE Programs (16 Institutes)
  - 26 planned with Sections (some Sections involved with more than one program)
  - 30 planned with Chairs unaffiliated with Section or Committee
  - 5 planned with other groups (State Board of Workers' Compensation, American College of Trial Lawyers, Augusta Bar, Georgia Municipal Association, Association County Commissioners of Georgia)
  - 3 planned as part of a national speakers series
  - 3 planned with State Bar Committees or Programs (Bench and Bar Committee, Attorney Wellness Committee, Law Practice Management)
  - 1 planned with a Law School (Emory Law School)
- 101 - Program Chairs

---

**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**

18 E. Bay St.  
Savannah, GA 31401-9910  
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

- 462 – Hours of Educational Programming Produced
- 837 – Program Speakers

### **ICLE Programs (June 1 – September 30, 2024)**

- Institutes
  - Family Law Institute
  - Tri-State Environmental Conference
  - Fiduciary Law Institute
  - Urgent Legal Matters Institute
  - Wellness Institute
  - Institute for City and County Attorneys
  - Solo and Small Firm Conference (postponed due to Hurricane Helene)
- Annual Meeting Programs
  - War Stories and Evidence Update
  - Leadership for Lawyers
- Bar Center Programs
  - Nursing Home Litigation
  - Wrongful Death
  -
- On Demand Programs
  - 1,801 on demand products purchased by 1,296 members (July 1 – September 30, 2024)
  - 13,058 on demand programs purchased by 8,502 members (October 1, 2023 – September 30, 2024)

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

- Insurance Law Institute – October 10-12, 2024 -Fernandina Beach, FL
- Workers' Compensation Law Institute – October 24-26, 2024 – Jekyll Island, GA
- Advanced Health Law – November 1, 2024 – Atlanta, GA
- Corporate Counsel Institute – December 12-13, 2024 – Atlanta, GA
- Consumer & Business Bankruptcy Institute – December 12-13, 2024 – Lake Oconee, GA
- Estate Planning Institute - February 6-7, 2025 - Athens, GA
- General Practice & Trial Institute – March 6-8, 2025 – Savannah, GA (contract pending)
- Update on Georgia Law (Ski LE) – February 10-13, 2025 – Avon, CO
- Real Property Law Institute – May 8-10, 2025 – Fernandina Beach, FL
- Family Law Institute – May 30- June 1, 2025 – Fernandina Beach, FL

## **Programming Updates**

ICLE continues to encourage and support innovative programming, and recent programs have incorporated the use of the Bar's courtroom; utilized a podcast format; and was held at the Michael C. Carlos Museum. 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.

## Law Practice Management Program

(Abbreviated report for the 2024-2025 Bar Year)

**Total Number of Members Served – 134**

**July 1, 2024 – September 22, 2024**

The program has served a grand total of **134** members and their staff from July 1, 2024-September 22, 2024. Our program has made contact with **40** existing members, **81** new members, and **3** law firm staff during this period.

### Resource Requests

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

- **Starting a Law Practice** - There were zero startup discussion appointments, and a total of **29** Starting a Georgia Law Practice guides were distributed to our members by request via email (3) and web store order (26), and no copies were provided during visits to the Bar Center.
- **Software Recommendation/Technology Advice** – A total of **3** members contacted our program for a law office software recommendation by both email and phone.
- **LPM Resources Assistance** – The program has responded to a total of **159** phone calls and emails, providing resources such as sample practice management forms, closing a law practice/succession planning resources, trust accounting resources, opening a law practice resources, program events, and member benefit services. This total includes **24** practice management inquiries on various topics.

### Consultations

A total of **12** virtual consultation appointments were completed during this period. Our program scheduled **9** general law firm assessments and **3** corrective action virtual consultations to discuss law firm practice management matters.

### Resource Library

The LPM lending library has a grand total of **1,430** books, CDs, and DVDs for checkout to members and their staff, with an option to pick up materials at the Bar Center or to be mailed. A total of **26** members registered to get access to the [lending library](#). During this period, **4** patrons visited the resource library, **5** patrons checked out a total of **16** books, and we responded to **31** emails and **2** phone call inquiries about the resource library.

### Social Media Outreach

Members can follow LPM's *GA Law Practice Advisor* on [LinkedIn](#), and [Instagram](#) and subscribe to our newsletter the *LPM Insider* for practice tips and the latest on LPM events and programming. Since our social media channels have been created, we have **185** Instagram followers, **76** LinkedIn followers, and **345** people who have subscribed to the *LPM Insider* newsletter with a grand total of **606** followers and growing.

### Speaking Engagements and LPM Seminars

The program's staff has **2** continuing legal education (CLE) presentations and special sessions scheduled for Georgia lawyers, locally and nationally.

Date	Event Name	Presentation(s)
Oct.7-8, 2024	<a href="#">Clio Cloud Conference</a>	<i>Client Experience Panel - Speakers: Daniela Szary, Lolita Rudovica, Host: Nkoyo-Ene Effiong Lewis</i>
Oct. 9, 2024	Tifton Bar Association Virtual Brown Bag Lunch CLE	<i>The State Bar's Law Practice Management Program</i>

vLex Fastcase Platform and New Content

vLex Fastcase Report

vLex [Fastcase](#) is ranked as one of the best member benefits product 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 a significant improvement to the vLex Fastcase platform due to its excellent design, improved citator and new skills like the automated headnotes, case summaries, and the ability to find similar legal materials using Vincent AI.

A key feature of the upgrade is the new Cert citator, which flags negative treatment and other citing references to a case. Cert is a major improvement over the previous citation service, Bad Law Bot, with vastly more extensive coverage and more types of negative treatment. The real advantage of Cert is the review by editorial experts that was missing in Bad Law Bot.

A tutorial is now available to members when they log into the new platform. It's recommended that you 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 650M dockets and documents, is now available for our members. Several members have expressed gratitude for this extra content as being helpful for litigation strategy, calendaring, research, business development, and calculating legal risk. These documents will be a part of your Fastcase subscription and will populate in the results of your search query when you choose briefs, motions, and orders within your search criteria.

The bottom line is that vLex Fastcase has evolved into a premium legal research service in its own right, not just a "free alternative." It has the sources, features, and tools a modern practice needs to thrive.

Training will be available for the new vLex Fastcase platform and the Docket Alarm library.

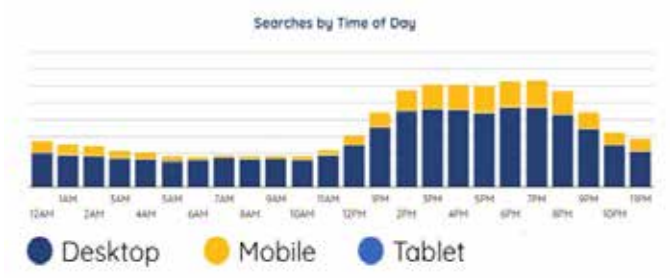
vLex Fastcase Usage Report (July 2024-August 2024)			
	Jul	Aug	Total
First Time Logins	88	58	124
Total Logins	9,554	10,382	19,936
Total Users Who Logged In	2,500	2,662	5,242
Searches Conducted	34,453	36,840	71,293
Documents Viewed	125,030	123,218	248,248
Documents Printed	27,988	59,940	87,906
Total Transactions	199,649	233,098	432,747

vLex Fastcase Reported Issues/Problems (July 2024-September 2024)	
Fastcase Reported Issues / Problems	
Issue Reported to Member Benefits Coordinator (MBC)	Response
<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.

CloudLawyer/ReliaGuide Report

Since the beginning of the year there were **367,769** interactions with member profiles (views, clicks, and contact requests) including **69,469** profile views, **4,990** completed contact form requests, **6,394** clicks on lawyer's email and **11,852** clicks on lawyer's phone numbers. Most directory searches took place on a

Thursday or Friday between 1pm and 9pm. Member engagement remains steady, with **3,463** sign-ins and **1,537** photos uploaded. In a joint effort between ReliaGuide and the State Bar of Georgia, we are creating campaigns to help members receive maximum benefit from the directory. In terms of additional offerings, ReliaGuide had decommissioned the old payment system and some members have yet to update their payment information in the new system, we hope they will do that this fall. Currently there are 226 Profile Plus subscriptions, 11 analytics products, and 7 website products.





State Bar of Georgia  
Private Health Insurance Exchange  
September 20, 2024

WEBSITE ANALYTICS	
Total Users	84,265
Total Sessions	114,185
Total Pageviews	300,726
INDIVIDUAL ENROLLMENTS	
Total Enrollments	8,221
• Medical	2,518
• Medicare	45
• Dental	1,195
• Vision	568
• Telehealth	573
• ID Theft Protection	49
• Life / AD&D	2,914
• Disability	289
• Long-Term Care Enrollments	70
EMPLOYER ENROLLMENTS	
Total Enrollments	2,913
• Medical	1,277
• Ancillary	1,233
• Professional Liability	401
• Cyber Security	2

PUBLISHED ARTICLES 2024-2025			Headline	Circulation
Date	Newspaper			
6/13/2024	Albany Herald		Ivy Cadle installed as 62nd State Bar of Georgia president	3,763
6/13/2024	Clayton News-Daily, Jonesboro		Ivy Cadle installed as 62nd State Bar of Georgia president	643
6/13/2024	Rockdale Citizen, Conyers		Ivy Cadle installed as 62nd State Bar of Georgia president	1,254
6/13/2024	Morgan County Citizen, Madison		Ivy Cadle installed as 62nd State Bar of Georgia president	2,574
6/13/2024	Henry Herald, McDonough		Ivy Cadle installed as 62nd State Bar of Georgia president	1,111
6/13/2024	Rome News-Tribune		Ivy Cadle installed as 62nd State Bar of Georgia president	6,515
6/14/2024	Daily Report, Atlanta		Baker Donelson Litigator Leads State Bar	1,905
6/16/2024	Douglas County Citizen, Douglasville		Dalia Rachine 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
		<b>TOTAL CIRCULATION</b>	<b>272,635</b>

