

BOG BOARD BOOK

2025 Fall Meeting Rising Fawn, GA

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



309th BOARD OF GOVERNORS MEETING Saturday, October 11, 2025 9 a.m. – 12 p.m. Cloudland at McLemore Resort

Rising Fawn, GA

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u> <u>Pa</u>	age No.
1) ADMINISTRATION		
a) Welcome and Call to Order	Christopher P. Twyman President	1
b) Pledge of Allegiance	Marissa "Missy" Torgerso YLD Board of Directors	n
c) Invocation	Taylor S. Wilson YLD Board of Directors	
d) Recognition of Special Guests	Chris Twyman	
e) Future Meetings Schedule	Chris Twyman	5
f) Roll Call	Shiriki C. Jones Secretary	7
2) ACTION		
a) Minutes of the 307 th & 308 th Meetings of the Board of Governors on June 6-7, 2025	Shiriki Jones	13
b) Proposed Changes to Rule 4-203.1(a) Uniform Service Rule.	Russell D. Willard General Counsel	24
c) Proposed Changes to Sections Bylaws	Deputy General Counsel	

<u>Page No.</u>

d)	Appointments to the State Disciplinary	. Chris Twyman
e)	Appointments to the ICLE Board	. Chris Twyman
f)	Appointments to the Commission on	28)
3) LE	GISLATION	
a)	Advisory Committee on Legislation New Legislative Proposals (action)	Jennifer McNeely Director of Governmental Affairs
b)	Legislative Update	.Jenn McNeely
4) IN	FORMATIONAL REPORTS	
a)	President's Report	. Chris Twyman
b)	Executive Director's Report	. Damon Elmore Executive Director
c)	Treasurer's Report	.R. Javoyne Hicks 47 Treasurer
d)	Young Lawyers Division Report	. Veronica R. Cox 105 YLD President
e)	Preview of Proposed Fee Arbitration Rule Amendments	.Bill NeSmith110
5) W	RITTEN REPORTS	
a)	Executive Committee Meeting Minutes(1) August 21, 2025	226

<u>Topics</u>	<u>Presenter</u>	Page No.
b) State Bar of Georgia Annual Report		231
c) Institute of Continuing Legal Education Repo	rt	295
d) Law Practice Management Report		298
e) Chief Justice's Commission on Professionalis	m Report	301
f) Media Report		304
6) CLOSING		
a) Old Business	Chris Twyman	
b) New Business	Chris Twyman	
c) Announcements	Chris Twyman	
d) Executive Session	Chris Twyman	
e) Remarks / Q&A / Comments / Suggestions		
f) Adjournment		

STATE BAR OF GEORGIA

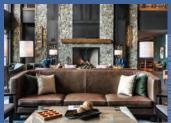
20|FALL 25|MEETING

BOARD OF GOVERNORS and YOUNG LAWYERS DIVISION





CLOUDLAND AT MCLEMORE RESORT RISING FAWN, GEORGIA



HOTEL CUT-OFF: **SEPT. 18**REGISTRATION CUT-OFF: **OCT. 3**

State Bar of Georgia

SCHEDULE OF EVENTS



FRIDAY, OCT. 10

8 a.m. - 7 p.m. Registration

10 a.m. - 2 p.m.

State Disciplinary Board Meeting

(By invitation only)

12 - 2 p.m.

State Disciplinary Review Board Meeting

(By invitation only)

6:30 - 9 p.m. Board of Governors Dinner

SATURDAY, OCT. 11 Registration

8 a.m. - 12 p.m.

9 a.m. - 12 p.m.

Board of Governors Meeting

12:30 - 2 p.m.

Hike and Connect with the YLD

CLE | A Fireside Chat With Justice Bethel and Friends

4:30 - 5:30 p.m.

YLD General Session

6:30 - 8:30 p.m.

YLD Dinner Under the Stars

SPECIAL EVENTS



BOARD OF GOVERNORS DINNER

Friday, Oct. 10 | 6:30 - 9 p.m.

Please join us Friday evening for dinner and drinks, along with the opportunity to relax and network with fellow Board members and their guests.

HIKE AND CONNECT WITH THE YLD

Saturday, Oct. 11 | 12:30 - 2 p.m.

Join the YLD for a leisure hike through Cloudland Canyon. Location details will be provided to registrants prior to the meeting. All are welcome to attend.

CLE I A FIRESIDE CHAT WITH JUSTICE BETHEL AND FRIENDS

Saturday, Oct. 11 | 3 - 4 p.m. | 1 Professionalism Hour Make plans to join the YLD for their CLE featuring Justice Charlie Bethel and friends of the judiciary. This interactive discussion on courtroom professionalism will encourage and inspire you to put your best foot forward in any and all professional situations. This CLE is open to all, so don't forget to sign up!

YLD GENERAL SESSION

Saturday, Oct. 11 | 4:30 - 5:30 p.m.

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

YLD DINNER UNDER THE STARS

Saturday, Oct. 11 | 6:30 - 8:30 p.m.

Join the YLD for al fresco dining under the stars. Come ready to mix and mingle with friends while we experience the beauty of North Georgia at night. Dinner guests will receive a YLD souvenir fleece blanket, perfect for a crisp fall evening.

POPULAR ACTIVITIES NEARBY



- Golf: To book a tee time please call 800-329-8154 or visit info.themclemore.com/cloudland_request-0.
- Rock Climbing
- Road Cycling
- Mountain Biking
- Waterfalls
- Scenic Views
- Shopping
- Trails

YLD DONATION DRIVE



The YLD will be hosting a donation drive to support Northwest Georgia Hunger Ministries and their Backpack Buddies Program, which provides weekend meals to children facing food insecurity. Items requested include:

- Microwavable mac and cheese
- Canned foods Granola hars
- Instant oatmeal
- Fruit snacks
- Ramen noodles
- Snack size chips
- Sweet snacks
- · Canned or packaged fruit

*Items can be dropped of at the registration desk.

HOTEL ACCOMMODATIONS



Cloudland at McLemore Resort 243 Cloudland Drive Rising Fawn, GA 30738 888-391-1148 www.staycloudland.com

Cut-off date: Thursday, Sept. 18

Cloudland at McLemore Resort will be our host hotel, offering discounted room rates. A block of rooms has been reserved at a standard discounted rate of \$444 per night (\$399, plus a \$45 resort fee) plus applicable state and local tax (currently 16%) for the nights of Oct. 9-12. To book a room visit, bit.ly/46Nm8Xz or call 1-800-844-HI-CURIO and mention the group code SBG. Reservations must be made by Thursday, Sept. 18, as rooms will be on a space and rate availability basis after this date.

Please Note: Our group receives a \$10 discount per day on the resort fee, reducing it to \$35 per day, which will be reflected upon checkout.

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

PARKING

Valet parking is available at a discounted rate of \$33 per day.

ATTIRE

Business casual dress for all meetings. Resort casual for BOG and YLD dinners.

RESORT AMENITIES

- Guest internet access
- \$15 daily spa credit
- Two signature cocktails every evening at the Pocket Café
- Complimentary access to golf practice facilities
- Golf course transportation
- Golf bag storage
- Bicycle rentals (available through concierge)
- Curated library access
- Stargazing equipment







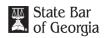




2025 FALL MEETING REGISTRATION FORM

Please complete and remit the enclosed registration form by Friday, Oct. 3. 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	Board of Governors Functions	Qty.
Accorded information	□ BOG Dinner (Fri.)	\$120
Bar Number	☐ BOG Meeting (Sat.)	N/C
	CLE	
Name	☐ A Fireside Chat With Justice Bethel and Friends	\$40
	YLD	
Nickname	☐ YLD General Session	N/C
	☐ Hike and Connect with the YLD	N/C
Spouse/Guest Name (if applicable)	☐ YLD Dinner Under the Stars	\$85
	Total Enclosed \$	
Address		
	Credit Card Information Please bill my □ Visa □ MasterCard □ An	nEv.
City/State/Zip	Flease bill my d visa d Masterdard d An	IILX
	Credit Card Number	
Phone/Fax	Credit Card Number	
	Expiration Date CVV	ZIP CODE
Email	Expiration bate	2 0002
Special Needs	Name as it appears on the card (Please p	print)
Dietary Restrictions	Cignoture	
	Signature	
ADA: If you qualify for assistance under the Americans with Disabilities Act, please email meetings@gabar.org for assistance.	Credit card and no charge registrations (404-527-8717.	may be faxed to
Cancellation/Refund Policy Cancellation of registration must be received in writing		
no later than Friday, Oct. 3, 2025. Cancellations will		
receive a full refund. Absolutely no refunds will be made after Friday, Oct. 3. Requests should be emailed to		
gakiik@gabar.org; mailed to the State Bar of Georgia,	THANK YOU TO OUI	m225- 5
Attn: Gakii Kassamba, 104 Marietta St. NW, Suite 100,	I CORPORATE SPONSO	RS
Atlanta, GA 30303; or faxed to 404-527-8717.		_
Registration and Payment Information Register online at www.gabar.org. Visa, MasterCard and	5 GAVEL	
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, 2025 Fall Meeting,	MemberBe	nefits
Meetings Department, 104 Marietta St. NW, Suite 100,	Wiember	
Atlanta, GA 30303. Registrations will be processed on a	' 	
first-come, first-served basis.	VERTICA	I S
Bod and the second second		
Register online at www.gabar.org.		



Future Meetings Schedule

E	C
Executive	Committee

Executive Committee		
December 5, 2025		Executive Committee Meeting 9 a.m. – 3 p.m. YLD Leadership Holiday Party with Special Guests By Invitation Only Four Seasons Hotel, Atlanta, GA
February 6, 2026		Executive Committee Meeting 11:30 a.m. – 4 p.m. Local Affinity Bar Association Luncheon The Partridge Inn, Augusta, GA (*Contract Tentative)
April 17, 2026		Executive Committee Meeting 9 a.m. – 3 p.m. Local Affinity Bar Association Reception Thu. Apr. 16 5:30 p.m. – 7:30 p.m. The Inn at Serenbe, Chattahoochee Hills, GA (*Contract Tentative)
Board of Governors		
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta Atlanta, GA
Spring 2026	March 27-29, 2026	The Ritz-Carlton Reynolds, Lake Oconee Greensboro, GA
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL
Midyear 2027	January 14-17, 2027	Omni Hotel at the Battery Atlanta Atlanta, GA
Young Lawyers Div	ision	
Midyear 2026	January 15-18, 2026	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA
Spring 2026	April 23-25, 2026	Kimpton Hotel Arras Asheville, NC
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort In conjunction with the State Bar Annual Meeting Fernandina Beach, FL
Midyear 2027	January 14-17, 2027	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA

(Updated 9/2/25)

^{*}Contract Tentative — Initial stage where terms are being discussed but not confirmed | *Pending — Agreement is in progress, awaiting final approvals or signatures.



Future Meetings Schedule

American Bar Association

Midyear 2026 February 3-9, 2026 Hotel TBD | San Antonio, TX

Annual 2026 Date TBD Hotel TBD | Location TBD

Southern Conference of Bar Presidents

2026 Alabama October 2026 Hotel TBD

2027 Maryland

	6-24	11-24	1-25	3-25	6-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
Jonathan Lang Adams	•	ө	`•	•	n	•	Jonathan Lang Adams
Keith E.Adams	`•	•	`•	n	n	n	Keith E. Adams
Mark W. Alexander	•	•	•	•	•	•	Mark W. Alexander
JaDawnya Cintelle Baker	•	ө	•	•	•	•	JaDawnya Cintelle Baker
Nina M. Baker	•	ө	> •	ө	ө	9	Nina M. Baker
Eric A. Ballinger	•	•	^•	•	•	n	Eric A. Ballinger
Thua G. Barlay	•	•	`•	е	•	•	Thua G. Barlay
Donna G. Barwick	^•	ө	•	•	•	•	Donna G. Barwick
John C. Bell Jr.	•	•	•	•	•	•	John C. Bell Jr.
Tracee R. Benzo	•	ө	`•	•	•	•	Tracee Ready Benzo
N. John Bey	•	ө	`•	n	n	•	N. John Bey
James D. Blitch IV	n	n	`•	•	n	n	James D. Blitch IV
Sherry Boston	•	•	'•	Ф	•	•	Sherry Boston
Charity Reneatha Bridgewater	•	•	> •	•	•	•	Charity Reneatha Bridgewater
Ashley Mackin Brodie	•	n	^•	n	•	•	Ashley Mackin Brodie
Stephanie D. Burton	`•	n	`•	•	•	•	Stephanie D. Burton
Ivy Neal Cadle	•	•	•	•	•	•	Ivy Neal Cadle
Jerry Neal Cadle	•	•	•	•	•	•	Jerry Neal Cadle
Neal Joseph Callahan	n/a	n/a	n/a	n/a	n/a	•	Neal Joseph Callahan
Stacey McSwine Cameron	•	•	^•	•	n	•	Stacey McSwine Cameron
Richard D. Campbell	•	•	•	•	n	•	Richard D. Campbell
Tedra L. Cannella	•	n	`•	n	n	•	Tedra L. Cannella
David L. Cannon	`•	n	`•	•	•	•	David L. Cannon
Carl S. Cansino	n	•	ө	u	u	n	Carl S. Cansino
Chris M. Carr	n	n	ө	u	u	n	Chris M. Carr
Kimberly A. Childs	•	ө	•	•	•	•	Kimberly A. Childs
Amanda Rourk Clark Palmer	,	n	À.	•	•	n	Amanda Rourk Clark Palmer
Daniel Jackson Connell III	,	•	n	u	е	ө	Daniel Jackson Connell III
Susan P. Coppedge	•	•	•	•	•	•	Susan P. Coppedge
John Craig Cotton	•	•	`•	u	•	•	John Craig Cotton
Martin L. Cowen III	`•	•	•	•	•	•	Martin L. Cowen III

To request an excused absence, please email Secretary Shiriki Jones (shirikijonesesq@gmail.com)

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

	6-24	11-24	1-25	3-25	6-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
Veronica Rogusky Cox	•	•	•	•	•	•	Veronica Rogusky Cox
Eric C. Crawford	n/a	n/a	n/a	n/a	u/a	•	Eric C. Crawford
Gerald Davidson Jr.	•	ө	^•	•	•	•	Gerald Davidson Jr.
J. Anderson Davis	n	•	> •	•	n	n	J. Anderson Davis
William T. Davis	•	n	n	•	•	•	William T. Davis
Howard Mark Delashmit	•	•	^•	•	•	•	Howard Mark Delashmit
Joseph W. Dent	•	•	•	•	•	•	Joseph W. Dent
Miguel Angel Dominguez	•	•	^•	•	•	•	Miguel Angel Dominguez
Thomas V. Duck III	n/a	n/a	n/a	•	•	•	Thomas V. Duck III
Susan E. Edlein	^•	•	^•	•	Θ	ө	Susan E. Edlein
Otobong Ukpong "Oto" Ekpo	•	ө	^•	•	•	•	Otobong Ukpong "Oto" Ekpo
Ryan Welton English	•	•	•	•	•	•	Ryan Welton English
Archibald A. Farrar	•	Φ	`•	•	•	•	Archibald A. Farrar
Adam Ferrell	n/a	n/a	n/a	n/a	u/a	•	Adam Ferrell
Gillian Brooke Fierer	•	•	^•	•	•	•	Gillian Brooke Fierer
Amanda Renee Flora	•	•	^•	•	•	•	Amanda Renee Flora
Harold Eugene Franklin Jr.	^•	ө	ө	е	n	•	Harold Eugene Franklin Jr.
Keith E. Gammage	^•	•	^•	•	Э	•	Keith E. Gammage
William C. Gentry	•	•	•	•	•	•	William C. Gentry
Patricia A. Gorham	•	•	^•	е	Э	ө	Patricia A. Gorham
Rebecca Holmes Liles Grist	•	•	•	•	•	•	Rebecca Holmes Liles Grist
Paul William Hamilton	n	•	•	•	•	•	Paul William Hamilton
Thomas B. "Britt" Hammond	•	•	•	•	•	•	Thomas B. "Britt" Hammond
Roger Brent Hatcher Jr.	•	•	n	•	•	•	Roger Brent Hatcher Jr.
John Haubenreich	•	•	^•	•	•	•	John Haubenreich
Patrick H. Head	^•	ө	•	•	n	n	Patrick H. Head
Render M. Heard Jr.	•	•	•	u	•	•	Render M. Heard Jr.
Amanda Nichole Heath	•	ө	^•	•	•	•	Amanda Nichole Heath
Catherine Harris Helms	n/a	n/a	n/a	n/a	n/a	•	Catherine Harris Helms
Matthew J. Hennesy	•	•	•	•	•	•	Matthew J. Hennesy
Thomas W. Herman	n	•	'•	•	•	•	Thomas W. Herman

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	6-24	11-24	1-25	3-25	6-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
R. Javoyne Hicks	•	•	•	•	•	•	R. Javoyne Hicks
Kimberly Wilkerson Higginbotham	n	•	, .	•	•	•	Kimberly Wilkerson Higginbotham
Norbert D. "Bert" Hummel IV	•	•	•	•	•	•	Norbert D. "Bert" Hummel IV
Stacey K. Hydrick	•	•	^•	е	•	•	Stacey K. Hydrick
Shukura L. Ingram	•	n	•	•	n	n	Shukura L. Ingram
James T. Irvin	•	•	ө	е	•	•	James T. Irvin
Christopher Ross Jackson	•	•	^•	•	•	•	Christopher Ross Jackson
Charles Michael Johnson	•	n	^•	•	•	•	Charles Michael Johnson
Lester B. Johnson, III	•	•	•	е	е	Ф	Lester B. Johnson, III
Shiriki L. Cavitt Jones	•	•	•	•	•	•	Shiriki L. Cavitt Jones
Virginia C. Josey	n/a	n/a	n/a	n/a	n/a	•	Virginia C. Josey
Maria Christene Mekras Justus	> •	n	•	•	Φ	•	Maria Christene Mekras Justus
Zahra S. Karinshak	•	Φ	Φ	•	•	•	Zahra S. Karinshak
John F. Kennedy	n	n	^•	n	n	n	John F. Kennedy
Barry E. King	•	•	•	•	•	•	Barry E. King
Judy C. King	^•	•	•	•	•	•	Judy C. King
Catherine Koura	`•	n	`•	n	ө	0	Catherine Koura
Rachel R. Krause	^•	•	^•	•	•	•	Rachel R. Krause
Rhonda Bender Kreuziger	•	n	^•	•	•	•	Rhonda Bender Kreuziger
Edward B. Krugman	^•	ө	^•	е	е	ө	Edward B. Krugman
Jeffrey R. Kuester	`•	•	^•	е	•	•	Jeffrey R. Kuester
Anne Templeton LaMalva	•	•	^•	•	n	•	Anne Templeton LaMalva
Allegra Lawrence-Hardy	n	n	,	u	е	ө	Allegra Lawrence-Hardy
Nicole C. Leet	•	ө	`•	•	•	•	Nicole C. Leet
Katie K. Leonard	^•	•	•	•	•	•	Katie K. Leonard
Dawn Renee Levine	•	•	^•	•	•	•	Dawn Renee Levine
Joyce Gist Lewis	•	•	,	•	•	•	Joyce Gist Lewis
Lisa Katsuko Liang	•	•	,	•	•	•	Lisa Katsuko Liang
Thomas Fredrick Lindsay	•	•	,	•	•	•	Thomas Fredrick Lindsay
David S. Lipscomb	•	•	•	•	•	•	David S. Lipscomb
John R. B. Long	•	•	•	•	•	•	John R. B. Long

To request an excused absence, please email Secretary Shiriki Jones (shirikijonesesq@gmail.com)

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

Board of Governors Attendance Record

	6-24	11-24	1-25	3-25	9-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
Dax Eric Lopez	•	Φ	`•	Θ	n	n	Dax Eric Lopez
Lindsey Stephens Macon	•	n	•	е	•	•	Lindsey Stephens Macon
John Bell Manly	•	•	•	n	Э	ө	John Bell Manly
Troy Windel Marsh Jr.	^•	•	À.	n	n	•	Troy Windel Marsh Jr.
Edward T. McAfee	•	•	•	ө	n	•	Edward T. McAfee
Robert Charles McBurney	n/a	n/a	n/a	n/a	u/a	•	Robert Charles McBurney
Hugh J. McCullough	•	•	`•	•	n	•	Hugh J. McCullough
Letitia A. McDonald	'•	Φ	`•	Ф	•	•	Letitia A. McDonald
Brad J. McFall	Ф	Φ	> •	n	Э	Ф	Brad J. McFall
Michael D. McRae	`•	n	> •	•	•	•	Michael D. McRae
Terry L. Miller	•	•	•	•	•	•	Terry L. Miller
Kenneth Mitchell Jr.	•	•	•	•	•	•	Kenneth Mitchell Jr.
William J. Monahan	•	•	Φ	•	•	•	William J. Monahan
Shondeana Crews Morris	•	Φ	`•	•	•	•	Shondeana Crews Morris
Stephen Russell Morris	•	•	•	•	•	•	Stephen Russell Morris
Joseph Kenneth Mulholland	•	•	ө	•	n	•	Joseph Kenneth Mulholland
Samantha Marie Mullis	n/a	n/a	n/a	n/a	u/a	•	Samantha Marie Mullis
Katrell Nash	•	n	`•	•	•	•	Katrell Nash
Paul Wain Painter III	•	•	•	•	n	n	Paul Wain Painter III
Joy Renea Parks	`•	ө	^•	n	•	•	Joy Renea Parks
David Jared Parrish	n/a	n/a	n/a	n/a	u/a	•	David Jared Parrish
Kathryn Drew Parrish Bennett	ө	•	^•	•	Э	ө	Kathryn Drew Parrish Bennett
Kevin Charles Patrick	•	•	^•	•	•	•	Kevin Charles Patrick
Tabitha Edwina Payne	^•	•	•	n	Θ	•	Tabitha Edwina Payne
Brandon Lee Peak	•	•	^•	•	•	•	Brandon Lee Peak
Edward Piasta	•	•	^•	•	•	ө	Edward Piasta
Michael Prieto	•	n	n	u	n	n	Michael Prieto
Philip Zachary Pritchard	•	•	^•	n	n	n	Philip Zachary Pritchard
Jill Pryor	`•	ө	ө	е	ө	ө	Jill Pryor
Elizabeth Dalia Racine	•	ө	`•	•	•	•	Elizabeth Dalia Racine
William M. Ragland	^•	ө	^•	•	•	•	William M. Ragland

To request an excused absence, please email Secretary Shiriki Jones (shirikijonesesq@gmail.com)

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	6-24	11-24	1-25	3-25	6-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
Tina S. Roddenbery	^•	ө	•	е	•	•	Tina S. Roddenberry
Carlos Javier Rodriguez	n/a	n/a	n/a	n/a	u/a	•	Carlos Javier Rodriguez
Kevin W. Roper	•	ө	^•	•	Э	Ф	Kevin W. Roper
Joseph Roseborough	•	n	n	n	•	•	Joseph Roseborough
Wesley Charles Ross	•	•	^•	•	•	•	Wesley Charles Ross
Adam Joshua Rozen	n/a	n/a	n/a	n/a	n/a	•	Adam Joshua Rozen
Claudia S. Saari	•	•	^•	•	•	•	Claudia S. Saari
Betrice A. Scott	n/a	n/a	n/a	n/a	u/a	•	Betrice A. Scott
Amanda Kay Seals	n/a	n/a	n/a	n/a	n/a	•	Amanda Kay Seals
Alex Musole Shalishali	•	n	Ф	•	n	n	Alex Musole Shalishali
H. Burke Sherwood	•	•	•	•	•	•	H. Burke Sherwood
William Murray Shingler	n/a	n/a	n/a	n/a	e/u	•	William Murray Shingler
Mitchell McKinley Shook	^•	n	'•	•	•	•	Mitchell McKinley Shook
Robert H. Smalley, III	^•	•	^•	•	n	n	Robert H. Smalley, III
Philip C. Smith	•	•	Ф	•	•	•	Philip C. Smith
R. Rucker Smith	•	•	•	•	•	•	R. Rucker Smith
Daniel B. Snipes	•	ө	^•	•	•	•	Daniel B. Snipes
R. Gary Spencer	•	•	•	е	•	•	R. Gary Spencer
H. Craig Stafford	n	•	^•	•	n	n	H. Craig Stafford
Lawton E. Stephens	•	ө	^•	•	Э	Ф	Lawton E. Stephens
Donna Coleman Stribling	•	ө	`•	•	•	•	Donna Coleman Stribling
Joseph C. Sumner, Jr.	^•	n	n	n	ө	ө	Joseph C. Sumner, Jr.
Anita W. Thomas	`•	ө	n	•	n	•	Anita W. Thomas
Stephen Elliot Tillman	•	•	•	•	•	•	Stephen Elliot Tillman
Edward D. Tolley	Ф	n	Ф	•	n	n	Edward D. Tolley
Clayton Tomlinson	•	•	`•	•	•	•	Clayton Tomlinson
Chris P. Twyman	•	•	•	•	•	•	Christopher Paul Twyman
Martin E. Valbuena	•	•	`.	е	•	•	Martin E. Valbuena
J. Henry Walker	`•	n	`.	е	•	•	J. Henry Walker
Janice M. Wallace	•	•	•	•	•	•	Janice M. Wallace
Amy Carol Walters	^•	ө	^•	•	Э	ө	Amy Carol Walters
Andrew Jackson Welch, III	'•	ө	^•	n	•	•	Andrew Jackson Welch, III

To request an excused absence, please email Secretary Shiriki Jones (shirikijonesesq@gmail.com)

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

Board of Governors Attendance Record

	6-24	11-24	1-25	3-25	6-25	6-25	
	Saturday				Friday	Saturday	
	Amelia Island	Jekyll Island	Savannah	Athens	Sawgrass	Sawgrass	
Nancy J. Whaley	^•	•	ө	•	•	•	Nancy J. Whaley
Paige Reese Whitaker	•	Θ	•	•	•	•	Paige Reese Whitaker
Martha Wilson Williams	•	•	Φ	•	•	n	Martha Wilson Williams
Robert D. Wolf	•	Θ	> •	•	•	•	Robert D. Wolf
Douglas Woodruff	^•	•	ө	ө	•	•	Douglas Woodruff
 attended meeting 							
* - attended virtually							
e - excused absence							
u - unexcused absence							

DRAFT STATE BAR OF GEORGIA BOARD OF GOVERNORS MEETING MINUTES

Friday, June 6, 2025, 9:00 a.m. Sawgrass Marriott Golf Report & Spa Ponte Vedra Beach, Florida

The 307th meeting of the Board of Governors of the State Bar of Georgia was held on the date and location shown above. President Ivy N. Cadle presided.

Pledge of Allegiance

Board of Governors Member Gillian B. Fierer, Atlanta Circuit, Post 38, led the Pledge of Allegiance.

Invocation

Board of Governors Member Tedra L. Cannella, DeKalb Circuit, Post 8, gave the invocation.

Security Update

Sgt. Dexter Harden gave a security update to the Board of Governors.

Special Recognition

President Ivy Cadle 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 Ivy Cadle recognized the following retiring Executive Committee and Board of Governors members: Hon. J. Antonio "Tony" DelCampo, Immediate Past President, 19 years; Brittanie D. Browning, YLD Immediate Past President, 3 years; Michael G. Geoffroy, Alcovy Circuit, Post 1, 7 years; Graham Elliott McDonald, Atlanta Circuit, Post 36, 5 years; Donna Stanaland Hix, Chattahoochee Circuit, Post 4, 14 years; Hon. Kathryn Lauranne "Katie" Powers, Clayton Circuit, Post 1, 5 years; Ronald Arthur Lowry, Cobb Circuit, Post 2, 18 years; Laura Joan Murphree, Cobb Circuit, Post 6, 12 years; Danny L. Durham, Columbia Circuit, 4 years; Rotsen Dara Diya "Chinny" Law, Member-at-Large, Post 2, 4 years; Edward R. Collier, Pataula Circuit, 12 years; Vernon L. Chambless, Waycross Circuit, Post 2, 2 years; Jason W. Swindle Sr., West Georgia Circuit, 8 years.

Resolution for G. "Pete" Donaldson III

Court of Appeals Judge Kenneth Hodges and Board Member Thomas Duck presented a resolution to Lea Donaldson, the wife of the late former Board Member Pete Donaldson, who passed away in December.

Roll Call

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

Future Meetings Schedule

President-Elect Chris Twyman reviewed the Future Meetings Schedule.

Distinguished Service Award Presentation

President Ivy Cadle presented the 2025 Distinguished Service Award to former Chief Justice Michael Boggs for "conspicuous service to the cause of jurisprudence and to the advancement of the legal profession in the state of Georgia." This award is the highest accolade bestowed on an individual lawyer by the State Bar of Georgia.

President's Report

On behalf of President Ivy Cadle, Board Members Katie Powers and Bert Hummel delivered the President's Address (Exhibit B).

State of the Supreme Court of Georgia

Hon. Nels S.D. Peterson, 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 the Governor

Executive Counsel Sam Hatcher delivered the State of the Office of the Governor on behalf of Gov. Brian Kemp.

Georgia General Assembly

Rep. Rob Leverett, House Judiciary Committee, reported on the activities of the House Judiciary Committee

Young Lawyers Division

Young Lawyers Division President Kenneth Mitchell, Jr. reported on the activities of the YLD (Exhibit C).

Memorials

President Ivy Cadle presented the Memorials report.

Minutes of the 306th Meeting of the Board of Governors

The minutes of the Board of Governors meeting held March 22, 2025, were approved by majority vote as presented.

Board of Governors Meeting adjourned, Members' Meeting called to order.

Establishment of the Senior Lawyers Division

1. Proposed Bylaw Changes to Article IX. Section 2. Senior Lawyers Division

The members of the State Bar of Georgia, by majority vote, approved the proposed bylaw change.

Members' Meeting adjourned, Board of Governors Meeting called to order.

2. Proposed Senior Lawyers Division Bylaws

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

3. Proposed addition of Rule 1-707. Senior Lawyers Division

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

Proposed Amendments to the Rules of the State Bar of Georgia

Bar Rule 1-202. Membership Status.

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

new subsection (g) and include: (1) A minimum of five years of legal experience; and (2) Completion of a minimum of one hour of continuing legal education (CLE) relevant to the area of representation during each CLE renewal period. Inactive and Emeritus Status members may only represent clients referred through an approved pro bono organization. The revised rule vests in the Supreme Court the authority to approve pro bono organizations that Inactive and Emeritus Status members may provide pro bono services. Approved pro bono entities must supervise the services provided by Non-Active and Emeritus Status members to ensure the pro bono client receives legal services that are up to the standards imposed by these rules.

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

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 Bill Cassara.

Judge Willie Lovett Award for Advancing the Field of Juvenile Law

Supreme Court Justice Charles Bethel and Child Protection and Advocacy Section member Ira Foster presented the Judge Willie Lovett Award for Advancing the Field of Juvenile Law Award to Hon. Talia Johnson Nurse, associate judge, Douglas County Juvenile Court.

<u>Chief Justice Harris Hines Award for Outstanding Advocacy for Children in Dependency Proceedings</u>

Supreme Court Justice Charles Bethel and Child Protection and Advocacy Section member Ira Foster presented the Chief Justice Harris Hines Award for Outstanding Advocacy for Children in Dependency Proceedings Award to Quandula M. Wright, Worth County Division of Family and Children Services (case manager), and Ashley A. Stinson, Guardian Ad Litem Office, Child Advocacy and Juvenile Services, Gwinnett County Government (lawyer).

Chief Justice Thomas O. Marshall Professionalism Awards

President Ivy Cadle presented the 24th Chief Justice Thomas O. Marshall Professionalism Awards to Hon. Hugh P. Thompson, retired, Supreme Court of Georgia, Milledgeville (judge); and Patrise Perkins-Hooker, Atlanta (lawyer).

Check Presentation to Georgia Legal Services Program (GLSP)

President Ivy Cadle presented a \$488,608 check to Susan Coppedge, GLSP Executive Director, representing Bar members' contributions to the 2024 GLSP "And Justice for All" Campaign.

Recognition of Corporate Sponsors

President Ivy Cadle recognized the Bar's Five-Gavel Corporate Sponsors, i3 Verticals and Member Benefits, Inc.; One-Gavel Sponsor Milestone Reporting; and other section and company sponsors.

President Ivy Cadle presented the following Local and Voluntary Bar Awards:

Thomas R. Burnside Jr. Excellence in Bar Leadership Award: Angela Hsu, as nominated by the Georgia Asian Pacific American Bar Association.

2025 Award of Merit: Newton County Bar Association (Under 50 members); Georgia Alliance of African American Attorneys (51 to 100 members); Georgia Asian Pacific American Bar Association (251 to 500 members); Georgia Association of Black Women Attorneys (501 members or more).

2025 Law Day Award of Achievement: Newton County Bar Association (Under 50 members); Gwinnett County Bar Association (251 to 500 members); Cobb County Bar Association (501 members or more).

2025 Best New Entry Award: Georgia Alliance of African American Attorneys.

2025 Best Newsletter Award: Georgia Asian Pacific American Bar Association (251 to 500 members); Georgia Association of Black Women Attorneys (501 members or more).

2025 Best Website Award: Georgia Asian Pacific American Bar Association (251 to 500 members); Georgia Association of Black Women Attorneys (501 members or more).

2025 President's Cup Award: Georgia Association of Black Women Attorneys.

President Ivy Cadle presented the following Section Awards:

Section of the Year: Alternative Dispute Resolution, Shan Momin, chair.

Section Awards of Achievement: Elder Law Section, Paul Hamilton, chair.

President Ivy Cadle recognized the 2025 Annual Georgia Legal Food Frenzy winners: Habachy Law (Attorney General's Cup); GreenbergTraurig LLP (Bar President's Award); BakerHostetler (Large Firm); Krevolin & Horst (Medium Firm); Durham Bray Law Firm (Small Firm); Law Offices of Nathan M. Jolles, PC (Sole Proprietor); Adam Law LLC (Sole Proprietor); Chick-Fil-A, Inc. (Corporate, In-House Counsel); Serta Simmons Bedding, LLC (Corporate, In-House Counsel); Magistrate Court of Fulton County (Judicial); Augusta Superior Court Judges (Judicial); Georgia Tech Office of the General Counsel (Legal Organization); and Mercer Law (Law School).

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 11:30 a.m.

	R. Javoyne Hicks, Secretary
Approved:	
Ivy N. Cadle, President	

Board of Governors Meeting

June 6, 2025 Page 5

DRAFT STATE BAR OF GEORGIA BOARD OF GOVERNORS MEETING MINUTES

Saturday, June 7, 2025, 9:00 a.m. Sawgrass Marriott Golf Resort & Spa Ponte Vedra, Florida

The 308th meeting of the Board of Governors of the State Bar of Georgia was held on the date and location shown above. President Christopher P. Twyman presided.

Pledge of Allegiance

Past President Dawn Jones led the Pledge of Allegiance.

Invocation

Past President Patrise Perkins-Hooker gave the invocation.

Special Presentation

In a demonstration of unity and commitment to the Rule of Law, Chief Justice Nels S.D. Peterson administered the Lawyer's Oath to all lawyers present, serving as a reminder of the enduring principles that guide the practice of law in Georgia and the United States.

Special Recognition

President Chris Twyman 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 Chris Twyman recognized the new officers and Board of Governors members.

Roll Call

Secretary Shiriki Jones circulated the roll for signature. (Exhibit A)

Future Meetings Schedule

President Chris Twyman reviewed the Future Meetings Schedule.

President's Address

President Chris Twyman delivered the President's Address (Exhibit B).

Georgia General Assembly

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

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 Robert H. Smalley III, Dalton (2028) Christine Koehler, Lawrenceville (2028)

State Disciplinary Review Board

> Norbert Daniel "Bert" Hummel, IV, Kennesaw, Northern District (2028) Pamela Sue James, Augusta, Southern District (2028) LaShekia Hughes, Macon, Lay Member (2028)

Formal Advisory Opinion Board

Member-at-Large: Edward B. Krugman, Atlanta (2027)
Member-at-Large: Martin A. Levinson, Atlanta (2027)
Young Lawyers Division: Emily C. Long, Alpharetta (2027)
Georgia Trial Lawyers Association: Christy C. Childers, Macon (2027)
Georgia Defense Lawyers Association: Jacob E. Daly, Atlanta (2027)
Atlanta's John Marshall Law School: Jeffrey A. Van Detta, Atlanta (2027)
Mercer University School of Law: Patrick E. Longan, Macon (2027)
University of Georgia School of Law: David N. Lefkowitz, Athens (2027)
State Disciplinary Board: Marcella C. Ducca, Atlanta (2026)
State Disciplinary Review Board: John R. B. Long, Augusta (2026)

Approval of 2025-2026 Standing, Special & Program Committees and Boards

The Board of Governors approved the proposed 2025-2026 Standing, Special & Program Committees and Boards by majority vote.

Proposed Rules Changes

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

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

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

Rule 4-203.1. Uniform Service Rule

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

The Board of Governors, by majority vote, did not approve the proposed rules change.

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

This proposed change, originating from the Disciplinary Rules and Procedures Committee, addresses concerns raised by the Supreme Court regarding Disciplinary Review Board Reprimands. It replaces the term "issued" with "read in the presence of the respondent" and

requires the reprimand to be administered during the portion of the Review Board meeting open to the public. Additional changes clarify notice requirements for both the public and the respondent.

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

Treasurer's Report

Treasurer Javoyne Hicks reported on the Bar's finances and investments. She referred to the financials in the Board Book that are through March 31, 2025. The combined audit was included in the Board Book, which contained no audit adjustments.

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, 2025; Total Bar Center Operations Revenues and Expenditures Executive Summary for the year-to-date period ending March 31, 2025; Operations Income Statement for the year-to-date period ending March 31, 2025; Supporting Schedule of Other Expenses for the year-to-date period ending March 31, 2025; Status and Use of Cash Investments as of March 31, 2025; SBG Unallocated Cash chart; Board-Designated and Donor Temporarily Restricted Net Assets as of March 31, 2025; Summary of Members and Voluntary Legislative Contributions paid through March 31, 2025; Summary of Members and Voluntary Contributions to GLSP paid through March 31, 2025; Legislative Activity Report through March 31, 2025; and Summary of Clients' Security Fund Activity for the year-to-date period ending March 31, 2025.

Election Schedule 2025-2026

The Board of Governors approved the proposed 2025-2026 Elections Schedule (Exhibit F) by majority vote.

Executive Committee Election

The Executive Committee election was held with the following results:

Two-Year Term 2025-2027 Results:

Candidate: Thua G. Barlay Elected by majority vote for two-year term

Nominator: Anne Templeton LaMalva

Seconded: Ryan English

Candidate: Joyce Gist Lewis Elected by majority vote for two-year term

Nominator: Past President Dawn M. Jones Seconded: Past President Robin Frazer Clark

Candidate: David S. Lipscomb Elected by majority vote for two-year term

Nominator: Past President Brown Sally Akins

Seconded: Thomas W. Herman

Candidate: John R.B. "Jack" Long Was not elected

Nominator: Hon. Amanda Nicole Heath

Seconded: Edward T. McAfee

Georgia Legal Services Program Appointments

By majority vote, the Board of Governors approved the appointments of Tamara S. Caldas, Atlanta; Ronald E. Daniels, Eastman; and Elisa S. Kodish, 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 David M. Paule 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 2025-2026 Bar year by majority vote.

Executive Director's Report

Executive Director Damon Elmore expressed his gratitude to the Board for their support in extending his term and emphasized the importance of teamwork in achieving the Bar's mission. As the current Bar year concludes, he conveyed optimism about the upcoming year and reiterated the value of starting anew, referencing St. Benedict's philosophy of "always, we begin again." Elmore announced that full details summarizing the 2024-2025 year would be included in the Bar's annual report, expected in the Fall Board Book. He highlighted the Bar staff's commitment to enhancing member services and operational improvements. He acknowledged the recent losses of team members Mike Monahan and Laura Johnson, thanking the Board for their support during this time. Elmore said he looked forward to working with President Chris Twyman and collaborating with the Executive Committee and others to attract new tenants and optimize resources at the Bar Center, while expressing appreciation for the leadership of President Ivy Cadle and the Supreme Court liaisons.

Young Lawyers Division President's Report

YLD President Veronica Cox reported on the year ahead for the Young Lawyers Division, marking the 20th anniversary of the YLD Leadership Academy. She expressed enthusiasm for celebrating the achievements of the YLD, acknowledging the hard work and success of its members. YLD President Cox outlined plans to continue the YLD's service efforts while highlighting successful programming and enhancing visibility and engagement among members. She emphasized the importance of bringing back pre-pandemic events and confirmed that the YLD would participate in all meetings with the Board of Governors, except for the Spring Meeting. Additionally, she encouraged Board members to welcome new participants and urge mentees and young lawyers to get involved in YLD activities.

Legislative Report

Director of Governmental Affairs Jennifer McNeely reported on the legislative activities of the Bar.

Special Committee on Artificial Intelligence and Technology Report

Past President and Chair Darrell Sutton provided an update on the activities of the Special Committee on Artificial Intelligence and Technology. He explained how the committee was established, outlining the necessity for its creation and the findings that emerged from their review of the Georgia Rules of Professional Conduct. The committee recommended three changes to the rules to better address the implications of artificial intelligence in legal practice, two of which were already in progress with the Office of the General Counsel and the Supreme Court. Additionally, an AI Toolkit was developed, which will be maintained and updated by the Director of Law Practice Management, Nkoyo Effiong. The committee's name was changed to the Artificial Intelligence and Emerging Technology Committee to reflect its broader focus. Sutton expressed his gratitude to the staff and committee members for their efforts and looked forward to continuing the committee's work in the upcoming Bar year.

Suicide Prevention and Awareness Committee Report

Hon. Shondeana Morris, chair of the committee, reported on the activities of the Suicide Prevention and Awareness Committee. She shared a moving video reminding all of those the Bar has lost by suicide over

recent years. Past President Robin Frazer Clark provided bracelets to represent the importance of the Bar's Lawyer Assistance Program, which were shared with everyone at the meeting.

Chief Justice's Commission on Professionalism Report

Executive Director Karlise Grier reported on the Chief Justice's Commission on Professionalism, expressing her gratitude to Chief Justice Nels S.D. Peterson for his leadership. She announced that the grant application period for the commission is open through July 15. Carlos Vilela, Kevin Patrick, and Sam Mullis were present to discuss the efforts of the Professionalism Committee. Grier indicated that the commission is actively recruiting group leaders for the 2025 law school orientations and encouraged Board members to volunteer for this important role. Additionally, she highlighted upcoming professionalism CLE sessions.

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 2024 and related auditor's letter regarding governance.

Center for Lawyer Wellbeing

The Board of Governors received information on the Center for Lawyer Wellbeing.

Office of the General Counsel

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

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; Alternative Dispute Resolution Section; Construction Law Section; Creditor's Rights Section; Elder Law Section; Eminent Domain Section; Energy Law Section; Entertainment and Sports Law Section; Environmental Law Section; Family Law Section; Franchise and Distribution Law Section; Health Law Section; Intellectual Property Law Section; Nonprofit Law Section; Privacy & Technology Law Section; Real Property Law Section; Taxation Law Section; White Collar Law Section; and Workers' Compensation 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

Board Member and Judge Joseph W. Dent offered to be the first chair of the Senior Lawyers Division when it is formally established.

Remarks/Q&A/Comments/Suggestions

President Chris Twyman opened the floor to remarks, questions, comments, and suggestions. Board Member Martin Valbuena acknowledged Board members Will Davis and Jared Parrish for taking a YLD member to the ER the previous evening.

Adjournment

There being no further business, the meeting was adjourned at 11:30 a.m.

	Shiriki Cavitt Jones, Secretary
pproved:	
r	



EXECUTIVE SUMMARY

To: Board of Governors

From: Russell D. Willard

Date: October 11, 2025

Re: Proposed Changes to Rule 4-203.1(a)

Rule 4-203.1. Uniform Service Rule.

This proposed change only amends 4-203.1(a) (providing for companion email notification/service) and does not propose any additional changes to 4-203.1(b) (personal service). This language cleans up concerns expressed by the Court, as regards the current pending Motion 2023-2, that a lawyer could be found to be in violation of the GRPC if they do not maintain an email address on file with the State Bar. This proposed amendment, building on the current language found within the pending Motion 2023-2, makes clear that for pending provisions that require the complementary component of email service, such as service of petitions on Georgia-barred attorneys who maintain an official address in a foreign country, such provisions are deemed satisfied once the non-email components are completed.

(NOTE: Proposed Changes for EC consideration are in RED; Proposed changes previously approved by the BOG and pending with the Supreme Court under Motion 2023-2 are in BLUE). Language that was in 2023-2 that is proposed for alteration (strikethrough if proposed for deletion, underlined without strikethrough if proposed for re-insertion) is reflected in GREEN.

1 Rule 4-203.1. Uniform Service Rule

- 2 (a) Lawyers shall inform the Membership Department of the State
- 3 Bar of Georgia, in writing, of their <u>Official Address</u>, which shall
- 4 <u>include the lawyer's</u> current name, <u>official mailing</u> address, <u>email</u>
- 5 <u>address</u>, and telephone number. The Supreme Court of Georgia and
- 6 the State Bar of Georgia may rely on the official address Official
- 7 Address and email address on file with the Membership Department
- 8 in all efforts to contact, communicate with, and perfect service upon a
- 9 lawyer. The failure of a lawyer to maintain any component of an
- 10 Official Address pursuant to the provisions of this Rule shall not
- 11 form a separate basis for discipline against the lawyer. The choice of
- 12 a lawyer to provide only a post office box or commercial equivalent
- address to the Membership Department of the State Bar of Georgia
- shall constitute an election to waive personal service. Notification of a
- change of address given to any department of the State Bar of

- 16 Georgia other than the Membership Department shall not satisfy the
- 17 requirement herein. Should a member fail to include an email
- 18 <u>address in their Official Address on file with the Membership</u>
- 19 Department of the State Bar of Georgia, neither the Supreme Court
- 20 of Georgia nor the State Bar of Georgia need comply with any
- 21 requirement pertaining to emailing set forth herein, and any
- 22 provision requiring emailing shall be deemed satisfied as soon as any
- 23 requirements other than the requirement for emailing have been
- 24 <u>completed.</u>

1 Rule 4-203.1. Uniform Service Rule

- 2 (a) Lawyers shall inform the Membership Department of the State
- 3 Bar of Georgia, in writing, of their Official Address, which shall
- 4 include the lawyer's current name, mailing address, email address,
- 5 and telephone number. The Supreme Court of Georgia and the State
- 6 Bar of Georgia may rely on the Official Address on file with the
- 7 Membership Department in all efforts to contact, communicate with,
- 8 and perfect service upon a lawyer. The failure of a lawyer to maintain
- 9 any component of an Official Address pursuant to the provisions of
- this Rule shall not form a separate basis for discipline against the
- lawyer. The choice of a lawyer to provide only a post office box or
- 12 commercial equivalent address to the Membership Department of the
- 13 State Bar of Georgia shall constitute an election to waive personal
- service. Notification of a change of address given to any department
- of the State Bar of Georgia other than the Membership Department
- shall not satisfy the requirement herein. Should a member fail to
- include an email address in their Official Address on file with the
- 18 Membership Department of the State Bar of Georgia, neither the
- 19 Supreme Court of Georgia nor the State Bar of Georgia need comply

- 20 with any requirement pertaining to emailing set forth herein, and
- 21 any provision requiring emailing shall be deemed satisfied as soon as
- 22 any requirements other than the requirement for emailing have been
- 23 completed.

1	BYLAWS
2	
3	EMINENT DOMAIN SECTION
4	STATE BAR OF GEORGIA
5	A DINTER TO
6	ARTICLE I
7 8	Name and Purpose
9	wante and I ar pose
10	Section 1: The name of this Section shall be the Eminent Domain
11	Section.
12	
13	Section 2: The purpose of this Section shall be to form an association of
14	licensed lawyers in the State of Georgia who desire to develop their
15	knowledge and professional abilities in eminent domain and to render
16	better services to their clients and the public.
17	
18	ARTICLE II
19	M 1 1 1 D
20 21	Membership and Dues
22	Section 1: Each member of this Section shall be a member in good
23	standing of the State Bar of Georgia. Upon enrollment and payment of
24	annual Section dues, any member of the State Bar shall be enrolled as a
25	member of this Section. Thereafter, dues shall be paid in advance
26	annually at the time of the payment of dues to the State Bar of Georgia.
27	Section members who are enrolled and whose dues are paid shall
28	constitute the membership of this Section. Any member whose annual
29	dues are unpaid and past due shall cease to be a member and shall be
30	dropped from the rolls of the Section, subject to reinstatement at any time
31	upon the payment of dues for the current year. Annual dues shall be set
32	by the Section's Officers and approved by the Board of Governors.
33	
34	Section 2: Any law-student member, pursuant to Rule 1-206.1, shall be
35	eligible and may become a law-student member of this Section upon
36	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, and a Secretary-Treasurer, 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. Except for actions requiring a vote by the entire membership of the Section, the Section's Officers shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any formal action taken by the Section's Officers beyond administrative matters 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, if any.

Section 2: All newly elected Officers shall hold office for a term of one (1) year. This term shall ordinarily commence with the beginning of the fiscal year of the State Bar of Georgia following the election at which such Officers are elected and end at the close of the same fiscal year of the State Bar of Georgia. The foregoing notwithstanding, all Officers shall remain in office until their successors are elected. In the event that annual elections are not held for successor Officer(s) prior to the close of any given fiscal year of the State Bar of Georgia, the term of any such successor Officer(s) elected thereafter shall be deemed to commence upon their election and last through the end of the same fiscal year of the State Bar of Georgia in which such successor Officer(s) were elected, with the same proviso that any such successor Officer(s) shall remain in office until his or her successor is elected.

 Section 3: If a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become the Chairperson for the unexpired term. If a vacancy arises in the office of the Vice-Chairperson, the Secretary-Treasurer shall become the Vice-Chairperson for the unexpired term. If a vacancy arises in the office of the Secretary-Treasurer, the other two Officers may either appoint a successor Secretary-Treasurer, or, if no agreement between the remaining two officers can be reached as to the appointment of a successor Secretary-Treasurer, then a meeting shall be called as soon as reasonably practical for the purpose of holding an election to fill the vacancy in the office of the Secretary-Treasurer for the unexpired term. Any Officer holding the unexpired term of an office in which a vacancy arises shall be eligible to become reelected to the office held by reason of such vacancy at the next annual election. If a vacancy arises in all three Officer positions, the President of the State Bar of Georgia shall appoint a successor Chairperson who shall hold office for the unexpired term. Such appointed Chairperson shall thereafter call a meeting as soon as reasonably practical for the purpose of holding elections to fill the other vacant Officer positions for the remainder of the unexpired term(s).

Section 3: The Chairperson shall provide notice of the Section's meetings. The Chairperson shall preside over all meetings of the Section, plan and supervise the annual meeting of the Section, and 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: In the absence or disability of the Vice-Chairperson, the Secretary-Treasurer shall perform the duties of the Vice-Chairperson. The Secretary-Treasurer shall also record and keep minutes of all meetings of the Section, present minutes to the Section members for

approval, and maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary-Treasurer. The Secretary-Treasurer shall also coordinate with the Bar's Section Director and Coordinators to ensure that an accurate record of Section membership and all income and expenses for the Section is maintained, assist in the preparation of the annual budget, and otherwise monitor the financial condition and health of the Section. The Secretary-Treasurer shall also perform such other duties as may be prescribed by the Chairperson.

ARTICLE IV

Meetings of the Section

Section 1: The Section shall meet a minimum of once per Bar year.

Section 2: Meetings of the Section may be held from time to time on the call of the Chairperson, two other Officers, or any ten active members of the Section, to be convened at such time and place and with such program and order of business as may be provided in the call of such meeting.

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 decisions made by the Officers or the Section Executive Committee as provided for herein, 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 Robert's 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 provided by email or by 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. The 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. The Office of the General Counsel must approve all internal rules.

ARTICLE V

Section Executive Committee

Section 1: The Section Executive Committee shall consist of the Officers of the Section and other Section members who may be appointed to any committee.

Section 2: Any Section member appointed to any committee, and the committees themselves, shall have only such powers, duties, and responsibilities as may be delegated to them by the Officers, unless otherwise expressly provided for herein.

Section 3: All committees shall be appointed or removed by majority vote of the Officers, except as otherwise provided herein. 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, except in unavoidable circumstances. Prior to each election, the Officers 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 nominations shall be presented to the Section membership at the Section's annual meeting, or may be presented in advance by email or publication of a newsletter, if any. Thereafter, and before the election of any new or subsequent Officers, any member of the Section may nominate any other member of the Section for election to fill any of the Officer positions by communicating said nomination to the Secretary-Treasurer. Nominations shall be closed prior to voting, and may be closed upon motion to close the nominations made at the meeting during which elections will be held.

Section 2: The names of all members of the Section nominated for each office, either by the Officers or from the floor, shall be submitted to the membership, and ballots shall be cast until there shall be a majority of the members of the Section present favoring the election of a designated member to an office. Voting shall be viva-voce, and the nominee for an office with the lowest number of votes in any ballot shall be dropped from consideration on the next succeeding ballot, provided that, by majority vote of the members of the Section present, written, secret ballots may be required--or the procedure governing any election may be modified.

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 two (2) Officers and paid by the Chief Financial Officer of the State Bar of Georgia. The Secretary-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 Section's Officers, who will either approve or deny the reimbursement.

Section 4: A financial report of the funds of the Section shall be reported by the Secretary-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

The Pursley Award

Section 1: The Section's lifetime achievement award (named for its first recipient and prominent member of the Section, Charles Pursley) shall be bestowed by the Section at the Section's annual meeting.

Section 2: Notwithstanding anything to the contrary contained herein, there shall be a standing committee to nominate the annual recipient of this Award. This Committee shall consist of three members in good

standing of the Section. The Officers shall appoint annually, by majority vote of the Officers, one member who represents primarily condemnors and one member who represents primarily condemnees. The third member shall be a former recipient of the Award. The initial member who formerly received the Award shall be Charles Pursley. Mr. Pursley shall hold this position for so long as he is willing and able. The successor member of this committee who formerly received this award shall be appointed by the outgoing member who formerly received this award. The three members of this committee shall deliberate and nominate one individual to the Officers for receipt of the Award on an annual basis. The Officers may then accept or reject the nomination by majority vote of the Officers. In the event that the Officers reject a nominee, the Committee shall then nominate another recipient until such time as the Officers accept the recipient put forth by the Committee.

ARTICLE IX

Miscellaneous

Section 1: The Section shall conduct continuing education programs at least once each Bar year (which may be held at the same time and in conjunction with the Section's annual meeting). Continuing education programs that are more than six (6) hours in credit-hour length 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 six (6) hours or less may be conducted by the Section without the Institute of Continuing Legal Education of the State Bar of Georgia. The Commission must approve all continuing education programs 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 a majority of the Executive Committee has first approved the proposed amendment. **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 .

[Signature Page Follows]

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321	CHAIRPERSON
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326	VICE-CHAIRPERSON
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331	SECRETARY-TREASURER
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334	Approved by the Board of Governors theday of, 20
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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 <u>Finances</u>

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	ore the undersigned this the day of
, 20	
	CHAIRPERSON
	SECTION SECRETARY



To: Bar Officers/Finance Committee

From: Ron Turner RWT

Date: September 10, 2025

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

Attached please find the June 2025 financial statements. As June 30 is the year-end of the Bar, full departmental details are 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, 2025 and the audit by the Bar's outside accountants.

State Bar of Georgia Financial Statement Budget Variances Page Two

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

New and revised items are highlighted in bold.

Savings were realized in each department to offset any overages.

Executive Summary

In total, the Bar budgeted a loss of \$1,140,469 for the year ended June 30, 2025. This total budgeted loss for the Bar was calculated as a budgeted loss for Bar operations of \$1,288,225 and a budgeted gain for the Bar Center of \$147,756.

The Bar Center realized an actual loss of \$574,745 for the year instead of the budgeted gain of \$147,756. This difference of 722,501 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 \$227,741 more 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) additional rental revenue of \$223,600 and (3) additional parking revenue of \$148,257. These savings were offset by (4) additional audio/video, furniture and equipment costs of \$58,798 and (5) additional building rehab costs of \$1,267,225. These five amounts net to an additional expense of \$726,425.

Bar operations realized a gain of \$181,742 instead of the budgeted loss of This difference of \$1,469,967 is comprised of the following components: (1) additional interest income and earnings due primarily to the writeup of the Bar's investments to fair market value. Like Bar Center operations, these income amounts totaled \$429.444 more than what was budgeted. (2) ICLE earned \$243,255 more in net program revenue than what was originally budgeted (3) savings in salaries and related personnel costs of \$984,993, (4) savings in officer expenses of \$28,613, (5) savings in bond premium amortization and investment service fees of \$28,908 (6) savings associated with the Bar Journal of \$28,722 (7) savings in building insurance of \$29,452 (8) savings in printing costs of \$35,387 (9) savings in supplies of \$26,102 (10) savings in seminars and training of \$27,964 and (11) savings in furniture and equipment of \$44,776. The savings were offset by the following components: (12) an overage in meeting costs (Board of Governors and Members meetings, Supreme Court and Court of Appeals meeting costs an Executive Committee meetings costs) of \$89,206 (13) additional costs for the State Disciplinary Board Panels of \$26,156 (14) website redesign costs of \$168,909 (15) Membership Database Project costs of \$110,713 (16) additional contract labor and contract programming costs of \$127,701 and (17) additional computer software costs of \$48,448. These seventeen items total a difference of \$1,291,707.

State Bar of Georgia Financial Statement Budget Variances Page Three

Administration

Miscellaneous costs have exceeded the budget by approximately \$31,200 due to the following: (1) those costs associated with the retirement of Paula Frederick in the amount of \$20,200 (2) costs of \$4,400 associated with Mike Monahan's memorial service and (3) costs of approximately \$4,900 incurred by the Georgia Diversity program for which they did not have sufficient restricted monies to pay for these expenses. For Paula's retirement, a budgeted amount was intentionally not included in the operating budget of the Bar as monies from sponsorships and unallocated cash were designated for this expense.

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 (3) a return to in-person participation at certain events and (4) regular presence at SBOG satellite offices and with BOG members when in their area.

Credit card discounts and fees are over budget by \$8,875 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.

Office of General Counsel

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

Attorney and staff travel is over budget primarily due to the following reasons: (1) more people attended meetings than what was originally budgeted for and (2) general travel costs (airfare, transportation, etc.) have increased.

Computer hardware is in excess of the budget by **\$7,028** due to the purchase of a computer, **five** monitors, **two** printers and three scanners by the department that were not budgeted for.

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

Contract programming is over the budget primarily for the following reasons: (1) when the budget was established for the 2024-2025 year, it was not known that the department was going to transition MogLog from being locally held on a server to the cloud; and (2) the transition costs of having the 30-year legacy programming modified to be able to locally access the cloud based data as well as to work on conversion to a cloud-based access to the MogLog system have been substantially greater than expected.

State Bar of Georgia Financial Statement Budget Variances Page Four

Office of General Counsel (Continued)

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

Communications

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.

The Bar has incurred \$168,909 in charges associated with the redesign of the Bar's website. A budgeted amount was intentionally not included in the operating budget of the Bar as monies from unallocated cash were used to fund this investment. This new website became operational in September 2024.

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

Salaries are more than 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.

Attorney and staff travel is more than the budget primarily for the following reasons: (1) the YLD Director attended two events that were highly encouraged to attend, however, these two events were not budgeted for and (2) the administrative person in YLD attended certain events as well and her travel was also not budgeted for.

Unauthorized Practice of Law

Contract programming is over the budget primarily because costs were incurred for the development of various reports for UPL in the cloud. When the budget was established for the 2024-2025 year, it was not known that the department was going to transition to these cloud-based reports.

Savannah

Rent and utilities are greater than the budget due to higher than anticipated real estate taxes and operating costs. The Bar is required to pay their share of real estate taxes and operating costs monthly as part of the rent and then if additional amounts are due, those payments are also required.

<u>Tifton</u>

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

State Bar of Georgia Financial Statement Budget Variances Page Five

Institute of Continuing Legal Education (ICLE)

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

BOG and Member Meetings

Costs associated with the BOG and Member Meetings are in excess of the budget primarily due to the following reasons: (1) hotel and food costs are higher than what was originally anticipated/budgeted (2) annual meeting production cost was higher than anticipated due to vendor constraints (3) there was a change in the scope of services requested (4) additional costs that were not budgeted associated with both shuttle busses and alternative options due to inclement weather issues.

Supreme Court Meetings

Supreme Court meetings are in excess of the budget due to hotel and food costs being higher than originally anticipated/budgeted.

Executive Committee Meetings

Costs associated with the Executive Committee meetings are in excess of the budgeted amounts primarily due to the following reasons: (1) hotel and food costs are higher than what was originally anticipated/budgeted (2) more meetings for the Executive Committee were held outside of the State Bar of Georgia building and (3) there were receptions held with local bars. These joint receptions incurred additional costs that were not originally anticipated and the attendance at these receptions was better than anticipated.

Court of Appeals Meetings

The costs associated with Court of Appeals meetings was more than the budget primarily due to the following reasons: (1) hotel and food costs are higher than what was originally anticipated/budgeted and (2) the dinner with the Court of Appeals was not anticipated when the budget was prepared.

For all meetings, because the costs of hotels and meetings are increasing at a more significant rate than general expenses, we are encouraging the Meetings Department Director along with the appropriate Bar officers to design meetings further in advance of the event and examine opportunities to reduce costs and expenses around events.

Fastcase

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

Membership Database Project

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

State Bar of Georgia Financial Statement Budget Variances Page Six

Shared Office

Rubbish removal is over budget due to costs incurred. In previous years, we were not charged removal costs, however, the provider discontinued service and we had to obtain a new provider. This purchase was not originally budgeted for.

Furniture and equipment is in excess of the budget due to the purchase of an ice maker to replace a broken unit that could not be repaired. This purchase was not originally budgeted for.

The Human Resources department is over budget by \$3,543 due to certain Bar-wide seminars that were provided to employees that were not adequately budgeted for.

Sections

Salaries are more than 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 is in excess of the budget due to additional time incurred at the annual meeting for various events than what was originally budgeted.

Supplies for sections are in excess of the budget by approximately \$3,400 primarily due to the following: (1) purchase of name badge holders and badge stock. The costs of these items have increased, Sections are also doing more programs, and more people are attending these events and (2) purchase of more specialized items including table clothes, napkins and cups.

Conference Center

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

Other Bar Center Operations

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

Audio and video equipment for the Bar is in excess of the budget by approximately \$58,800 primarily because (1) the Bar incurred charges associated with the installation of new poke thru devices in meeting rooms 3 and 5 to provide additional electrical capabilities in these rooms along with a remote clicker and (2) installation of computer, monitor and scanner for use by individuals who are at the Bar and want to scan and provide information to employees and (3) the installation of television in a conference room that allows for the presentation of information on a screen to an entire room. These upgrades were intentionally not included in the operating budget of the Bar Center as monies from unallocated cash were used to fund this investment.

State Bar of Georgia Financial Statement Budget Variances Page Seven

Other Bar Center Operations (Continued)

The Bar incurred unbudgeted building rehab costs of approximately \$1,267,200 for the following items: (1) lease buildout costs for a tenant to enter into a lease renewal for the occupation of space on the 6th floor in the amount of approximately \$35,000 (2) approximately \$465,300 in costs paid for work done on electrical panels in order to replace the old electrical panels (3) approximately \$334,100 for flooring for the 1st and 3rd floors along with the sub-basement (4) approximately \$18,000 in costs associated with a potential move of the Office of General Counsel within the building (5) approximately \$14,300 of other costs for additional wi-fi access and additional electrical installation costs (6) approximately \$9,800 of costs associated with security cameras in the parking deck (7) electrical costs for the parking deck associated with the intended installation of EV chargers and the installation of the EV chargers themselves. These amounts total approximately \$81,900 (8) architectural costs of approximately \$23,300 for a tenant to enter into a lease renewal for space on the 4th floor (9) approximately \$115,800 in costs associated with the purchase of replacement windows for the building and (10) approximately \$166,000 paid towards the purchase of new chairs for the conference center floor. The resources in unallocated cash are being used to fund these costs.

Rental

Repairs and maintenance costs for HVAC are approximately \$40,800 over budget primarily due to five repairs totaling approximately \$40,100 that were not budgeted for. These repairs were for (1) a replacement of the chiller pump motor (2) the replacement of an oil heater (3) an additional repair to the chiller (4) repair to water piping and (5) seal pump replacements.

Repairs and maintenance costs for plumbing are over budget by approximately **\$5,200** primarily due to repairs in the amount of approximately \$12,900 which were not budgeted for. These repairs were to a backflow preventor that had to be rebuilt as it failed inspection and a repair for the failure of a boiler for a glass blower.

Repairs and maintenance for fire/life safety prevention are in excess of the budget by approximately \$2,900 due to a failure of a relay. The cost of this relay repair was \$2,453.

Repairs and maintenance for rubbish removal is greater than the budget due to additional garbage pickups that were required during the current fiscal year.

Repairs and maintenance for the general building is in excess of the budget by approximately \$4,400 primarily due to unbudgeted repairs in the amount of \$2,366 for the replacement of a circuit board to operate a door that malfunctioned.

Electric costs are greater than the budget for the following reasons: (1) the budget was established based upon historical information that was available, however the building is using additional electric than what was originally anticipated due to weather conditions and (2) the rate per kilowatt hour also increased.

Security Contract was in excess of the budget due to additional raises provided to the security guards to increase their compensation to be more in line with other security guards in the Atlanta area.

State Bar of Georgia Financial Statement Budget Variances Page Eight

Parking

Repairs and maintenance costs for the parking deck are over budget by \$9,321 primarily due to the incurrence of \$6,000 in repair costs for re-concreting and caulking certain areas. These costs were not originally budgeted for.

Garage insurance and equipment and supplies are over budget due to an under budget by our outside parking management company.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately **\$168,200.** This is a positive variance.

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

cc: Damon Elmore Russ Willard Sarah Coole

State Bar of Georgia Consolidated Revenues and Expenditures Operations and Bar Center Combined For the Year To Date Period Ending June 30, 2025

Year Ending

Year To Date

Year Ending

	06/30/2024		June 30, 2025	% of Budget	06/30/2025
	4	Actual	Actual		Annual Budget
Membership Numbers					
Active Members	42	42,194	42,777	100.19 %	42,695
Inactive Members	ω	3,017	7,827	% 22.66	7,845
Provisional Members		18	21	105.00 %	20
Associates/Affiliates		14	20	200.00 %	10
Foreign Legal Consultants		10	12	133.33 %	0
Students		520	491	104.47 %	470
Emeritus	4	4,617	5,095	111.12 %	4,585
Total Membership Numbers	32	55,390	56,243	101.09 %	55,634
Revenue					
Dues Active	10,957,918	7,918	11,283,972	100.11 %	11,271,480
Dues Inactive	1,067	1,067,188	1,061,172	102.48 %	1,035,540
Dues Provisional	91	3,932	006'6	83.33 %	11,880
Dues Associates	_	1,750	850	82.00 %	1,000
Dues Foreign Legal Consultant	N	2,448	2,508	105.56 %	2,376
Dues Late Fees	256	256,000	244,825	92.39 %	265,000
Dues NSF Check Fee		120	140	70.00 %	200
Dues Prior Years	4)	5,705	11,847	197.45 %	6,000
Total License and Dues	12,308,061	3,061	12,615,214	100.17 %	12,593,476
Program Registration Income	4,790,586),586	4,742,679	107.79 %	4,400,000
Section Expense Reimbursement	301	301,039	320,694	100.00 %	320,694
CSF Expense Reimbursement	73	73,000	73,000	100.00 %	73,000
Advertising and Sales	46	45,389	53,362	203.48 %	26,225
Membership Income	166	65,617	215,977	122.16 %	176,800
Credit Card Processing Fees	107	107,601	131,682	123.07 %	107,000
Interest Income	454	454,907	704,444	256.16 %	275,000
Miscellaneous Revenues	21	21,581	34,896	158.62 %	22,000
Total Bar Revenue	18,267,781	,781	18,891,948	104.99 %	17,994,195
Total Bar Expenses	17,723,696	3,696	18,710,206	97.03 %	19,282,420
SBG Net Gain (Loss)	\$ 544	544,085 \$	181,742	(14.11) % \$	(1,288,225)

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

State Bar of Georgia

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State Bar of Georgia

Consolidated Revenues and Expenditures Operations and Bar Center Combined For the Year To Date Period Ending June 30, 2025	Reven and Ba	isolidated Revenues and Expenditu Operations and Bar Center Combined e Year To Date Period Ending June 30	penditures ombined June 30, 2025		
	>	Year Ending 06/30/2024 Actual	Year To Date June 30, 2025 Actual	% of Budget	Year Ending 06/30/2025 Annual Budget
Total Bar Center Operations Revenue Total Bar Center Operations Expenses	ļ	3,314,107 3,454,316	3,409,662 3,984,407	120.78 % 148.94 %	2,822,960 2,675,204
Total Bar Center Operations Net Gain (Loss)	\$	(140,209) \$	(574,745)	\$ % (86.88£)	147,756
Combined Revenue Combined Expenses		21,581,888 21,178,012	22,301,610 22,694,613	107.13 % 103.36 %	20,817,155 21,957,624
Total Combined Net Income (Loss)	↔	403,876 \$	(393,003)	34.46 % \$	(1,140,469)

State Bar of Georgia

Page 1 June 2025 Financial Statements

State Bar of Georgia Total Bar Center Operations Revenues and Expenditures - Executive Summary For the Year To Date Period Ending June 30, 2025

	Mo	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts		,		,				,
Bar Center Assessments		0	0.00 %	0 !	0.00 %	200	200	0 !
Gain/Loss Investment Interest Allocation		39,491	0.00	146,317	% 00.0	0	(146,317)	263,476
CCLC Contributions to Bar Center		858,390	62.43 %	1,358,389	98.79 %	1,375,000	16,611	1,393,988
Interest and Dividend Income		58,613	22.46 %	183,425	179.83 %	102,000	(81,425)	132,667
Bar Center Income and Cash Receipts	⇔	956,494	64.75 %	\$ 1,688,131	114.28 %	\$ 1,477,200	\$ (210,931)	\$ 1,790,131
Bar Center Expenses and Cash Disbursements								
		2,057	12.10 %	11,053	65.02 %	17,000	5,947	17,366
Investment Service Fees		7,271	33.05 %	27,376	124.44 %	22,000	(5,376)	24,138
Museum and 1st Floor Exhibit		0	% 00:0	0	% 00:0	0	0	6,453
Audio Video, Furniture and Equipment		69	1.20 %	64,498	1,131.54 %	2,700	(28,798)	219,552
Building Rehabilitation		134,599	1,602.37 %	1,275,625	15,186.01 %	8,400	(1,267,225)	726,161
President's Boardroom		0	% 00:0	1,109	% 00:0	0	(1,109)	0
Bar Center Expenses and Cash Disbursements		143,996	271.18 %	1,379,661	2,598.23 %	53,100	(1,326,561)	993,670
Bar Center Combined Net Cash Flow	⇔	812,498	22.05 %	\$ 308,470	21.66 %	\$ 1,424,100	\$ 1,115,630	\$ 796,462
Conference Center Income and Expenses								
Room Rentals and Various Charges		492	3.94 %	16,415	131.32 %	12,500	(3,915)	13,817
Conference Center Operating Expenses		34,873	7.11 %	469,343	95.72 %	490,349	21,006	477,025
Conference Center Combined Net Cash Flow	v)	(34,381)	7.19 %	\$ (452,929)	94.78 %	\$ (477,849)	\$ (24,920)	\$ (463,208)
Rental Income and Expenses Rental Income		83,042	10.93 %	983,600	129.42 %	760,000	(223,600)	926,110
Building Operating Expenses		192,502	10.80 %	1,792,395	100.59 %	1,781,945	(10,450)	1,692,176
Rental Combined Net Cash Flow	₩	(109,460)	10.71 %	(808,795)	79.14 %	\$ (1,021,945)	\$ (213,150)	(166,066)
Parking Income and Expenses			,					
Parking Income		52,228	9.11 %	721,517	125.86 %	573,260	(148,257)	584,050
Parking Deck Operating Expenses		29,815	8.52 %	343,008	% 90.86	349,810	6,802	291,446
Parking Combined Net Cash Flow	()	22,413	10.03 %	\$ 378,509	169.39 %	\$ 223,450	\$ (155,059)	\$ 292,603
Total Bar Center Operations Net Gain (Loss)	₩	691,071	467.71 %	\$ (574,745)	(388.98) %	\$ 147,756	\$ 722,501	\$ (140,209)

Note: Non-Cash depreciation expense and gain/loss on disposal of fixed assets are excluded from this schedule. Created on 09/09/2025 State Bar of Georgia

State Bar of Georgia Income Statement YTD - Operations For the Year To Date Period Ending June 30, 2025

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Dues - Active	11,283,972 \$	11,271,480	100.11 % \$	10,957,918
Dues - Inactive	1,061,172	1,035,540	102.48 %	1,067,188
Dues - Provisional	006'6	11,880	83.33 %	16,932
Dues - Misc. Types	3,358	3,376	99.47 %	4,198
Dues - Late Fees	256,812	271,200	94.69 %	261,825
Total Dues & Licenses	12,615,214	12,593,476	100.17 %	12,308,061
Program Registration Income	4,742,679	4,400,000	107.79 %	4,790,586
Section Expense Reimbursement	320,694	320,694	100.00 %	301,039
CSF Expense Reimbursement	73,000	73,000	100.00 %	73,000
Advertising and Sales	53,362	26,225	203.48 %	45,389
Membership Income	94,477	82,200	114.94 %	76,992
Pro Hac Vice	535,200	430,000	124.47 %	410,525
Pro Hac Vice Contra	(413,700)	(335,400)	123.35 %	(321,900)
Credit Card Processing Fees	131,682	107,000	123.07 %	102,601
Interest Income	704,444	275,000	256.16 %	454,907
Miscellaneous Revenues	34,896	22,000	158.62 %	21,581
Total Revenues	18,891,948	17,994,195	104.99 %	18,267,781
Expenses				
Administration	2,846,592	2,924,908	97.32 %	2,772,737
General Counsel	5,133,157	5,094,921	100.75 %	4,688,270
Communications	1,061,121	920,402	115.29 %	1,176,662
Lawyer's Assistance Program	154,674	155,000	% 62.66	125,000
Fee Arbitration	571,668	594,971	% 80.96	544,647
Law Practice Management	458,571	528,234	86.81 %	455,563
Sections	323,193	320,694	100.78 %	306,746
Savannah Office	310,494	316,729	98.03 %	306,971
Tifton Office	209,899	185,013	113.45 %	164,659
Young Lawyers	435,031	449,090	96.87 %	420,015
Unauthorized Practice of Law	904,586	994,864	90.93 %	942,450
Law Related Education	438,473	448,085	97.85 %	420,300
High School Mock Trial	187,023	182,067	102.72 %	167,484
ICLE	3,935,703	4,393,900	89.57 %	3,848,996

lote: For Total Other Expenses, the details can be found on the next page. :reated on 09/09/2025 State Bar of Georgia

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State Bar of Georgia Income Statement YTD - Operations For the Year To Date Period Ending June 30, 2025

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	212,216	212,216	100.00 %	212,216
Fastcase	462,428	455,000	101.63 %	297,471
Officers' Expenses	73,857	102,470	72.08 %	79,023
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	1,104,541	948,690	116.43 %	857,373
Unallocated Services	(168,187)	0	0.00 %	(118,053)
Total Expenses	18,710,206	19,282,420	97.03 %	17,723,696
Net Income	\$ 181,742	(1,288,225)	(14.11) %	544,085

Note: For Total Other Expenses, the details can be found on the next page. Created on 09/09/2025 State Bar of Georgia

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Supporting Schedule of Other Expenses - YTD For the Year To Date Period Ending June 30, 2025 State Bar of Georgia

			% CFX	
	YTD Actual	Annual Budget	of Budget	Prior Year
•	1			
€	651,918	\$ 588,200	110.83 % \$	530,767
	81,230	75,000	108.31 %	79,023
	56,444	42,000	134.39 %	7,681
	24,814	20,000	124.07 %	0
	31,500	31,500	100.00 %	30,000
	16,646	20,000	83.23 %	17,674
	32,984	45,990	71.72 %	34,148
	2,033	2,500	81.32 %	1,713
	12,442	11,000	113.11 %	9,728
	4,823	000'9	80.37 %	4,670
	110,713	0	0.00 %	57,912
	16,486	20,000	82.43 %	16,070
	10,000	10,000	100.00 %	10,000
	2,413	2,500	96.54 %	2,116
	2,500	2,500	100.00 %	2,500
	11,688	29,000	40.30 %	22,811
	28,407	35,000	81.16 %	29,958
	7,500	7,500	100.00 %	601
•	77 7 7 7 7	040 000	6 67 077	011
A	1,104,541	\$ 948,690	116.43 % \$	857,372

State Disciplinary Board Lawyers Electronic Ballots

Dues Notice Letters of Good Standing

Executive Committee Meetings **BOG** and Member Meetings

Other Expenses

Court of Appeals Meetings Supreme Court Meetings

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Access to Justice/Pro Bono

Investment Service Fees

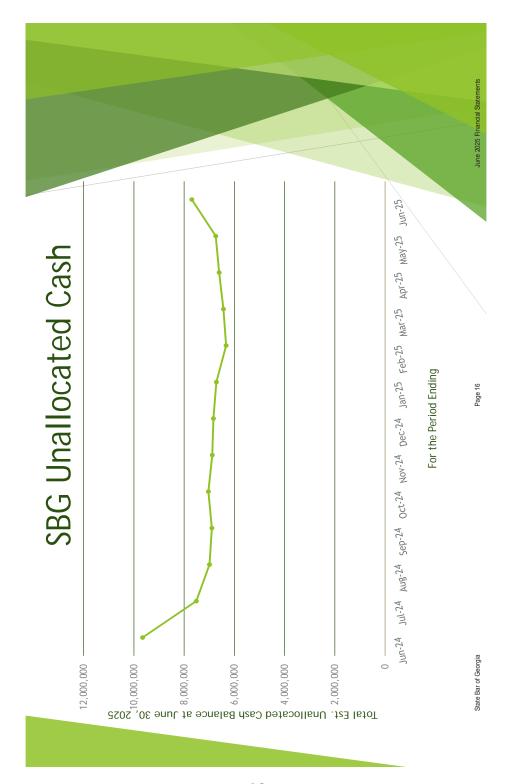
Commitment to Equality Awards Bond Premium Amortization

Bar Membership Cards 50 Year Certificates Membership Database Project State Bar Committees Georgia Diversity Program ABA Delegate Breakfast

State Bar of Georgia Status and Use of Cash and Investments For the Current Period Ending June 30, 2025

	Current Month	Ending of Prior Fiscal Year		% Increase/
	(June 2025)	(June 2024)	Dollar Change	Decrease
Cash and Investments - Bar	\$ 45,502,196			
Less:	(0.000.000)			
CCLC Cash and Investments Included in Above Amount Unrealized (Gain)/Loss in Investments	(6,960,080) (830,965)			
Net Cash Available for State Bar	37,711,151			
Use of Cash: Less:				
Board Designated - See Separate Schedule Attached Donor Temporarily Restricted - See Separate Schedule Attached	(8,663,664) (3,371,033)			
Total Board Designated and Temporarily Restricted	(12,034,697)			
Other - Cash Allocated:	200 122			
Collection of Outstanding Accounts Receivable	208,138			
Payment of Accounts Payable Payment of Accrued Vacation	(1,591,771) (526,460)			
Deferred Income	(11,460,354)			
Payment of Credit Card Bill	(512,642)			
Payment of Accrued Salary	(404,957)			
Payment of Accrued Taxes	(30,979)			
Payment of Other Accrued Expenses (primarily pension)	(701,019)			
Payment to Client Security Fund	(2,715,520)			
Net Amount to be Received from Related Entities	438,361			
Total Other - Cash Allocated	(17,297,203)			
Anticipated Use of Unallocated Cash - Bar Operations (For Ongoing Projects in Progress).				
Estimated Cash and Investments - June 30, 2025 - Bar	8,379,251	9,818,381	(1,439,130)	-15%
Cash and Investments - Bar Center	219,069			
Other Cash Allocated - Bar Center:	04.070			
Collection of Outstanding Accounts Receivable Payment of Accounts Payable	91,273 (13,384)			
Payment of Other Accrued Expenses	(130,432)			
Total Other - Cash Allocated - Bar Center	(52,543)			
Anticipated Use of Unallocated Cash - Bar Center Operations (For Ongoing Projects in Progress).	(850,416)			
Estimated Cash and Investments June 30, 2025 - Bar Center	(683,890)	(160,919)	(522,971)	-325%
Total Estimated Cash Balance at June 30, 2025	\$ 7,695,361	\$ 9,657,462	(1,962,101)	-20%

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.



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State Bar of Georgia Board-Designated and Donor Temporarily Restricted Net Assets For the Year To Date Period Ending June 30, 2025

	٦	June 30, 2022	June 30, 2023		June 30, 2024	June 30, 2025
Board Designated Board Designated - General Operations - Bar Board Designated - General Operations - Bar Center Litigation Board Designated - Sections YLD Meetings	₩	2,750,000 8 2,000,000 300,000 3,677,156 88,929	\$ 2,750,000 2,000,000 300,000 3,664,312 77,999	↔	2,750,000 \$ 2,000,000 300,000 3,745,183 49,795	2,750,000 2,000,000 300,000 3,608,573 5,091
Total Board-Designated excludes ICLE	\$	8,816,085	\$ 8,792,311	\$	8,844,978 \$	8,663,664
Donor Temporarily Restricted	¥	1 503 629 6	4 806 483	¥	2 423 119 \$	2 825 925
Law Related Education/Marshall fund))		162,382
High School Mock Trial		18,617	15,299		17,481	27,719
Basics Program		115,094	116,951		121,963	125,851
Younger Lawyers		87,006	87,199		126,603	135,410
Lawyers Assistance		33,188	31,863		33,229	34,352
Georgia Diversity Program		46,528	13,555		6,374	165
Bar Media Conference		13,037	3,115		1,523	943
Law Day		6,266	6,212		6,317	5,610
Access to Justice		1,435	3,175		19,993	22,150
Promote Inclusion		8,842	8,701		5,924	12,649
Military Vet Pro Bono		14,240	14,481		15,101	15,582
Justice Portraits		1,006	1,022		1,066	1,100
Center for Lawyer Well-Being		0	0		0	1,195
Total Donor Temporarily Restricted	₩	2,061,572	\$ 2,315,655	€	2,971,089 \$	3,371,033
Net Board Designated and Donor Temporarily Restricted	\$	10,877,657	\$ 11,107,967	₩	11,816,068 \$	12,034,697

State Bar of Georgia Summary of Members and Voluntary Legislative Contributions With Contributions Paid Through June 30, 2025

Dues	2025-26	Dues Season	2024-25	Dues Season	2023-24	Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)		50,592		50,114		49,695
Active - Number Paid		33,938		43,317		42,632
Inactive - Number Paid		5,548		8,074		8,237
Total Number of Members With Dues Paid		39,486		51,391		50,869
Percent of Total Members With Dues Paid		78.0%		102.5%		102.4%
Number of Members Who Made A Contribution		3,647		8,649		9,091
Percent of Members Who Made A Contribution		9.2%		16.8%		17.9%
Total Contribution Amount	\$	315,361	\$	820,248	\$	862,990
Average Amount Paid	\$	86	\$	95	\$	95

Legislative Contribution Amounts by Dues Year

2025 - 2026	\$ 315,361
2024 - 2025	\$ 820,248
2023 - 2024	\$ 862,990
2022 - 2023	\$ 803,415
2021 - 2022	\$ 760,350
2020 - 2021	\$ 766,123
2019 - 2020	
	\$ 322,708
2018 - 2019	\$ 494,906
2017 - 2018	\$ 546,905
2016 - 2017	\$ 557,991

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

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June 2025 Financial Statements

State Bar of Georgia Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP) With Contributions Paid Through June 30, 2025

Dues	2025-26 Dues Season	2024-25 Dues Season	2023-24 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	50,592	50,114	49,695
Active - Number Paid	33,938	43,317	42,632
Inactive - Number Paid	5,548	8,074	8,237
Total Number of Members With Dues Paid	39,486	51,391	50,869
Percent of Total Members With Dues Paid	78.0%	102.5%	102.4%
Number of Members Who Made A Contribution	1,545	3,460	3,575
Percent of Members Who Made A Contribution	3.9%	6.7%	7.0%
Total Contribution Amount	\$ 179,952	\$ 485,947	\$ 490,605
Average Contribution Amount	\$ 116	\$ 140	\$ 137

GLSP Contribution Amounts by Dues Year

2025 - 2026	\$	179,952
2024 - 2025	\$	485,947
2023 - 2024	\$	490,605
2022 - 2023	\$	483,850
2021 - 2022	\$	478,287
2020 - 2021	\$	436,815
2019 - 2020	\$	366,674
2018 - 2019	\$	295,454
2017 - 2018	\$	312,251
2016 - 2017	\$	276,487
2010 2011	<u> </u>	2.0,10.

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 Page 19 June 2025 Financial Statements

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State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025	\$ 2,423,119	58,915 43,328 815,798	918,041	434,935 11,493 6,961 4,632 21,572 1,286 1,286	515,234
Governmental Legislative Affairs For the	Beginning Balance	Income: Interest and Dividend Income Gain/Loss Investment Interest Allocation Miscellaneous Income	Total Income	Expenditures: Staff and Contract Lobbyists Grassroots Efforts Travel Legislative Guests/Meetings Shared Office Allocation Computer Hardware Miscellaneous	Total Expenditures

Net Donor Temporarily Restricted Balance

\$ 2,825,925

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State Bar of Georgia Summary of Client Security Fund Activity For the Year To Date Period Ending June 30, 2025	State of Clie o Date	State Bar of Georgia of Client Security Fur o Date Period Ending	State Bar of Georgia Summary of Client Security Fund Activity the Year To Date Period Ending June 30, 2	ity), 2025		
		2022 June 30	2023 June 30	2024 June 30	24	June 30, 2025
Fund Balance, Beginning of Year	\$	1,798,187 \$	1,634,260	\$ 2,212,202	8	2,782,908
Income: Interest and Dividend Income		26,218	33,117	44,364	4	60,224
Gain/Loss Investment Interest Allocation		(79,620)	19,577	92,242	N C	47,344
Restitution Income		85,621	18,445	821) -	13,207
Total Income	€	109,809 \$	822,819	\$ 897,477	\$ 2	888,400
Expenses:		000	23 000	90	c	000 62
Client Security Fund Claims Payments		186.737	159.879	239,968	0 00	870.020
Bond Premium Amortization		8,444	4,288	5,737	7	3,704
Investment Service Fees	ļ	5,555	7,710	8,066	9	9,064
Total Expenses	\$	273,736 \$	244,877	\$ 326,771	\$	955,788
Net Income	€	(163,927) \$	577,942	\$ 570,706	\$	(67,388)

Fund Balance, End of Period

2,715,520

2,782,908 \$

2,212,202

1,634,260 \$

Administration		Expo For the	State enditure Current F	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	rgia Operations y June 30, 2	025		
	_	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Overtime	€	78,664 3,402		\$ 1,271,379 5,991	96.49 % \$ 126.67 %	1,317,620 \$	46,241 \$ (1,261)	1,234,436
Taxes and Benefits Pension		33,769 (1,344)	8.12 % (1.35) %	379,708 90,168	91.30 % 90.32 %	415,905 99,832	36,197 9,664	384,921 89,593
Total Personnel Services		114,491	6.23 %	1,747,246	92.06 %	1,838,087	90,841	1,711,490
Operating Expenses Shared Office Allocation		45.149	8.33 %	541.791	100.00 %	541.791	0	528.259
Postage and Freight		252	4.85 %	3,475		5,200	1,725	4,754
Printing Supplies		827	31.80 % 7.42 %	827 2.761	31.80 % 102.27 %	2,600	1,773	149 2.324
Telephone		375	8.33 %	4,500	100.00 %	4,500	0	4,500
Subscriptions and Books		0	0.00 %	4,392	162.05 %	2,710	(1,682)	4,674
Dues and Memberships Licenses and Certifications		356 0	15.08 %	1,961	83.09 % 0.00 %	2,360	366 0	2,417
Seminars and Training		949	17.57 %	3,244	% 20.09	5,400	2,156	4,798
Miscellaneous		11,183	95.18 %	42,995	365.91 %	11,750	(31,245)	9,404
Attorney and Staff Travel Executive Director Travel		10,484 5,635	23.34 % 25.61 %	38,672 28,788	86.11 % 130.86 %	44,910 22.000	6,238 (6,788)	38,462 23.476
Luncheons		358	11.92 %	1,531	51.02 %	3,000	1,469	1,161
Bank Fees		171	1.22 %	171	1.22 %	14,000	13,829	2,789
Credit Card Discount and Fees		101,710	34.48 %	303,875	103.01 % 253 97 %	295,000	(8,875)	303,678
Computer Software		0	0.00 %	1,588	88.22 %	1.800	212	0
Membership Software License		0	0.00 %	114,710	95.59 %	120,000	5,290	117,490
Contract Programming		0	0.00 %	0	% 00.0	2,500	2,500	11,919
Total Operating Expenses		177,650	16.35 %	1,099,345	101.15 %	1,086,821	(12,524)	1,060,344
Furniture/Equipment		0	0.00 %	0	% 00.0	0	0	904
Total Expenses	↔	292,142	% 66.6	\$ 2,846,591	97.32 % \$	2,924,908 \$	78,317 \$	2,772,738

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State Bar of Georgia Expenditure Statement - Operations -or the Current Period Ending June 30, 2025

		For the	Current Pe	For the Current Period Ending June 30, 2025	June 30, 2	025		
		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Salaries-Hourly PT Overtime Taxes and Benefits Pension	↔	195,828 2,531 521 80,832 6,599	6.49 % \$ 6.18 % \$ 9.22 % 3.42 %	3,009,566 26,764 1,024 816,417 183,526	99.69 65.34 % 36.56 % 93.12 % 95.09 %	3,018,850 \$ 40,961 2,800 876,739 193,011	9,284 \$ 14,197 1,776 60,322 9,485	2,792,696 24,178 2,962 748,392 187,255
Total Personnel Services		286,311	6.93 %	4,037,297	97.70 %	4,132,361	95,064	3,755,483
Operating Expenses Shared Office Allocation		53,276	8.33 %	639,310	100.00 %	639,310	0	623,340
Postage and Freight		1,254	7.84 %	16,140	100.88 %	16,000	(140)	13,972
Supplies		4,581	20.82 %	14,697	66.81 %	22,000	7,303	17,515
Telephone		225	5.00 %	2,952	65.59 %	4,500	1,548	2,580
Subscriptions and books Dues and Memberships		3,946	28.19 %	18,014	128.67 %	14,000	339	10.918
Seminars and Training		97.	0.63 %	14,928	119.42 %	12,500	(2,428)	9,515
Miscellaneous		47	2.38 %	1,512	75.62 %	2,000	488	2,468
Recruitment Costs		147	7.35 %	147	7.35 %	2,000	1,853	0 0
Attorney and Starr Travel Investigator Travel		18,822	23.98 %	83,262	73.71 %	6,000	(4,762)	6,999
Luncheons		523	26.15 %	4,052	202.64 %	2,000	(2,052)	3,338
Computer Hardware		3,012	0.00 %	7,028	0.00 %	0	(7,028)	2,746
Computer Software		0	0.00 %	9,056	85.44 %	10,600	1,544	8,306
Contract Labor		3,200	0.00 %	61,415	% 00.0	0	(61,415)	0
Contract Programming		11,250	26.25 %	69,600	348.00 %	20,000	(49,600)	28,575
Receiverships		0	% 00.0	6,738	89.83 %	7,500	762	4,206
State Disciplinary Board Panel		24,772	35.39 %	96,156	137.37 %	20,000	(26,156)	82,616
Lexis Online		3,523	14.59 %	21,167	82.65 %	24,150	2,983	25,568
Total Operating Expenses		131,296	13.71 %	1,092,203	114.06 %	957,560	(134,643)	931,193
Furniture/Equipment		822	16.44 %	3,657	73.15 %	5,000	1,343	1,594
Total Expenses	\$	418,429	8.21 % \$	5,133,157	100.75 % \$	5,094,921 \$	(38,236) \$	4,688,270

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Communications	Exp. For the	State enditure S Current P	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operations I June 30, 2	025		
	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	24,689	8.17 %	303,254	100.29 %	302,374	(880)	288,693
Overtime	696	96.90 %	1,089	108.85 %	1,000	(88)	472
Taxes and Benefits Pension	13,217	12.66 % 7.16 %	114,894	110.09 % 98.82 %	104,364	(10,530) 227	104,073 17.865
Total Personnel Services	40,259	9.43 %	438,347	102.64 %	427,075	(11,272)	411,103
Expenses	1	0000	00000	9000	10000	c	0.00
Snared Office Allocation	7,224	0.33 %	199,09	100.00 %	799,09	0 0	64,520
Postage and Freight	30	1.48 %	980	49.00 %	2,000	1,020	1,426
Telephone	25	833 %	006	100.00 %	006)	006
Subscriptions and Books	80	1.26 %	5,189	81.92 %	6,335	1,146	3,604
Dues and Memberships	0	0.00 %	405	100.00 %	405	0	405
Seminars and Training	0	0.00 %	1,230	27.33 %	4,500	3,270	3,098
Miscellaneous	0	0.00 %	293	59.28 %	1,000	407	84
Attorney and Staff Travel	4,134	25.06 %	17,622	106.80 %	16,500	(1,122)	12,651
Luncheons	0	0.00	20	50.61 %	100	20	0
Credit Card Discount and Fees	- (0.40 %	884	294.64 %	300	(584)	321
Computer Software	0 000	0.00 %	1,458	91.10%	1,600	142	1,458
Media Consultants	10,066	30.50 %	30,365	92.02 %	33,000	2,635	30,436
Website Maintenance	8,964	13.18%	07,242	98.88	68,000	(168 909)	05,263
Membership Certificates	547	27.30 %	2,185	109.21 %	2,000	(185)	2,574
Subtotal	31,121	13.87 %	385,380	171.79 %	224,327	(161,053)	482,452
Furniture/Equipment	0	0.00 %	0	% 00.0	0	0	0
Subtotal	71,379	10.96 %	823,726	126.45 %	651,402	(172,324)	893,556
Publications							
Bar Journal	0 0	% %	227,778	88.80 %	256,500	28,722	273,976
Supplemental Directory Special Publications and Printing	00	0.00	9,347	13.51 %	2,000	1,130	9,130 0
Total Publications	0	% 00.0	237,395	88.25 %	269,000	31,605	283,106
Total Communications	71,379	7.76 %	1,061,121	115.29 %	920,402	(140,719)	1,176,662

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State Bar of Goorgia

ee Arbitration		Exp For the	State enditure S Current Pe	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operations June 30, 20	25		
		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services	6	700 00	900	052 470	9 /0 92 90	00000	7	248 257
Overtime	9	40,004	% 00.0	232,470				246,337
Taxes and Benefits		13,111	10.75 %	130,525	106.99 %	121,994	(8.531)	108,623
Pension		402	2.44 %	15,508	94.10 %	16,480	972	11,941
Total Personnel Services		33,517	8.31 %	398,515	98.85 %	403,134	4,619	368,943
Operating Expenses								
Shared Office Allocation		7,224	8.33 %	86,687	100.00 %	86,687	0	84,520
Postage and Freight		215	2.59 %	3,304	39.81 %	8,300	4,996	4,404
Printing		0	0.00 %	0	0.00 %	4,200	4,200	1,706
Supplies		437	21.85 %	832	41.70 %	2,000	1,165	1,856
Subscriptions and Books		0	0.00 %	1,240	65.27 %	1,900	099	1,415
Dues and Memberships		0	0.00 %	300	% 29.99	450	150	310
Seminars and Training		77	7.70 %	380	38.05 %	1,000	620	0
Miscellaneous		750	22.69 %	1,245	95.73 %	1,300	55	740
Attorney and Staff Travel		2,331	93.24 %	2,331	93.24 %	2,500	169	3,145
Luncheons		0	0.00 %	699	26.77 %	2,500	1,831	1,928
Computer Hardware		0	0.00 %	0	0.00 %	0	0	089
Contract Labor		000'9	8.00%	72,000	% 00.96	75,000	3,000	72,000
Contract Programming		0	% 00.0	4,163	69.38 %	6,000	1,837	3,000
Total Operating Expenses		17,034	8.88 %	173,154	90.26 %	191,837	18,683	175,704
Total Expenses	€9	50,551	8.50 % \$	571,669	\$ % 80.96	594,971 \$	23,302 \$	544,647

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State Bar of Georgia	Income Statement	For the Current Period Ending June 30, 2025
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		For the C	urrent Per	For the Current Period Ending June 30, 2025	June 30, 20)25		
	ž	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Consultation Publications Vendor Directory Miscellaneous Income	⇔	75 0 0 0 0 0	5.00 % 0.00 % 0.00 % 9.33 %	5,400 65 7,261 1,583	360.03 % \$ 65.00 % 90.76 % 211.00 %	1,500 \$ 100 8,000 750	(3,900) \$ 35 739 (833)	2,171 50 11,170 1,580
Total Revenues		145	1.40 %	14,309	138.25 %	10,350	(3,959)	14,971
Personnel Services Salaries Overtime Taxes and Benefits Pension		19,637 390 10,575 (1,467)	6.86% 15.61% 9.31% (7.94)%	240,648 2,627 95,732 15,469	84.04 % 105.09 % 84.28 % 83.73 %	286,349 2,500 113,588 18,476	45,701 (127) 17,856 3,007	265,614 1,772 90,307 14,321
Total Personnel Services		29,135	6.92 %	354,476	84.22 %	420,913	66,437	372,014
Operating Expenses								
Shared Office Allocation		7,224	8.33 %	86,687	100.00 %	86,687	0	84,520
Postage and Freight		52	2.59 %	1,039	51.96 %	2,000	961	1,122
Pillting Silsen		0 0	% 60.7	707	% 60.7	000,	923	2002
Supplies		75	% % 33 %	900	100 00 %	000,1	076	006
Subscriptions and Books		1,132	16.39 %	4,343	62.94 %	006'9	2,557	2,798
Dues and Memberships		546	30.33 %	943	52.42 %	1,800	857	720
Seminars and Training		1,139	26.00 %	2,269	151.26 %	1,500	(269)	1,339
Miscellaneous		750	214.29 %	750	214.29 %	320	(400)	200
Attorney and Staff Travel		2,946	29.60 %	11,144	112.00%	9,950	(1,194)	5,961
Credit Card Discount and Fees			0.00	153	43.53 %	350	197	345
Computer Software		377	5.35 %	5,496	78.14 %	7,034	1,538	4,706
Total Operating Expenses		14,317	11.96 %	114,381	95.58 %	119,671	5,290	103,411
Total Expenses		43,452	8.04 %	468,857	86.73 %	540,584	71,727	475,425
Solo and Small Firm		(25)	(1.25) %	(4,022)	(201.09) %	2,000	6,022	4,900
Showcase Programs		0	0.00 %	0	0.00 %	0	0	(10)
Net Income	₩.	(43,332)	8.20 % \$	(458,570)	86.81 % \$	(528,234) \$	(69,664) \$	(455,563)

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Young Lawyers Division

State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025

		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services								
Salaries	↔	11,120		\$ 136,474	103.08 % \$	132,400 \$	(4,074) \$	127,061
Overtime		304	60.81 %	922	184.39 %	200	(422)	488
Taxes and Benefits		5,064	8.08 %	062'09	97.01 %	62,660	1,870	57,579
Pension		808	10.09 %	8,127	101.75 %	7,987	(140)	7,404
Total Personnel Services		17,294	8.50 %	206,313	101.36 %	203,547	(2,766)	192,532
Operating Expenses								
Shared Office Allocation		3,612	8.33 %	43,343	100.00 %	43,343	0	42,261
Postage and Freight		0	0.00 %	29	0.00 %	0	(29)	0
Printing		0	0.00 %	257	0.00 %	0	(257)	0
Supplies		0	0.00 %	209	52.21 %	400	191	322
Telephone		75	8.33 %	006	100.00 %	006	0	006
Subscriptions and Books		73	2.92 %	3,950	157.98 %	2,500	(1,450)	1,856
Dues and Memberships		0	0.00 %	135	% 00.06	150	15	135
Seminars and Training		0	0.00 %	613	81.73 %	750	137	820
Miscellaneous		0	0.00 %	472	0.00 %	0	(472)	0
Attorney and Staff Travel		2,281	16.01 %	19,065	133.79 %	14,250	(4,815)	13,536
Credit Card Discount and Fees		က	0.00 %	35	% 00.0	0	(32)	59
Computer Software		0	0.00 %	729	91.10 %	800	71	729
Committee Brochures		203	2.70 %	202	2.70 %	7,500	7,298	0
President		3,685	18.43 %	15,133	22.66 %	20,000	4,867	14,446
President Elect		3,058	22.65 %	8,031	59.49 %	13,500	5,469	7,151
Immediate Past President		1,500	13.63 %	8,047	73.15 %	11,000	2,953	9,595
Treasurer		0	0.00 %	2,500	100.00 %	2,500	0	1,300
Secretary		381	15.27 %	2,500	100.00 %	2,500	0	1,300
Meetings		0	0.00 %	47,500	100.00 %	47,500	0	47,500
Total Operating Expenses		14,871	8.87 %	153,650	91.68 %	167,593	13,943	141,910
Committees Activities								
Committees Income Committees Expense		13.976	0.00 %	(8,450) 83.519	211.25 %	(4,000) 81,950	4,450	(6,905) 92,478
				0			(0001)	í
Total Committees Activities		13,976	17.93 %	75,069	96.30 %	77,950	2,881	85,573
Total Expenses	₩	46,141	10.27 %	\$ 435,031	\$ % 28.96	449,090 \$	14,059 \$	420,015
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Unauthorized Practice of Law		Expo For the	State enditure S Current Pe	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operation June 30, 3	IS 2025			
	-	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	ب	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Overtime Taxes and Benefits Pension	₩	15,146 0 12,092 (506)	2.55 % \$ 0.00 % 5.59 % (1.25) %	544,646 0 175,413 36,560	91.71% \$ 0.00% 81.12% 90.42%	593,865 250 216,233 40,436	6	49,219 \$ 250 40,820 3,876	566,639 0 202,982 37,397
Total Personnel Services		26,732	3.14 %	756,619	88.93 %	850,784		94,165	807,018
Operating Expenses Shared Office Allocation		10,836	8.33 %	130,030	100.00 %	130,030		0 {	126,781
Postage and Freight Printing		55 0	6.17 % 0.00 %	0	85.31 % 0.00 %	900 100		132 100	679 0
Supplies Subscriptions and Books		506 5	50.60 % 0.52 %	1,493 832	149.34 % 104.00 %	1,000		(493) (32)	1,457 669
Dues and Memberships Seminars and Training		592	84.57 %	1,202	171.71 %	700		(502)	610
Miscellaneous		00	0.00 %	423	42.26 %	1,000		577	00
Attorney and Staff Travel Investigator Travel		187	0.00 8.26 %	119	14.86 % 37.14 %	3,000		681 1.886	87 890
Luncheons		58	5.79 %	28	5.79 %	1,000		942	0
Contract Programming Lexis Online		722	0.00 %	7,650 4,278	0.00 % 100.65 %	0 4,250		(7,650)	0 4,259
Total Operating Expenses		12,961	% 00.6	147,967	102.70 %	144,080		(3,887)	135,432
Total Expenses	\$	39,693	3.99 %	904,586	\$ % 86.06	994,864	↔	90,278 \$	942,450

State Bar of Georgia

savannah Office		Exp. For the	State enditure Current	State Bar of Georgia iture Statement - Op rent Period Ending Ju	seorg nt - O ding	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	25		
	Σ	Current Month Actual	Month % of Budget	Yeart	o Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	₩	9.575	8.08 %	\$ 119.120	120	100.49 % \$	118.545 \$	\$ (225)	113.667
Overtime		0	0.00 %		173	69.30 %	250	7.7	0
Taxes and Benefits Pension		3,660 517	5.96 % 7.24 %	Ω.	8,162 7,061	94.69 % 98.90 %	61,423 7,139	3,261 78	59,331 6,588
Total Personnel Services		13,752	7.34 %	184,516	516	98.48 %	187,357	2,841	179,586
Operating Expenses Shared Office Allocation		1.806	8.33 %	21.672	672	100.00 %	21.672	0	21.130
Postage and Freight		0	0.00 %		14	27.57 %	150	109	2
Printing		0	0.00 %		0	% 00.0	100	100	0
Supplies		0	0.00 %		260	46.62 %	1,200	640	409
Telephone		289	7.85 %		6,794	90.59 %	7,500	902	6,989
Subscriptions and Books		0	0.00 %		181	90.16 %	200	19	192
Miscellaneous		0	0.00 %		0	% 00.0	4,000	4,000	10
Attorney and Staff Travel		0 (0.00 %		1,151	115.13 %	1,000	(151)	3,990
Luncheons Computer Hardware		စ္တ င	38.01 %		8 C	38.01 %	100		1 922
Computer Software		0	0.00 %		0	0.00 %	100	100	0
Equipment Maintenance and Rental		-	0.07 %		984	42.78 %	2,300	1,316	1,328
Rent and Utilities		7,405	8.46 %	93,848	848	107.19 %	87,550	(6,298)	83,951
Facilities Maintenance		0	0.00 %		602	20.26 %	3,500	2,791	3,015
Total Operating Expenses		9,839	7.61 %	125,978	978	97.38 %	129,372	3,394	122,941
Furniture/Equipment		0	0.00 %		0	% 00.0	0	0	4,444
Total Expenses	\$	23,591	7.45 %	\$ 310,494	494	98.03 % \$	316,729 \$	6,235 \$	306,971

State Bar of Georgia Expenditure Statement - Operations

		For the	Current P	For the Current Period Ending June 30, 2025	June 30, 2	025		
	Σ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Salaries-Hourly PT Taxes and Benefits Pension	∨	5,376 1,740 1,087 (1,359)	8.08 % 5.79 % 4.99 % (23.41) %	\$ 66,942 21,370 19,755 3,962	100.57 % \$ 71.16 % 90.58 % 68.25 %	66,564 \$ 30,030 21,810 5,805	(378) \$ 8,660 2,055 1,843	63,510 20,837 19,960 3,698
Total Personnel Services		6,844	5.51 %	112,029	90.19 %	124,209	12,180	108,005
Operating Expenses Shared Office Allocation		1,355	8.33 %	16,254	100.00 %	16,254	0	15,847
Postage and Freight Printing		1 0	2.25 %	596 17	91.76 %	650 100	83 83	490
Supplies		224	8.94 %	2,607	104.27 %	2,500	(107)	2,111
Telephone		531	7.59 %	6,363	% 06.06	2,000	637	6,385
Subscriptions and Books		00	0.00 %	345	86.33 %	400	55	358
Miscellaneous		00	% 00:00 %	17	8.10 %	200	183	00
Attorney and Staff Travel		0	% 00.0	1,249	124.90 %	1,000	(249)	3,395
Luncheons		22	22.08 %	7	71.32 %	100	50	24
Computer Software		00	0.00 %	00	0.00 %	200	200	000
Equipment Maintenance and Rental		-	0.07 %	992	49.59 %	2,000	1,008	1,328
Rent and Utilities		1,848	8.04 %	21,602	93.92 %	23,000	1,398	20,622
raciilles Maintenance		1,130	% 00.71	067,6		0,400	0/0	4,100
Total Operating Expenses		5,125	8.43 %	55,843	91.84 %	60,804	4,961	55,252
Furniture/Equipment		0	0.00 %	42,027	0.00 %	0	(42,027)	1,402
Total Expenses	€	11,969	6.47 %	\$ 209,899	113.45 % \$	185,013 \$	(24,886) \$	164,659

Law

Law Related Education		For the	State Inco Current F	State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025	gia nt y June 30,	2025		
	Θ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Miscellaneous Income	₩	0	0.00 %	\$ 264	0.00 %	0 \$	\$ (264)	\$ 227
Total Revenues		0	0.00 %	264	0.00 %	0	(264)	227
Personnel Services Salaries Overtime Taxes and Benefits Pension		19,320 0 7,939 1,215	8.16 % 0.00 % 6.55 % 7.53 %	239,048 0 115,730 15,999	100.92 % 0.00 % 95.47 % 99.20 %	236,860 350 121,224 16,128	(2,188) 350 5,494 129	226,032 0 111,763 14,900
Total Personnel Services		28,474	7.60 %	370,777	% 66.86	374,562	3,785	352,695
Operating Expenses Shared Office Allocation		5,418	8.33 %	65,015	100.00 %	65,015	0	03,390
Postage and Freight		00	0.00 %	17	34.78 %		33	
Supplies		329	32.88 %	202	76.72 %		232	1,343
Subscriptions and Books		00	0.00	180	72.13 %		70	385
Seminars and Training		00	0.00	0	0.00	1,000	1,000	300
Miscellaneous		0	0.00%	310	62.06 %		190	377
Attorney and Staff Travel Luncheons		323	7.01 % 0.00 %	1,517	32.91 % 0.00 %		3,091	2,037
Total Operating Expenses		6,070	8.26 %	67,960	92.43 %	73,523	5,563	67,832
Total Expenses		34,544	7.71 %	438,737	97.91 %	448,085	9,348	420,527
Net Income	↔	(34,544)	7.71 %	\$ (438,473)	97.85 %	\$ (448,085)	\$ (9,612)	\$ (420,300)

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State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

	ш	or the Cu	Income urrent Perio	Income Statement For the Current Period Ending June 30, 2025	ne 30, 2025			
	Mont	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Miscellaneous Income	0	(4)	\$ % (90.0)	36	\$ %99.0	5,500 \$	5,464 \$	337
Total Revenues		(4)	% (90.0)	36	% 99.0	5,500	5,464	337
Personnel Services Salaries Taxes and Benefits Pension		6,055 3,576 332	8.08 % 11.74 % 7.37 %	75,396 30,740 4,463	100.57 % 100.89 % 99.04 %	74,970 30,469 4,506	(426) (271) 44	71,531 33,990 4,165
Total Personnel Services		9,963	% 90.6	110,599	100.59 %	109,945	(654)	109,686
Operating Expenses			0				(
Shared Office Allocation Postage and Freight		1,806	8.33 0.14 %	21,672	100.00 %	21,672	0 469	21,130
Supplies		0	0.00%	66	11.57 %	800	707	234
Subscriptions and Books		20	7.78 %	635	70.59 %	006	265	1,304
Dues and Memberships		296	148.00 %	296	148.00 %	200	(96)	0
Miscellaneous		0 0	0.00 %	0 624	0.00 %	200	200	7 708
Attorney and Stall Travel Luncheons		66. -	% 00.0	333	66.62 %	3,150	(461)	2,403
Credit Card Discount and Fees		0	0.00%	2	1.49 %	100	86	9
		0	0.00 %	3,235	107.84 %	3,000	(235)	0
Computer Software		0	% 00.0	364	91.10 %	400	36	0
Total Operating Expenses		3,772	12.00 %	30,292	96.40 %	31,422	1,130	26,631
HSMT Events								
Sponsorships		0	0.00 %	0	0.00 %	0	0	(10,000)
Law Academy		0	0.00%	4,740	86.18 %	2,500	260	6,203
Regional Competition		2,767	(83.86) %	(4,069)	123.28 %	(3,300)	169	(7,458)
State Competition		0 (0.00 %	15,457	90.92 %	17,000	1,543	16,754
National Competition		0 :	0.00	18,296	107.63 %	17,000	(1,296)	17,087
District Competition		211	2.11%	11,745	117.44 %	10,000	(1,745)	8,938
ZUTS NHSMTC-Amens		0	0.00%	0	0.00 %	0	0	(81)
Total HSMT Events		2,978	6.45 %	46,169	99.93 %	46,200	31	31,505
Total Expenses		16,713	8.91 %	187,059	99.73 %	187,567	508	167,822

Page 1 June 2025 Financial Statements

Net Income

State Bar of Georgia

	Prior Year	(167,485)
	Remaining Balance of Budget	4,956
	Budget	(182,067)
ne 30, 2025	YTD % of Budget	102.72 %
State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025	Year to Date Actual	(187,023)
State Bar Income urrent Perio	Month % of Budget	9.18 %
For the C	Current Month Actual	(16,716)
		•

Institute of Continuing Legal Education

State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Program Revenue Registration Revenue Program Discounts Other	218,715 (595) 12,679	4.86 % 0.60 % 0.00 %	4,744,145 (21,544) 20,078	105.43 % 21.54 % 0.00 %	4,500,000 (100,000)	(244,145) (78,456) (20,078)	4,827,097 (33,421) (3,090)
Total Program Revenue	230,799	5.25 %	4,742,679	107.79 %	4,400,000	(342,679)	4,790,586
Total Program Expenditures	328,037	20.48 %	1,700,923	106.21 %	1,601,500	(99,423)	1,773,059
Net Margin on Programs	(97,238)	(3.47) %	3,041,755	108.69 %	2,798,500	(243,255)	3,017,527
Personnel Services		1					
Salaries Full Time	96,707	7.02 %	1,122,077	81.51 %	1,376,679	254,602	1,060,131
Salaries Part Time	3,294	10.46 %	23,694	75.22 %	31,500	7,806	22,894
Overlime Pay	087	3.72%	14,563	69.35 %	21,000	0,437	16,447
l axes and benefits Pension	29,993	5.96 %	307,427	61.13%	502,927	195,500	267,900
	(966,91)	(44.04) /0	43,022	00.07	10,0	604,42	00,730
Total Personnel Services	112,436	5.61 %	1,517,083	75.63 %	2,005,917	488,834	1,417,665
Operating Expenses							
Shared Office Allocation	36,119	8.33 %	433,433	100.00 %	433,433	0	380,343
Board and Committee Meetings	1,657	41.41 %	1,888	47.20 %	4,000	2,112	1,108
Dues and Memberships	3,998	57.11 %	6,641	94.86 %	2,000	329	4,705
Licenses and Certification	0	0.00 %	610	20.35 %	3,000	2,390	611
Seminars and Training	202	2.30 %	4,997	22.71 %	22,000	17,003	8,822
Attorney and Staff Travel	4,734	23.67 %	14,123	70.62 %	20,000	2,877	18,333
Supplies	0 (0.00%	10,040	100.40 %	10,000	(40)	19,568
Printing	0 0 0	0.00 %	0 7	0.00%	1,500	1,500	000
Subscriptions and Books	7,430	7.82 %	79,711	83.91 %	000,58	15,289	77,830
Postage and Preignt	0	5.93%	100	25.32 %	067	180	08 -
l elephone	525	6.48 %	5,400	% 19.99	8,100	2,700	5,475
Internet Services	329	7.29 %	2,329	51.77 %	4,500	2,171	231
Computer Software	0	0.00 %	_	0.10 %	1,000	666	0
Contract Programming	0	0.00 %	0	0.00 %	3,000	3,000	0
Computer Hardware	0	0.00 %	14,848	0.00 %	0	(14,848)	11,670
Miscellaneous	365	7.30 %	3,903	78.07 %	2,000	1,097	3,594
Created on 09/09/2025, 11:17 AM EDT State Bar of Georgia		_	Page 34		Jur	P June 2025 Financial Statements	Page 1 ments

Page 2 June 2025 Financial Statements

State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025 Institute of Continuing Legal Education

	Σ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Professional Fees		0	0.00 %	0	0.00 %	5,000	5,000	0
Credit Card Discount and Fees		3,641	3.03 %	102,002	82.00 %	120,000	17,998	105,783
Banking Fees		0	0.00 %	_	0.38 %	200	199	0
Luncheons		0	0.00 %	4,112	102.82 %	4,000	(112)	4,058
Contract Labor		0	0.00 %	1,020	102.00 %	1,000	(20)	0
Volunteer Recognition		777	15.54 %	6,841	136.81 %	2,000	(1,841)	2,865
Marketing Materials		12,141	80.94 %	14,736	98.24 %	15,000	264	335
Total Operating Expenses		72,236	9.41 %	706,700	92.02 %	767,983	61,283	645,361
Furniture and Equipment Furniture and Equipment		0	0.00 %	0	0.00 %	2,500	2,500	2,505
Total Expenses		184,672	6.65 %	2,223,783	80.10 %	2,776,400	552,617	2,065,531
Net Income Before Other Inc and Exp		(281,910)	(1,275.61) %	817,972	3,701.23 %	22,100	(795,872)	951,996
Other Income and Expenses Interest Income Bond Premium Amortization Investment Service Fees		39,065 (490) (849)	39.06 % 8.16 % 8.49 %	159,653 (763) (10,234)	159.65 % 12.72 % 102.33 %	100,000 (6,000)	(59,653) (5,237) 234	132,063 (588) (9,817)
Total Other Income and Expenses		37,726	44.91 %	148,656	176.97 %	84,000	(64,656)	121,658
Net Income	6	(244,184)	(230.15) %	\$ 966,629	911.05 %	106,100	(860,529)	1,073,654

State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025

Other Activities and Miscellaneous	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Other Activities	8,565	23.79 %	31,625	87.85 %	36,000	4,375	22,075
SBG President Elect	6,215	28.25 %	10,875	49.43 %	22,000	11,125	22,000
SBG Treasurer	859	19.08 %	4.500	100.00 %	4.500	000,1	3.758
SBG Secretary	1,118	24.84 %	4,500	100.00 %	4,500	0	4,000
SBG Immediate Past President	3,510	24.21 %	6,179	42.61 %	14,500	8,321	11,912
SBG Past President	0 0	0.00 %	0 000	0.00 %	1,620	1,620	1,620
Exec. Comm B. Gary Spencer	(251)	(8.38) %	000,6	100.00 %	000,8		2,470
Exec. Comm Shiriki Cavitt Jones	668	22.28 %	3,000	100.00 %	3,000	0	2,551
Exec. Comm David S. Lipscomb	296	32.22 %	1,568	52.28 %	3,000	1,432	2,305
Exec. Comm Martin E. Valbuena	1,762	75	3,000	8	3,000	0	1,066
Exec. Comm Joyce Gist Lewis	1,289	42.97 %	2,610	86.97 %	3,000	390	3,000
Total Officer's Expenses	24,903	24.30 %	73,857	72.08 %	102,470	28,613	79,024
BOG and Member Meetings	386,556	65.72 %	651,918		588,200	(63,718)	230,767
Supreme Court Meetings	15,052	20.07 %	81,230	108.31 %	75,000	(6,230)	79,023
Executive Committee Meetings	2	0.01 %	56,444	134.39 %	42,000	(14,444)	7,681
	12,742	63.71 %	24,814	124.07 %	20,000	(4,814)	0
Lawyer's Assistance Program	0	0.00 %	154,674	86.79 %	155,000	326	125,000
	29,731	9.27 %	323,193	100.78 %	320,694	(2,499)	306,746
State Disciplinary Board Lawyers	2,625	8.33 %	31,500	100.00 %	31,500	0	30,000
Elections	0	0.00 %	16,646	83.23 %	20,000	3,354	17,674
Dues Notice	0	0.00	32,984	71.72 %	45,990	13,006	34,148
Letters of Good Standing	235	9.38%	2,033	81.32 %	2,500	467	1,713
	1,218	11.08 %	12,442	113.11 %	11,000	(1,442)	9,727
50 Year Certificates	_	0.02 %	4,823	80.37 %	6,000	1,178	4,671
Fastcase	0	% 00.0	462,428	101.63 %	455,000	(7,429)	297,471
Membership Database Project	439	0.00%	110,713	% 00.0	0	(110,713)	57,911
State Bar Committees	8,016	40.08 %	16,486	82.43 %	20,000	3,514	16,070
Georgia Diversity Program	0 (0.00%	10,000	100.00 %	10,000	0 į	10,000
ABA Delegate Breakfast	0	0.00%	2,413	96.54 %	2,500	8/	2,117
Commitment to Equality Awards		0.00	2,500	100.00 %	2,500	00	2,500
Rood Dramium Amortization	(1000)	7 66) %	11,000	70:00	200,000	17 310	22,-00
Investment Service Fees	(14,354)	(41.01) %	28,407	81.16%	35,000	6,593	29,957

State Bar of Georgia Expenditure Statement - Operations or the Current Period Ending June 30, 2025

	Expe For the C
Other Activities and Miscellaneous	Current Month Actual
Access to Justice/Pro Bono	7,500
Total Miscellaneous	447,545
Pro Bono	17,685
Total Other Activities	490,133
Unallocated Services	(65,936)
Grand Total	1,986,731

ing e of get Prior Year	0 602	52) 1,641,755	0 212,216	39) 1,932,995	87 (118,053)	17,723,696
Remaining Balance of Budget		(165,452)		(136,839)	168,187	572,214
Budget	7,500	1,934,550	212,216	2,249,236	0	19,282,420
YTD % of Budget	100.00 %	108.55 %	100.00 %	106.08 %	% 00.0	97.03 %
Year to Date Actual	7,500	2,100,002	212,216	2,386,075	(168,187)	18,710,206
Month % of Budget	100.00 %	23.13 %	8.33 %	21.79 %	% 00:0	10.30 %
Current Month Actual	7,500	447,545	17,685	490,133	(65,936)	1,986,731

State Bar of Georgia Expenditure Statement - Operations

	Current Month	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Shared Office Overhead Rubbish Removal	227	% 00 0	2.724	% 00 0	C	(2.724)	C
Telephone	231	0.43 %	49,263	91.23 %	54,000	4,737	52,326
Computer Software	2,303	43.46 %	6,369	120.17 %	5,300	(1,069)	6,854
Internet Services	3,416	13.55 %	22,708	90.11 %	25,200	2,492	24,868
Equipment Rental	2,130	3.71 %	55,396	96.34 %	22,500	2,104	55,738
Kitchen	2,079	7.70 %	24,026	88.98 %	27,000	2,974	21,953
Facilities Maintenance	1,030	8.87 %	14,652	% 89.76	15,000	348	13,423
Payroll Service	2,472	14.13 %	16,974	% 00.76	17,500	526	16,538
Audit	0	0.00 %	31,252	96.16 %	32,500	1,248	27,023
Building and Other Insurance (Not Group)	18,127	7.25 %	220,548	88.22 %	250,000	29,452	237,469
Furniture/Equipment	0	0.00	5,615	00.00	0	(5,615)	4,668
Supplies and Printing	1,886	3.93 %	24,343	50.71 %	48,000	23,657	47,494
Subtotal	33,901	6.37 %	473,870	89.07 %	532,000	58,130	508,354
Other Services							
Accounting	36,977	6.41 %	577,542	100.06 %	577,214	(328)	546,817
Human Resources	24,796	8.60 %	291,976	101.23 %	288,433	(3,543)	273,786
Mailroom	(918)	(1.02) %	63,444	70.72 %	89,715	26,271	84,164
Receptionist	2,580	3.71 %	61,206	87.94 %	69,604	8,398	46,838
Information Technology	44,721	4.76 %	859,682	91.56 %	938,940	79,258	768,833
Subtotal Other Services	108,156	5.51 %	1,853,850	94.40 %	1,963,906	110,056	1,720,438
Total Shared Office Overhead	142,056	2.69 %	2,327,720	93.26 %	2,495,906	168,186	2,228,792
Total Allocated Services	(207,992)	8.33 %	(2,495,906)	100.00 %	(2,495,906)	0	(2,346,845)
Unallocated Services	(65,936)	0.00 %	(168,187)	0.00 %	0	168,187	(118,053)

		For th	Expend ne Year	State Editure Siture To Date	3ar o tater Peric	State Bar of Georgia iture Statement - Ope o Date Period Ending	State Bar of Georgia Expenditure Statement - Operations For the Year To Date Period Ending June 30, 2025	202	2
	Curre	Current Month Actual	Month % of Budget	Yeart	o Date Actual	YTD % of Budget	Budget		Prior Year
Related Organizations Shared Office Allocations									
Georgia Bar Foundation Continuing Legal Education	⇔	353	8.33 %	. α ω	4,240 86.687	100.00 %	\$ 4,240 86,687	↔	4,000
Pro Bono		4.566	8.33 %		54.784	100.00 %	54,784		51,503
Professionalism		353	8.33 %		4,240	100.00 %	4,240		4,000
Sections		5,418	8.33 %		65,015	100.00 %	65,015		63,391
Subtotal		17,914	8.33 %	214,966	996	100.00 %	214,966		186,284
State Bar Departments - Shared Office Allocations									
Membership		9,030	8.33 %	_	08,358	100.00 %	108,358		105,651
Meetings		3,612	8.33 %		43,343	100.00 %	43,343		42,261
Executives		32,507	8.33 %	m	060	100.00 %	390,090		380,347
General Counsel		53,276	8.33 %	9	310	100.00 %	639,310		623,340
Communications		7,224	8.33 %		86,687	100.00 %	86,687		84,520
Fee Arbitration		7,224	8.33 %		86,687	100.00 %	86,687		84,520
Law Practice Management		7,224	8.33 %		86,687	100.00 %	86,687		84,520
Savannah Office		1,806	8.33 %		21,672	100.00 %	21,672		21,130
Tifton Office		1,354	8.33 %		16,254	100.00 %	16,254		15,847
Younger Lawyers		3,612	8.33 %		43,343	100.00 %	43,343		42,261
Unauthorized Practice of Law		10,836	8.33 %	_	30,030	100.00 %	130,030		126,781
Law Related Education		5,418	8.33 %		65,015	100.00 %	65,015		63,390
High School Mock Trial		1,806	8.33 %		21,672	100.00 %	21,672		21,130
ICLE		36,119	8.33 %	433,433	433	100.00 %	433,433		380,343
Conference Center		7,224	8.33 %		86,687	100.00 %	86,687		84,520
Legislative Program		1,806	8.33 %		21,672	100.00 %	21,672		0
Subtotal	ļ	190,078	8.33 %	2,280,940	940	100.00 %	2,280,940		2,160,561
Total Allocated Services	₩	207,992	8.33 %	\$ 2,495,906	906	100.00 %	\$ 2,495,906	\$	2,346,845

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Sections		Exp For the	State enditure S Current P	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operations June 30, 20	125		
	_	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Overtime	₩	15,684 2,243	8.56 % \$ 320.45 %	1	102.29 % \$ 735.10 %	183,225 \$	(4,197) \$ (4,446)	176,522 2,383
laxes and benefits Pension		4,691	0.20 %	43,442 11,457	91.87 %	43,187 12,472	(255) 1,015	41,158 7,858
Total Personnel Services		22,643	9.45 %	247,467	103.29 %	239,584	(7,883)	227,921
Operating Expenses Shared Office Allocation Doctage and Freight		5,418	8.33 %	65,015	100.00 %	65,015	0 0	63,391
Printing		0	0.00 %	212	0.00%	0	(212)	0
Supplies Telephone		0 75	0.00 8.33 %	4,905 900	327.01 % 100.00 %	1,500 900	(3,405) 0	3,159 900
Subscriptions and Books		~ 0	0.32 %	727	33.69 %	2,160	1,433	2,873
Seminars and Training		0	0.00 %	0	0.00 %	1,000	1,000	0
Miscellaneous Attorney and Staff Travel		0 1 579	0.00 %	1,191	119.01 %	1,000	(191)	493 4 793
Luncheons		0	% 00.0	0	0.00 %	2009	2009	0
Computer Hardware		00	0.00	0 0	0.00 %	200	500	00
Special Meetings		00	0.00 %	0	% 00.0 0.00 %	1,500	1,500	1,889
Total Operating Expenses		7,088	8.74 %	75,726	93.36 %	81,110	5,384	78,137
Furniture/Equipment		0	0.00 %	0	% 00:0	0	0	688
Total Expenses	₩	29,731	9.27 % \$	323,193	100.78 % \$	320,694 \$	(2,499) \$	306,746

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State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

	Ĕ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues After Hours Fees Beverage Service Cleaning Fees Audio Video Support	₩	350 142 0 0	4.12 % \$ 0.00 % 0.00 %	14,563 1,272 280 300	171.32 % \$ 127.20 % 28.00 % 15.00 %	8,500 \$ 1,000 1,000 2,000	(6,063) \$ (272) 721 721 721	9,633 524 1,432 2,228
Total Revenues		492	3.94 %	16,415	131.32 %	12,500	(3,915)	13,817
Personnel Services Salaries Overtime Taxes and Benefits Pension		19,000 0 11,057 (3,580)	7.66 % 0.00 % 11.27 % (23.31) %	236,407 3,177 95,640 10,496	95.33 % 42.36 % 97.48 % 68.35 %	247,995 7,500 98,111 15,356	11,588 4,323 2,471 4,860	240,245 4,257 91,014 14,456
Total Personnel Services		26,477	7.18 %	345,720	93.70 %	368,962	23,242	349,972
Operating Expenses Shared Office Allocation Postage and Freight		7,224	8.33 %	86,687	100.00 %	86,687	00	84,520
Supplies Subscriptions and Books		00	0.00 % 0.00 %	2,054 5,837	82.16 % 83.38 %	2,500 7,000	446 1,163	3,108 5,969
Miscellaneous Attorney and Staff Travel Luncheons		000	% % % 0.00 0	51 206 0	10.21 % 41.16 % 0.00 %	200 200	449 294 0	118 0 66
Credit Card Discount and Fees Computer Software		0,40	8.46 % 0.00 %	131	65.82 % 0.00 %	200	0 0 0	1,338
After Hours Security Contract Programming		00	0.00 0.00 %	00	0.00 0.00 %	500	500	00
Equipment Maintenance and Rental Furniture Repairs and Maintenance Kitchen		4 875 276	0.08 % 8.75 % 3.45 %	4,468 9,028 7,643	89.36 % 90.28 % 95.53 %	5,000 10,000 8,000	532 972 357	4,043 12,441 5,894
Total Operating Expenses		8,396	6.92 %	116,105	95.65 %	121,387	5,282	117,613
Total Expenses		34,873	7.11 %	461,825	94.18 %	490,349	28,524	467,585
Furniture/Equipment		0	% 00.0	7,518	% 00.0	0	(7,518)	9,440
Net Income	⇔	(34,381)	7.19 %	(452,929)	94.78 % \$	(477,849) \$	(24,920) \$	(463,208)

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Other Bar Center Operations	For the Cu	State Bar of Georgia Income Statement irrent Period Ending Ju	State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025	30, 2025			
	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Interest and Dividend Income Gain/Loss Investment Interest Allocation Bar Center Assessments CCLC Contributions to Bar Center	\$ 58,613 39,491 0 858,390	57.46 % \$ 0.00 % 0.00 % 62.43 %	183,424 146,317 0 1,358,390	179.83 % \$ 0.00 % 0.00 % 98.79 %	102,000 \$ 0 200 1,375,000	(81,424) \$ (146,317) 200 16,610	132,667 263,476 0 1,393,988
Total Revenues	956,494	64.75 %	1,688,131	114.28 %	1,477,200	(210,931)	1,790,131
Operating Expenses Bond Premium Amortization Investment Service Fees Museum and 1st Floor Exhibit Audio Video, Furniture and Equipment Building Rehabilitation President's Boardroom	2,057 7,271 0 69 134,599	12.10 % 3.305 % 0.00 % 1.20 % 1,602.37 %	11,053 27,376 0 64,498 1,275,625 1,109	65.02 % 124.44 % 0.00 % 1,131.54 % 15,186.01 %	17,000 22,000 5,700 8,400	5,947 (5,376) 0 (58,798) (1,267,225) (1,109)	17,366 24,138 6,453 219,552 726,161
Total Operating Expenses	143,996	271.18 %	1,379,661	2,598.23 %	53,100	(1,326,561)	993,670
Total Expenses	143,996	271.18 %	1,379,661	2,598.23 %	53,100	(1,326,561)	993,670

796,462

1,115,630 \$

21.66 % \$ 1,424,100 \$

308,470

57.05 % \$

812,498

Net Income

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State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

	Z	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Income Rental Operations	€	83,042	10.93 % \$	983,600	129.42 % \$	760,000 \$	(223,600) \$	926,110
Total Revenues		83,042	10.93 %	983,600	129.42 %	760,000	(223,600)	926,110
Operating Expenses		!	;	:	,			
Personnel Management Salary		5,319	8.86 %	41,605	69.34 %	60,000	18,395	39,288
Administrative laxes and Benefits		882	5.26 %	17,335	103.18 %	16,800	(535)	14,793
Iravel Supplies		22	121.22 %	121	121.22 %	96	(572)	322
Telephone Expense		(282)	(13.81) %	1,648		2,040	392	2,491
Management Fees		5,703	8.27 %	67,440	97.74 %	000'69	1,560	65,476
Bank Fees		110	6.10 %	1,261	% 90.02	1,800	539	1,474
R&M Salaries		17,225	7.65 %	203,870	% 29.06	225,100	21,230	197,748
R&M Taxes and Benefits		1,661	1.72 %	67,871	70.12 %	96,800	28,929	69,992
R&M HVAC		36,281	54.48 %	107,427	161.30 %	009'99	(40,827)	54,904
R&M Plumbing		0	0.00	14,246	158.29 %	000'6	(5,246)	17,354
R&M Fire/Life Prevention		0 V	0.00 %	11,495	82.55 %	13,925	2,430	19,135
R&M Water Treatment		944	7.67 %	11,768	95.68 %	12.300	532	11.846
R&M Life Safety Contract		0	0.00%	14,925	124.37 %	12,000	(2,925)	23,922
R&M Tools/Radios		0	0.00 %	2,116	84.64 %	2,500	384	791
R&M Elevators		2,289	7.34 %	26,351	84.46 %	31,200	4,849	33,577
R&M Pest Control		929	17.88 %	3,948	104.44 %	3,780	(168)	3,720
R&M Rubbish Removal		1,711	12.23 %	18,926	135.19 %	14,000	(4,926)	15,125
R&M Other: Locks and Keys		0 (0.00	230	76.67 %	300	70	0
R&M Painting		0	0.00	0	0.00	9,000	0006	5,379
R&M Other: General Building		0 (0.00%	7,828	230.24 %	3,400	(4,428)	7,673
K&M Lobby		0 0	0.00%	0 000	0.00%	3,000	3,000	1,701
Oniforms		0 7	0.00	2,228	148.53 %	000,010	(728)	1,167
		00,-00	0.00	459, 199	123.49 %	000,088	(69, 199)	404,094
Water		2,540	3.91%	30,722	47.26 %	000,69	34,278	45,652
Gas		(5,234)	(16.35) %	24,044	75.14 %	32,000	956,7	23,277
Observed Contract		32,010	0.40 %	400,032	05.10 %	300,000	(20,032)	175,784
Grounds Supplies and Maintenance		15,136	6.64 %	6.954	99.34 %	7.000	9,27.1	5.578
Insurance		5,675	7.09 %	960,89	85.12 %	80,000	11,904	75,507
Total Operating Expenses		192,502	10.80 %	1,792,395	100.59 %	1,781,945	(10,450)	1,692,176

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Total Expenses Net Income

	Prior Year	1,692,176	(766,066)
	Remaining Balance of Budget	(10,450)	(213,150)
			₩
	Budget	1,781,945	79.14 % \$ (1,021,945)
	<u> </u>		\$
30, 2025	YTD % of Budget	100.59 %	79.14 %
State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025	Year to Date Actual	1,792,395	(808,795)
ar c e S iod	et %	9	
State Bi Incom	Month % of Budget	10.80 %	10.71 % \$
For the Cur	Current Month Actual	192,502	(109,460)
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State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

		For the Cur	rent Period	For the Current Period Ending June 30, 2025	30, 2025			
	Ψ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues Monthly Parking Operations Daily Parking Operations Special Events Parking Operations EV Charging Stations	∨	10,984 5,672 33,548 2,024	9.70 % \$ 56.49 % 7.46 % 0.00 %	125,262 75,696 516,673 3,886	110.64 % 753.94 % 114.82 % 0.00 %	\$ 113,220 \$ 10,040 450,000	\$ (12,042) (65,656) (66,673) (3,886)	\$ 115,838 54,862 413,350
Total Revenues		52,228	9.11 %	721,517	125.86 %	573,260	(148,257)	584,050
Operating Expenses Credit Card Eag. EV. Charding Stations		, 7	% 00 0	776	% 00 0	c	(770)	C
Salaries		9.082	% 66.9 % 66.9	119.424	91.87 %	130.000	10.576	98.946
Payroll Taxes		1,278	7.02 %	16,771	92.15 %	18,200	1,429	13,856
Workers' Compensation		1,186	6.59 %	15,563	86.46 %	18,000	2,437	12,855
Medical Ins/Benefits Uniforms		1,628	6.57 %	21,374	86.25 %	24,780	3,406	17,677
Repairs and Maintenance		942	3.62 %	35,321	135.85 %	26,000	(9,321)	24,913
Tickets		0	0.00 %	0	0.00 %	009	,009	0
Cell Phone/Beeper		(33)	(3.92) %	384	45.68 %	840	456	999
Office Expenses		3,922	38.11 %	10,742	104.39 %	10,290	(452)	10,290
Invoicing Expenses Bank Charges		445	8.56%	5,811	111.77 %	5,200	(611)	5,344
Credit Card Fees		1,161	12.22 %	8,412	88.55 %	9,500	1,088	7,836
Garage Insurance		1,148	10.44 %	13,780	125.27 %	11,000	(2,780)	12,110
Business License		0	0.00 %	833	29.06 %	1,410	222	873
Management Fee		350	8.33 %	4,200	100.00 %	4,200	0 763	4,200
Decumy		303	8.66 %	3 646	104 17 %	3,500	(146)	3,080
Equipment and Supplies		1,265	148.75 %	3,966	466.57 %	850	(3,116)	943
Miscellaneous		0	0.00 %	496	99.20 %	200	4	186
Cleaning		300	8.33 %	3,300	91.67 %	3,600	300	3,600
Fire Safety		0	0.00	0	0.00 %	2,500	2,500	0
Incentive Management Fees		200	8.33 %	6,000	100.00 %	6,000	0	6,000
Total Operating Expenses		29,815	8.52 %	343,008	% 90.86	349,810	6,802	291,446
Total Expenses		29,815	8.52 %	343,008	% 90.86	349,810	6,802	291,446
Net Income	s	22,413	10.03 % \$	378,509	169.39 %	\$ 223,450	(155,059)	\$ 292,603

Continuing Legal Education

State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

Remaining

	Σ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Balance of Budget	Prior Year
Revenues Interest and Dividend Income Gain/Loss on Investments	6	16,972	21.22 %	\$ 152,966 35,541	191.21 % \$ 0.00 %	\$ 000,08	(72,966) \$ (35,541)	103,395
Sponsor Fees		105,204	7.51%	1,414,573	101.04 %	1,400,000	(14,573)	1,416,509
Late renautes Attorneys Fees		10,494	3.00 %	302,206	86.34 %	350,000	47,794	370,163
Total Revenues		249,698	10.07 %	2,546,989	102.70 %	2,480,000	(686,989)	2,572,105
Personnel Services		25 713	% 20 8	320 312	100 49 %	318 766	(1 546)	297 185
Overtime		0	0.00 %	8 4 8	6.78 %	2005	466	0
Taxes and Benefits Pension		8,178 1,506	7.73 % 7.17 %	102,536 20,758	96.94 % 98.84 %	105,768 21,002	3,232 244	87,751 16,932
Total Personnel Services		35,397	7.94 %	443,640	99.46 %	446,036	2,396	401,868
Operating Expenses								
Shared Office Allocation		7,224	8.33 %	86,687	100.00 %	86,687	0	63,390
Postage and Freight		0	% 00.0	121	4.83 %	2,500	2,379	869
Printing		0	0.00 %	512	512.64 %	100	(412)	0
Supplies		0	0.00 %	494	32.91 %	1,500	1,006	425
Telephone		75	7.50 %	006	90.00 %	1,000	100	006
Subscriptions and Books		0 (0.00 %	180	30.05 %	009	420	192
Dues and Memberships Seminars and Training		00	0.00 0.00 0.00	900	90.00%	1,000	100 305	900
Miscellaneous		0	0.00%	2,030	203.01 %	1,000	(1,030)	254
Attorney and Staff Travel		764	15.29 %	3,835	76.70 %	2,000	1,165	3,140
Luncheons		2,377	79.21 %	2,507	83.56 %	3,000	493	3,132
Bank Fees		0	% 00.00	0	0.00 %	200	200	0
Credit Card Discount and Fees		3,200	8.00%	36,214	90.53 %	40,000	3,786	37,903
Computer Hardware		0 (0.00%	799	00.00	0 ((/96)	o :
Computer Software		0 0	0.00%	350	87.40 %	400	50	714
Contract Programming		0000	0.00%	3/5	0.75%	20,000	49,625	10,125
Grants		19,095	38.19%	93,336	166.63 %	50,000	(33,316)	50,000
Scholarships		92	0.95 %	4.440	44.40 %	10.000	5,560	5.720
Pro Bono Vouchers		0	0.00 %	30,000	100.00 %	30,000	0	30,000
Note: CI F Contribution to the Bar Center	is comp	rised of the follo	smeri owt priwo	. (1) \$500 000 and	(2) \$2 of every \$4	t per credit hour pa	Bar Center is comprised of the following two items: (1) \$500 000 and (2) \$2 of every \$4 per credit hour paid hy attorneys and/or	d/or

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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.

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Continuing Legal Education			State Bar Income 5	State Bar of Georgia Income Statement				
	Ľ	or the Cu	rrent Perioc	For the Current Period Ending June 30, 2025	30, 2025			
	Mont	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bond Premium Amortization		878	5.85 %	8,171	54.47 %	15,000	6,829	11,239
Investment Service Fees		0	0.00 %	20,781	90.36 %	23,000	2,219	19,823
Audit		0	0.00 %	5,000	100.00 %	5,000	0	4,500
Total Operating Expenses		892,097	52.42 %	1,646,464	96.74 %	1,701,987	55,523	1,637,929
Total Expenses		927,494	43.18 %	2,090,104	97.30 %	2,148,023	57,919	2,039,796
Net Income	\$	(677,796)	(204.17) %	456,885	137.63 % \$	331,977 \$	(124,908) \$	532,309

Transition into Law Practice Program

State Bar of Georgia Income Statement For the Current Period Ending June 30, 2025

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	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	0	0.00	0	0:00	0	0	7,628
Taxes and Benefits	0	% 00:0	0	0.00 %	0	0	2,634
Total Personnel Services	0	0.00 %	0	0.00 %	0	0	10,262
Total Expenses	0	0.00 %	0	0.00 %	0	0	10,262
Net Income	9	0.00 %	0	\$ % 00.0	\$	0	(10,262)

Governmental Legislative Affairs	<u>ir</u>	Exp For the	State enditure Current I	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	rgia Operatior g June 30,	ns 2025		
	2	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Taxes and Benefits Pension	₩	39,363 10,886 2,446	26.24 % 21.54 % 0.00 %	\$ 133,979 25,509 2,447	89.32 % \$50.48 % 0.00 %	\$ 150,000 \$ 50,538 0	16,021 \$ 25,029 (2,447)	38,643 3,474 2,334
Total Personnel Services		52,695	26.28 %	161,935	80.75 %	200,538	38,603	44,451
Operating Expenses Shared Office Allocation Postage and Freight		1,806	8.33 %	21,672	100.00 %	21,672	0 0	0 4
Supplies		370	148.04 %	1,680	672.09 %	250	(1,430)	0
Telephone		75	8.33 %	525	58.33 %	006	375	0
Subscriptions and Books		0 0	0.00 %	355	35.51 %	1,000	645	193
Seminars and Training		0	% 00.00 % 00.00	365	45.63 %	800,	435	0
Miscellaneous		753	753.00 %	788	787.85 %	100	(889)	206
Attorney and Staff Travel		2,899	48.32 %	6,961	116.01 %	6,000	(961)	2,377
Luncheons		179	1.05 %	17,773	104.55 %	17,000	(773)	16,114
Computer Hardware		18 750	0.00 %	1,267	0.00	000 826	(1,267)	0 000
Guests/Meetings		3.312	60.21 %	4.631	84.21 %	5,500	698	10.421
Grassroots Program		10,891	136.14 %	11,494	143.67 %	8,000	(3,494)	8,052
Bond Premium Amortization		630	% 00.6	3,578	51.11 %	2,000	3,422	4,958
Investment Service Fees		2,227	34.26 %	8,820	135.69 %	6,500	(2,320)	6,978
Total Operating Expenses		42,243	12.11 %	353,300	101.28 %	348,822	(4,478)	322,764
Total Expenses	\$	94,938	17.28 %	\$ 515,234	93.79 %	\$ 549,360 \$	34,126 \$	367,215

Expenditure Statement - Operations State Bar of Georgia

		For the	Current P	For the Current Period Ending June 30, 2025	June 30, 20	125		
		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	₩	19,797	5.16 % \$	(7)	98.19 % \$	383,892 \$	6,933 \$	366,346
Taxes and Benefits Pension		17,167 (178)	12.84 % (0.71) %	139,114 22,811	104.02 % 90.96 %	133,744 25,078	(5,370) 2,267	127,917 23,214
Total Personnel Services		36,786	6.78 %	538,884	99.29 %	542,714	3,830	517,477
Operating Expenses		000	12 50 %	7	% Oa OO	700	c	1 447
Supplies		0	% 00.0	945	72.66 %	1,300	355	1.528
Subscriptions and Books		0	0.00%	0	0.00%	1,200	1,200	0
Seminars and Training		0	0.00 %	249	13.11 %	1,900	1,651	0
Miscellaneous		0	0.00 %	344	88.76 %	200	156	441
Attorney and Staff Travel		0	0.00%	0	0.00 %	100	100	0
Luncheons		0	0.00 %	716	119.41 %	009	(116)	484
Computer Software		0	0.00%	32,006	129.65 %	27,000	(8,006)	25,439
Contract Programming	ļ	0	0.00 %	0	% 00.0	200	200	0
Total Operating Expenses		190	0.55 %	38,658	112.05 %	34,500	(4,158)	29,339
Total Expenses	₩	36,977	6.41 % \$	577,542	100.06 % \$	577,214 \$	(328) \$	546,817

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State Bar of Goorgia

Information Technology		Exp For the	State enditure (Current P	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operations June 30, 2	025		
		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	₩	8,470	1.74 % \$	397,608	81.84 % \$	485,831	\$ 88,223 \$	373,845
Overtime		0 7	0.00 %	0 000	0.00 %	500	500	113
raxes and benefits Pension		78,15 <i>2</i> (10,671)	11.63 % (42.52) %	145,829	93.47 % 49.15 %	156,023 25,096	10,195	117,049 23,194
Total Personnel Services		15,951	2.39 %	555,771	83.27 %	667,450	111,679	514,201
Operating Expenses		•	6				1	
Postage and Freight		0 413	0.00	143	95.23 %	3 500	(4 379)	3 611
Unauthorized Access		0	0.00	o o	0.00	000,5	0	15.159
Telephone		150	8.33 %	1,800	100.00 %	1,800	0	1,800
Subscriptions and Books		0	0.00 %	360	72.13 %	200	140	385
Dues and Memberships		0	0.00 %	0	0.00 %	200	200	0
Seminars and Training		0	0.00 %	0	0.00 %	6,490	6,490	6,188
Miscellaneous Pecruitment Costs		00	% 00.0	406	20.29 %	2,000	1,594	37 500
Attorney and Staff Travel		0	0.00	0	0.00	3,500	3,500	0
Luncheons		239	95.48 %	239	95.48 %	250	11	29
Computer Hardware		0	0.00 %	75,311	76.85 %	98,000	22,689	10,642
Computer Software		27,601	22.62 %	166,285	136.30 %	122,000	(44,285)	117,323
Contract Labor		627	3.71 %	23,872	141.26 %	16,900	(6,972)	8,590
Contract Programming		0	0.00 %	28,208		12,000	(16,208)	50,581
Internet Services		(260)	% (69.9)	1,431	36.71 %	3,900	2,469	2,029
Total Operating Expenses		28,770	10.60 %	302,934	111.58 %	271,490	(31,444)	254,128
Furniture/Equipment	ļ	0	0.00 %	926	0.00 %	0	(926)	504

97

768,832

79,258 \$

938,940 \$

91.56 % \$

859,682

4.76 % \$

44,721

Total Expenses

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State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget		Remaining Balance of Budget	Prior Year
6	3,802	8.05 % \$	42,058	89.01 % \$	47,250	6	5,192 \$	32,453
	0	0.00 %	0	0.00 %	320		350	J
	1,400	7.98 %	18,496	105.44 %	17,543		(953)	13,745
	(2,623)	(91.67) %	0	0.00 %	2,861		2,861	
	2,579	3.79 %	60,554	89.04 %	68,004		7,450	46,198
	0	0:00 %	0	0.00 %	200		200	326
	0	0.00 %	0	0.00 %	200		200	249
	0	% 00.0	52	17.42 %	300		248	39
	0	0.00 %	52	5.23 %	1,000		948	640
	0	0.00 %	009	100.01 %	009		0	
4	2,579	3.71 % \$	61,206	87.94 % \$	69,604	6	8.398 \$	46,838

Page 53

Page 1 June 2025 Financial Statements

Total Operating Expenses

Furniture/Equipment Total Expenses

Total Personnel Services

Personnel Services Salaries Overtime Taxes and Benefits Pension Operating Expenses
Supplies
Seminars and Training
Miscellaneous

Mailroom

State Bar of Georgia

		Exp For the	enditure Current F	Expenditure Statement - Operations For the Current Period Ending June 30, 2025	Operations June 30, 20	25		
	Σ	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries	€	140	0.22 %	\$ 45.098	69.54 % \$	64.856 \$	19.758 \$	61.881
Overtime	٠	0	0.00 %					0
Taxes and Benefits		(328)	(1.99) %	15,264	79.95 %	19,090	3,826	16,747
Pension		(678)	(17.31) %	2,914	74.36 %	3,919	1,005	3,603
Total Personnel Services		(917)	(1.04) %	63,276	71.73 %	88,215	24,939	82,231
Operating Expenses Supplies		0	0.00 %	74	24.60 %	300	226	793
Miscellaneous		0	0.00 %	92	7.92 %	1,200	1,105	1,140
Total Operating Expenses		0	0.00 %	169	11.25 %	1,500	1,331	1,933
Total Expenses	₩.	(917)	(1.02) %	\$ 63,444	70.72 % \$	89,715 \$	26,271 \$	84,164

Membership		Exp For the	State enditure S Current P	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operation June 30,	ns 2025			
		Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	ning nce Iget	Prior Year
Personnel Services Salaries Overtime Taxes and Benefits Pension	€	25,592 92 12,624 (1,153)	8.13% \$ 18.54% 9.03% (5.88)%	310,653 93 139,733 16,815	98.75 % 18.54 % 99.96 % 85.78 %	\$ 314,597 500 139,795 19,601	& Q	3,944 \$ 407 62 2,786	302,814 144 128,832 17,778
Total Personnel Services		37,155	7.83 %	467,294	98.48 %	474,493	7,7	7,199	449,568
Operating Expenses									
Shared Office Allocation		9,030	8.33 %	108,358	100.00 %	108,358		0	105,651
Postage and Freight		7	0.24 %	3,044	63.42 %	4,800		1,756	4,134
Supplies		0	0.00 %	479	53.22 %	006		421	375
Subscriptions and Books		0	0.00	1,150	328.63 %	350		(800)	1,198
Miscellaneous		00	%00.0	36	14.38 %	250	•	214	325
Credit Card Discount and Fees		101,711	34.48 %	303,875	103.01 %	295,000	(8,8)	(8,875)	303,676
Computer Hardware		0	0.00 %	1,583	98.91 %	1,600	•	17	0
		0	0.00 %	874	87.40 %	1,000		126	0
Membership Software License		0	% 00.0	114,711	95.59 %	120,000	5,3	5,289	117,491
Contract Programming		0	% 00.0	0	% 00.0	2,000	2,0	2,000	675
Total Operating Expenses		110,752	20.72 %	534,232	% 96.66	534,458		226	533,522
Furniture/Equipment		0	0.00 %	0	0.00 %	0		0	904
Total Expenses	₩	147,906	14.66 % \$	1,001,525	99.26 %	\$ 1,008,951	\$ 7,	7,426 \$	983,993

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Aeetings		Exp. For the	State enditure (Current P	State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2025	gia Operation y June 30, 2	s 2025		
	_	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services Salaries Overtime Taxes and Benefits Pension	₩	13,134 1,984 10,919 (3,287)		\$ 148,575 4,312 63,970 7,640	83.83 % \$ 157.93 % 70.28 % 64.09 %	177,228 \$ 2,730 91,029 11,920	28,653 \$ (1,582) 27,059 4,280	169,478 1,799 77,941 11,001
Total Personnel Services		22,750	8.04 %	224,497	79.35 %	282,907	58,410	260,219
Operating Expenses								
Shared Office Allocation		3.612	8.33 %	43,343	100.00 %	43,343	0	42.261
Postage and Freight		241	0.00%	241	00.00	0	(241)	47
Supplies		53	10.60 %	1.104	220.93 %	200	(604)	1.134
Telephone		75	8.33 %	006	100.00%	006	`o	006
Subscriptions and Books		0	0.00%	006	118.32 %	260	(140)	710
Dues and Memberships		0	0.00%	0	0.00%	200	,200	237
Seminars and Training		0	0.00%	0	0.00%	200	200	199
Miscellaneous		0	0.00%	45	0.00%	0	(45)	0
Attorney and Staff Travel		5,858	24.20 %	22,112	91.33 %	24,210	2,098	19,937
Luncheons		0	0.00%	428	142.60 %	300	(128)	0
Credit Card Discount and Fees		0	0.00%	0	0.00%	0	0	-
Computer Hardware		0	0.00%	1,173	0.00%	0	(1,173)	0
Contract Programming		0	0.00 %	0	0.00 %	3,000	3,000	11,244
Total Operating Expenses		9,839	13.29 %	70,246	94.91 %	74,013	3,767	76,670
Total Expenses	49	32.590	9.13%	\$ 294.743	82.58 % \$	356,920 \$	62.177 \$	336,889
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State Bar of Georgia	Expenditure Statement - Operations	For the Current Period Ending June 30, 2025
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		For the	Current F	For the Current Period Ending June 30, 2025	June 30,	2025		
	2	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services	¥	90 080		A 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	08 35 9%	825 705	4.2 6.4 6.4 6.4	762 111
Overtime)	1,325	88.33 %			1,500	_	598
Taxes and Benefits		10,227	5.53 %	176,003	95.10 %	185,081	9.078	178.148
Pension		3,096	4.53 %	65,714	96.20 %	68,311	2,597	60,814
Total Personnel Services		54,587	5.05 %	1,055,455	% 29.76	1,080,687	25,232	1,001,704
Operating Expenses								
Shared Office Allocation		32,508	8.33 %	390,090	100.00%	390,090	0	380,347
Postage and Freight		0	0.00%	190	47.54 %	400	210	574
Printing		826	31.80 %	827	31.80 %	2,600	1,773	148
Supplies		148	11.34 %	1,178	% 09.06	1,300	122	815
Telephone		300	8.33 %	3,600	100.00%	3,600	0	3,600
Subscriptions and Books		0	0.00%	2,342	146.39 %	1,600	(742)	2,766
Dues and Memberships		326	19.14 %	1,961	105.43 %	1,860	(101)	2,180
Licenses and Certifications		0	0.00 %	0	0.00 %	0	0	06
Seminars and Training		949	19.37 %	3,244	66.20 %	4,900	1,656	4,599
Miscellaneous		11,183	97.25 %	42,914	373.16 %	11,500	(31,414)	9,372
Attorney and Staff Travel		4,626	22.35 %	16,560	80.00%	20,700	4,140	18,525
Executive Director Travel		5,635	25.61 %	28,788	130.86 %	22,000	(6,788)	23,476
Luncheons		357	14.30 %	981	39.24 %	2,500	1,519	871
Bank Fees		171	1.22 %	171	1.22 %	14,000	13,829	2,789
Computer Hardware		0	0.00%	1,308	0.00%	0	(1,308)	0
Computer Software		0	0.00%	714	89.25 %	800	86	0
Contract Programming		0	0.00 %	0	0.00 %	200	200	0
Total Operating Expenses		57,059	11.93 %	494,868	103.45 %	478,350	(16,518)	450,152
Total Expenses	€9	111,646	7.16%	\$ 1,550,323	99.44 % \$	1,559,037 \$	8,714 \$	1,451,856

Geo

Georgia Diversity Program	S For the Curr	State Bar of Georgia Statement of Account For the Current Period Ending June 30, 2025	orgia sount ng June 30, 2	025	
	Current Month Actual	Year To Date Actual	Budget	Remaining Balance of Budget	Prior Year
Beginning Fund Balance	152	6,374	6,374	0	13,554
Income Interest and Dividend Income Gain/Loss Investment Interest Allocation	20 00	40	400	360 (71)	115
Miscellaneous Income	00	10,000	10,000	0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0, 0	17,975
CLE Conference	00	0	10,000	10,000	2,500
Total Income	13	24,361	33,400	9,039	45,012
Expenses CLE Conference	0	0	1.000	1,000	386
Miscellaneous	0	0	200	200	831
Credit Card Discount and Fees	0	62	400	338	06
Contract Labor	0 0	30,500	31,200	700	50,850
Bond Premium Amortization Investment Service Fees	⊃ -	ာ ဖ	100	94	21
Total Expenses	-	30,571	33,400	2,829	52,192
Ending Fund Balance	164	164	6,374	6,210	6,374



October 11, 2025

Dear Board of Governors,

It is my immense privilege to report to this esteemed body as the YLD's 79th president. I've spent the last seven years working toward this goal, serving in various capacities of YLD leadership from YLD Legal Food Frenzy Committee chair to secretary, treasurer and president-elect. I hold the YLD near and dear to my heart. I met my husband through the YLD, and many of my closest friends are active YLD members. I promise to honor this role with energy, humility and steadfast commitment to ensuring the YLD continues to be the place where young lawyers grow as professionals, leaders and friends.

Since its establishment in 1947, the purpose of the Younger Lawyers Section, now Division, 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 continue that legacy by serving as the service arm of the Bar and by providing valuable resources to young lawyers across Georgia.

The year ahead is particularly special. The YLD celebrates the 20th anniversary of Leadership Academy and the 15th anniversary of the Legal Food Frenzy competition. As I shared in my last address to the Board, my theme for the year is "Celebrate the YLD." To further that mission, I promised to highlight our successful programming, bring back pre-pandemic events, create consistency and transparency, and continue to increase the visibility and engagement of our membership.

In the short two months since Supreme Court of Georgia Justice Andrew Pinson graciously swore in the YLD's new slate of officers, the YLD has already begun its work to further our goals. On July 1, we ushered in a new term of office for our 2025-26 YLD officers, directors, district representatives and committee chairs. We have a lot of new faces this year and a growing group of young leaders. I encourage you all to meet and support them, as they represent the future of the Bar.

In August, the YLD held its Executive Committee Meeting in Athens, where the officers and directors had a productive meeting and engaged in team bonding by going to Creature Comforts, Big Dawgs on the River for river tubing, and Shokitini for karaoke. This year's directors will each serve as a liaison/adviser to a YLD committee, or will take on another imperative task such as planning the signature fundraiser, working with sponsors or helping with the Legal Writing Seminar. I am most excited to announce that for the first time ever, the YLD board of directors contains a multi-bar/bar affiliate subcommittee with representatives from many of the bar organizations and affiliates throughout the state, who will work throughout the year to unite the young lawyers across Georgia.

The YLD also held its Committee Chair Orientation, where all 30 committees engaged in robust planning and each chair brainstormed at least two potential events to be held by their respective committees throughout the bar year.

Some specific YLD events to look forward to include:

- Dec. 5, 2025 Leadership Academy Holiday Luncheon (Atlanta, Ga.)
- Dec. 5, 2025 YLD Leadership Holiday Party (Atlanta, Ga.)
- March 7, 2026 Signature Fundraiser benefiting Middle Georgia Justice (Macon, Ga.)

Our future meetings are as follows:

• Jan. 15-17, 2026 — Midyear Meeting (Atlanta, Ga.)

- April 24-26, 2026 Spring Meeting (Asheville, N.C.)
- June 11-14, 2026 Annual Meeting (Fernandina Beach, Fla.)

At each of our quarterly meetings, you can expect at least one CLE, one networking event and one service opportunity. Details will be provided in advance.

At the Fall Meeting at McLemore, we hope you will join the YLD for its Ethics and Professionalism CLE with Justice Bethel and friends, a Dinner Under the Stars, and a leisurely hike. We will also host a food and funds drive for Northwest Georgia Hunger Ministries—you can participate by donating requested items, packing meals or donating funds via a QR code.

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 Criminal Law Committee Devin Rafus and Erin Wingo, Co-Chairs

The YLD Criminal Law Committee will host a Halloween Networking Event, "Judges Aren't So Scary," on October 17, 2025, at Arora Law Firm. This event will provide members with the opportunity to meet and talk with local judges in a relaxed setting.

YLD Business Litigation Subcommittee Nathan R. Miles, Chair

The YLD Business Litigation Subcommittee held its first committee meeting on August 21, 2025. Members brainstormed potential CLE topics and panelists for a fall event regarding tort reform, and also discussed upcoming Bar events, the YLD Leadership Academy application process, and other ways to get involved with the YLD and the State Bar. The committee also began exploring ideas for potential service projects in the spring.

YLD Child Protection and Advocacy Committee Zipporah Tillman and Mary Kathryn Vasquez, Co-Chairs

The YLD Child Protection and Advocacy Committee is planning a virtual CLE and lunch-and-learn on representing minor clients, with a target date in mid-fall or early spring depending on availability. The CLE will feature a panel of child welfare attorneys with significant experience in client-directed representation. Panelists will also compare and contrast GAL/best interests representation and adult-directed representation. In addition, the committee will host a networking hour in January to coincide with the State Bar of Georgia's Child Protection and Advocacy Section at the 2026 Annual Meeting.

YLD Community Service Projects Committee Lyddy O'Brien and Nick Smith, Co-Chairs

The YLD Community Service Projects Committee will revisit two popular service projects from last year: the food bank and Trees Atlanta. The Trees Atlanta volunteer day will take place during the winter months (November–January). The committee will also collaborate with the Legal Food Frenzy Committee in October to organize a statewide day of service at local food banks, encouraging YLD members to volunteer and deliver donations at multiple locations across Georgia. A service project with Habitat for Humanity is also being considered for the spring.

YLD Corporate Counsel Committee Forrest Lind and Nick Schackleford, Co-Chairs

The YLD Corporate Counsel Committee is planning a Virtual Meet and Greet (date TBD) as well as a Networking Social at Emory Law (date TBD).

YLD Estate and Elder Law Committee Chelsey Haun and Benjamin Walker, Co-Chairs

The YLD Estate and Elder Law Committee is planning a CLE Virtual Lunch and Learn and a Networking Event for the fall. The committee is also excited to continue its Wills Clinic in the spring. Dates and locations for these events will be confirmed soon.

YLD Ethics and Professionalism Committee Meagan Hurley and Meghan Pittman, Co-Chairs

The YLD Ethics and Professionalism Committee will hold its first meeting of the year on September 9 at 12 p.m. via Zoom to introduce members and discuss plans for the year. The committee is assisting with the CLE on ethics and professionalism at the Fall Meeting with Justice Bethel and Judge Hise. The committee is also resuming its monthly "Rule of Professionalism" posts on social media, which will be released on the first Tuesday of every month. The first post will be published on September 2. In addition, the committee is exploring a joint CLE with the Intellectual Property Committee on ethics, professionalism, and the use of artificial intelligence.

YLD Family Law Committee Emily Long and Sarah Trahan, Co-Chairs

The YLD Family Law Committee is planning several events, including a Pickleball Tournament fundraiser to benefit 2Polarities, a CLE on the basics of filing or defending an appeal in family law cases (to be held in winter via Zoom), and a potential program on self-defense and security practices for family law attorneys. The committee has also received offers from other committees to collaborate and is considering those opportunities.

YLD Inclusion in the Profession Committee Mercedes Dickerson and Will Ortiz, Co-Chairs

The YLD Inclusion in the Profession Committee plans to host a "Crimmigration" panel via Zoom in mid-October. This CLE will address the intersection between criminal and immigration law. The committee plans to reach out to the Criminal Law Committee to discuss co-hosting the event.

YLD Judicial Law Clerk Committee Caleb Grant and Maggie Martin, Co-Chairs

The YLD Judicial Law Clerk Committee will hold its first committee meeting on August 26 to discuss upcoming events for the year. Planned events include Clerkship War Stories, a fall panel featuring former clerks discussing the clerkship process, and Bar v. Bench, a spring panel featuring judges and attorneys discussing professionalism, ethics, and courtroom practices. The committee is also planning a joint hiking event with the YLD Wellness Committee in the spring. Dates and locations are being finalized.

YLD Labor and Employment Committee Dymond Anthony and Amber Porter, Co-Chairs

On August 21, the YLD Labor and Employment Committee co-hosted a networking event with NELA at Joystick Gamebar, which drew approximately 15 attendees despite inclement weather. The committee held its first meeting on August 7 to brainstorm CLE ideas for later this year and to discuss committee leadership opportunities. The committee looks forward to hosting additional meetings and CLE programming in the months ahead.

YLD Law School Outreach Committee Tom Church, Chair

The YLD Law School Outreach Committee will hold its first planning call next week to identify events for the next two semesters. Discussions are underway with law students regarding potential events, including participation in Georgia State University's annual "Fair," which the committee has attended in past years.

YLD Leadership Academy James Banter, Matt Caudell and Kelsie Speight, Co-Chairs

The YLD Leadership Academy Co-Chairs are pleased to announce the locations of the six 2026 Leadership Academy sessions: (1) Atlanta, GA (Mid-Year Meeting); (2) Atlanta, GA (State Capitol, Supreme Court, Court of Appeals, etc.); (3) Savannah, GA; (4) Asheville, NC (YLD Spring Meeting); (5) Gainesville, GA; and (6) Fernandina Beach, FL (Annual Meeting). Applications opened on August 18, and all eligible YLD members are encouraged to apply.

YLD Legal Food Frenzy Committee Alexa Dato-Caudell and Jack Wareham, Co-Chairs

Although dates for the 2026 Legal Food Frenzy have not yet been released, the YLD Legal Food Frenzy Committee is coordinating with the Community Service Committee to plan a joint day of service at local food banks in fall 2025. In September, the committee will meet with Sophia Jackson of Feeding Georgia to begin the planning process.

YLD Moot Court Committee Jamie Christy and Doug Comin, Co-Chairs

The YLD Moot Court Committee is preparing for the National Moot Court Regional Competition, which will be held in November 2025.

YLD Solo Practice and Small Firm Committee Angelik Holloway, Chair

The YLD Solo Practice and Small Firm Committee hosted its first event of the year, Bingo Bites and Business Cards, on July 24 at Prestige Solutions. The networking event featured unique bingo questions and was well received. The committee is now planning a Fall 2025 brunch workshop at the State Bar, with the date to be confirmed.

YLD Sports Law Committee Joy D. Bonner, Chair

The YLD Sports Law Committee has begun planning events for the upcoming year, including CLE programming in the high school (GHSA), collegiate, and professional athletics spaces. The committee is working with the Intellectual Property Committee to host a CLE during the 2026 Midyear Meeting at Battery Atlanta, home of the Atlanta Braves. The committee also plans to host a YLD Night with the Atlanta Hawks, as well as service events next spring in connection with the 2026 World Cup games scheduled in Atlanta.

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

The YLD Women in the Profession Committee is planning a wine and cheese mixer for this fall, its annual Atlanta United game in April/May 2026, and a "Meals That Heal" volunteer event with Ronald McDonald House (either fall or spring). The committee is also exploring a joint CLE with Meghan Pittman's committee.

YLD Workers' Compensation Committee Dagem Araya and Andrew Skibiel, Co-Chairs

The YLD Workers' Compensation Committee will host its annual seminar October 9–11, 2025. The committee is also planning a networking event during or around the seminar dates.

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 | Oct. 10-12

Cloudland at McLemore Resort Rising Fawn, GA Held in conjunction with the State Bar of Georgia Board of Governors.

Midyear Meeting | Jan. 15-18

Omni Hotel at the Battery Atlanta Atlanta, GA Held in conjunction with the State Bar of Georgia Board of Governors.

Spring Meeting | Mar. 28-30

Kimpton Hotel Arras Asheville, NC

Annual Meeting | Jun. 5-8

Vin R Ces

Omni Amelia Island Resort Fernandina Beach, FL

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

I hope to see you at an upcoming YLD meeting or event and encourage you to take advantage of the opportunities the YLD has to offer.

Sincerely,

Veronica R. Cox YLD President



MEMORANDUM

To: Board of Governors

From: Bill NeSmith

Date: October 11, 2025

Re: Proposed Fee Arbitration Rules changes

Below is a comprehensive explanation of the proposed fee arbitration program rules changes on the agenda for the Fall Board of Governors meeting:

Executive Summary of Changes to Part VI - Arbitration of Fee Disputes

I. Binding Effect of Arbitration (New)

- Petitioner Bound Automatically: Any party filing a petition is automatically bound by the result.
- Respondent Consent Requirements:
 - Client Respondent: Must affirmatively consent for jurisdiction to exist.
 - Attorney Respondent: If the Client requests arbitration and jurisdiction is accepted, an attorney respondent must participate in the arbitration. The attorney will be bound by the award.

II. Committee Structure and Administration

- Committee Composition: Six lawyer members (appointed by the State Bar President) and three public members (appointed by the Georgia Supreme Court).
- Terms of Office: Staggered initial terms; successors serve three-year terms.
- Authority Expanded: Committee empowered to interpret rules, oversee administration, rule on arbitrator neutrality, and refer matters to the Office of General Counsel for potential disciplinary investigation.

III. Jurisdictional Guidelines

- Mandatory Criteria: Arbitration is permitted only if:
 - o The fee exceeds \$1,000;
 - The matter is not currently pending in court;
 - The petition is filed within two years of the dispute;
 - \circ No statutory/court-approved fee controls exist.

Written Agreements to Arbitrate:

- Must be set out in a separate paragraph;
- o In font size equal to or larger than the surrounding text;
- Must be separately initialed by both attorney and client (new emphasis consistent with Georgia Arbitration Code). (New)

IV. Procedural Rules and Hearing Management

- Arbitrator Selection:
 - Default panel of 3 (2 lawyers, 1 public member);
 - Option for sole arbitrator in small claims (≤ \$2,500) or by party agreement.
- Evidence and Discovery: Arbitrators may allow flexible presentation of
 evidence, including affidavits, video conferencing, and limited discovery.
- Default Hearings: Proceedings may continue in the absence of a party but require evidence before an award is issued.
- Hearing Rules Enhanced: Includes oaths, order of proceedings, discretion
 in sequestering witnesses, and detailed requirements for recordkeeping.
- Compensation: Arbitrators may be compensated in an amount to be determined by the Committee prior to an arbitration where all parties are lawyers. The compensation is to be paid by the lawyers. (Reworded)

V. Awards and Post-Hearing Actions

- Timeframe for Awards: Must be issued within 30 days of hearing closure, unless extended.
- Award Format: Written and signed by majority; opinion issued if requested.
- Settlement Awards: May be recorded by consent of both parties.
- Confirmation and Enforcement:
 - Clients may receive assistance from Bar-provided or volunteer counsel for award enforcement;
 - Attorneys must proceed independently to confirm awards in their favor.

VI. Confidentiality and Immunity

- Confidentiality Protections: Records are confidential and not publicly accessible unless all parties consent or court orders disclosure.
- Retention Policy: Records retained under Committee-established protocols.
- Immunity Affirmed: Arbitrators, Committee members, staff, and volunteer counsel are granted quasi-judicial immunity as recognized by the Georgia Supreme Court.

VII. Enforcement Mechanism and Discipline Referrals

• **Discipline Referral Pathway**: Allegations or findings potentially implicating ethical violations (e.g., unreasonable or unearned fees) may be referred to the Office of the General Counsel.

Redlined

- Part VI Arbitration of Fee Disputes
- 2 Preamble

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The purpose of the State Bar of Georgia's program for the arbitration of fee disputes is to provide a convenient mechanism for the resolution of disputes (1) between lawyers and clients over fees; (2) between lawyers in connection with the dissolution of a practice or the withdrawal of a lawyer from a partnership or practice; or (3) between lawyers concerning the allocation of fees earned from joint services. If the parties to such a dispute have been unable to reach an agreement between or among themselves, either side may petition the State Bar

Committee on the Arbitration of Attorney Fee Disputes ("Committee") to arbitrate the dispute pursuant to these rules.

Regardless of whether a lawyer or a client initiates the filing of a petition requesting arbitration of the dispute, by filing the petition, the petitioner shall be bound by the result of the arbitration. This is intended to discourage the filing of complaints that are frivolous or that seek to invoke the process simply to obtain an "advisory opinion."

18 If the respondent also agrees to be bound, the resulting arbitration

- 19 award shall be enforceable under the Georgia Arbitration Code,
- 20 O.C.G.A. § 9-9-1 et seq.
- By filing a Petition for Fee Arbitration, the Petitioner agrees to
- be bound by the award. If the Respondent is an attorney, the
- 23 <u>attorney is likewise bound. However, if the Respondent is a client,</u>
- 24 <u>the Committee lacks jurisdiction unless the client consents to</u>
- arbitration. In any fee dispute between an attorney and client, the
- attorney is required to participate in arbitration if requested by the
- 27 client and is bound by the award.
- 28 If a client initiates the arbitration process and the respondent lawyer
- 29 refuses to be bound by any resulting award, the matter will not be
- 30 accepted for arbitration.
- If at any time during the process as set forth in these rules, based
- 32 upon information received or a lack of information received, the
- 33 Committee may make a referral to the Office of the General Counsel
- for consideration of an inquiry into a possible disciplinary action based
- on Georgia Rules of Professional Conduct including Rule 1.5
- 36 (unreasonable fees) and/or Rule 1.16 (d) (failure to return unearned
- 37 fees) or other applicable rules.

- 38 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE
- 39 DISPUTES
- 40 Rule 6-101. Administration of Program.
- This program will be administered by the State Bar Committee
- on the Arbitration of Attorney Fee Disputes ("Committee").
- Rule 6-102. Committee Membership.
- The Committee shall consist of six lawyer members and three
- 45 public members who are not lawyers. The six lawyer members shall
- be appointed by the President of the State Bar of Georgia, and the
- 47 three public members shall be appointed by the Supreme Court of
- 48 Georgia.
- 49 Rule 6-103. Terms.
- Initially, two members of the Committee, including one of the
- 51 public members, shall be appointed for a period of three years; two
- 52 members, including the remaining public members, for a period of two
- years; and one member for a period of one year. As each member's term
- of office on the Committee expires, his or her successor shall be
- appointed for a period of three years. The President of the State Bar
- shall appoint the chair of the Committee each year from among the

- 57 members. Vacancies in unexpired terms shall be filled by their
- 58 respective appointing authorities.
- 59 Rule 6-104. Powers and Duties of Committee.
- The Committee shall have the following powers and duties:
- 61 (a) To determine whether to accept jurisdiction over a dispute;
- 62 (b) To appoint and remove lawyer and nonlawyer arbitrators
- and panels of arbitrators;
- (c) To oversee the operation of the arbitration process;
- 65 (d) To develop and implement fee arbitration procedures;
- 66 (e) To interpret these rules and to decide any disputes
- regarding the interpretation and application of these rules;
- 68 (f) To determine challenges to, and rule on, the neutrality of
- an arbitrator where the arbitrator does not voluntarily
- 70 withdraw:
- 71 (g) To maintain the records of the State Bar of Georgia's Fee
- 72 Arbitration Program; and
- 73 (h) To perform all other acts necessary for the effective
- operation of the Fee Arbitration Program.
- 75 Rule 6-105. Staff's Responsibilities.

- State Bar of Georgia staff shall be assigned to assist the
 Committee. The assigned staff will have such administrative
 responsibilities as may be delegated by the Committee, which may
 include the following:
- 80 (a) Receive and review arbitration requests and discuss them
 81 with the parties, if necessary;
- 82 (b) Conduct inquiries to obtain additional information as needed;
- 84 (c) Make recommendations to the Committee whether to 85 accept or decline jurisdiction; and
- (d) Transmit notices of arbitration hearings, arbitration awards, and other Committee correspondence.

88 CHAPTER 2 JURISDICTIONAL GUIDELINES

- 89 Rule 6-201. Petition.
- A request for arbitration of a fee dispute is initiated by the filing
 of a petition with the Committee. Each petition shall be filed on the
 Fee Arbitration Petition Form supplied by Committee staff and shall
 contain the following elements:

- 94 (a) A statement of the nature of the dispute and the
 95 petitioner's statement of facts, including relevant exhibits and
 96 dates. The statement must be double-spaced, typed in a 12-point
 97 font or hand written and is limited to 50 pages including
 98 exhibits. The page limit may be increased by the Fee Arbitration
 99 staff for good cause shown;
 - (b) The names and addresses of the client(s) and the lawyer(s);
- 101 (c) A statement as to whether or not the petitioner has made

 102 a good faith effort to resolve the dispute;
- 103 (d) A statement that by filing the petition, the petitioner has
 104 agreed to be bound by the result of the arbitration;
- 105 (e) The date of the petition; and
- 106 (f) Each petitioner's signature.
- 107 Rule 6-202. Service of Petition.

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If a petition has been properly completed and appears to have merit, Committee staff shall serve a copy of the petition, along with a Fee Arbitration Answer Form and an acknowledgment of service form, upon the respondent by first class mail addressed to such party's last known address. A signed acknowledgment of service form or a written answer from the respondent or respondent's counsel shall constitute conclusive proof of service and shall eliminate the need to utilize any other form of service.

In the absence of an acknowledgment of service or a written response from the respondent or respondent's counsel, service shall be certified mail, return receipt requested, addressed to such party's last known address.

In unusual circumstances as determined by the Committee or its staff, when service has not been accomplished by other less costly measures, service may be accomplished by the Sheriff or a court-approved agent for service of process.

If service is not accomplished, the Committee shall not accept jurisdiction of the case.

126 Rule 6-203. Answer.

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Each respondent shall have 20 calendar days after service of a petition to file an answer with the Committee. Staff, in its discretion, may grant appropriate extensions of time for the filing of an answer.

The answer shall be filed on or with the Fee Arbitration Answer
Form supplied by Committee staff and shall contain the following
elements:

- (a) If the respondent is the client and/or payer, a statement as to whether the respondent agrees to be bound by the result of the arbitration;
- 136 (b) The respondent's statement of facts. The statement must
 137 be double-spaced, typed in a 12-point font or hand written, and
 138 the submission is limited to 50 pages including exhibits. The
 139 page limit may be increased by the Fee Arbitration staff for good
 140 cause shown;
 - (c) Any defenses the respondent intends to assert;
- 142 (d) The date of the answer; and

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- 143 (e) Each respondent's signature.
- 144 Committee staff shall serve a copy of the answer upon each
 145 petitioner by first class mail, addressed to such party's last known
 146 address.

The failure to file an answer shall not deprive the Committee of jurisdiction and shall not result in a default judgment against the respondent.

Rule 6-204. Accepting Jurisdiction.

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- The Committee or its designee may accept jurisdiction over a fee dispute only if the following requirements are considered satisfied:
 - (a) The fee in question, whether paid or unpaid, was for legal services rendered by a lawyer who is, or was at the time the services were rendered, a member of the State Bar of Georgia or otherwise authorized to practice law in the State of Georgia.
 - (b) The legal services in question were performed:
 - (1) in the State of Georgia; or
 - (2) from an office located in the State of Georgia; or
 - (3) by a lawyer who is not admitted to the practice of law in any United States jurisdiction other than Georgia, and the circumstances are such that if the State Bar of Georgia does not accept jurisdiction, no other United States jurisdiction will be available to a client who has filed a petition under this program.

(c) The disputed fee exceeds \$1,000.

- (d) The amount of the disputed fee is not governed by statute or other law, nor has any court fixed or approved the full amount or all terms of the disputed fee.
 - (e) The fee dispute is not the subject of litigation in court at the time the petition for arbitration is filed or when the Committee determines jurisdiction.
 - (f) The petition seeking arbitration of the fee dispute is filed with the Committee no more than two years following the date on which the controversy arose. If this date is disputed, it shall be determined in the same manner as the commencement of a cause of action on the underlying contract.
 - (g) In the case of disputes between lawyers and clients, a lawyer/client relationship existed between the petitioner and the respondent at the time the legal services in question were performed. A relative or other person paying the legal fees of the client may request arbitration of disputes over those fees, provided both the client and the other person payor join as co-

184	petitioners or co-respondents and both agree to be bound by the
185	result of the arbitration.
186	(h) The client, whether petitioner or respondent, agrees to be

- (h) The client, whether petitioner or respondent, agrees to be bound by the result of the arbitration. Any subsequent arbitration award shall be final and binding if jurisdiction is accepted.
 - (h) The client, whether petitioner or respondent, agrees to be bound by the result of the arbitration. If the respondent lawyer does not agree to be bound by the result of the arbitration, the Committee will not accept the matter for arbitration.
 - (i) In disputes between lawyers, the lawyers who are parties to the dispute are all members of the State Bar of Georgia and have all agreed to arbitrate the dispute under this program and to be bound by the result of the arbitration.
 - (j) Where the parties to a fee dispute have signed a written agreement to submit fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee Arbitration Program, the Committee will consider the agreement enforceable if it is:
 - (1) set out in a separate paragraph;

203 (2) written in a font size at least as large as the rest of
the contract; and

- (3) separately initialed by the client and the lawyer and be in compliance with the Georgia Arbitration Code.
- (k) In deciding whether to accept jurisdiction, the Committee shall review available evidence, including the recommendations of the staff, and make a determination whether to accept or decline jurisdiction. The Committee's decisions on jurisdiction are final, except that such decisions are subject to reconsideration by the Committee upon the request of either party made within 30 days of the initial decision. Staff shall notify the parties of the Committee's decision on jurisdiction by first class mail.
- Rule 6-205. Termination or Suspension of Proceedings.

The Committee may suspend or terminate arbitration proceedings or may decline or terminate jurisdiction if the client, in addition to pursuing arbitration of a fee dispute under these rules, asserts a claim against the lawyer in any court arising out of the same set of circumstances, including any claim of malpractice. Any claim or

evidence of professional misconduct within the meaning of the Georgia Rules of Professional Conduct may be reported by the arbitrators or the Committee to the Office of the General Counsel for consideration under its normal procedures.

226 Rule 6-206. Revocation.

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After jurisdiction has been accepted by the Committee, the submission to arbitration shall be irrevocable except by consent of all parties or by action of the Committee or the arbitration panel for good cause shown.

CHAPTER 3 SELECTION OF ARBITRATORS

Rule 6-301. Roster of Arbitrators.

The Committee shall maintain a roster of lawyers available to serve as arbitrators on an "as needed" basis in appropriate geographical areas throughout the state. To the extent possible, the arbitration should take place in the same geographical area where the services in question were performed; however, the final decision as to the location of the arbitration remains with the Committee.

The Committee shall likewise maintain a roster of nonlawyer public members selected by the Supreme Court of Georgia.

Rule 6-302. Neutrality of Arbitrators.

No person shall serve as an arbitrator in any matter in which that person has any financial or personal interest. Upon appointment to a particular arbitration, each arbitrator shall disclose to the Committee any circumstance that may affect his or her neutrality in regard to the dispute in question.

If an arbitrator becomes aware of any circumstances that might preclude that arbitrator from rendering an objective and impartial determination of the proceeding, the arbitrator must disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the potential conflict prior to the hearing, the disclosure shall be made to the Committee, which shall forward the disclosure to the parties. If the potential conflict becomes apparent during the hearing, the disclosure shall be made directly to the parties.

If a party believes that an arbitrator has a potential conflict of interest and should withdraw or be disqualified, and the arbitrator does not voluntarily withdraw, the party shall promptly notify the Committee so that the issue may be addressed and resolved as early in the arbitration process as possible.

Rule 6-303. Selection of Arbitrators.

The arbitrator panel shall be selected by the Committee or its staff. Except as provided below the arbitration panel shall consist of two lawyers members who have practiced law actively for at least five years and one nonlawyer public member.

In cases involving disputed amounts not exceeding \$2,500, the Committee in its sole discretion may appoint an arbitration panel consisting of one lawyer who has practiced law actively for at least five years.

Petitioner and respondent by mutual agreement shall have the right to select the three arbitrators. They also may mutually agree to have the dispute determined by a sole arbitrator jointly selected by them, provided any such sole arbitrator shall be one of the persons on the roster of arbitrators or shall have been approved in advance by the Committee upon the joint request of petitioner and respondent.

- 275 Rule 6-304. Qualifications of Lawyer Arbitrators.
- In addition to being impartial, lawyer arbitrators shall:
 - (a) Have practiced law actively for at least five years; and

Be an active member in good standing of the State Bar of (b) 278 Georgia. 279 Rule 6-305. Powers and Duties of Arbitration Panel. 280 The panel of arbitrators shall have the following powers and 281 duties: 282 (a) To compel by subpoena the attendance of witnesses and the 283 production of documents and things; 284 To decide the extent and method of any discovery; (b) 285 To administer oaths and affirmations; (c) 286 (d) To take and hear evidence pertaining to the proceeding; 287 (e) To rule on the admissibility of evidence; 288 (f) To interpret and apply these rules insofar as they relate to 289 the arbitrators' powers and duties; and 290 To perform all acts necessary to conduct an effective (g) 291 arbitration hearing. 292 Rule 6-306. Compensation. 293 All arbitrators shall serve voluntarily and without fee or expense 294 reimbursement; provided, however, that arbitrators selected to serve

in disputes in which all the parties are lawyers may at the discretion

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of the Committee will be compensated, with such compensation to be paid by the lawyer parties as directed by the Committee.

CHAPTER 4 RULES OF PROCEDURE

Rule 6-401. Representation by Counsel.

Parties may be represented throughout the arbitration by counsel at their own expense, or they may represent themselves.

Rule 6-402. Time and Place of Arbitration Hearing.

Upon their appointment by the Committee, the arbitrators shall elect a chair and then shall fix a time and place for the arbitration hearing. To the extent feasible, the hearing shall be held no more than 60 days after the appointment of the last arbitrator. At least ten calendar days prior to the hearing, the Committee shall mail notices of the time and place of the hearing to each party by first class mail, addressed to each party's last known address.

Rule 6-403. Attendance and Participation at Hearing.

The parties shall have the right to attend and participate in the arbitration hearing at their own expense. It shall be discretionary with the arbitrators whether to allow the attendance of any persons who are not parties, witnesses, or counsel to one of the parties.

At the discretion of the arbitrators, a party may be permitted to appear or present witness testimony at the hearing by telephone conference call, video conference, computer-facilitated conference, or similar telecommunications equipment, provided all persons participating in the hearing can simultaneously hear each other during the hearing.

Rule 6-404. Stenographic Record.

Any party may ask the Committee to arrange for the taking of a stenographic record of the proceeding. If a party orders a transcript, that party shall acquire and provide a certified copy of the transcript for the record at no cost to the panel. Other parties are entitled at their own expense to acquire a copy of the transcript by making arrangements directly with the court reporter. However, it shall not be necessary to have a stenographic record of the hearing.

If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee or its designee shall determine the course of further proceedings and may appoint a

Rule 6-405. Death, Disability, or Resignation of Arbitrator.

substitute or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

Rule 6-406. Discovery, Subpoenas and Witnesses.

Upon the written request of a party or the panel's own motion, discovery may be allowed to the extent deemed necessary by the arbitrators in their sole discretion.

The arbitrators may issue subpoenas for the attendance of witnesses and for the production of documents and things, and may do so either upon the arbitrators' own initiative or upon the request of a party. These subpoenas shall be served and, upon application to the Superior Court in the county in which the arbitration is pending by a party or the arbitrators, enforced in the same manner provided by law for the service and enforcement of subpoenas in a civil action.

Rule 6-407. Adjournments.

The arbitrators for good cause shown may adjourn the hearing upon the request of either party or upon the arbitrators' own initiative.

Rule 6-408. Arbitrators' Oath.

Before proceeding with the hearing, the arbitrators shall take an oath of office. The arbitrators have the discretion to require witnesses

to testify under oath or affirmation, and, if requested by either party, shall so require.

Rule 6-409. Order of Proceedings.

The hearing shall be opened by the filing of the oath of the arbitrators. Next, the panel shall record the place, time, and date of the hearing, the names of the arbitrators, the parties, parties' counsel, and any witnesses who will be presenting evidence during the hearing.

The normal order of proceedings shall be the same as at a trial, with the petitioner's claim being presented first. However, the arbitrators shall have the discretion to vary the normal order of proceedings.

The petitioner shall have the burden of proof by a preponderance of the evidence.

Rule 6-410. Arbitration in the Absence of a Party.

The arbitration may proceed in the absence of a party, who, after due notice, fails to be present in person or by telephonic or electronic means. An award shall not be made solely on the default of a party; the arbitrators shall require the other party or parties to present such evidence as the arbitrators may require for the making of an award.

Rule 6-411. Evidence.

- (a) Parties may offer such relevant and material evidence as they desire and shall produce such additional evidence as the arbitrators may deem necessary to an understanding and determination of the dispute. The arbitrators shall be the judge of the relevancy and materiality of the evidence offered. The rules of evidence shall be liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.
- (b) A list shall be made of all exhibits received into evidence by the arbitrators. Exhibits shall be listed in the order in which they were received, and the list shall be made a part of the record.
- (c) The names and addresses of all witnesses who testify at the arbitration shall be made a part of the record. Upon their own motion or at the request of any party, the arbitrators shall have the power to require the sequestration of any witness during the testimony of other witnesses.

- (d) The arbitrators may receive and consider the evidence of witnesses by affidavit (copies of which shall be served on the opposing party at least five days prior to the hearing), but shall give such evidence only such weight as the arbitrators deem proper after consideration of any objections made to its admissibility.
 - (e) The petition, answer, and other pleadings, including any documents attached thereto, may be considered as evidence at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.
 - (f) The receipt of testimony by deposition, conference telephone calls, and other procedures is within the discretion of the arbitrators upon their own motion or at the request of any party.
- 405 Rule 6-412. Written Contract.

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- Arbitrators shall give due regard to the terms of any written contract signed by the parties.
- Rule 6-413. Closing of Hearings.

Prior to the closing of an arbitration hearing, the arbitrators shall inquire of all parties whether they have any further evidence to offer or additional witnesses to be heard. If no further evidence is to be presented by either party, the arbitrators shall declare the hearing closed and make a record of that fact.

Rule 6-414. Reopening of Hearings.

Upon the motion of the arbitrators or of a party, an arbitration may be reopened for good cause shown at any time before an award is made. However, if the reopening of the hearing would prevent the award from being rendered within the time provided by these rules, the matter may not be reopened unless both parties agree upon the extension of such time limit.

Rule 6-415. Waiver of Rules.

Any party who, knowing of a failure to comply with a provision or requirement of these rules, fails to state an objection on the record or in writing prior to the closing of the hearing, shall be deemed to have waived any right to object.

Rule 6-416. Waiver of Oral Hearings.

The parties may provide by written agreement for the waiver of oral hearings.

429 Rule 6-417. Award.

The award of the arbitrators is final and binding upon the parties.

Rule 6-418. Time of Award.

The arbitrators shall make all reasonable efforts to render their award promptly and not later than 30 days from the date of the closing of the hearing, unless otherwise agreed upon by the parties with the consent of the arbitrators or an extension is obtained from the Committee or its chair. If oral hearing has been waived, then the time period for rendering the award shall begin to run from the date of the receipt of final statements and evidence by the arbitrators.

Rule 6-419. Form of Award.

The award shall be in writing and shall be signed by the arbitrators or by a concurring majority. The parties shall advise the arbitrators in writing prior to the close of the hearing if they request the arbitrators to accompany the award with an opinion.

- Rule 6-420. Award Upon Settlement.
- If the parties settle their dispute during the course of the arbitration proceeding, the arbitrators, the Committee, or the Committee's designee, upon the written consent of all parties, may set forth the terms of the settlement in an award.
- Rule 6-421. Service of Award Upon Parties.

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- Service of the award upon the parties shall be the responsibility of Committee staff. Service of the award shall be accomplished by depositing a copy of the award in the United States Mail in a properly addressed envelope with adequate first class postage thereon and addressed to each party at his or her last known address.
- Rule 6-422. Communication with Arbitrators.
- There shall be no ex parte communication between a party and an arbitrator.
- Rule 6-423. Interpretation and Application of Rules.
- If the arbitrators on a panel disagree as to the interpretation or application of any rule relating to the arbitrators' powers and duties, such dispute shall be decided by a majority vote of the arbitrators. If the dispute cannot be resolved in that manner, an arbitrator or a party

may refer the question to the Committee for its determination. The
Committee's decision on the interpretation or application of these
rules shall be final.

CHAPTER 5 POST-AWARD PROCEEDINGS

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Rule 6-501. Confirmation of Award in Favor of Client.

In cases where an award in favor of a client has not been satisfied within three months after it was served upon the parties, the client may apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

Upon the written request of a client, the Committee may provide
a lawyer to represent the client in post-award proceedings at no cost
to the client other than court filing fees and litigation expenses.
Alternatively, the Office of the General Counsel of the State Bar of
Georgia may represent, assist, or advise a client in post-award
proceedings, provided the client shall be responsible for all court filing
fees and litigation expenses.

Rule 6-502. Confirmation of Award in Favor of Lawyer.

- In cases where an award has been issued in favor of a lawyer,
 the lawyermay apply to the appropriate Georgia superior court for
 confirmation of the award in accordance with the Georgia Arbitration
 Code, O.C.G.A. § 9-9-1 et seq.
- The State Bar will not represent, assist, or advise the attorney
 except to provide copies of any necessary papers from the fee
 arbitration file pursuant to State Bar policies.
- 490 Rule 6-503. Enforcement of Arbitration Awards.
- All arbitration awards under these rules are enforceable under the Georgia Arbitration Code, OCGA §9-9-1 et seq.
- Upon the written request of a client, the Committee may provide
 a lawyer to represent the client in post-award proceedings at no cost
 to the client other than court filing fees and litigation expenses.
 Alternatively, the Office of the General Counsel of the State Bar of
 Georgia may represent, assist, or advise a client in post-award
 proceedings, provided the client shall be responsible for all court filing
 fees and litigation expenses.
- 500 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND

502 Rule 6-601. Confidentiality.

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All records, documents, files, proceedings, and hearings
pertaining to the arbitration of a fee dispute under this program are
the property of the State Bar of Georgia and, except for the award
itself, shall be deemed confidential and shall not be made public by the
State Bar of Georgia.

A person who was not a party to the dispute shall not be allowed access to such materials unless all parties to the arbitration consent in writing or a court of competent jurisdiction orders such access. However, the Committee, its staff, or representative may reveal confidential information in those circumstances in which the Office of the General Counsel is authorized by Bar Rule 4-221.1 to do so.

Rule 6-602. Record Retention.

The record of any fee dispute under these rules shall be retained by the Committee in accordance with policies adopted by the Committee.

518 Rule 6-603. Immunity.

The Supreme Court of Georgia recognizes the Fee Arbitration

Program of the State Bar of Georgia to be judicial and quasi-judicial

in nature and within the Court's regulatory function, and in connection with such arbitration proceedings, members of the Fee Arbitration Committee, volunteer arbitrators, appointed voluntary counsel assisting the program and State Bar of Georgia Fee Arbitration staff are entitled to those immunities customarily afforded to persons so participating in judicial and quasi-judicial proceedings or engaged in such arbitration activities.

Part VI - Arbitration of Fee Disputes

Preamble

The purpose of the State Bar of Georgia's program for the arbitration of fee disputes is to provide a convenient mechanism for the resolution of disputes (1) between lawyers and clients over fees; (2) between lawyers in connection with the dissolution of a practice or the withdrawal of a lawyer from a partnership or practice; or (3) between lawyers concerning the allocation of fees earned from joint services. If the parties to such a dispute have been unable to reach an agreement between or among themselves, either side may petition the State Bar Committee on the Arbitration of Attorney Fee Disputes ("Committee") to arbitrate the dispute pursuant to these rules.

Regardless of whether a lawyer or a client initiates the filing of a petition requesting arbitration of the dispute, by filing the petition, the petitioner shall be bound by the result of the arbitration. This is intended to discourage the filing of complaints that are frivolous or that seek to invoke the process simply to obtain an "advisory opinion." If the respondent also agrees to be bound, the resulting arbitration award shall be enforceable under the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

If a client initiates the arbitration process and the respondent lawyer refuses to be bound by any resulting award, the matter will not be accepted for arbitration.

If at any time during the process as set forth in these rules, based upon information received or a lack of information received, the Committee may make a referral to the Office of the General Counsel for consideration of an inquiry into a possible disciplinary action based on Georgia Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule 1.16 (d) (failure to return unearned fees) or other applicable rules.

- CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE
- 559 DISPUTES

- Rule 6-101. Administration of Program.
- This program will be administered by the State Bar Committee
 on the Arbitration of Attorney Fee Disputes ("Committee").
- Rule 6-102. Committee Membership.
 - The Committee shall consist of six lawyer members and three public members who are not lawyers. The six lawyer members shall be appointed by the President of the State Bar of Georgia, and the three public members shall be appointed by the Supreme Court of Georgia.
- 569 Rule 6-103. Terms.
 - Initially, two members of the Committee, including one of the public members, shall be appointed for a period of three years; two members, including the remaining public members, for a period of two years; and one member for a period of one year. As each member's term of office on the Committee expires, his or her successor shall be appointed for a period of three years. The President of the State Bar shall appoint the chair of the Committee each year from among the

- members. Vacancies in unexpired terms shall be filled by their respective appointing authorities.
- Rule 6-104. Powers and Duties of Committee.
- The Committee shall have the following powers and duties:
- 581 (a) To determine whether to accept jurisdiction over a dispute;
- 582 (b) To appoint and remove lawyer and nonlawyer arbitrators

 and panels of arbitrators;
- 584 (c) To oversee the operation of the arbitration process;
- 585 (d) To develop and implement fee arbitration procedures;
- (e) To interpret these rules and to decide any disputes regarding the interpretation and application of these rules;
- 588 (f) To determine challenges to, and rule on, the neutrality of
 589 an arbitrator where the arbitrator does not voluntarily
 590 withdraw;
- 591 (g) To maintain the records of the State Bar of Georgia's Fee
 592 Arbitration Program; and
- 593 (h) To perform all other acts necessary for the effective 594 operation of the Fee Arbitration Program.
- Rule 6-105. Staff's Responsibilities.

- State Bar of Georgia staff shall be assigned to assist the
 Committee. The assigned staff will have such administrative
 responsibilities as may be delegated by the Committee, which may
 include the following:
- 600 (a) Receive and review arbitration requests and discuss them
 601 with the parties, if necessary;
- 602 (b) Conduct inquiries to obtain additional information as needed;
- 604 (c) Make recommendations to the Committee whether to 605 accept or decline jurisdiction; and
- 606 (d) Transmit notices of arbitration hearings, arbitration 607 awards, and other Committee correspondence.

CHAPTER 2 JURISDICTIONAL GUIDELINES

Rule 6-201. Petition.

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A request for arbitration of a fee dispute is initiated by the filing
of a petition with the Committee. Each petition shall be filed on the
Fee Arbitration Petition Form supplied by Committee staff and shall
contain the following elements:

- (a) A statement of the nature of the dispute and the
 petitioner's statement of facts, including relevant exhibits and
 dates. The statement must be double-spaced, typed in a 12-point
 font or hand written and is limited to 50 pages including
 exhibits. The page limit may be increased by the Fee Arbitration
 staff for good cause shown;
 - (b) The names and addresses of the client(s) and the lawyer(s);
 - (c) A statement as to whether or not the petitioner has made a good faith effort to resolve the dispute;
 - (d) A statement that by filing the petition, the petitioner has agreed to be bound by the result of the arbitration;
 - (e) The date of the petition; and
- 626 (f) Each petitioner's signature.
- Rule 6-202. Service of Petition.

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If a petition has been properly completed and appears to have merit, Committee staff shall serve a copy of the petition, along with a Fee Arbitration Answer Form and an acknowledgment of service form, upon the respondent by first class mail addressed to such party's last known address. A signed acknowledgment of service form or a written answer from the respondent or respondent's counsel shall constitute conclusive proof of service and shall eliminate the need to utilize any other form of service.

In the absence of an acknowledgment of service or a written response from the respondent or respondent's counsel, service shall be certified mail, return receipt requested, addressed to such party's last known address.

In unusual circumstances as determined by the Committee or its staff, when service has not been accomplished by other less costly measures, service may be accomplished by the Sheriff or a court-approved agent for service of process.

If service is not accomplished, the Committee shall not accept jurisdiction of the case.

646 Rule 6-203. Answer.

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Each respondent shall have 20 calendar days after service of a petition to file an answer with the Committee. Staff, in its discretion, may grant appropriate extensions of time for the filing of an answer.

The answer shall be filed on or with the Fee Arbitration Answer
Form supplied by Committee staff and shall contain the following
elements:

- (a) If the respondent is the client and/or payer, a statement as to whether the respondent agrees to be bound by the result of the arbitration;
- 656 (b) The respondent's statement of facts. The statement must 657 be double-spaced, typed in a 12-point font or hand written, and 658 the submission is limited to 50 pages including exhibits. The 659 page limit may be increased by the Fee Arbitration staff for good 660 cause shown;
 - (c) Any defenses the respondent intends to assert;
- (d) The date of the answer; and

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- 663 (e) Each respondent's signature.
- Committee staff shall serve a copy of the answer upon each
 petitioner by first class mail, addressed to such party's last known
 address.

The failure to file an answer shall not deprive the Committee of jurisdiction and shall not result in a default judgment against the respondent.

Rule 6-204. Accepting Jurisdiction.

- The Committee or its designee may accept jurisdiction over a fee dispute only if the following requirements are considered satisfied:
 - (a) The fee in question, whether paid or unpaid, was for legal services rendered by a lawyer who is, or was at the time the services were rendered, a member of the State Bar of Georgia or otherwise authorized to practice law in the State of Georgia.
 - (b) The legal services in question were performed:
 - (1) in the State of Georgia; or
 - (2) from an office located in the State of Georgia; or
 - (3) by a lawyer who is not admitted to the practice of law in any United States jurisdiction other than Georgia, and the circumstances are such that if the State Bar of Georgia does not accept jurisdiction, no other United States jurisdiction will be available to a client who has filed a petition under this program.

(c) The disputed fee exceeds \$1,000.

- (d) The amount of the disputed fee is not governed by statute or other law, nor has any court fixed or approved the full amount or all terms of the disputed fee.
 - (e) The fee dispute is not the subject of litigation in court at the time the petition for arbitration is filed or when the Committee determines jurisdiction.
 - (f) The petition seeking arbitration of the fee dispute is filed with the Committee no more than two years following the date on which the controversy arose. If this date is disputed, it shall be determined in the same manner as the commencement of a cause of action on the underlying contract.
 - (g) In the case of disputes between lawyers and clients, a lawyer/client relationship existed between the petitioner and the respondent at the time the legal services in question were performed. A relative or other person paying the legal fees of the client may request arbitration of disputes over those fees, provided both the client and the other person payor join as co-

petitioners or co-respondents and both agree to be bound by the result of the arbitration.

- (h) The client, whether petitioner or respondent, agrees to be bound by the result of the arbitration. If the respondent lawyer does not agree to be bound by the result of the arbitration, the Committee will not accept the matter for arbitration.
- (i) In disputes between lawyers, the lawyers who are parties to the dispute are all members of the State Bar of Georgia and have all agreed to arbitrate the dispute under this program and to be bound by the result of the arbitration.
- (j) Where the parties to a fee dispute have signed a written agreement to submit fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee Arbitration Program, the Committee will consider the agreement enforceable if it is:
 - (1) set out in a separate paragraph;
 - (2) written in a font size at least as large as the rest of the contract; and
 - (3) separately initialed by the client and the lawyer.

(k) In deciding whether to accept jurisdiction, the Committee shall review available evidence, including the recommendations of the staff, and make a determination whether to accept or decline jurisdiction. The Committee's decisions on jurisdiction are final, except that such decisions are subject to reconsideration by the Committee upon the request of either party made within 30 days of the initial decision. Staff shall notify the parties of the Committee's decision on jurisdiction by first class mail.

Rule 6-205. Termination or Suspension of Proceedings.

The Committee may suspend or terminate arbitration proceedings or may decline or terminate jurisdiction if the client, in addition to pursuing arbitration of a fee dispute under these rules, asserts a claim against the lawyer in any court arising out of the same set of circumstances, including any claim of malpractice. Any claim or evidence of professional misconduct within the meaning of the Georgia Code of Professional Responsibility may be reported by the arbitrators or the Committee to the Office of the General Counsel for consideration under its normal procedures.

741 Rule 6-206. Revocation.

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After jurisdiction has been accepted by the Committee, the submission to arbitration shall be irrevocable except by consent of all parties or by action of the Committee or the arbitration panel for good cause shown.

CHAPTER 3 SELECTION OF ARBITRATORS

747 Rule 6-301. Roster of Arbitrators.

The Committee shall maintain a roster of lawyers available to serve as arbitrators on an "as needed" basis in appropriate geographical areas throughout the state. To the extent possible, the arbitration should take place in the same geographical area where the services in question were performed; however, the final decision as to the location of the arbitration remains with the Committee.

The Committee shall likewise maintain a roster of nonlawyer public members selected by the Supreme Court of Georgia.

Rule 6-302. Neutrality of Arbitrators.

No person shall serve as an arbitrator in any matter in which that person has any financial or personal interest. Upon appointment to a particular arbitration, each arbitrator shall disclose to the Committee any circumstance that may affect his or her neutrality in regard to the dispute in question.

If an arbitrator becomes aware of any circumstances that might preclude that arbitrator from rendering an objective and impartial determination of the proceeding, the arbitrator must disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the potential conflict prior to the hearing, the disclosure shall be made to the Committee, which shall forward the disclosure to the parties. If the potential conflict becomes apparent during the hearing, the disclosure shall be made directly to the parties.

If a party believes that an arbitrator has a potential conflict of interest and should withdraw or be disqualified, and the arbitrator does not voluntarily withdraw, the party shall promptly notify the Committee so that the issue may be addressed and resolved as early in the arbitration process as possible.

Rule 6-303. Selection of Arbitrators.

The arbitrator panel shall be selected by the Committee or its staff. Except as provided below the arbitration panel shall consist of two lawyer members who have practiced law actively for at least fiveyears and one nonlawyer public member.

In cases involving disputed amounts not exceeding \$2,500, the Committee in its sole discretion may appoint an arbitration panel consisting of one lawyer who has practiced law actively for at least five years.

Petitioner and respondent by mutual agreement shall have the right to select the three arbitrators. They also may mutually agree to have the dispute determined by a sole arbitrator jointly selected by them, provided any such sole arbitrator shall be one of the persons on the roster of arbitrators or shall have been approved in advance by the Committee upon the joint request of petitioner and respondent.

790 Rule 6-304. Qualifications of Lawyer Arbitrators.

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- In addition to being impartial, lawyer arbitrators shall:
- 792 (a) Have practiced law actively for at least five years; and
- 793 (b) Be an active member in good standing of the State Bar of
 794 Georgia.
- Rule 6-305. Powers and Duties of Arbitration Panel.

The panel of arbitrators shall have the following powers and duties:

- 798 (a) To compel by subpoena the attendance of witnesses and the 799 production of documents and things;
- 800 (b) To decide the extent and method of any discovery;
- 801 (c) To administer oaths and affirmations;
- 802 (d) To take and hear evidence pertaining to the proceeding;
- 803 (e) To rule on the admissibility of evidence;
- (f) To interpret and apply these rules insofar as they relate to the arbitrators' powers and duties; and
- 806 (g) To perform all acts necessary to conduct an effective 807 arbitration hearing.
- 808 Rule 6-306. Compensation.
- All arbitrators shall serve voluntarily and without fee or expense reimbursement; provided, however, that arbitrators selected to serve in disputes in which all the parties are lawyers may at the discretion of the Committee be compensated, with such compensation to be paid by the lawyer parties as directed by the Committee.
- 814 CHAPTER 4 RULES OF PROCEDURE

Rule 6-401. Representation by Counsel.

Parties may be represented throughout the arbitration by counsel at their own expense, or they may represent themselves.

Rule 6-402. Time and Place of Arbitration Hearing.

Upon their appointment by the Committee, the arbitrators shall elect a chair and then shall fix a time and place for the arbitration hearing. To the extent feasible, the hearing shall be held no more than 60 days after the appointment of the last arbitrator. At least ten calendar days prior to the hearing, the Committee shall mail notices of the time and place of the hearing to each party by first class mail, addressed to each party's last known address.

Rule 6-403. Attendance and Participation at Hearing.

The parties shall have the right to attend and participate in the arbitration hearing at their own expense. It shall be discretionary with the arbitrators whether to allow the attendance of any persons who are not parties, witnesses, or counsel to one of the parties.

At the discretion of the arbitrators, a party may be permitted to appear or present witness testimony at the hearing by telephone conference call, video conference, computer-facilitated conference, or similar telecommunications equipment, provided all persons participating in the hearing can simultaneously hear each other during the hearing.

Rule 6-404. Stenographic Record.

Any party may ask the Committee to arrange for the taking of a stenographic record of the proceeding. If a party orders a transcript, that party shall acquire and provide a certified copy of the transcript for the record at no cost to the panel. Other parties are entitled at their own expense to acquire a copy of the transcript by making arrangements directly with the court reporter. However, it shall not be necessary to have a stenographic record of the hearing.

Rule 6-405. Death, Disability, or Resignation of Arbitrator.

If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee or its designee shall determine the course of further proceedings and may appoint a substitute or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

Rule 6-406. Discovery, Subpoenas and Witnesses.

Upon the written request of a party or the panel's own motion, discovery may be allowed to the extent deemed necessary by the arbitrators in their sole discretion.

The arbitrators may issue subpoenas for the attendance of witnesses and for the production of documents and things, and may do so either upon the arbitrators' own initiative or upon the request of a party. These subpoenas shall be served and, upon application to the Superior Court in the county in which the arbitration is pending by a party or the arbitrators, enforced in the same manner provided by law for the service and enforcement of subpoenas in a civil action.

Rule 6-407. Adjournments.

The arbitrators for good cause shown may adjourn the hearing upon the request of either party or upon the arbitrators' own initiative.

Rule 6-408. Arbitrators' Oath.

Before proceeding with the hearing, the arbitrators shall take an oath of office. The arbitrators have the discretion to require witnesses to testify under oath or affirmation, and, if requested by either party, shall so require.

Rule 6-409. Order of Proceedings.

The hearing shall be opened by the filing of the oath of the arbitrators. Next, the panel shall record the place, time, and date of the hearing, the names of the arbitrators, the parties, parties' counsel, and any witnesses who will be presenting evidence during the hearing.

The normal order of proceedings shall be the same as at a trial, with the petitioner's claim being presented first. However, the arbitrators shall have the discretion to vary the normal order of proceedings.

The petitioner shall have the burden of proof by a preponderance of the evidence.

Rule 6-410. Arbitration in the Absence of a Party.

The arbitration may proceed in the absence of a party, who, after due notice, fails to be present in person or by telephonic or electronic means. An award shall not be made solely on the default of a party; the arbitrators shall require the other party or parties to present such evidence as the arbitrators may require for the making of an award.

888 Rule 6-411. Evidence.

(a) Parties may offer such relevant and material evidence as they desire and shall produce such additional evidence as the arbitrators may deem necessary to an understanding and determination of the dispute. The arbitrators shall be the judge of the relevancy and materiality of the evidence offered. The rules of evidence shall be liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.

- (b) A list shall be made of all exhibits received into evidence by the arbitrators. Exhibits shall be listed in the order in which they were received, and the list shall be made a part of the record.
- (c) The names and addresses of all witnesses who testify at the arbitration shall be made a part of the record. Upon their own motion or at the request of any party, the arbitrators shall have the power to require the sequestration of any witness during the testimony of other witnesses.
- (d) The arbitrators may receive and consider the evidence of witnesses by affidavit (copies of which shall be served on the opposing party at least five days prior to the hearing), but shall give such evidence only such weight as the arbitrators deem

- proper after consideration of any objections made to its admissibility.
- 912 (e) The petition, answer, and other pleadings, including any 913 documents attached thereto, may be considered as evidence at 914 the discretion of the arbitrators and given such weight as the 915 arbitrators deem appropriate.
- 916 (f) The receipt of testimony by deposition, conference 917 telephone calls, and other procedures is within the discretion of 918 the arbitrators upon their own motion or at the request of any 919 party.
- 920 Rule 6-412. Written Contract.
- Arbitrators shall give due regard to the terms of any written contract signed by the parties.
- P23 Rule 6-413. Closing of Hearings.

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Prior to the closing of an arbitration hearing, the arbitrators shall inquire of all parties whether they have any further evidence to offer or additional witnesses to be heard. If no further evidence is to be presented by either party, the arbitrators shall declare the hearing closed and make a record of that fact.

Rule 6-414. Reopening of Hearings.

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Upon the motion of the arbitrators or of a party, an arbitration
may be reopened for good cause shown at any time before an award is
made. However, if the reopening of the hearing would prevent the
award from being rendered within the time provided by these rules,
the matter may not be reopened unless both parties agree upon the
extension of such time limit.

Rule 6-415. Waiver of Rules.

Any party who, knowing of a failure to comply with a provision or requirement of these rules, fails to state an objection on the record or in writing prior to the closing of the hearing, shall be deemed to have waived any right to object.

941 Rule 6-416. Waiver of Oral Hearings.

The parties may provide by written agreement for the waiver of oral hearings.

944 Rule 6-417. Award.

The award of the arbitrators is final and binding upon the parties.

947 Rule 6-418. Time of Award.

The arbitrators shall make all reasonable efforts to render their award promptly and not later than 30 days from the date of the closing of the hearing, unless otherwise agreed upon by the parties with the consent of the arbitrators or an extension is obtained from the Committee or its chair. If oral hearing has been waived, then the time period for rendering the award shall begin to run from the date of the receipt of final statements and evidence by the arbitrators.

Rule 6-419. Form of Award.

The award shall be in writing and shall be signed by the arbitrators or by a concurring majority. The parties shall advise the arbitrators in writing prior to the close of the hearing if they request the arbitrators to accompany the award with an opinion.

Rule 6-420. Award Upon Settlement.

If the parties settle their dispute during the course of the arbitration proceeding, the arbitrators, the Committee, or the Committee's designee, upon the written consent of all parties, may set forth the terms of the settlement in an award.

965 Rule 6-421. Service of Award Upon Parties.

Service of the award upon the parties shall be the responsibility
of Committee staff. Service of the award shall be accomplished by
depositing a copy of the award in the United States Mail in a properly
addressed envelope with adequate first class postage thereon and
addressed to each party at his or her last known address.

Prince Rule 6-422. Communication with Arbitrators.

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There shall be no ex parte communication between a party and an arbitrator.

Rule 6-423. Interpretation and Application of Rules.

If the arbitrators on a panel disagree as to the interpretation or application of any rule relating to the arbitrators' powers and duties, such dispute shall be decided by a majority vote of the arbitrators. If the dispute cannot be resolved in that manner, an arbitrator or a party may refer the question to the Committee for its determination. The Committee's decision on the interpretation or application of these rules shall be final.

982 CHAPTER 5 POST-AWARD PROCEEDINGS

983 Rule 6-501. Confirmation of Award in Favor of Client.

In cases where an award in favor of a client has not been satisfied within three months after it was served upon the parties, the client may apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

Upon the written request of a client, the Committee may provide
a lawyer to represent the client in post-award proceedings at no cost
to the client other than court filing fees and litigation expenses.
Alternatively, the Office of the General Counsel of the State Bar of
Georgia may represent, assist, or advise a client in post-award
proceedings, provided the client shall be responsible for all court filing
fees and litigation expenses.

996 Rule 6-502. Confirmation of Award in Favor of Lawyer.

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In cases where an award has been issued in favor of a lawyer, the lawyer may apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

The State Bar will not represent, assist, or advise the attorney
except to provide copies of any necessary papers from the fee
arbitration file pursuant to State Bar policies.

Rule 6-503. Enforcement of Arbitration Awards.

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All arbitration awards under these rules are enforceable under the Georgia Arbitration Code, OCGA §9-9-1 et seq.

Upon the written request of a client, the Committee may provide
a lawyer to represent the client in post-award proceedings at no cost
to the client other than court filing fees and litigation expenses.
Alternatively, the Office of the General Counsel of the State Bar of
Georgia may represent, assist, or advise a client in post-award
proceedings, provided the client shall be responsible for all court filing
fees and litigation expenses.

1014 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND
1015 IMMUNITY

1016 Rule 6-601. Confidentiality.

All records, documents, files, proceedings, and hearings
pertaining to the arbitration of a fee dispute under this program are
the property of the State Bar of Georgia and, except for the award

itself, shall be deemed confidential and shall not be made public by the

State Bar of Georgia.

A person who was not a party to the dispute shall not be allowed access to such materials unless all parties to the arbitration consent in writing or a court of competent jurisdiction orders such access. However, the Committee, its staff, or representative may reveal confidential information in those circumstances in which the Office of the General Counsel is authorized by Bar Rule 4-221.1 to do so.

The record of any fee dispute under these rules shall be retained by the Committee in accordance with policies adopted by the Committee.

1032 Rule 6-603. Immunity.

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Rule 6-602. Record Retention.

The Supreme Court of Georgia recognizes the Fee Arbitration

Program of the State Bar of Georgia to be judicial and quasi-judicial

in nature and within the Court's regulatory function, and in

connection with such arbitration proceedings, members of the Fee

Arbitration Committee, volunteer arbitrators, appointed voluntary

counsel assisting the program and State Bar of Georgia Fee

Arbitration staff are entitled to those immunities customarily afforded to persons so participating in judicial and quasi-judicial proceedings or engaged in such arbitration activities.

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- 1 Part VI Arbitration of Fee Disputes
- 2 Preamble

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The purpose of the State Bar of Georgia's program for the 3 arbitration of fee disputes is to provide a convenient mechanism for the resolution of disputes (1) between lawyers and clients over fees; (2) 5 between lawyers in connection with the dissolution of a practice or the 7 withdrawal of a lawyer from a partnership or practice; or (3) between lawyers concerning the allocation of fees earned from joint services. If 8 the parties to such a dispute have been unable to reach an agreement 9 between or among themselves, either side may petition the State Bar 10 Committee on the Arbitration of Attorney Fee Disputes ("Committee") 11

Regardless of whether a lawyer or a client initiates the filing of a petition requesting arbitration of the dispute, by filing the petition, the petitioner shall be bound by the result of the arbitration. This is intended to discourage the filing of complaints that are frivolous or that seek to invoke the process simply to obtain an "advisory opinion."

to arbitrate the dispute pursuant to these rules.

18 If the respondent also agrees to be bound, the resulting arbitration

- 19 award shall be enforceable under the Georgia Arbitration Code,
- 20 O.C.G.A. § 9-9-1 et seq.
- By filing a Petition for Fee Arbitration, the Petitioner agrees to
- be bound by the award. If the Respondent is an attorney, the
- 23 attorney is likewise bound. However, if the Respondent is a client,
- the Committee lacks jurisdiction unless the client consents to
- arbitration. In any fee dispute between an attorney and client, the
- attorney is required to participate in arbitration if requested by the
- 27 client and is bound by the award.
- 28 If at any time during the process as set forth in these rules, based
- 29 upon information received or a lack of information received, the
- 30 Committee may make a referral to the Office of the General Counsel
- 31 for consideration of an inquiry into a possible disciplinary action based
- on Georgia Rules of Professional Conduct including Rule 1.5
- 33 (unreasonable fees) and/or Rule 1.16 (d) (failure to return unearned
- section fees) or other applicable rules.
- 35 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE
- 36 DISPUTES
- 37 Rule 6-101. Administration of Program.

- This program will be administered by the State Bar Committee
 on the Arbitration of Attorney Fee Disputes ("Committee").
- 40 Rule 6-102. Committee Membership.
- The Committee shall consist of six lawyer members and three public members who are not lawyers. The six lawyer members shall be appointed by the President of the State Bar of Georgia, and the three public members shall be appointed by the Supreme Court of Georgia.
- 46 Rule 6-103. Terms.
- Initially, two members of the Committee, including one of the 47 public members, shall be appointed for a period of three years; two 48 members, including the remaining public members, for a period of two 49 years; and one member for a period of one year. As each member's term 50 of office on the Committee expires, his or her successor shall be 51 appointed for a period of three years. The President of the State Bar 52 shall appoint the chair of the Committee each year from among the 53 members. Vacancies in unexpired terms shall be filled by their 54 respective appointing authorities. 55
- Rule 6-104. Powers and Duties of Committee.

- The Committee shall have the following powers and duties:
- 58 (a) To determine whether to accept jurisdiction over a dispute;
- 59 (b) To appoint and remove lawyer and nonlawyer arbitrators
- and panels of arbitrators;
- 61 (c) To oversee the operation of the arbitration process;
- 62 (d) To develop and implement fee arbitration procedures;
- (e) To interpret these rules and to decide any disputes
- regarding the interpretation and application of these rules;
- 65 (f) To determine challenges to, and rule on, the neutrality of
- an arbitrator where the arbitrator does not voluntarily
- 67 withdraw;
- 68 (g) To maintain the records of the State Bar of Georgia's Fee
- Arbitration Program; and
- 70 (h) To perform all other acts necessary for the effective
- operation of the Fee Arbitration Program.
- 72 Rule 6-105. Staff's Responsibilities.
- State Bar of Georgia staff shall be assigned to assist the
- 74 Committee. The assigned staff will have such administrative

- 75 responsibilities as may be delegated by the Committee, which may
- 76 include the following:
- 77 (a) Receive and review arbitration requests and discuss them
- 78 with the parties, if necessary;
- 79 (b) Conduct inquiries to obtain additional information as
- needed;
- 81 (c) Make recommendations to the Committee whether to
- accept or decline jurisdiction; and
- 83 (d) Transmit notices of arbitration hearings, arbitration
- awards, and other Committee correspondence.
- 85 CHAPTER 2 JURISDICTIONAL GUIDELINES
- 86 Rule 6-201. Petition.
- A request for arbitration of a fee dispute is initiated by the filing
- of a petition with the Committee. Each petition shall be filed on the
- 89 Fee Arbitration Petition Form supplied by Committee staff and shall
- 90 contain the following elements:
- 91 (a) A statement of the nature of the dispute and the
- petitioner's statement of facts, including relevant exhibits and
- dates. The statement must be double-spaced, typed in a 12-point

- font or hand written and is limited to 50 pages including exhibits. The page limit may be increased by the Fee Arbitration staff for good cause shown;
- 97 (b) The names and addresses of the client(s) and the lawyer(s);
- 98 (c) A statement as to whether or not the petitioner has made 99 a good faith effort to resolve the dispute;
- 100 (d) A statement that by filing the petition, the petitioner has
 101 agreed to be bound by the result of the arbitration;
- 102 (e) The date of the petition; and
- 103 (f) Each petitioner's signature.
- 104 Rule 6-202. Service of Petition.

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If a petition has been properly completed and appears to have merit, Committee staff shall serve a copy of the petition, along with a Fee Arbitration Answer Form and an acknowledgment of service form, upon the respondent by first class mail addressed to such party's last known address. A signed acknowledgment of service form or a written answer from the respondent or respondent's counsel shall constitute conclusive proof of service and shall eliminate the need to utilize any other form of service.

In the absence of an acknowledgment of service or a written response from the respondent or respondent's counsel, service shall be certified mail, return receipt requested, addressed to such party's last known address.

In unusual circumstances as determined by the Committee or its staff, when service has not been accomplished by other less costly measures, service may be accomplished by the Sheriff or a court-approved agent for service of process.

If service is not accomplished, the Committee shall not accept jurisdiction of the case.

123 Rule 6-203. Answer.

Each respondent shall have 20 calendar days after service of a petition to file an answer with the Committee. Staff, in its discretion, may grant appropriate extensions of time for the filing of an answer.

The answer shall be filed on or with the Fee Arbitration Answer

Form supplied by Committee staff and shall contain the following
elements:

- 130 (a) If the respondent is the client and/or payer, a statement as
 131 to whether the respondent agrees to be bound by the result of the
 132 arbitration;
- 133 (b) The respondent's statement of facts. The statement must
 134 be double-spaced, typed in a 12-point font or hand written, and
 135 the submission is limited to 50 pages including exhibits. The
 136 page limit may be increased by the Fee Arbitration staff for good
 137 cause shown;
- (c) Any defenses the respondent intends to assert;
- (d) The date of the answer; and

- (e) Each respondent's signature.
- 141 Committee staff shall serve a copy of the answer upon each
 142 petitioner by first class mail, addressed to such party's last known
 143 address.
- The failure to file an answer shall not deprive the Committee of jurisdiction and shall not result in a default judgment against the respondent.
- Rule 6-204. Accepting Jurisdiction.

The Committee or its designee may accept jurisdiction over a fee dispute only if the following requirements are considered satisfied:

- (a) The fee in question, whether paid or unpaid, was for legal services rendered by a lawyer who is, or was at the time the services were rendered, a member of the State Bar of Georgia or otherwise authorized to practice law in the State of Georgia.
- (b) The legal services in question were performed:
 - (1) in the State of Georgia; or
 - (2) from an office located in the State of Georgia; or
 - (3) by a lawyer who is not admitted to the practice of law in any United States jurisdiction other than Georgia, and the circumstances are such that if the State Bar of Georgia does not accept jurisdiction, no other United States jurisdiction will be available to a client who has filed a petition under this program.
- (c) The disputed fee exceeds \$1,000.
- (d) The amount of the disputed fee is not governed by statute or other law, nor has any court fixed or approved the full amount or all terms of the disputed fee.

(e) The fee dispute is not the subject of litigation in court at the time the petition for arbitration is filed or when the Committee determines jurisdiction.

- (f) The petition seeking arbitration of the fee dispute is filed with the Committee no more than two years following the date on which the controversy arose. If this date is disputed, it shall be determined in the same manner as the commencement of a cause of action on the underlying contract.
- (g) In the case of disputes between lawyers and clients, a lawyer/client relationship existed between the petitioner and the respondent at the time the legal services in question were performed. A relative or other person paying the legal fees of the client may request arbitration of disputes over those fees, provided both the client and the other person payor join as copetitioners or co-respondents and both agree to be bound by the result of the arbitration.
- (h) The client, whether petitioner or respondent, agrees to be bound by the result of the arbitration. Any subsequent

arbitration award shall be final and binding if jurisdiction is accepted.

- (i) In disputes between lawyers, the lawyers who are parties to the dispute are all members of the State Bar of Georgia and have all agreed to arbitrate the dispute under this program and to be bound by the result of the arbitration.
- (j) Where the parties to a fee dispute have signed a written agreement to submit fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee Arbitration Program, the Committee will consider the agreement enforceable if it is:
 - (1) set out in a separate paragraph;
 - (2) written in a font size at least as large as the rest of the contract; and
 - (3) separately initialed by the client and the lawyer and be in compliance with the Georgia Arbitration Code.
- (k) In deciding whether to accept jurisdiction, the Committee shall review available evidence, including the recommendations of the staff, and make a determination whether to accept or decline jurisdiction. The Committee's decisions on jurisdiction

are final, except that such decisions are subject to reconsideration by the Committee upon the request of either party made within 30 days of the initial decision. Staff shall notify the parties of the Committee's decision on jurisdiction by first class mail.

Rule 6-205. Termination or Suspension of Proceedings.

The Committee may suspend or terminate arbitration proceedings or may decline or terminate jurisdiction if the client, in addition to pursuing arbitration of a fee dispute under these rules, asserts a claim against the lawyer in any court arising out of the same set of circumstances, including any claim of malpractice. Any claim or evidence of professional misconduct within the meaning of the Georgia Rules of Professional Conduct may be reported by the arbitrators or the Committee to the Office of the General Counsel for consideration under its normal procedures.

219 Rule 6-206. Revocation.

After jurisdiction has been accepted by the Committee, the submission to arbitration shall be irrevocable except by consent of all

parties or by action of the Committee or the arbitration panel for good cause shown.

CHAPTER 3 SELECTION OF ARBITRATORS

Rule 6-301. Roster of Arbitrators.

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The Committee shall maintain a roster of lawyers available to serve as arbitrators on an "as needed" basis in appropriate geographical areas throughout the state. To the extent possible, the arbitration should take place in the same geographical area where the services in question were performed; however, the final decision as to the location of the arbitration remains with the Committee.

The Committee shall likewise maintain a roster of nonlawyer public members selected by the Supreme Court of Georgia.

Rule 6-302. Neutrality of Arbitrators.

No person shall serve as an arbitrator in any matter in which that person has any financial or personal interest. Upon appointment to a particular arbitration, each arbitrator shall disclose to the Committee any circumstance that may affect his or her neutrality in regard to the dispute in question. If an arbitrator becomes aware of any circumstances that might preclude that arbitrator from rendering an objective and impartial determination of the proceeding, the arbitrator must disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the potential conflict prior to the hearing, the disclosure shall be made to the Committee, which shall forward the disclosure to the parties. If the potential conflict becomes apparent during the hearing, the disclosure shall be made directly to the parties.

If a party believes that an arbitrator has a potential conflict of interest and should withdraw or be disqualified, and the arbitrator does not voluntarily withdraw, the party shall promptly notify the Committee so that the issue may be addressed and resolved as early in the arbitration process as possible.

Rule 6-303. Selection of Arbitrators.

The arbitrator panel shall be selected by the Committee or its staff. Except as provided below the arbitration panel shall consist of two lawyers members who have practiced law actively for at least five years and one nonlawyer public member.

In cases involving disputed amounts not exceeding \$2,500, the Committee in its sole discretion may appoint an arbitration panel consisting of one lawyer who has practiced law actively for at least five years.

Petitioner and respondent by mutual agreement shall have the right to select the three arbitrators. They also may mutually agree to have the dispute determined by a sole arbitrator jointly selected by them, provided any such sole arbitrator shall be one of the persons on the roster of arbitrators or shall have been approved in advance by the Committee upon the joint request of petitioner and respondent.

Rule 6-304. Qualifications of Lawyer Arbitrators.

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- In addition to being impartial, lawyer arbitrators shall:
- 270 (a) Have practiced law actively for at least five years; and
- (b) Be an active member in good standing of the State Bar of Georgia.
- 273 Rule 6-305. Powers and Duties of Arbitration Panel.
- The panel of arbitrators shall have the following powers and duties:

- 276 (a) To compel by subpoena the attendance of witnesses and the
 277 production of documents and things;
- (b) To decide the extent and method of any discovery;
- (c) To administer oaths and affirmations;
- 280 (d) To take and hear evidence pertaining to the proceeding;
- (e) To rule on the admissibility of evidence;
- 282 (f) To interpret and apply these rules insofar as they relate to
- the arbitrators' powers and duties; and
- 284 (g) To perform all acts necessary to conduct an effective
- arbitration hearing.
- Rule 6-306. Compensation.
- All arbitrators shall serve voluntarily and without fee or expense
- reimbursement; provided, however, that arbitrators selected to serve
- in disputes in which all the parties are lawyers will be compensated,
- 290 with such compensation to be paid by the lawyer parties as directed
- by the Committee.
- 292 CHAPTER 4 RULES OF PROCEDURE
- Rule 6-401. Representation by Counsel.

Parties may be represented throughout the arbitration by counsel at their own expense, or they may represent themselves.

Rule 6-402. Time and Place of Arbitration Hearing.

Upon their appointment by the Committee, the arbitrators shall elect a chair and then shall fix a time and place for the arbitration hearing. To the extent feasible, the hearing shall be held no more than 60 days after the appointment of the last arbitrator. At least ten calendar days prior to the hearing, the Committee shall mail notices of the time and place of the hearing to each party by first class mail, addressed to each party's last known address.

Rule 6-403. Attendance and Participation at Hearing.

The parties shall have the right to attend and participate in the arbitration hearing at their own expense. It shall be discretionary with the arbitrators whether to allow the attendance of any persons who are not parties, witnesses, or counsel to one of the parties.

At the discretion of the arbitrators, a party may be permitted to appear or present witness testimony at the hearing by telephone conference call, video conference, computer-facilitated conference, or similar telecommunications equipment, provided all persons participating in the hearing can simultaneously hear each other during the hearing.

Rule 6-404. Stenographic Record.

Any party may ask the Committee to arrange for the taking of a stenographic record of the proceeding. If a party orders a transcript, that party shall acquire and provide a certified copy of the transcript for the record at no cost to the panel. Other parties are entitled at their own expense to acquire a copy of the transcript by making arrangements directly with the court reporter. However, it shall not be necessary to have a stenographic record of the hearing.

Rule 6-405. Death, Disability, or Resignation of Arbitrator.

If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee or its designee shall determine the course of further proceedings and may appoint a substitute or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

Rule 6-406. Discovery, Subpoenas and Witnesses.

Upon the written request of a party or the panel's own motion, discovery may be allowed to the extent deemed necessary by the arbitrators in their sole discretion.

The arbitrators may issue subpoenas for the attendance of witnesses and for the production of documents and things, and may do so either upon the arbitrators' own initiative or upon the request of a party. These subpoenas shall be served and, upon application to the Superior Court in the county in which the arbitration is pending by a party or the arbitrators, enforced in the same manner provided by law for the service and enforcement of subpoenas in a civil action.

Rule 6-407. Adjournments.

The arbitrators for good cause shown may adjourn the hearing upon the request of either party or upon the arbitrators' own initiative.

Rule 6-408. Arbitrators' Oath.

Before proceeding with the hearing, the arbitrators shall take an oath of office. The arbitrators have the discretion to require witnesses to testify under oath or affirmation, and, if requested by either party, shall so require.

Rule 6-409. Order of Proceedings.

The hearing shall be opened by the filing of the oath of the arbitrators. Next, the panel shall record the place, time, and date of the hearing, the names of the arbitrators, the parties, parties' counsel, and any witnesses who will be presenting evidence during the hearing.

The normal order of proceedings shall be the same as at a trial, with the petitioner's claim being presented first. However, the arbitrators shall have the discretion to vary the normal order of proceedings.

The petitioner shall have the burden of proof by a preponderance of the evidence.

Rule 6-410. Arbitration in the Absence of a Party.

The arbitration may proceed in the absence of a party, who, after due notice, fails to be present in person or by telephonic or electronic means. An award shall not be made solely on the default of a party; the arbitrators shall require the other party or parties to present such evidence as the arbitrators may require for the making of an award.

Rule 6-411. Evidence.

(a) Parties may offer such relevant and material evidence as they desire and shall produce such additional evidence as the arbitrators may deem necessary to an understanding and determination of the dispute. The arbitrators shall be the judge of the relevancy and materiality of the evidence offered. The rules of evidence shall be liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.

- (b) A list shall be made of all exhibits received into evidence by the arbitrators. Exhibits shall be listed in the order in which they were received, and the list shall be made a part of the record.
- (c) The names and addresses of all witnesses who testify at the arbitration shall be made a part of the record. Upon their own motion or at the request of any party, the arbitrators shall have the power to require the sequestration of any witness during the testimony of other witnesses.
- (d) The arbitrators may receive and consider the evidence of witnesses by affidavit (copies of which shall be served on the opposing party at least five days prior to the hearing), but shall give such evidence only such weight as the arbitrators deem

- proper after consideration of any objections made to its admissibility.
- (e) The petition, answer, and other pleadings, including any documents attached thereto, may be considered as evidence at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.
 - (f) The receipt of testimony by deposition, conference telephone calls, and other procedures is within the discretion of the arbitrators upon their own motion or at the request of any party.
- 398 Rule 6-412. Written Contract.

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- Arbitrators shall give due regard to the terms of any written contract signed by the parties.
- 401 Rule 6-413. Closing of Hearings.
- Prior to the closing of an arbitration hearing, the arbitrators
 shall inquire of all parties whether they have any further evidence to
 offer or additional witnesses to be heard. If no further evidence is to
 be presented by either party, the arbitrators shall declare the hearing
 closed and make a record of that fact.

407 Rule 6-414. Reopening of Hearings.

Upon the motion of the arbitrators or of a party, an arbitration
may be reopened for good cause shown at any time before an award is
made. However, if the reopening of the hearing would prevent the
award from being rendered within the time provided by these rules,
the matter may not be reopened unless both parties agree upon the
extension of such time limit.

Rule 6-415. Waiver of Rules.

Any party who, knowing of a failure to comply with a provision or requirement of these rules, fails to state an objection on the record or in writing prior to the closing of the hearing, shall be deemed to have waived any right to object.

Rule 6-416. Waiver of Oral Hearings.

The parties may provide by written agreement for the waiver of oral hearings.

422 Rule 6-417. Award.

The award of the arbitrators is final and binding upon the parties.

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Rule 6-418. Time of Award.

The arbitrators shall make all reasonable efforts to render their
award promptly and not later than 30 days from the date of the closing
of the hearing, unless otherwise agreed upon by the parties with the
consent of the arbitrators or an extension is obtained from the
Committee or its chair. If oral hearing has been waived, then the time
period for rendering the award shall begin to run from the date of the
receipt of final statements and evidence by the arbitrators.

Rule 6-419. Form of Award.

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The award shall be in writing and shall be signed by the arbitrators or by a concurring majority. The parties shall advise the arbitrators in writing prior to the close of the hearing if they request the arbitrators to accompany the award with an opinion.

Rule 6-420. Award Upon Settlement.

If the parties settle their dispute during the course of the arbitration proceeding, the arbitrators, the Committee, or the Committee's designee, upon the written consent of all parties, may set forth the terms of the settlement in an award.

Rule 6-421. Service of Award Upon Parties.

Service of the award upon the parties shall be the responsibility
of Committee staff. Service of the award shall be accomplished by
depositing a copy of the award in the United States Mail in a properly
addressed envelope with adequate first class postage thereon and
addressed to each party at his or her last known address.

- Rule 6-422. Communication with Arbitrators.
- There shall be no ex parte communication between a party and an arbitrator.
- Rule 6-423. Interpretation and Application of Rules.
- If the arbitrators on a panel disagree as to the interpretation or application of any rule relating to the arbitrators' powers and duties, such dispute shall be decided by a majority vote of the arbitrators. If the dispute cannot be resolved in that manner, an arbitrator or a party may refer the question to the Committee for its determination. The Committee's decision on the interpretation or application of these rules shall be final.
- 461 CHAPTER 5 POST-AWARD PROCEEDINGS
- Rule 6-501. Confirmation of Award in Favor of Client.

In cases where an award in favor of a client has not been satisfied within three months after it was served upon the parties, the client may apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

Upon the written request of a client, the Committee may provide a lawyer to represent the client in post-award proceedings at no cost to the client other than court filing fees and litigation expenses. Alternatively, the Office of the General Counsel of the State Bar of Georgia may represent, assist, or advise a client in post-award proceedings, provided the client shall be responsible for all court filing fees and litigation expenses.

Rule 6-502. Confirmation of Award in Favor of Lawyer.

In cases where an award has been issued in favor of a lawyer, the lawyermay apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

- The State Bar will not represent, assist, or advise the attorney
 except to provide copies of any necessary papers from the fee
 arbitration file pursuant to State Bar policies.
- Rule 6-503. Enforcement of Arbitration Awards.
- All arbitration awards under these rules are enforceable under the Georgia Arbitration Code, OCGA §9-9-1 et seq.
- Upon the written request of a client, the Committee may provide
 a lawyer to represent the client in post-award proceedings at no cost
 to the client other than court filing fees and litigation expenses.
 Alternatively, the Office of the General Counsel of the State Bar of
 Georgia may represent, assist, or advise a client in post-award
 proceedings, provided the client shall be responsible for all court filing
 fees and litigation expenses.
- 493 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND
- 494 IMMUNITY
- 495 Rule 6-601. Confidentiality.
- All records, documents, files, proceedings, and hearings
 pertaining to the arbitration of a fee dispute under this program are
 the property of the State Bar of Georgia and, except for the award

itself, shall be deemed confidential and shall not be made public by theState Bar of Georgia.

A person who was not a party to the dispute shall not be allowed access to such materials unless all parties to the arbitration consent in writing or a court of competent jurisdiction orders such access. However, the Committee, its staff, or representative may reveal confidential information in those circumstances in which the Office of the General Counsel is authorized by Bar Rule 4-221.1 to do so.

Rule 6-602. Record Retention.

The record of any fee dispute under these rules shall be retained by the Committee in accordance with policies adopted by the Committee.

511 Rule 6-603. Immunity.

The Supreme Court of Georgia recognizes the Fee Arbitration
Program of the State Bar of Georgia to be judicial and quasi-judicial
in nature and within the Court's regulatory function, and in
connection with such arbitration proceedings, members of the Fee
Arbitration Committee, volunteer arbitrators, appointed voluntary
counsel assisting the program and State Bar of Georgia Fee

Arbitration staff are entitled to those immunities customarily afforded to persons so participating in judicial and quasi-judicial proceedings or engaged in such arbitration activities.

Part VI - Arbitration of Fee Disputes

Preamble

The purpose of the State Bar of Georgia's program for the arbitration of fee disputes is to provide a convenient mechanism for the resolution of disputes (1) between lawyers and clients over fees; (2) between lawyers in connection with the dissolution of a practice or the withdrawal of a lawyer from a partnership or practice; or (3) between lawyers concerning the allocation of fees earned from joint services. If the parties to such a dispute have been unable to reach an agreement between or among themselves, either side may petition the State Bar Committee on the Arbitration of Attorney Fee Disputes ("Committee") to arbitrate the dispute pursuant to these rules.

Regardless of whether a lawyer or a client initiates the filing of a petition requesting arbitration of the dispute, by filing the petition, the petitioner shall be bound by the result of the arbitration. This is intended to discourage the filing of complaints that are frivolous or

- that seek to invoke the process simply to obtain an "advisory opinion."
- If the respondent also agrees to be bound, the resulting arbitration
- award shall be enforceable under the Georgia Arbitration Code,
- 540 O.C.G.A. § 9-9-1 et seq.
- If a client initiates the arbitration process and the respondent
- lawyer refuses to be bound by any resulting award, the matter will not
- be accepted for arbitration.
- If at any time during the process as set forth in these rules, based
- 545 upon information received or a lack of information received, the
- 546 Committee may make a referral to the Office of the General Counsel
- for consideration of an inquiry into a possible disciplinary action based
- 548 on Georgia Rules of Professional Conduct including Rule 1.5
- 549 (unreasonable fees) and/or Rule 1.16 (d) (failure to return unearned
- 550 fees) or other applicable rules.
- 551 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE
- 552 DISPUTES
- Rule 6-101. Administration of Program.
- This program will be administered by the State Bar Committee
- on the Arbitration of Attorney Fee Disputes ("Committee").

Rule 6-102. Committee Membership.

The Committee shall consist of six lawyer members and three public members who are not lawyers. The six lawyer members shall be appointed by the President of the State Bar of Georgia, and the three public members shall be appointed by the Supreme Court of Georgia.

562 Rule 6-103. Terms.

Initially, two members of the Committee, including one of the public members, shall be appointed for a period of three years; two members, including the remaining public members, for a period of two years; and one member for a period of one year. As each member's term of office on the Committee expires, his or her successor shall be appointed for a period of three years. The President of the State Bar shall appoint the chair of the Committee each year from among the members. Vacancies in unexpired terms shall be filled by their respective appointing authorities.

- Rule 6-104. Powers and Duties of Committee.
- The Committee shall have the following powers and duties:
- 574 (a) To determine whether to accept jurisdiction over a dispute;

- 575 (b) To appoint and remove lawyer and nonlawyer arbitrators
 576 and panels of arbitrators;
- 577 (c) To oversee the operation of the arbitration process;
- 578 (d) To develop and implement fee arbitration procedures;
- (e) To interpret these rules and to decide any disputes regarding the interpretation and application of these rules;
- (f) To determine challenges to, and rule on, the neutrality of an arbitrator where the arbitrator does not voluntarily withdraw;
- 584 (g) To maintain the records of the State Bar of Georgia's Fee
 585 Arbitration Program; and
- 586 (h) To perform all other acts necessary for the effective 587 operation of the Fee Arbitration Program.
- Rule 6-105. Staff's Responsibilities.
- State Bar of Georgia staff shall be assigned to assist the
 Committee. The assigned staff will have such administrative
 responsibilities as may be delegated by the Committee, which may
 include the following:

- 593 (a) Receive and review arbitration requests and discuss them
 594 with the parties, if necessary;
- 595 (b) Conduct inquiries to obtain additional information as 596 needed;
- 597 (c) Make recommendations to the Committee whether to 598 accept or decline jurisdiction; and
- (d) Transmit notices of arbitration hearings, arbitration awards, and other Committee correspondence.

601 CHAPTER 2 JURISDICTIONAL GUIDELINES

Rule 6-201. Petition.

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A request for arbitration of a fee dispute is initiated by the filing
of a petition with the Committee. Each petition shall be filed on the
Fee Arbitration Petition Form supplied by Committee staff and shall
contain the following elements:

(a) A statement of the nature of the dispute and the petitioner's statement of facts, including relevant exhibits and dates. The statement must be double-spaced, typed in a 12-point font or hand written and is limited to 50 pages including

- exhibits. The page limit may be increased by the Fee Arbitration staff for good cause shown;
 - (b) The names and addresses of the client(s) and the lawyer(s);
- 614 (c) A statement as to whether or not the petitioner has made
 615 a good faith effort to resolve the dispute;
- 616 (d) A statement that by filing the petition, the petitioner has
 617 agreed to be bound by the result of the arbitration;
- (e) The date of the petition; and
- 619 (f) Each petitioner's signature.
- Rule 6-202. Service of Petition.

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If a petition has been properly completed and appears to have merit, Committee staff shall serve a copy of the petition, along with a Fee Arbitration Answer Form and an acknowledgment of service form, upon the respondent by first class mail addressed to such party's last known address. A signed acknowledgment of service form or a written answer from the respondent or respondent's counsel shall constitute conclusive proof of service and shall eliminate the need to utilize any other form of service.

In the absence of an acknowledgment of service or a written response from the respondent or respondent's counsel, service shall be certified mail, return receipt requested, addressed to such party's last known address.

In unusual circumstances as determined by the Committee or its staff, when service has not been accomplished by other less costly measures, service may be accomplished by the Sheriff or a court-approved agent for service of process.

If service is not accomplished, the Committee shall not accept jurisdiction of the case.

Rule 6-203. Answer.

Each respondent shall have 20 calendar days after service of a petition to file an answer with the Committee. Staff, in its discretion, may grant appropriate extensions of time for the filing of an answer.

The answer shall be filed on or with the Fee Arbitration Answer

Form supplied by Committee staff and shall contain the following

elements:

- (a) If the respondent is the client and/or payer, a statement as
 to whether the respondent agrees to be bound by the result of the
 arbitration;
- (b) The respondent's statement of facts. The statement must be double-spaced, typed in a 12-point font or hand written, and the submission is limited to 50 pages including exhibits. The page limit may be increased by the Fee Arbitration staff for good cause shown;
- 654 (c) Any defenses the respondent intends to assert;
- 655 (d) The date of the answer; and
- 656 (e) Each respondent's signature.
- Committee staff shall serve a copy of the answer upon each petitioner by first class mail, addressed to such party's last known address.
- The failure to file an answer shall not deprive the Committee of jurisdiction and shall not result in a default judgment against the respondent.
- Rule 6-204. Accepting Jurisdiction.

The Committee or its designee may accept jurisdiction over a fee dispute only if the following requirements are considered satisfied:

- (a) The fee in question, whether paid or unpaid, was for legal services rendered by a lawyer who is, or was at the time the services were rendered, a member of the State Bar of Georgia or otherwise authorized to practice law in the State of Georgia.
- (b) The legal services in question were performed:
 - (1) in the State of Georgia; or

- (2) from an office located in the State of Georgia; or
- (3) by a lawyer who is not admitted to the practice of law in any United States jurisdiction other than Georgia, and the circumstances are such that if the State Bar of Georgia does not accept jurisdiction, no other United States jurisdiction will be available to a client who has filed a petition under this program.
- (c) The disputed fee exceeds \$1,000.
- or other law, nor has any court fixed or approved the full amount or all terms of the disputed fee.

(e) The fee dispute is not the subject of litigation in court at the time the petition for arbitration is filed or when the Committee determines jurisdiction.

- (f) The petition seeking arbitration of the fee dispute is filed with the Committee no more than two years following the date on which the controversy arose. If this date is disputed, it shall be determined in the same manner as the commencement of a cause of action on the underlying contract.
- (g) In the case of disputes between lawyers and clients, a lawyer/client relationship existed between the petitioner and the respondent at the time the legal services in question were performed. A relative or other person paying the legal fees of the client may request arbitration of disputes over those fees, provided both the client and the other person payor join as copetitioners or co-respondents and both agree to be bound by the result of the arbitration.
- (h) The client, whether petitioner or respondent, agrees to be bound by the result of the arbitration. If the respondent lawyer

does not agree to be bound by the result of the arbitration, the Committee will not accept the matter for arbitration.

- (i) In disputes between lawyers, the lawyers who are parties to the dispute are all members of the State Bar of Georgia and have all agreed to arbitrate the dispute under this program and to be bound by the result of the arbitration.
- (j) Where the parties to a fee dispute have signed a written agreement to submit fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee Arbitration Program, the Committee will consider the agreement enforceable if it is:
 - (1) set out in a separate paragraph;
 - (2) written in a font size at least as large as the rest of the contract; and
 - (3) separately initialed by the client and the lawyer.
- (k) In deciding whether to accept jurisdiction, the Committee shall review available evidence, including the recommendations of the staff, and make a determination whether to accept or decline jurisdiction. The Committee's decisions on jurisdiction are final, except that such decisions are subject to

reconsideration by the Committee upon the request of either party made within 30 days of the initial decision. Staff shall notify the parties of the Committee's decision on jurisdiction by first class mail.

Rule 6-205. Termination or Suspension of Proceedings.

The Committee may suspend or terminate arbitration proceedings or may decline or terminate jurisdiction if the client, in addition to pursuing arbitration of a fee dispute under these rules, asserts a claim against the lawyer in any court arising out of the same set of circumstances, including any claim of malpractice. Any claim or evidence of professional misconduct within the meaning of the Georgia Code of Professional Responsibility may be reported by the arbitrators or the Committee to the Office of the General Counsel for consideration under its normal procedures.

734 Rule 6-206. Revocation.

After jurisdiction has been accepted by the Committee, the submission to arbitration shall be irrevocable except by consent of all parties or by action of the Committee or the arbitration panel for good cause shown.

CHAPTER 3 SELECTION OF ARBITRATORS

740 Rule 6-301. Roster of Arbitrators.

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The Committee shall maintain a roster of lawyers available to serve as arbitrators on an "as needed" basis in appropriate geographical areas throughout the state. To the extent possible, the arbitration should take place in the same geographical area where the services in question were performed; however, the final decision as to the location of the arbitration remains with the Committee.

The Committee shall likewise maintain a roster of nonlawyer public members selected by the Supreme Court of Georgia.

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No person shall serve as an arbitrator in any matter in which that person has any financial or personal interest. Upon appointment to a particular arbitration, each arbitrator shall disclose to the Committee any circumstance that may affect his or her neutrality in regard to the dispute in question.

If an arbitrator becomes aware of any circumstances that might preclude that arbitrator from rendering an objective and impartial determination of the proceeding, the arbitrator must disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the potential conflict prior to the hearing, the disclosure shall be made to the Committee, which shall forward the disclosure to the parties. If the potential conflict becomes apparent during the hearing, the disclosure shall be made directly to the parties.

If a party believes that an arbitrator has a potential conflict of interest and should withdraw or be disqualified, and the arbitrator does not voluntarily withdraw, the party shall promptly notify the Committee so that the issue may be addressed and resolved as early in the arbitration process as possible.

Rule 6-303. Selection of Arbitrators.

The arbitrator panel shall be selected by the Committee or its staff. Except as provided below the arbitration panel shall consist of two lawyer members who have practiced law actively for at least five years and one nonlawyer public member.

In cases involving disputed amounts not exceeding \$2,500, the Committee in its sole discretion may appoint an arbitration panel consisting of one lawyer who has practiced law actively for at least five years.

Petitioner and respondent by mutual agreement shall have the right to select the three arbitrators. They also may mutually agree to have the dispute determined by a sole arbitrator jointly selected by them, provided any such sole arbitrator shall be one of the persons on the roster of arbitrators or shall have been approved in advance by the Committee upon the joint request of petitioner and respondent.

- Rule 6-304. Qualifications of Lawyer Arbitrators.
- In addition to being impartial, lawyer arbitrators shall:
- 785 (a) Have practiced law actively for at least five years; and
- 786 (b) Be an active member in good standing of the State Bar of Georgia.
- Rule 6-305. Powers and Duties of Arbitration Panel.
- The panel of arbitrators shall have the following powers and duties:
- 791 (a) To compel by subpoena the attendance of witnesses and the 792 production of documents and things;
- 793 (b) To decide the extent and method of any discovery;
- 794 (c) To administer oaths and affirmations;
- 795 (d) To take and hear evidence pertaining to the proceeding;

- 796 (e) To rule on the admissibility of evidence;
- 797 (f) To interpret and apply these rules insofar as they relate to
 798 the arbitrators' powers and duties; and
- 799 (g) To perform all acts necessary to conduct an effective 800 arbitration hearing.
- 801 Rule 6-306. Compensation.

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All arbitrators shall serve voluntarily and without fee or expense reimbursement; provided, however, that arbitrators selected to serve in disputes in which all the parties are lawyers may at the discretion of the Committee be compensated, with such compensation to be paid by the lawyer parties as directed by the Committee.

807 CHAPTER 4 RULES OF PROCEDURE

- 808 Rule 6-401. Representation by Counsel.
- Parties may be represented throughout the arbitration by counsel at their own expense, or they may represent themselves.
- Rule 6-402. Time and Place of Arbitration Hearing.
- Upon their appointment by the Committee, the arbitrators shall elect a chair and then shall fix a time and place for the arbitration hearing. To the extent feasible, the hearing shall be held no more than

60 days after the appointment of the last arbitrator. At least ten calendar days prior to the hearing, the Committee shall mail notices of the time and place of the hearing to each party by first class mail, addressed to each party's last known address.

Rule 6-403. Attendance and Participation at Hearing.

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The parties shall have the right to attend and participate in the arbitration hearing at their own expense. It shall be discretionary with the arbitrators whether to allow the attendance of any persons who are not parties, witnesses, or counsel to one of the parties.

At the discretion of the arbitrators, a party may be permitted to appear or present witness testimony at the hearing by telephone conference call, video conference, computer-facilitated conference, or similar telecommunications equipment, provided all persons participating in the hearing can simultaneously hear each other during the hearing.

Rule 6-404. Stenographic Record.

Any party may ask the Committee to arrange for the taking of a stenographic record of the proceeding. If a party orders a transcript, that party shall acquire and provide a certified copy of the transcript for the record at no cost to the panel. Other parties are entitled at their
own expense to acquire a copy of the transcript by making
arrangements directly with the court reporter. However, it shall not
be necessary to have a stenographic record of the hearing.

Rule 6-405. Death, Disability, or Resignation of Arbitrator.

If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee or its designee shall determine the course of further proceedings and may appoint a substitute or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

Rule 6-406. Discovery, Subpoenas and Witnesses.

Upon the written request of a party or the panel's own motion, discovery may be allowed to the extent deemed necessary by the arbitrators in their sole discretion.

The arbitrators may issue subpoenas for the attendance of witnesses and for the production of documents and things, and may do so either upon the arbitrators' own initiative or upon the request of a party. These subpoenas shall be served and, upon application to the Superior Court in the county in which the arbitration is pending by a party or the arbitrators, enforced in the same manner provided by law for the service and enforcement of subpoenas in a civil action.

Rule 6-407. Adjournments.

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The arbitrators for good cause shown may adjourn the hearing upon the request of either party or upon the arbitrators' own initiative.

Rule 6-408. Arbitrators' Oath.

Before proceeding with the hearing, the arbitrators shall take an oath of office. The arbitrators have the discretion to require witnesses to testify under oath or affirmation, and, if requested by either party, shall so require.

Rule 6-409. Order of Proceedings.

The hearing shall be opened by the filing of the oath of the arbitrators. Next, the panel shall record the place, time, and date of the hearing, the names of the arbitrators, the parties, parties' counsel, and any witnesses who will be presenting evidence during the hearing.

The normal order of proceedings shall be the same as at a trial, with the petitioner's claim being presented first. However, the

arbitrators shall have the discretion to vary the normal order of proceedings.

The petitioner shall have the burden of proof by a preponderance of the evidence.

Rule 6-410. Arbitration in the Absence of a Party.

The arbitration may proceed in the absence of a party, who, after due notice, fails to be present in person or by telephonic or electronic means. An award shall not be made solely on the default of a party; the arbitrators shall require the other party or parties to present such evidence as the arbitrators may require for the making of an award. Rule 6-411. Evidence.

(a) Parties may offer such relevant and material evidence as they desire and shall produce such additional evidence as the arbitrators may deem necessary to an understanding and determination of the dispute. The arbitrators shall be the judge of the relevancy and materiality of the evidence offered. The rules of evidence shall be liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.

(b) A list shall be made of all exhibits received into evidence by the arbitrators. Exhibits shall be listed in the order in which they were received, and the list shall be made a part of the record.

- (c) The names and addresses of all witnesses who testify at the arbitration shall be made a part of the record. Upon their own motion or at the request of any party, the arbitrators shall have the power to require the sequestration of any witness during the testimony of other witnesses.
- (d) The arbitrators may receive and consider the evidence of witnesses by affidavit (copies of which shall be served on the opposing party at least five days prior to the hearing), but shall give such evidence only such weight as the arbitrators deem proper after consideration of any objections made to its admissibility.
- (e) The petition, answer, and other pleadings, including any documents attached thereto, may be considered as evidence at the discretion of the arbitrators and given such weight as the arbitrators deem appropriate.

(f) The receipt of testimony by deposition, conference telephone calls, and other procedures is within the discretion of the arbitrators upon their own motion or at the request of any party.

Rule 6-412. Written Contract.

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Arbitrators shall give due regard to the terms of any written contract signed by the parties.

916 Rule 6-413. Closing of Hearings.

Prior to the closing of an arbitration hearing, the arbitrators shall inquire of all parties whether they have any further evidence to offer or additional witnesses to be heard. If no further evidence is to be presented by either party, the arbitrators shall declare the hearing closed and make a record of that fact.

922 Rule 6-414. Reopening of Hearings.

Upon the motion of the arbitrators or of a party, an arbitration may be reopened for good cause shown at any time before an award is made. However, if the reopening of the hearing would prevent the award from being rendered within the time provided by these rules, the matter may not be reopened unless both parties agree upon the extension of such time limit.

929 Rule 6-415. Waiver of Rules.

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Any party who, knowing of a failure to comply with a provision or requirement of these rules, fails to state an objection on the record or in writing prior to the closing of the hearing, shall be deemed to have waived any right to object.

Rule 6-416. Waiver of Oral Hearings.

The parties may provide by written agreement for the waiver of oral hearings.

937 Rule 6-417. Award.

The award of the arbitrators is final and binding upon the parties.

940 Rule 6-418. Time of Award.

The arbitrators shall make all reasonable efforts to render their award promptly and not later than 30 days from the date of the closing of the hearing, unless otherwise agreed upon by the parties with the consent of the arbitrators or an extension is obtained from the Committee or its chair. If oral hearing has been waived, then the time

period for rendering the award shall begin to run from the date of the
 receipt of final statements and evidence by the arbitrators.

948 Rule 6-419. Form of Award.

The award shall be in writing and shall be signed by the arbitrators or by a concurring majority. The parties shall advise the arbitrators in writing prior to the close of the hearing if they request the arbitrators to accompany the award with an opinion.

Rule 6-420. Award Upon Settlement.

If the parties settle their dispute during the course of the arbitration proceeding, the arbitrators, the Committee, or the Committee's designee, upon the written consent of all parties, may set forth the terms of the settlement in an award.

Rule 6-421. Service of Award Upon Parties.

Service of the award upon the parties shall be the responsibility of Committee staff. Service of the award shall be accomplished by depositing a copy of the award in the United States Mail in a properly addressed envelope with adequate first class postage thereon and addressed to each party at his or her last known address.

Rule 6-422. Communication with Arbitrators.

There shall be no ex parte communication between a party and an arbitrator.

Rule 6-423. Interpretation and Application of Rules.

If the arbitrators on a panel disagree as to the interpretation or application of any rule relating to the arbitrators' powers and duties, such dispute shall be decided by a majority vote of the arbitrators. If the dispute cannot be resolved in that manner, an arbitrator or a party may refer the question to the Committee for its determination. The Committee's decision on the interpretation or application of these rules shall be final.

CHAPTER 5 POST-AWARD PROCEEDINGS

976 Rule 6-501. Confirmation of Award in Favor of Client.

In cases where an award in favor of a client has not been satisfied within three months after it was served upon the parties, the client may apply to the appropriate Georgia superior court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

Upon the written request of a client, the Committee may provide a lawyer to represent the client in post-award proceedings at no cost

- 984 to the client other than court filing fees and litigation expenses.
- 985 Alternatively, the Office of the General Counsel of the State Bar of
- 986 Georgia may represent, assist, or advise a client in post-award
- proceedings, provided the client shall be responsible for all court filing
- 988 fees and litigation expenses.
- 989 Rule 6-502. Confirmation of Award in Favor of Lawyer.
- In cases where an award has been issued in favor of a lawyer,
- 991 the lawyer may apply to the appropriate Georgia superior court for
- confirmation of the award in accordance with the Georgia Arbitration
- 993 Code, O.C.G.A. § 9-9-1 et seq.
- The State Bar will not represent, assist, or advise the attorney
- 995 except to provide copies of any necessary papers from the fee
- arbitration file pursuant to State Bar policies.
- 997 Rule 6-503. Enforcement of Arbitration Awards.
- All arbitration awards under these rules are enforceable under
- 999 the Georgia Arbitration Code, OCGA §9-9-1 et seq.
- 1000 Upon the written request of a client, the Committee may provide
- a lawyer to represent the client in post-award proceedings at no cost
- to the client other than court filing fees and litigation expenses.

Alternatively, the Office of the General Counsel of the State Bar of Georgia may represent, assist, or advise a client in post-award proceedings, provided the client shall be responsible for all court filing fees and litigation expenses.

1007 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND

1008 IMMUNITY

1009 Rule 6-601. Confidentiality.

All records, documents, files, proceedings, and hearings
pertaining to the arbitration of a fee dispute under this program are
the property of the State Bar of Georgia and, except for the award
itself, shall be deemed confidential and shall not be made public by the
State Bar of Georgia.

A person who was not a party to the dispute shall not be allowed access to such materials unless all parties to the arbitration consent in writing or a court of competent jurisdiction orders such access.

However, the Committee, its staff, or representative may reveal confidential information in those circumstances in which the Office of the General Counsel is authorized by Bar Rule 4-221.1 to do so.

1021 Rule 6-602. Record Retention.

The record of any fee dispute under these rules shall be retained by the Committee in accordance with policies adopted by the Committee.

1025 Rule 6-603. Immunity.

The Supreme Court of Georgia recognizes the Fee Arbitration 1026 Program of the State Bar of Georgia to be judicial and quasi-judicial 1027 in nature and within the Court's regulatory function, and in 1028 connection with such arbitration proceedings, members of the Fee 1029 Arbitration Committee, volunteer arbitrators, appointed voluntary 1030 counsel assisting the program and State Bar of Georgia Fee 1031 Arbitration staff are entitled to those immunities customarily afforded 1032 to persons so participating in judicial and quasi-judicial proceedings 1033 or engaged in such arbitration activities. 1034

DRAFT STATE BAR OF GEORGIA EXECUTIVE COMMITTEE MEETING MINUTES

August 21, 2025, 9 a.m. Cloudland at McLemore Resort Rising Fawn, GA

Members Participating

Christopher Twyman, President; William "Bill" Gentry, President-Elect; Javoyne Hicks, Treasurer; Shiriki Jones, Secretary; Ivy Cadle, Immediate Past President; Veronica Cox, YLD President; Kenneth Mitchell Jr., YLD Immediate Past President; Thua Barlay; Bert Hummel; Joyce Gist Lewis; David Lipscomb; Gary Spencer; and Martin Valbuena.

Members Absent

Virginia Josey, YLD President-Elect.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Jenn McNeely, Director of Governmental Affairs; Andreea Morrison, Assistant Deputy Counsel; Bill NeSmith, Deputy General Counsel; Ron Turner, Chief Financial Officer; and Russ Willard, General Counsel.

Call to Order

President Chris Twyman called the meeting to order at 9 a.m. The members of the Executive Committee in attendance are indicated above. President Twyman welcomed the new members of the Executive Committee: YLD President-Elect Virginia Josey and Executive Committee Member Thua Barlay.

Future Meetings Schedule

President Chris Twyman 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 and General Counsel 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); (7) Responding to Communication Regarding the Disciplinary Process; and (8) Executive Committee Liaison Assignments.

Executive Committee Minutes

Secretary Shiriki Jones presented for approval the minutes of the April 25, 2025, Executive Committee meeting, 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: Wendy Elizabeth Ahmed-597720; Carolyn Mackie Appelbe-464085; Rebecca G. Ball-308655; George John Batarseh-076204; Laurie Eggleston Beever-242230; Robert Platt Bell-330108; Connie Caldwell Breeser-102507; Julia Mehr Brown-324745; Jennifer Leigh Brown-726070; Robert G. Brunton-090784; Shellee K. Buchanan-425172; Christopher Carlsen-110230; Christopher Patrick Childers-852153; Michael I. Cohn-175560; Stacey S. Collins-690123; Theresa A. Cortese-Fusaro-840173; Jeremy Dakota Cutting-947729; Deborah Anne Czuba-142207; Elizabeth Lynn Daniel-104243; Laura Lynn DeFilippo-362763; Spencer B. Eig-242530; Martin J. Elgison-243187; Paul Michael Eza-930336; Zachary Matthew Fialkow-871262; Carolyn K. Fisher-640540; Melissa Gregory Garcia-274726; John

Philip Gaset-883793; Kathleen Teresa Gillard-294822; Mark E. Gralen-305025; Christopher John Gramiccioni-433054; Paul Scott Greco-340925; Steven Marc Greenbaum-307722; Brandon Tyler Guinn-534157; Susan Joyce Hall-319312; Jennifer Rae Harbaugh-074327; Christopher Jay Barton Harrelson-438290; Jodi Lynn Harter-333750; Lisa Lorraine Heller-344109; Alan Rhys Jenkins-390198; Jihan April Rush Jenkins-196859; Laura Anne Jones-402430; Amy Elizabeth Jones-142350; Jason Peter King-421187; Kimberly Capps Klein-108870; Edward Yomtob Kroub-142730; Barbara Jane League-442355; Joseph Edward Leonard, Jr.-205178; Robert Liguori-452345; Dionna Kathleen Litvin-621495; Sarah Nell Lowe-459954; Emma Haas MacGuidwin-532008; Meryl Colle Maneker-468577; Johann Ray Manning, Jr.-469385; Laurel S. Marks-313566; Cynthia Newberry Martin-541086; Martin Lee McFarland-491291; Marc Joseph Meister-935548; Jonathan Marc Minnen-002580; Susannah Gale Mitchell-133047; Griffith James Morris-523925; Elena Marlene Mushkin-532701; Mark T. Mustian-532906; Karen Sue Nadler-604310; Nicole Marie O'Connor-548423; Joseph Harold O'Neill-735859; Linda Sue Portasik-584672; Melissa Metz Potts-350634: Benjamin H. Pruett-003080: Jason Noah Reisfeld-853443: Richard Michael Riccobono-602630; Gerald Stuart Sachs-415090; Nathaniel Jay mith-471704; Robin Lenn Smith-142430; Craig Tarrant Smith-751847; Knolan Daniel Smith-403995; Samuel Spitzberg Spitzberg-276355; James Ronald Stegall, Jr.-677785; Jason Hughes Stuber-776173; Matthew Henry Triggs-716299; Glen M. W. Trowbridge-717235; Lori Van Rossem-724120; Liza Sharon Vertinsky-448007; Matthew James Vivian-422085; Alex E. Wehner-745730; Andrew M. Weiss-746468; Jane A. Wells-747815; John Leslie Wharton-750838; Sheree Helms Wolfenden-773394; Kelly C. Woolfolk-940645; Benjamin Chingyen Wu-164709; Leslie Macon Yount-783488.

Members Requesting Disability

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

Proposed Rule Change

Rule 4-203.1. Uniform Service Rule.

The proposed changes introduce a new requirement that a member inform the Bar of their email address as part of their "official address" for purposes of Bar business, including service in disciplinary matters. An amendment to subsection (b)(3)(i) will allow the Chair of the State Disciplinary Board to authorize individuals to serve process in disciplinary matters. The provisions at subsection (b)(3)(ii) regarding service by publication will include a requirement that the service documents be emailed to the respondent's official email address. Subsection (b)(5) creates service procedures for members with an address outside of the United States.

(NOTE: The Executive Committee initially approved a portion of these proposed changes in April 2025. The Board of Governors had additional proposed changes at the 2025 Annual Meeting. This version also includes changes that were previously approved by the Executive Committee that are currently pending with the Supreme Court.)

After extensive discussion and comments from the Executive Committee, the Office of the General Counsel will incorporate additional feedback into the proposed changes. The Executive Committee will then review the revised version at its September Meeting.

Proposed Section Bylaws

Deputy General Counsel Bill NeSmith presented proposed changes to the Eminent Domain Section Bylaws, which the Executive Committee unanimously approved.

President's Report

President Chris Twyman outlined his goals for the Bar year, which include strengthening bar relations, containing costs, enhancing committee work, and continuing to explore the use of technology in a manner

that provides direction to lawyers to avoid conflicts with the Rules of Professional Conduct. He highlighted initiatives related to the Rule of Law (ROL), including collaboration with the Law-Related Education and High School Mock Trial programs to incorporate ROL components. As part of this effort, a script will be developed to assist attorneys speaking at schools or other places in explaining the importance of the Rule of Law. In addition, he would like to implement the "Law Day Every Day" initiative which aims to highlight Law Day and ROL each month in different judicial circuits.

President Twyman further reported that the Special Committee on Artificial Intelligence and Emerging Technology has met and that the new toolkit will be rolled out in the near future. Regarding the Bar Center, he clarified that, although it is not a new initiative, efforts are underway to market the rentable space. He has met with the broker currently listing the property and emphasized that filling available space will help offset rising expenses. He also noted that the current parking situation is under review to identify ways to increase revenue while preserving access for Bar members. Meetings are being conducted with various parking vendors to evaluate additional opportunities for improving operations and financial sustainability.

Executive Director's Report

Executive Director Damon Elmore reported on the recent orientations – committee chair, section chair and staff liaison – that focused on committee governance and emphasized the importance of holding robust and effective meetings. He noted that the staff liaison orientation reinforced committee chair responsibilities, with particular focus on ensuring that meetings are conducted consistently. All orientations to date were well attended and positively received. He made the committee aware of a recent safety incident in the parking deck. Since the incident, the Office of General Counsel conducted a comprehensive review, which identified potential areas for improvement and enhancement. Additional security measures have been authorized, including permission for security personnel to carry non-lethal deterrents, specifically pepper spray, additional live sweeps of the parking facility, and revisions to camera feed review. Finally, Executive Director Elmore provided an update on the unallocated cash, highlighting the current management summary of planned projects and building expenditures, as well as a high-level discussion of Bar expenses overall, and plans to minimize. He explained that while planning is based on anticipated needs, unexpected expenses, such as the replacement of the card chip reader in the parking deck and other equipment updates, can arise. For this reason, he emphasized the importance of establishing a proper reserve fund to address unforeseen requirements, describing it as both prudent and necessary.

Treasurer's Report

Treasurer Javoyne Hicks presented the financial report as of May 31, 2025, highlighting that the current financials are detailed in the meeting materials. The Executive Committee was provided with a memo that explained budget expense variances of \$2,500 or greater. Senior management of the Bar believes that the Bar, excluding the Bar Center, will be under budget for its total expenses for the year ending June 30, 2025. However, expenses for the Bar Center are expected to exceed the budget due to building repairs and maintenance costs, which were previously known and included in the unallocated cash schedule. There were no additional items of concern related to budget variances. Treasurer Hicks encouraged everyone to review the contributions to both the Legislative Fund and Georgia Legal Services Program (GLSP), and a note of thanks was extended for those generous contributions. Lastly, it was mentioned that the audit for the year ending June 30, 2025, is estimated to begin in late September 2025.

Office of the General Counsel Report

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

Committee Updates

Executive Committee liaisons to State Bar committees provided updates regarding the committees to which they are assigned. They were also provided with their new Executive Committee liaison committee appointments for the year.

Legislative Report

Director of Governmental Affairs Jennifer McNeely announced the upcoming Advisory Committee on Legislation meeting schedule, noting that the committee will meet on Sept. 30 and Dec. 11. She then provided an update on the 2026 legislative session. She reported that Senate Bill 215, the Bar Bill sponsored by Sen. Robinson, remains pending; however, there has been no engagement with him beyond initial discussions during last year's session. Director of Governmental Affairs McNeely highlighted anticipated leadership changes, as several key legislators—many of them lawyers—are running for higher office. This creates uncertainty regarding how active the upcoming session will be. She also reported on the decline of lawyer-legislators in the Senate. Currently there are 10, but following the session, only four will remain, with just one serving in the majority party. She emphasized that this will create a significant vacuum of legal knowledge within the Senate and requested feedback from the committee and members on how to encourage more lawyers to run for office or, at minimum, to involve Bar committees and sections in providing expertise on legislation impacting the profession.

YLD Report

YLD President Veronica Cox reported that the YLD theme for the year is "Celebrate the YLD." This year the YLD celebrates the 20th Anniversary of Leadership Academy and the 15th Anniversary of the Legal Food Frenzy. This year's goals related to the theme include: spotlighting successful programming, creating consistency and transparency, and encouraging more involvement from YLD membership. Members can expect a CLE, service project, and networking event at every YLD General Session. This year's Board of Directors includes a Multi-Bar/Bar Affiliate Committee and each of the YLD Committees will have an advisor from the Board. The YLD had its Officers and Directors Retreat in Athens where the Board had a productive meeting and engaged in team-bonding. The YLD also held its Committee Chair Orientation where committees engaged in robust planning and each chair brainstormed two potential events to be held by respective committees throughout the Bar year.

YLD President Cox shared some specific YLD events to look forward to including: the Leadership Academy Holiday Luncheon, the YLD Leadership Holiday Party, the Signature Fundraiser in Macon benefitting Middle Georgia Justice, and the YLD stand-a-lone meeting in Asheville, NC where the Georgia YLD will join up with the North Carolina YLD to network and perform service in the Asheville community related to Hurricane Helene recovery. Leadership Academy applications for the 2026 program are now open until September 19. The YLD will also be bringing back the Good Lawyer Podcast with Ron Daniels and Bert Hummel as co-hosts. Lastly, at the Fall Meeting at McLemore, the YLD will have an Ethics and Professionalism "fireside chat" CLE with Justice Bethel and Judge Hise, a Dinner Under the Stars, a leisurely hike, and a food and funds drive to pack meals for kids.

Proposed Fee Arbitration Rules Changes

Deputy General Counsel Bill NeSmith presented proposed changes to the Fee Arbitration Rules. He explained the original process, under which a petition was filed, the lawyer was asked if they would be bound by arbitration, and regardless of the lawyer's response, the arbitration proceeded and the lawyer was required to abide by the decision. This process helped ensure that fee disputes were settled effectively. However, under changes implemented in 2022, the rules were revised so that if a lawyer chose not to be bound, the arbitration would not move forward. Deputy General Counsel NeSmith noted that this shift significantly reduced its effectiveness in protecting the public.

Executive Committee Member David Lipscomb, who has served on the Fee Arbitration committee since 2000, provided additional context. He referenced data from Fee Arbitration Director Donna Davis showing that, while the program previously managed approximately 100 hearings per month, only nine hearings have been conducted so far this Bar year, with 62% of lawyers refusing to be bound. Currently, 53 lawyers and seven law firms have multiple pending petitions. The new rules had been modeled after The Florida Bar's system, which functions effectively there with three times as many attorneys, but the model has not worked well in Georgia. Deputy General Counsel NeSmith emphasized that the suggested rule change

would align Georgia with practices followed by many other bar associations. The proposed rules changes would revert the program back to its original way of functioning. This will now be presented to the Board of Governors as information at the Fall Board Meeting.

Topics of Discussion with the Supreme Court

The Executive Committee discussed topics for the joint meeting with the Supreme Court of Georgia which follows this meeting.

Board of Governors Minutes

The Annual Meeting minutes were provided as informational material.

Old Business

There was no old business.

New Business

There was no new business.

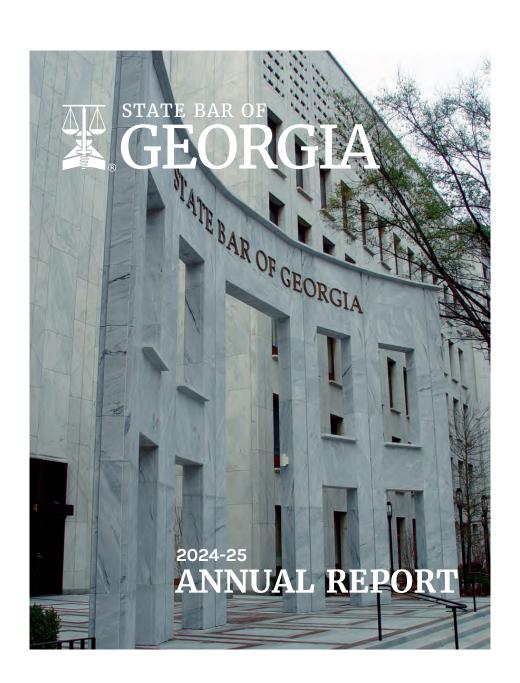
Announcements

There were no announcements.

Adjournment

There being no further business, the meeting was adjourned at 1:30 p.m.

	Shiriki Cavitt Jones, Secretary
pproved:	



2024-25

EXECUTIVE COMMITTEE PRESIDENT Ivy N. Cadle PRESIDENT-ELECT Christopher P. Twyman TREASURER William C. "Bill" Gentry SECRETARY R. Javoyne Hicks IMMEDIATE PAST PRESIDENT Hon. J. Antonio "Tony' DelCampo YLD PRESIDENT Kenneth Mitchell Jr. YLD PRESIDENT-ELECT Veronica Rogusky Cox YLD IMMEDIATE PAST PRESIDENT Brittanie D. Browning COBB CIRCUIT, POST 7 Norbert D. "Bert" Hummel IV ATLANTA CIRCUIT, POST 30 Shiriki Cavitt Iones ATLANTA CIRCUIT, POST 12 Joyce Gist Lewis GWINNETT CIRCUIT, POST 1 David S. Lipscomb ATLANTA CIRCUIT, POST 13 R. Gary Spencer PAULDING CIRCUIT Martin E. Valbuena

BOARD OF GOVERNORS

ALAPAHA CIRCUIT, POST 1 Daniel Jackson Connell III ALAPAHA CIRCUIT POST 2 Hon. Clayton Alan Tomlinson ALCOVY CIRCUIT, POST 1 Michael G. Geoffroy ALCOVY CIRCUIT, POST 2 Anne Templeton LaMalva APPALACHIAN CIRCUIT Kevin William Roper ATLANTA CIRCUIT, POST Nicole Christine Leet ATLANTA CIRCUIT POST 2 Miguel Angel Dominguez ATLANTA CIRCUIT POST 3 Lisa Katsuko Liang ATLANTA CIRCUIT, POST 4 Jeffrey Ray Kuester ATLANTA CIRCUIT, POST 5 Catherine Koura ATLANTA CIRCUIT POST 6 Tracee Ready Benzo ATLANTA CIRCUIT, POST William M. Ragland Jr. ATLANTA CIRCUIT, POST 8 Hon. Paige Reese Whitaker ATLANTA CIRCUIT POST 9 Keith Elliott Gammage ATLANTA CIRCUIT, POST 10 Edward Alexander Piasta ATLANTA CIRCUIT, POST 11 Hon. Jill Pryor ATLANTA CIRCUIT POST 12 Iovce Gist Lewis ATLANTA CIRCUIT, POST 13 R. Gary Spencer

ATLANTA CIRCUIT, POST 14 Edward B. Krugman ATLANTA CIRCUIT POST 15 Letitia A. McDonald ATLANTA CIRCUIT, POST 16 James Daniel Blitch IV ATLANTA CIRCUIT, POST 17 Hon, JaDawnya C. Baker ATLANTA CIRCUIT, POST 18 Hon. Rachel R. Krause ATLANTA CIRCUIT, POST 19 Zahra S. Karinshak ATLANTA CIRCUIT, POST 20 Lindsey S. Macon ATLANTA CIRCUIT, POST 21 Patricia Anne Gorham ATLANTA CIRCUIT POST 22 Kevin C. Patrick ATLANTA CIRCUIT, POST 23 Donna G. Barwick ATLANTA CIRCUIT, POST 24 Joseph Anthony Roseborough ATLANTA CIRCUIT POST 25 Amanda Clark Palmer ATLANTA CIRCUIT, POST 26 Edward T. McAfee ATLANTA CIRCUIT, POST 27 Nancy Jean Whaley ATLANTA CIRCUIT POST 28 J. Henry Walker IV ATLANTA CIRCUIT, POST 29 Tina Shadix Roddenbery ATLANTA CIRCUIT, POST 30 Shiriki Cavitt Jones ATLANTA CIRCUIT POST 31 Hon. Robert David Wolf ATLANTA CIRCUIT, POST 32 Susan Patricia Coppedge ATLANTA CIRCUIT, POST 33 Hon. Susan Eichler Edlein ATLANTA CIRCUIT POST 34 Allegra J. Lawrence ATLANTA CIRCUIT, POST 35 N. John Bey ATLANTA CIRCUIT, POST 36 Graham Elliott McDonald ATLANTA CIRCUIT, POST 37 Harold Eugene Franklin Jr. ATLANTA CIRCUIT, POST 38 Gillian B. Fierer ATLANTA CIRCUIT, POST 39 Anita Wallace Thomas ATLANTA CIRCUIT, POST 40 Hon. Shukura L. Ingram ATLANTIC CIRCUIT, POST 1 H. Craig Stafford ATLANTIC CIRCUIT, POST 2 Hugh J. McCullough ATTORNEY GENERAL Christopher M. Carr AUGUSTA CIRCUIT POST 1 Hon. Amanda Nichole Heath AUGUSTA CIRCUIT, POST 2 Katrell Nash AUGUSTA CIRCUIT, POST 3 John C. Bell Jr. AUGUSTA CIRCUIT POST 4 John R. B. Long

BELL-FORSYTH CIRCUIT Hon, Philip C, Smith BLUE PINGE CIRCUIT POST 1 Hon. David Lee Cannon Ir BLUE RIDGE CIRCUIT, POST 2 Eric A. Ballinger BRUNSWICK CIRCUIT, POST 1 Stephen Elliott Tillman RPHNSWICK CIRCUIT POST 2 Martha Wilson Williams CHATTAHOOCHEE CIRCUIT, POST 1 Amy Carol Walters CHATTAHOOCHEE CIRCUIT, POST 2 Brandon Lee Peak CHATTAHOOCHEE CIRCUIT POST 3 Alex Musole Shalishali CHATTAHOOCHEE CIRCUIT POST 4 Donna Stanaland Hix CHEROKEE CIRCUIT, POST 1 Philip Zachary Pritchard CHEROKEE CIRCUIT POST 2 Howard Mark Delashmit CLAYTON CIRCUIT POST 1 Hon. Kathryn Lauranne Powers CLAYTON CIRCUIT, POST 2 Hon. Charity Bridgewater CLAYTON CIRCUIT, POST 3 Hon. Martin L. Cowen III CORR CIRCUIT POST 1 Katie Kiihnl Leonard COBB CIRCUIT, POST 2 Ronald Arthur Lowry COBB CIRCUIT, POST 3 Hon. Kimberly A. Childs CORR CIRCUIT POST 4 Patrick H. Head COBB CIRCUIT, POST 5 Dawn Renee Levine COBB CIRCUIT, POST 6 Laura Joan Murphree CORR CIRCUIT POST 7 Norbert Daniel Hummel IV COLUMBIA CIRCUIT Danny L. Durham CONASAUGA CIRCUIT, POST 1 Terry Leighton Miller CONASAUGA CIRCUIT POST 2 Robert Harris Smalley III CORDELE CIRCUIT John Craig Cotton COWETA CIRCUIT, POST Hon. Nina Markette Baker COWETA CIRCUIT POST 2 Iason W. Swindle Sr DOUGHERTY CIRCUIT, POST 1 Hon. Joseph West Dent DOUGHERTY CIRCUIT, POST 2 George P. Donaldson III DOLIGIAS CIRCUIT Dalia Racine DUBLIN CIRCUIT Joseph Carl Sumner Jr. EASTERN CIRCUIT, POST 1 Paul W. Painter III EASTERN CIRCUIT, POST 2 Lester B. Johnson III EASTERN CIRCUIT POST 3 Maria Justus

EASTERN CIRCUIT, POST 4 John Bell Manly ENOTAH CIRCUIT Hon. Joy Renea Parks FLINT CIRCUIT, POST 1 Hon. Amanda Renee Flora FLINT CIRCUIT, POST 2 Andrew Jackson Welch III GRIFFIN CIRCUIT POST 1 Janice Marie Wallace GRIFFIN CIRCUIT POST 2 Hon. Rhonda Bender Kreuziger GWINNETT CIRCUIT, POST 1 David S. Lipscomb GWINNETT CIRCUIT POST 2 Judy C. King GWINNETT CIRCUIT POST 3 Wesley Charles Ross GWINNETT CIRCUIT, POST 4 Gerald Davidson Ir. HOUSTON CIRCUIT Ryan English LOOKOUT MOUNTAIN CIRCUIT POST 1 Archibald A. Farrar Jr. LOOKOUT MOUNTAIN CIRCUIT, POST 2 Douglas Ray Woodruff LOOKOUT MOUNTAIN CIRCUIT, POST 3 Thomas Lindsay MACON CIRCUIT POST 1 John Flanders Kennedy MACON CIRCUIT, POST 2 Thomas W Herman MACON CIRCUIT, POST 3 Rebecca Holmes Liles Grist MEMBER-AT-LARGE POST I William Thomas Davis MEMBER-AT-LARGE, POST 2 Rotsen Dara Diva Law MEMBER-AT-LARGE, POST 3 Mike Prieto MIDDLE CIRCUIT POST 1 Mitchell M. Shook MIDDLE CIRCUIT, POST 2 Jerry Neal Cadle MOUNTAIN CIRCUIT Hon. James T. Irvin NORTHEASTERN CIRCUIT POST 1 Mark William Alexander NORTHEASTERN CIRCUIT, POST 2 R. Brent Hatcher Jr. NORTHERN CIRCUIT, POST 1 Kimberly Wilkerson Higginbotham NORTHERN CIRCUIT, POST 2 Hon. Richard Dale Campbell OCMULGEE CIRCUIT, POST 1 Carl Santos Cansino OCMULGEE CIRCUIT, POST 2 Ashlev Mackin Brodie OCMULIGEE CIRCUIT POST 3 Stephen Russell Morris OCONEE CIRCUIT POST 1 Hon. Charles Michael Johnson OCONEE CIRCUIT, POST 2 Hon. Stephanie Diane Burton OGEECHEE CIRCUIT POST I Daniel Brent Snipes OGEECHEE CIRCUIT POST 2

Troy Windel Marsh Jr.

OUT-OF-STATE, POST 1 Stacey McSwine Cameron OUT-OF-STATE POST 2 William J. Monahan PATAULA CIRCUIT Edward R. Collies PAULDING CIRCUIT Martin Enrique Valbuena PIEDMONT CIRCUIT Barry E. King ROCKDALE CIRCUIT Thua G. Barlay ROME CIRCUIT, POST Christopher Ross Jackson POME CIRCUIT POST 2 J. Anderson Davis SOUTH GEORGIA CIRCUIT POST 1 Joseph Mulholland SOUTH GEORGIA CIRCUIT, POST 2 Tabitha Edwina Pavne SOUTHERN CIRCUIT POST 1 Paul Hamilton SOUTHERN CIRCUIT POST 2 Kathryn Drew Parrish Bennett SOUTHERN CIRCUIT, POST 3 H. Burke Sherwood SOUTHWESTERN CIRCUIT Hon. R. Rucker Smith STONE MOUNTAIN CIRCUIT POST I Hon. Stacey K. Hydrick STONE MOUNTAIN CIRCUIT, POST 2 Otobong U. Ekpo STONE MOUNTAIN CIRCUIT, POST 3 Hon. Shondeana Crews Morris STONE MOUNTAIN CIRCUIT POST 4 Donna Coleman Stribling STONE MOUNTAIN CIRCUIT, POST 5 Keith F Adams STONE MOUNTAIN CIRCUIT, POST 6 Claudia Susan Saari STONE MOUNTAIN CIRCUIT POST 7 John G. Haubenreich STONE MOUNTAIN CIRCUIT, POST 8 Tedra L. Cannella STONE MOUNTAIN CIRCUIT, POST 9 Sherry Boston STONE MOUNTAIN CIRCUIT POST 10 Hon. Dax Eric Lopez TALLAPOOSA CIRCUIT, POST 1 Michael Douglas McRae TALLAPOOSA CIRCUIT, POST 2 Brad Joseph McFall TIFTON CIRCUIT Hon. Render Max Heard Jr. TOOMBS CIRCUIT Hon. Thomas Brittan Hammond TOWALIGA CIRCUIT Johnathan Lang Adams WAYCROSS CIRCUIT, POST 1 Matthew Jackson Hennesy WAYCROSS CIRCUIT POST 2 Vernon L. Chambliss WESTERN CIRCUIT, POST 1 Hon, Lawton E. Stephens

WESTERN CIRCUIT POST 2

Edward Donald Tolley





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IVY N. CADLE

2024-25 President State Bar of Georgia

President's Report

As I conclude my term as president of the State Bar of Georgia, I find myself reflecting on a year that has been both challenging and rewarding. It has been the honor of my professional life.

I can attest that my term in office reminded me to expect the unexpected. Last fall, Georgia was impacted by three tragic events: a mass shooting that claimed the lives of students and educators at Apalachee High School in Barrow County, a disastrous fire at the Biolab plant in Conyers and, most impactful on the legal profession, Hurricane Helene, the damage from which cut a wide path in our state from Florida to the North Carolina border.

One of the hardest-hit areas was from Waycross through Vidalia, Swainsboro and Augusta. Many of you were without power, water and other basic necessities for weeks. This natural disaster caused ripple effects for the courts, lawyers and their clients. The State Bar collaborated with then-Chief Justice Michael Boggs, new Chief Justice Nels Peterson and the Supreme Court of Georgia. Together, we were able to evaluate Bar members' needs and work on solutions, which included the declaration of a Judicial Emergency Order to give anyone affected by Helene a 30-day reprieve from court deadlines. We also partnered with the State Bar's Young Lawyers Division and the Georgia Legal Services Program to train more than 400 lawyers to help members of the public in need of legal assistance.

Artificial Intelligence and Technology

It's hard to miss the headlines about artificial intelligence. Our profession will be significantly impacted by these changes; hence, we established the Artificial Intelligence and Emerging Technology Committee. I would like to express my gratitude to State Bar Past President Darrell Sutton, who has served as chair of the committee and spearheaded this important effort. The committee was formed for the purpose of looking at the Rules of Professional Conduct as they relate to the advancement and use of artificial intelligence and technology, how our lawyers are governed and the ethical standards to which lawyers are held when they use artificial intelligence (AI), especially generative AI.

Our committee works in parallel with the Supreme Court of Georgia's Artificial Intelligence & Technology Committee appointed by Chief Justice Boggs to examine the impact of AI on the judiciary. The State Bar's committee will give a report on its work at the Board of Governors meeting on Saturday.

Attorney-Client Solicitation

I'm also grateful to Darl Champion and Brian Adams who reinvigorated the Attorney-Client Solicitation Committee and presided over several committee meetings as co-chairs. Tasked with advising the Executive Committee and the Board of Governors about attorney-client solicitation

practices that may violate the Rules of Professional Conduct, and if appropriate, make recommendations related to this issue, they worked on a survey to send to several organizations on various issues concerning client solicitation. I know they have worked hard on this renewed focus, and I look forward to receiving the results of that effort.

Legislative Activity

I'd like to commend Caesar Mitchell on his leadership as chair of the Advisory Committee on Legislation, which led to the success of several legislative proposals that we are either supporting or are part of the State Bar's legislative package, which is limited to matters germane to the practice of law.

We supported HB 85-The Superior Court Judicial Compensation Reform Act and have supported HB 86, which would adjust salaries for appellate and statewide judges. Both bills were passed, signed by Gov. Brian Kemp in May and will become effective on July 1.

I would like to extend my sincere appreciation to the members of the Fiduciary Law Section for their outstanding work during this legislative session in guiding HB 327 through the process. Their subjectmatter expertise, collaboration with the State Bar's Legislative Team and willingness to testify before the House Judiciary Committee were instrumental in the bill's success. Over the past 25 years, the General Assembly has enacted a series of significant reforms to Georgia's fiduciary statutes, including the comprehensive revisions of the Probate Code (1998), the Guardianship

Code (2005), the Trust Code (2010) and the adoption of the Uniform Power of Attorney Act (2017), Follow-up amendments in 2018 and 2020 addressed evolving issues and refinements in those statutory frameworks. HB 327 represents the next chapter in that long-term effort. The bill includes additional amendments designed to:

- · Conform existing provisions to prior Code revisions;
- Correct drafting errors and technical inconsistencies;
- · Address practical problems that have emerged through years of application in probate and fiduciary practice; and
- Implement reforms based on recommendations from Georgia lawyers who regularly practice in this area of law.

Thanks to their efforts, HB 327 passed both chambers unanimously and now awaits the governor's signature. This is a powerful example of how our sections and committees contribute to making the Bar's legislative presence effective. It also underscores the importance of practitioner-led engagement in shaping sound public policy and strengthening Georgia's legal framework.

Committee Quorum Change

It's important to make sure that Bar committees can do the work that is entrusted to them, as our committees are where the lion's share of the Bar's work occurs. It is critically important that when they hold meetings, they have a quorum present, so they can vote and conduct business. Too often, committee meeting attendance has

been insufficient for a quorum necessary for voting and carrying out official action. This rule change, which was approved by the Board of Governors at the Midyear Meeting, reduces the committee attendance requirement for a quorum from 50% of members to 40%.

We are grateful to the Bar members who serve on our various committees. I would also like to encourage members who are no longer able to commit to attend committee meetings on a regular basis, for whatever reason, to consider asking the current president to replace them on the committee. This would give newer Bar members an opportunity to engage in committee work where they have a passion to get involved in professional leadership.

With the leadership transition in the State Bar's Office of the General Counsel from Paula Frederick to Russ Willard, it was important to initiate these and other rules and bylaws changes while Paula was still available to share her institutional knowledge. This was a great opportunity to reflect and consider new priorities created by this transition. I'm grateful to Paula for helping with this important project that puts Russ in the position of having the best set of bylaws and rules possible as we move forward under his leadership.

Executive Committee Elections

The rule for members of the Board of Governors who want to be elected to the Executive Committee was updated and modernized to be in plain language and reflect the process we actually use. It's important that our Board of Governors understands how that process works and that we have a fair and streamlined election.

New Pro Bono Rule

Finally, the Executive Committee formally recommended a significant amendment to membership status rules, expanding eligibility for pro bono service beyond emeritus status to include inactive Bar members with at least five years of active practice. The determination of which pro bono organizations are authorized to supervise such services by non-active members will be determined by the Su-

preme Court. Non-active members will be restricted to representing clients referred solely by approved pro bono organizations and will be mandated to complete an hour-long CLE program during each renewal period to maintain eligibility. This proposed rule change aligns with the Supreme Court's Study Committee on Legal Regulatory Reform's objectives to address the prevailing civil justice gap.

Thank You

To everyone I had the privilege of working with this year—thank you. Whether you are a fellow officer, member of the

Executive Committee, the Court, you shared an idea with me, we crossed paths at a meeting, debated policy or just shared a story over coffee, you helped shape this year in ways both big and small. I know I'm not perfect, but I can promise you this: I gave it everything I had. Every decision, every interaction, I did it with one goal in mind: to serve this Bar faithfully and fully, and to leave it better than I found it. ●

Endnote

 This change to Rule 1-202 was approved by the Board of Governors on Friday, June 6, at the Annual Meeting in Ponte Vedra Beach, Florida.

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

107 FULL TIME EMPLOYEES

8 PART TIME EMPLOYEES



TOTAL # OF BAR MEMBERS

55,699

Georgia's license and other mandatory fees rank **7th** lowest among 33 mandatory bar associations.



DAMON E. ELMORE

Executive Director State Bar of Georgia damone@gabar.org

Executive Director's Message

We are thrilled to present our fourth 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 our members. Our mission is to provide insights into the benefits and options available, along with addressing the common questions we frequently hear from lawvers 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 2024-25 President Ivy N. Cadle, 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 Christopher P. Twyman and his goals of continuing the optimization of Bar resources and assets; enhancing the work product of our committees and other volunteer groups; staying abreast of emerging technologies and their impact on the practice of law; and renewing our commitment to the rule of law.

We are equally grateful to all of our other volunteer leaders, as well as our liaisons with the Supreme Court of Georgia-Presiding Justice Sarah Hawkins Warren, Justice Charlie Bethel and Justice Carla Wong McMillian-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 •

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Member Benefits



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. In 2024, the State Bar added six Level 2 EV charging stations on the fourth level. ullet



VENDOR DIRECTORY

gabar.org/vendor-directory

The online Vendor Directory provides a listing of practice-related products and services; many offer discounts to Bar members. ●

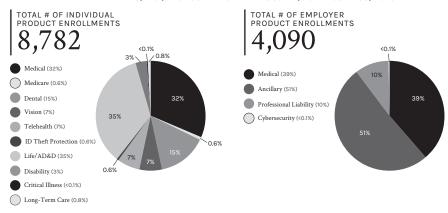
MemberBenefits

MEMBER BENEFITS, INC.

gabar.memberbenefits.com

Member Benefits, Inc., is the recommended broker of the State Bar of Georgia, Health, Dental & Vision Plans, plus Long-Term Disability and Long-Term Care. From July 1, 2024, through June 30, 2025, there were 8,782 total enrollments in various individual insurance products and 4,090 enrollments in employer insurance products in the past year.

MEMBER BENEFITS, INC., PRODUCT ENROLLMENTS JULY 1, 2024 - JUNE 30, 2025



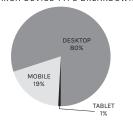


VLEX FASTCASE LEGAL RESEARCH

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.



SEARCH DEVICE TYPE BREAKDOWN



RELIAGUIDE

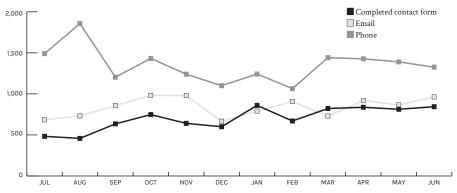
gabar.oreliaguide.com/home

ReliaGuide, with its Find a Lawyer 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 (Profile Plus) is available for only \$15 a month. From July 1, 2024, through June 30, 2025, interactions with member profiles totaled 540,273, including 82,201 profile views, 8,411 completed contact forms and 26,289 clicks on lawyer phone numbers and email addresses. •

OF MEMBER PROFILE INTERACTIONS 540,273 \$19% since 2023-24

The majority of searches occurred on Thursdays between 1 and 9 p.m.

OF RELIAGUIDE CONTACT REQUEST FORM INTERACTIONS JULY 1, 2024-JUNE 30,2025



2024-25 ANNUAL REPORT

State Bar of Georgia | 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. ●

Bar Conference Center: Atlanta

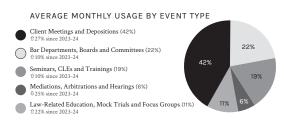
404-419-0155 | conferencecenter@gabar.org

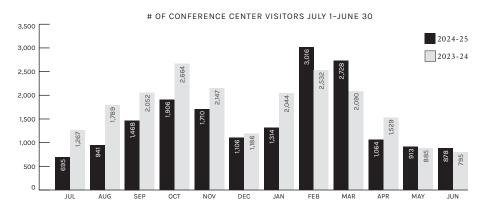
KYLE GAUSE, DIRECTOR

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.

The Conference Center features 13 unique meeting rooms that can host two to 200 attendees. ●

monthly average # of attendees 1,478





Center for Lawyer Wellbeing

www.gabar.org/wellbeing

R. JAVOYNE HICKS, CHAIR

The State Bar of Georgia's Center

for Lawyer Wellbeing was created in 2024 to promote holistic wellness for legal professionals. Membership in the Center offers invaluable resources, networking opportunities and exclusive benefits designed to support lawyers' personal and professional growth.

We encourage all to join to help build a comprehensive and robust destination for lawyers that places wellness, wellbeing and resilience as a critical part of law practice and an essential element of lawyer competency. The voluntary annual membership fee is \$40.

Goals of the Center for Lawyer Wellbeing

- Collaborating with Bar sections, committees and other entities to provide high-quality, up-to-date programming that will educate lawyers, judges, law students and other stakeholders on the significance of wellbeing issues and provide them with the tools they need to make a positive impact.
- Serving as a clearinghouse and repository of information on the work of



the State Bar of Georgia, its sections, committees, divisions and programs in the area of wellbeing.

- Encouraging continued study of the connection between wellbeing, professionalism and discipline.
- Developing and sharing policies and best practices that move the profession toward healthier behaviors.
- Eliminating the stigma associated with help-seeking behaviors.

Benefits of Membership in the Center for Lawyer Wellbeing

The benefits listed are a representative example of the current, planned and potential offerings to members. Benefits are subject to change.

- Discounts on continuing education and professional development.
- Discounts on wellness products and services.
- Priority access to wellness events and programs.
- Exclusive access to premium wellness resources.
- Networking with wellness experts and peers.
- Exclusive member-only events and perks.
- · Recognition and rewards.

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

2024-25 ANNUAL REPORT

Communications

404-527-8761 | communications@gabar.org

JENNIFER MASON, DIRECTOR

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, which underwent a complete redesign in 2024-25 that was very well received. The

Georgia Bar Journal, published quarterly, is the flagship publication of the State Bar of Georgia. 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. ●

OF SOCIAL MEDIA FOLLOWERS

7,953

û 2% since 2023-24

The State Bar's Facebook audience is split 65% women and 35% men. 2,548

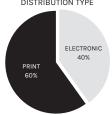
û 13% since 2023-24

25% of the State Bar's Instagram interactions are by non-followers. 9,414

û 9% since 2023-24

63% of the State Bar's LinkedIn audience is from the greater Atlanta area.





CONNECT WITH THE BAR

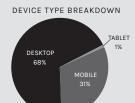
- www.gabar.org
- **f** @statebarofgeorgia
- @ @statebarofgain /state-bar-of-georgia
- @StateBarOfGeorgia

www.gabar.org

JULY 1, 2024-JUNE 30,2025

TOP FIVE PAGES VISITED

- 1. Member Directory
- 2. Home
- Search
 Handbook
- 5. Public/Find a Lawyer



747,564

5,314,639

TOTAL # OF SESSIONS

1,924,212

Continuing Legal Education Regulation

404-527-8710 | cle@gabar.org DEE DEE WORLEY, DIRECTOR

This program operates under the Commission on Continuing Lawyer Competency and assists lawyers with keeping track of their CLE hours through an online CLE transcript that can be viewed by the lawyer any time by logging in to their member portal on the Bar's website, www.gabar.org.

The CLE requirement is designed to help lawyers maintain their professional competence throughout their active practice of law. Active lawvers are required to keep current on the law by attending a minimum of 12 hours of legal education each year. Of these 12 total hours, at least 1 hour must be in legal ethics, 1 hour must be in professionalism and, for trial lawyers, 3 hours must be approved as trial hours. Lawyers can complete these 12 hours by an approved continuing legal education program attended either in-person or through a distance learning format. In addition to CLE programs, lawyers can receive CLE hours each year for coaching a high school mock trial team; judging a high school, college or law school mock trial competition; authoring a published legal article or observing a trial.

OF ACTIVE BAR MEMBERS IN 2024-25 **42.782**

OF BAR MEMBERS WITH A CLE REQUIREMENT 33.424

OF BAR MEMBERS SUSPENDED FOR CLE NONCOMPLIANCE 37

In the 2024-25 Bar year, **9,358** active lawyers received a CLE exemption (judge, out of state, age 70, Bar examiner, military, TILPP).

OF CLE PROVIDERS THAT SUBMITTED COURSES

\$3% since 2023-24

OF CLE COURSES APPROVED FOR CREDIT 19 206

û 1% since 2023-24

OF CLE HOURS ATTENDED BY BAR MEMBERS

460,220

û 3% since 2023-24



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Fee Arbitration

404-527-8750 | feearbitration@gabar.org

DONNA DAVIS, DIRECTOR

The Fee Arbitration Program of the

State Bar of Georgia provides a convenient mechanism for the resolution of fee disputes between attorneys and clients, and between attorneys in connection with the dissolution of a practice or the withdrawal of an attorney from a partnership or practice, or between attorneys concerning the allocation of fees earned from joint services.

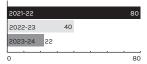
The State Bar of Georgia, through the Fee Arbitration Program, continues to show our commitment to service by making the program more accessible. We have continued to provide both in-person and Zoom hearings for cases in which jurisdiction was accepted. Providing Zoom hearings allows parties who are out of town, at work, on vacation, incarcerated and/or otherwise unavailable to appear in person to have an opportunity to present their cases and answer the arbitrators' questions. In March 2024, the program placed the petition on the Bar's website, allowing digital access. Additionally, our staff mailed an average of 20 petitions, upon request, each month, to individuals who are either not internet savvy or do not have access to a printer; in comparison, the staff mailed an average of 79 petitions, upon request, each month in the 2023-24 Bar year. The greater accessibility resulted in 503 new petitions being filed between July 1, 2024, and June 30, 2025, which is an 85% increase for this specific fiscal year. The program averaged 42 newly filed petitions each month.

This drastic increase in new petitions being filed shows that there is a substantial need for programs like the Fee Arbitration Program. However, in our current cases, we continue to find that the January 2022 Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted, has negatively impacted the program. After being served, 62% of respondents served did not agree to be bound by the results of the arbitration or failed to respond after being served and notified multiple times. This failure to respond resulted in petitions being dismissed, even in cases where jurisdiction appeared to be proper, because the attorney's lack of response is tantamount to declining to be bound by the results of the arbitration. Additionally, we have found a direct correlation between the 2022 Fee Arbitration Program's Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted and the drastic reduction in number of hearings held each year. During the COVID-19 pandemic, in FY 2021-22, the program held 80 hearings. In FY 2022-23, the program held forty 40 hearings. However, in FY 2023-24, the program only scheduled 22 hearings because many respondents declined to be bound by the result of the arbitration. Although the staff successfully managed an average of 1,006 calls each month and are required to retain a working knowledge of the Fee Arbitration Program Rules \$106,751

503

Nearly two-thirds of petitions filed dealt with underlying cases in criminal law or domestic/family law matters.

TREND IN # OF HEARINGS



and be familiar with the cases that have been filed, they continue to receive voluminous complaints from the public about Rule 6-204 (h), especially when cases are dismissed and/or jurisdiction is declined. It is important to note that jurisdiction is accepted, and hearings are scheduled only if there appears to be merit and the dispute is within the jurisdiction that the Supreme Court of Georgia gives the Program through its Rules, even when both the petitioner and respondent agree to be bound by the results of the arbitration. The program does not hold hearings on cases where jurisdiction does not appear to be proper.

When hearings are held, the program's success is largely attributed to the dedicated efforts and sound judgment of attorneys and members of the public, throughout the state who have volunteered to serve as arbitrators under the program.

Finance

404-527-8748 | ront@gabar.org

The Finance Department is responsible for safeguarding the financial integrity and sustainability of the State Bar of Georgia. The department manages all

financial operations in compliance with accounting standards, statutory requirements, and the State Bar's internal regulations. It maintains public trust by ensur-

TOTAL AMOUNT RAISED FOR GLSP CAMPAIGN

\$488,608

ing fiscal responsibility, transparency, and efficient management of resources to support the Bar's mission and services to its members.



The State Bar operated at a planned financial deficit for the Bar year ending June 30, 2025. The State Bar's net assets are estimated to be in the range of \$34 million to \$36 million. The Bar year's end is June 30, and as such, this amount is estimated. The State Bar operates without any debt.

Approved FY25 Budget

The State Bar Board of Governors approved a budget with a deficit for the year ended June 30, 2025, of \$1,140,469.

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.



2024-25 ANNUAL REPORT

Georgia Diversity Program

404-219-8174 | gadiversityprogram@gmail.com

HALIMA WHITE, DIRECTOR

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 sta-

tus 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.



2025 High School Pipeline Program

GDP had our annual High School Pipeline from Tuesday, June 17, through Friday, June 27, 2025. Once again, we partnered with Atlanta's John Marshall Law School where the scholars met daily from 9 a.m. to 4 p.m.

In the mornings, the scholars worked on writing with their instructors—a lawyer and a high school guidance counselor. For lunch, the scholars went to different courthouses, law firms or corporate legal departments to learn from judges, lawyers and law students. In the afternoons, the scholars engaged in Lincoln Douglas debate. Thus, the program was interactive focusing on writing, speaking, analytical skills and interaction with lawyers.

The program culminated in a speech and debate competition, and a number of the scholars' parents attended. This year, there were 17 scholars, including seven young gentlemen—the most men in recent years. The High School Pipeline Program remains a highlight of GDP.

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, for their continued support and acknowledge that without their dedication, the work of the program would not be possible.

Georgia High School Mock Trial

404-527-8779 | mocktrial@gabar.org

RICH HARRIS, DIRECTOR

The Georgia High School Mock Trial (HSMT) program continues to be one of the largest and strongest in the nation. The department oversees an annual statewide competition of more than 2,000 students (10% more than in 2024) from more than 130 public and private high schools and homeschool associations. 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 close to 1,000 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.

Law Academy

The program also conducts Law Academy, a three-day program each September, designed to empower the top 54 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 volunteer judges and trial lawyers.

Mock Trial by the Numbers

2025 SEASON

- 2,033 students (+1,845 in 2024)
- 127 schools registered
- 371 coaches, judges, attorneys and teachers

DISTRICTS

- 52 teams
- 8 locations across the state
- 200 volunteers on judging panels

REGIONS

- 153 competing teams (+136 in 2024)
- · 16 locations across the state
- 630 volunteers on judging panels

STATE FINALS

- 18 teams
- 79 volunteers on judging panels
- 5 rounds over 3 days to crown State Champion

State Champion Decatur High School competed at the National High School Mock Trial Championship in Phoenix, finishing **4th** of 48 teams.

CONNECT WITH HSMT

www.georgiamocktrial.org

GeorgiaMockTrial

@georgia_hs_mock_trial



2024-25 ANNUAL REPORT

Governmental Affairs // Legislative Program

404-526-8608 | jennm@gabar.org

JENN MCNEELY, DIRECTOR

The State Bar's Legislative Program advocates for legislation at the Georgia General Assembly aimed at regulating the legal profession and enhancing the quality of legal services. From September 2024 through early January 2025, the State Bar's sections and committees presented legislative proposals to the Advisory

Committee on Legislation and the Board of Governors for review and approval of the State Bar's legislative package.

During the 2025 legislative session, the Legislative Program successfully advocated for the passage of legislation aimed a modernizing Title 53, which deals with wills, trusts and the administration of

estates. This effort also included aligning provisions across related code sections. Additionally, the governor issued a proclamation recognizing April 2025 as Legal Professionalism Month.

The State Bar supported measures to reform judicial compensation for appellate, statewide and superior court judges. It also backed appropriations that benefit civil legal services, which include medical-legal partnerships, legal aid for victims of domestic violence, legal assistance for kinship care, and funding for the Georgia Appellate Practice and Educational Resource Center.

The State Bar's legislative consultants provided feedback from section experts to members of the General Assembly in order to proactively enhance legislation in specialized areas of law. For more information about the 2025 legislative session, including an overview of the State Bar legislative agenda, please visit 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, 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 JULIA NEIGHBORS, DIRECTOR

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 profession may enhance their skills, keep abreast of developments in the law, ethics and professionalism, engage in the study and research of the law, and disseminate the knowledge thus obtained. For more information about upcoming CLE programs, please visit icle.gabar.org.

TOTAL # OF ON DEMAND PROGRAMS SOLD

13,712



TOTAL # OF IN-PERSON REGISTRANTS

3,369



TOTAL # OF LIVE-STREAM REGISTRANTS

1,826



TOTAL # OF PROGRAM HOURS CREATED

TOTAL # OF SPEAKERS

/ **JJ**

TOTAL # OF PROGRAM CHAIRS

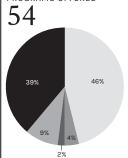
83

TOTAL # OF ICLE
PROGRAM LOCATIONS

10

Amelia Island, Florida Athens, Georgia Atlanta, Georgia Avon, Colorado Greensboro, Georgia Jekyll Island, Georgia Macon, Georgia Pine Mountain, Georgia Ponte Vedra Beach, Florida Savannah, Georgia





- 39% planned with sections
 46% planned with chairs unafiliated with a section, committee or Bar program
- 4% planned with other groups
- 2% planned as part of a national speaker series
- 9% planned with Bar offices, committees or programs

CONNECT WITH ICLE

- icle.gabar.org
- **G** @iclega
- @statebargaicle
- in /iclega

Law Practice Management

404-527-8770 | lpm@gabar.org NKOYO EFFIONG, DIRECTOR

The Law Practice Management Program supports Georgia lawyers to start, scale or shut down their practices with less stress. With resources like a library, vendor directory, toolkits, webinars, consultations and the Take Charge! Conference, we help legal professionals use technology and strategy to manage a successful and sustainable firm. Our team is dedicated to equipping you with essential practice tools.

CONNECT WITH LPM

- bit.ly/lpmnewsletter
- @gabarlpm
- in /law-practice-management



OF STARTUP KITS DISTRIBUTED

2023-24

SUBSCRIBERS

OF LPM INSIDER

OF BOOKS IN THE RESOURCE LIBRARY

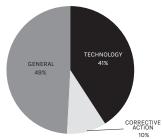
OF ATTENDEES AT THE 2025 TAKE CHARGE! 1-DAY SUMMIT

Generative AI Toolkit



This Bar year, the Law Practice Management Program partnered with the State Bar of Georgia Artificial Intelligence and Emerging Technology Committee to build out a toolkit and website as resources for Bar members. The site will launch in Fall 2025.





Law-Related Education

404-527-8785 | lre@gabar.org **DEBORAH CRAYTOR. DIRECTOR**



OF JTJ FIELD TRIPS IN 2024-25

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;

OF STUDENT PARTICIPANTS IN JTJ IN 2024-25

maintains the Virtual Museum of Law at 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; conducts teacher workshops; presents at teacher and parent conferences; and sponsors the ABA Civics and Law Honor Roll for Georgia high school students. •



TOP 5 VIRTUAL MUSEUM OF LAW VIDEOS BASED ON # OF VIEWS



VIDEO	# OF VIEWS	
"Brown v. Board of Education"	490,528	௴6% since 2023-24
"Marbury v. Madison"	328,373	௴7% since 2023-24
The Lizzie Borden Case	139,056	पे 6% since 2023-24
The Amistad Case	109,886	௴7% since 2023-24
The Scopes "Monkey" Trial	109,547	û 10% since 2023-2

TOTAL # OF VIEWS OF ALL MUSEUM OF LAW VIDEOS TO DATE

TOP 5 LIVEBINDERS BASED ON # OF VIEWS

VIDEO	# OF VIEWS	
"Hands Up, Don't Shoot" Free Press or Fair Trial	11,531	û 4% since 2023-24
First Amendment: Freedom of Speech, Press and Assembly	11,145	합32% since 2023-24
University of California v. Bakke	8,874	14% since 2023-24
Worcester v. Georgia	7,498	new to the list this year
General Cruel and Unusual Punishment Resources	7,440	र्च 34% since 2023-24

TOTAL # OF VIEWS OF ALL LIVEBINDERS TO DATE

Lawyer Assistance **Program**

800-327-9631 | gabar@curalinc.com **CURALINC HEALTHCARE, SERVICE PROVIDER**

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. Services are now provided by CuraLinc Healthcare, which transitioned from CorpCare on May 1, 2025.

Members may contact LAP for confidential assistance 24 hours a day, seven days a week, by calling 800-327-9631. Visit www.gabar.org/lap for more information about LAP.

UTILIZATION STATISTICS JULY 1, 2024-JUNE 30, 2025

date range.

OF EAP CASES

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.

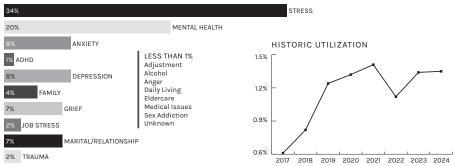
The total activities (contacts) from files, organizational services, information calls, etc., that have an activity date that falls between, and includes, the reporting period

OF ACTIVITIES

The total duration from all activites

that have an activity date that falls between, and includes, the reporting period date range.

PRIMARY PRESENTING PROBLEMS



State Bar of Georgia | Membership Services

Meetings

404-527-8713 | meetings@gabar.org

GAKII KASSAMBA, DIRECTOR

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 lawrelated 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. •



FALL 2024 | NOV. 1-3



178 ATTENDEES

MIDYEAR 2025 | JAN. 9-11



241 ATTENDEES An ice storm in 2024
An ice storm in 2025 caused many attendees to choose the hybrid option that was made available.

SPRING 2025 | MARCH 21-23



192 ATTENDEES

ANNUAL 2025 | JUNE 5-8



644 ATTENDEES

Membership

404-527-8777 | membership@gabar.org

AMANDA DRAPER, DIRECTOR

The mission of the Membership De-

partment is to deliver high-quality service to State Bar members through responsive and effective communication—whether by phone, email or in-person interaction. On average, the department responds to approximately 75 phone inquiries and 60 emails daily, ensuring consistent support across all channels.

Staffed by a dedicated team of five professionals, the department serves a core membership of approximately 56,000 attorneys. This number increases annually by an estimated 1,000 new members. In addition to the core membership, the department also provides support to 7,200 individuals in other membership categories, including student, affiliate, provisional, resigned, retired, disabled, suspended, disbarred and terminated members.

A cornerstone of the department's service is the timely and accurate maintenance of the membership database, which houses critical attorney information. Members can update their information online or request changes through the department. Each year, more than 18,000 updates are processed. This data is essential in addressing inquiries from both the public and the membership base.

OF ACTIVE MEMBER 42,777

OF INACTIVE MEMBERS 7.827

Beyond database management, the department handles a variety of essential member services. These include invoicing and processing annual membership license fees, issuing Letters of Good Standing (approximately 3,500 annually), and assisting members with login access to the State Bar website. The team also processes approximately 1,100 new attorney enrollment packages annually, along with 200 photo IDs and 1,200 membership cards.

OF EMERITUS MEMBERS 5,095

OF NEW MEMBERS 1,410

The Membership Department also manages the annual Board of Governors election. This includes oversight of the election process for all 153 board seats, verification of candidate petitions, ballot creation and ensuring voting compliance with established deadlines. The assistant director serves as the staff liaison to the State Bar of Georgia Elections Committee, coordinating meetings and assisting in the periodic review and revision of election procedures and policies. •

SATELLITE OFFICE

Coastal Georgia Office: Savannah

912-239-9910 // 877-239-9910 | kindallh@gabar.org

KINDALL HARVILLE, OFFICE MANAGER

The Coastal Georgia Office of the State

Bar of Georgia provides metro-Savannah 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 videoconferencing 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. •









TOTAL # OF

₽7% since 2023-24

FVFNTS







SATELLITE OFFICE

South Georgia Office: Tifton

229-387-0446 // 800-330-0446 | lacarar@gabar.org

LACARA REDDICK, OFFICE MANAGER

The South Georgia Office located in

Tifton serves more than 700 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. Our office is a well-liked meeting space due to its convenient location, as Tifton is a connecting point for several major transportation routes including 1-75 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 virual 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. A guest office provides attorneys with a dedicated workspace and a private setting for client meetings.

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 Tifton 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. •

OF CLIENT/MISCELLANEOUS MEETINGS

24

9% of 2024-25

OF DEPOSITIONS 14% of 2024-25

OF MEDIATIONS/ ARBITRATIONS 22 8 of 2024-25

OF WALK-INS 179 67% of 2024-25

OF CLE OPPORTUNITIES/TRAININGS
2% of 2024-25

û 150% since 2023-24

TOTAL # OF EVENTS 267

total # of people using the facility 713

OF INBOUND TELEPHONE CALLS 995 (77%) answered

ATTORNEY LOCATIONS

Adel Albany Alpharetta Ashburn Atlanta Buckhead Brunswick Canton Cartersville Cobb Columbus Cordele Covington

Decatur

Douglas
Dublin
Fitzgerald
Gaineville
Hazlehurst
Jonesboro
Lakeland
Lawrenceville
Macon
Marietta
Moultrie
Norcross
Peachtree City

Pooler St. Simon Savannah Senoia Sylvester Thomasville Tifton Tucker Valdosta Waycross Woodstock Zebulon

Sections

404-527-8782 | sections@gabar.org

MARY JO SULLIVAN, DIRECTOR

Sections are voluntary, non-appointed groups within the State Bar of Georgia that offer specialized resources and services tailored to specific areas of the law. Each section is led by member-elected leaders who develop and coordinate educational programs, community service initiatives and networking opportunities. Section leadership is also responsible for sharing relevant information about these events with their members, with support available from the State Bar's Sections team.

The level of activity within a section is largely driven by the engagement of its members. All Bar members in good standing are eligible to join a section by paying the annual dues set by each individual section; however, only active members of the State Bar may nominate candidates for section office or serve in a leadership role.

Sections also organize Continuing Legal Education (CLE) programs—both accredited and non-accredited—at discounted rates for their members. ●

During the 2024-25 Bar year, the State Bar's sections collectively offered 175.5 hours of CLE-accredited programming. In addition to general credit hours, several programs included specialty credits. Approximately 4,038 members fulfilled their continuing legal education requirements through these offerings.

OF STATE BAR SECTIONS 52

While most of the 52 sections remain active throughout the Bar year, the largest sections continue to demonstrate consistent engagement.

- Real Property Law
- 3,143 members (-59 since 2024)
- 2.493 members (+100 since 2024)
- Corporate Counsel Law 1,854 members (-11 since 2024)
- General Practice & Trial Law
- 1.850 members (-31 since 2024)
- Family Law
- 1,841 members (-118 since 2024)

 Business Law
- 1,730 members (-27 since 2024)
- Criminal Law
 1,388 members (-66 since 2024)
- Labor & Employment Law
- 1,341 members (+3 since 2024)
- Fiduciary Law 1,244 members (+48 since 2024)
- Intellectual Property Law 1,178 members (-75 since 2024)



Transition Into Law Practice Program

404-527-8704 | tilpp@gabar.org **DEE DEE WORLEY. DIRECTOR**

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:

Inside Mentoring
For an attorney who works in a law firm or organization and has a mentor within that firm or organization.

20utside Mentoring

For an attorney who is a sole practitioner with a mentor from another firm or organization.

3Group 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. Lawvers who are prosecutors or public defenders must attend their applicable training, which will satisfy their CLE requirement for the year.

TOTAL # OF LAWYERS ENROLLED IN TILPP

PROSECUTORS 2.5% of 2024-25 \$52% since 2023-24

OF PUBLIC DEFENDERS 3.5% of 2024-25

OF GROUP MENTORING 13% of 2024-25

OF INSIDE MENTORING

OF OUTSIDE MENTORING 3% of 2024-25

OF DEFERRED

Did You Know?

The State Bar of Georgia was the first in the country to have a mandatory mentoring program for lawyers.

Unlicensed Practice of Law

404-527-8769 | upl@gbar.org JOHN MARTY, DIRECTOR

The Unlicensed Practice of Law (UPL) Department acts at the direction of a statewide Standing Committee and 10 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 or without the need for further action. 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-anddesist affidavit within the last two years may be found on the Bar's website. •

OF PRELIMINARY UPL INVESTIGATIONS INITIATED

OF PRELIMINARY UPL INVESTIGATIONS CLOSED

OF FORMAL UPL CASES OPENED

OF FORMAL UPL CASES CLOSED resulting in voluntary compliance or no further necessary action 85%

OF SUBPOENAS PROCURED

OF ATTORNEYS INELIGIBLE TO PRACTICE EXAMINED

OF NOTARY LISTINGS ON HIGH-TRAFFIC WEBSITES REVIEWED



Young Lawyers Division

404-527-8778 | yld@gabar.org JESSICA OGLESBY, DIRECTOR



KENNETH MITCHELL JR.

2024-25 YLD President State Bar of Georgia 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 au-

tomatically 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.

The YLD Review

The YLD Review seeks to provide a forum for the discussion of subjects pertaining to the regulation of the legal profession and improving the quality of legal services, as well as other matters of general interest to Georgia lawyers. Visit www.gabar.org/theyldreview to read issues of The YLD Review.

YLD Signature Fundraiser

The 18th Annual Signature Fundraiser, "A Night on the Diamond," was held on March 8, 2025, at Truist Park. Paula

Frederick, former general counsel of the State Bar of Georgia, received the YLD Lifetime Achievement Award, and Ashley Akins, partner at Parker Poe, received the YLD Signature Service Award. The Signature Fundraiser raised \$85,000 for the YLD Public Interest Internship Program.

YLD Leadership Academy

The YLD Leadership Academy is a sixmonth 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 who went on to leadership positions within the State Bar of Georgia. •



2024-25 YLD Meetings

FALL 2024 | NOV. 1-3



In conjunction with the Board of Governors.

MIDYEAR 2025 | JAN. 9-11



In conjunction with the Board of Governors.

SPRING 2025 | MARCH 28-30



ANNUAL 2025 | JUNE 5-8



In conjunction with the Board of Governors

CONNECT WITH THE YLD





@georgiayld

/georgiayId



Board Action Items

SARAH I. COOLE. CHIEF OPERATING OFFICER

The following action items were taken by the Board of Governors of the State Bar of Georgia during the 2024-25 Bar year. ●

2024 Annual Meeting | June 8

The Board approved appointments to the State Disciplinary Board and the Formal Advisory Opinion 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 ICJE Board appointments; the Georgia Legal Services Program appointments; and the Chief Justice's Commission on Professionalism appointments.

Proposed Rules and Bylaws Changes

- Standing Board Policy 1000 | YES, majority.
- Part VIII Continuing Legal Education | YES, majority.

2024 Fall Meeting | Nov. 2

The Board approved appointments to the Commission on Continuing Lawyer Competency.

Proposed Rules and Bylaws Changes

- Rule 10-106. Eligible Claims | YES,
- Alternate Dispute Resolution Section Bylaws | YES, majority.

- Antitrust Section Bylaws | YES, majority.
- Franchise and Distribution Law Section Bylaws | YES, majority.
- Real Property Law Section Bylaws | YES, majority.
- Center for Lawyer Wellbeing Bylaws | YES, majority.

New Legislative Proposals

- Committee to Promote Inclusion in the Profession – Budget Request for FY 2026 – Funding for Civil Legal Services Grants for Victims of Domestic Violence | YES, majority.
- Fiduciary Law Section Amendments to Title 53 and Related Code Sections | YES, majority.

2025 Midyear Meeting | Jan. 11

The Board approved the Center for Lawyer Wellbeing Dues; nominations to the Georgia ABA delegate posts; and nominations of the State Bar officers for the 2025-26 Bar year.

Proposed Bylaws Changes

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

- Article III. Section 13. Standing Board Policies | YES, majority.
- Article IV. Section 1. Members | YES, majority.
- Article IV. Section 3. Misconduct and Removal | YES, majority.
- Article IV. Section 4. Standing Executive Committee Policies | YES, majority.
- Article VIII. Section 5. Authority to Establish Internal Rules | YES, majority.
- Article VIII. Section 6. Quorum | YES, majority.

Proposed Rules Changes

- Bar Rule 1-302. Composition | YES, majority.
- Bar Rule 1-501. License Fees | YES, majority.
- Bar Rule 1-501.1 License Fees—Late Fee | YES, majority.
- Bar Rule 4-106. Conviction of a Crime; Suspension and Disbarment | YES, majority.
- Bar Rule 4-108. Conduct Constituting Threat of Harm to Clients or Public; Emergency Suspension | YES, majority.
- GRPC 1.0. Terminology and Definitions | YES, majority.
- GRPC 1.6. Confidentiality of Information | YES, majority.

New Legislative Proposals

 Professionalism Committee - Support for a Resolution of the General

Assembly Recognizing April 2025 as Legal Professionalism Month | YES, majority.

 Indigent Defense Committee - Support for the Judicial Council's Budget Request for FY 2026 - Continued Funding for the Georgia Resource Center | YES, majority.

2025 Spring Meeting | March 22

The Board approved an appointment to the Formal Advisory Opinion Board and the 2025-26 State Bar Budget and Financial Resolutions.

2025-26 License Fees | YES, majority. Recommendations of the Executive Com-

- mittee.
 Active Fees \$270. (\$6 increase from
- Inactive Fees \$135. (\$3 increase from 2024-25.)

Approval of Other Bar License Fee Statement Items.

- Center for Lawyer Wellbeing and 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).

2025 Annual Meeting | June 6

The Board approved the establishment of the Senior Lawyers Division; appointments to the State Disciplinary Boards and the Formal Advisory Opinion Board; the 2025-26 Committees; the Executive Director election; the 2025-26 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. Section 2. Senior Lawyers Division | YES, majority.
- Senior Lawyers Division Bylaws | YES, majority.
- Rule 1-707. Senior Lawyers Division | YES, majority.
- Rule 1-202. Membership Status | YES, majority.
- Rule 1.15(II). Safekeeping Property-Trust Account and IOTLA | YES, majority.
- Rule 4-203.1. Uniform Service Rule | Did not pass.
- Rule 4-220. Notice of Punishment or Acquittal; Administration of Reprimands | YES, majority. ●





2024-25 REPORT OF THE

OFFICE OF THE GENERAL COUNSEL



Report of the General Counsel

RUSSELL WILLARD, GENERAL COUNSEL

I am pleased to update you on the activity of the Office of the General Counsel, including a complete report for the just-concluded Bar Year as well as the activity within the Office of the General Counsel since the close of the last Bar Year. This annual report shows in detail the work that the State Bar's attorneys and support staff are doing to further the mission, outreach, and oversight that you have entrusted to us. It is an honor each and every day to work alongside those whose reports fill this annual report, and I commend each and every one of them to you for the work reflected in these pages.

The Office of the General Counsel received 3,080 disciplinary grievances during the 2024-25 Bar Year. Through the work of the Disciplinary Division of the Office of the General Counsel, overseen by Deputy General Counsel Andreea Morrison, 215 disciplinary grievances were determined, after screening, to merit further consideration and were forwarded to the State Disciplinary Board for additional investigation. An additional 20 grievances were administratively mooted after an order of disbarment was entered by the Georgia Supreme Court. The Supreme Court entered public orders in 70 cases during the 2024-25 Bar Year, and

the State Disciplinary Board imposed confidential discipline in an additional 54 cases.

Staff for the Office of the General Counsel served as both counsel to and administratively supported the work of the Clients' Security Fund Trustees. Thirtynine claims were investigated and processed by the Clients' Security Fund, and 29 claims were paid out reflecting a total disbursement of \$639,489,98 to claimants.

During the 2024-25 Bar Year, the Office of the General Counsel staff served as receiver in 10 active matters. State Bar members handled another 25 receiverships for deceased or disbarred lawyers. One of the vaults left to the State Bar by the Federal Reserve upon their departure for their new Midtown property is regularly overflowing with old and abandoned files, and I encourage each and every one of you to have engaged conversations with your actual designated attorney or someone who could fill that role for you should you need it so as not to saddle your family with the herculean task of client file triage and return upon your passing.

Both the Board of Governors and the Formal Advisory Opinion Board have been diligently at work during the 2024-25 Bar year, and the Office of the General Counsel has worked closely with both groups to ensure that filings are timely made with the Supreme Court to ensure that both proposed rule amendments and advisory opinions can be acted upon by the Court. The specifics are laid out in detail in the reports provided by Deputy General Counsel Bill NeSmith and Senior Assistant General Counsel John Shiptenko, and I encourage you to review how many rules have moved forward thanks to the support of the Beard of Governors.

I want to thank the volunteers, both lawyer and non-lawyer, who my staff within the Office of the General Counsel work with daily. While many of these volunteers work within the legal profession, quite a few of our lay volunteers are just remotely connected to the legal profession, if at all. Both sets of volunteers routinely sacrifice personal and professional time, however, to do the vital work of the State Bar. The work reflected in these pages could simply not be accomplished without their time, effort and commitment to public service.

Thank you for the trust that you have placed in me and the staff within the Office of the General Counsel. It is a true pleasure and privilege to serve as your general counsel.

Client Assistance Program of the Office of the General Counsel

MERCEDES BALL ASSISTANT GENERAL COUNSEL/CAP DIRECTOR

The Client Assistance Program (CAP) of the Office of the General Counsel is often the first point of contact that a dissatisfied client or former client has with the State Bar about an attorney. Most often, CAP intervenes to facilitate communication between attorneys and their clients, but it also supports former clients in retrieving their files from former attorneys and assists individuals with locating potential resources when the State Bar does not have the authority to help them.

CAP attempts to resolve issues at an initial, informal stage where early intervention may provide a resolution before a Rule of Professional Conduct may be violated or actual harm occurs to the public. Through active intervention at this phase, CAP was able to resolve 86% of the issues reported to it during the 2024-25 Bar year outside of the formal grievance process. CAP's efforts quickly resolve issues for the public and save the State Bar the expenses associated with the formal grievance process where it is unnecessary.

TOTAL # OF NEW COMPLAINTS

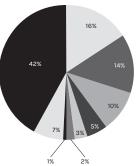
6.800 \$17% since 2023-24

of english/spanish translations 243

6,302

In 2024-25, CAP resolved 76% of formal grievances referred from screening. (Out of 147 grievances referred from screening, 36 were referred back to screening.)

BREAKDOWN OF TYPES OF CASES HANDLED BY CAP IN 2024-25



Approximately ...

- 42% of cases had underlying criminal issues
- 16% of cases had underlying personal injury issues
 14% of cases had underlying domestic issues
- 10% of cases had underlying general civil issues
- 5% of cases had underlying general civil issues
 5% of cases had underlying wills/estates issues
- 3% of cases had underlying real estate issues
- 2% of cases had underlying workers'
- compensation issues
- 1% of cases had underlying bankruptcy issues
- 7% of cases had other types of issues: collections, Social Security, immigration, etc.

State Disciplinary Board

CHRISTIAN STEINMETZ III, 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 2024-25 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

bers—four lawyers from each of the three federal judicial districts of Georgia; and four non-lawyer, public members. During the 2024-25 Bar year, the Board held 11 meetings. Two meetings were virtual, two were held in Atlanta and one each in Athens, Columbus, Jekyll Island, Macon, Rome and Tifton. The final meeting of the Bar year was held at the Annual Meeting in Ponte Vedra Beach, Florida.

The Bar received 3,080 grievance forms this year (719 more than last year). After review and screening by the Office of General Counsel, 2,814 grievances were closed or dismissed for their failure to state facts sufficient to invoke the juris-

Lawyers Division; 12 investigating mem-

forms this year (719 more than last year). After review and screening by the Office of General Counsel, 2,814 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 215 grievances contained allegations which, if true, would amount to violations of one or more of the Georgia Rules of Professional Conduct (30 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



TOTAL # OF GRIEVANCE FORMS RECEIVED

3,080 +179 sinc

TOTAL # OF GRIEVANCE FORMS DISMISSED

2,814 *some pending at the beginning of the Bar year

TOTAL # OF GRIEVANCE FORMS REFERRED FOR INVESTIGATION 2.15 +30 since 2023-24

Board dismissed 43 grievances, 22 of those with a letter of instruction to educate and inform the lawver about the Rules of Professional Conduct. One hundred and twenty-four 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, 23 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 2024-25 Bar year:

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.

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 who have likewise devoted personal and professional time to regulating this profession of which they are not members.

ACTION TAKEN	# OF CASES
Confidential Reprimands	6
Formal Letters of Admonition	17
Cases Dismissed with Letters of Instruction	22

2024-25 State Disciplinary Board

Lawyer Members

Kassi Nicole Conley, Atlanta
Christopher Sutton Connelly, Summerville
Jeffrey William DeLoach, Watkinsville
Marcella Coladangelo Ducca, Atlanta
Jennifer Elizabeth Dunlap, Columbus
Pamela Felecia Everett, Pooler
Robert Rogers Giannini, Lawrenceville
Taylor H. Haley, Saint Simons Island
William H. Noland, Macon

Brandon Lee Peak, Columbus Christian Joseph Steinmetz III, Savannah Carl Robert Varnedoe, Savannah

Non-Lawyer Members

Jill Cardenas, Savannah Noemi de Miguel Mota, Lilburn Jennifer D. Ward, Savannah Elisabeth Peyten Williams, Atlanta

Ex-Officio Members

Veronica Rogusky Cox, Atlanta YLD President-Elect Christopher P. Twyman, Rome President-Elect



State Disciplinary Review Board

NORBERT DANIEL HUMMEL IV, 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 renders

a final determination with the report and recommendation of the special master as well as the Review Board's recommendation considered in the Court's ultimate disposition of the disciplinary case.

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 atlarge 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, 2024, to June 30, 2025:

FORM OF DISCIPLINE	# OF CASES	# OF LAWYERS
Disbarment/Voluntary Surrender	25	17
Suspensions	45	25
Public Reprimand	2	2
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. •

2024-25 State Disciplinary Review Board

Members

Northern District Norbert Daniel Hummel IV, Kennesaw William Hickerson Thomas Jr., Atlanta Middle District

Caroline Whitehead Herrington, Macon Veronica McClendon, Macon Southern District John Ryd Bush Long, Augusta

Paul H. Threlkeld, Savannah

Lay Members

LaShekia Hughes, Macon Susan Leger-Boike, Cordele

At-Large

Brandon Alexander Bullard, Atlanta

Ex-Officio

Brittanie Danielle Browning, Atlanta Hon. J. Antonio DelCampo, Atlanta



Clients' Security Fund

WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

The legal profession is one of 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 money 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. 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 performs 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 stag-

gered 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.

2024-25 Board of Trustees

Members

Tyronia Monique Smith, Atlanta Robert J. Kauffman, Douglasville Michael G. Geoffroy, Covington R. Javoyne Hicks, Decatur Karl David Cooke Jr., Macon LaToya Simone Williams, Warner Robins Non-Lawyer Member Sammy Strode, Savannah

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-payment Bar members. The amendment also changed the maximum payout from \$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.

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, 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 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).

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 notify 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-lawver 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 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.

During the 2024-25 Bar year, the trustees of the Clients' Security Fund requested a change to the rules governing the Fund. The amendment is intended to correct an apparent limitation that could restrict the trustees' ability to award compensation on claims involving deceased, disabled or otherwise unavailable lawyers who could not be disciplined for their dishonest acts. On June 9, 2025, the Supreme Court of Georgia issued an order amending Rule 10-106, which allows the trustees of the Clients' Security Fund, at their discretion, to evaluate the merits of a claim based on available evidence of dishonesty and improper conduct regardless of the lawyer's disciplinary status. The amendments became effective on July 10, 2025.

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.

A statement of Fund balance, income and expenses for the period ending June 30, 2025, is on the next page. ●

Annual Financial Statistics					
talance on July 1, 2023		2023-24 2,212,202		2023-24 2,782,908	
ncome to Fund					
Assessments	\$	760,050	\$	755,592	
Restitution	\$	821	\$	13,207	
Interest and Dividend Income	\$	44,364	\$	42,742	
Gain/Loss Investment Assessment	\$	92,242	\$	35,566	
stributions from Fund					
Claims Paid	\$	239,968	\$	870,020	
Restricted Expenses	\$	73,000	\$	73,000	
Bond Premium Amortization	\$	5,737	\$	3,090	
Investment Service Fee	\$	8,066	\$	6,896	

Summary of Claims Activity

Following is a summary of claims activity from July 1, 2024–June 30, 2025.

ACTIVITY	2023-24	2024-25	
Recorded Application Requests	52	48	
Claims Filed	53	48	
Claims Considered	38	59	
Claims Approved	18	43	
Claims Denied	3	4	
Claims Tabled	6	7	
Claims Reconsidered	3	9	
Claims Administratively Closed	11	3	
Claims Withdrawn	0	1	
Claims Pending	54	38	
Inactive Claims	5	5	
# of Lawyers Invovled in Paid Claims	16	18	



Formal Advisory Opinion Board

JOHN J. SHIPTENKO, SENIOR ASSISTANT GENERAL COUNSEL



Formal Advisory Opinions

FAO Request Process

Requests for formal advisory opinions (FAOs) 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, the Office of the General Counsel prepares the request for the Board's consideration and 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.

Board Meetings

The Board works throughout the year, considering and researching the ethical issues presented in FAO requests and drafting proposed opinions. During the 2024-2025 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 2024-25 Bar year, the Board considered the following requests for a formal advisory opinion:

Formal Advisory Opinion Request No. 24-R1

FAO Request No. 21-R1 was received in the 2023-24 Bar year on or about June 6, 2024. The request was considered by the board during the 2024-25 Bar year. The requestor presented the following questions:

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?

Is it appropriate 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?

At its Sept. 18, 2024, meeting, the Board determined that the GRPC, specifically Rules 3.4 and 8.4, adequately addresses the issue raised in the request. Accordingly, the Board declined the request for the drafting of a formal advisory opinion.

Formal Advisory Opinion Request No. 24-R2

FAO Request No. 24-R2 was received on or about July 30, 2024. The requestor inquired about the following:

May a lawyer reveal the identity of their client, former client, or prospective client to a third party without consent?

The Board formed a subcommittee to study the matter and recommend to the Board whether to accept or decline the request. At its January 23, 2025, meeting, the subcommittee reported that the GRPC and opinions from other jurisdictions adequately address the issue presented. Based on the subcommittee's report and recommendation, the Board declined the request for the drafting of a formal advisory opinion.

Formal Advisory Opinion Request No. 24-R3

FAO Request No. 24-R3 was received on Oct. 8, 2024. The requestor posed the following questions:

1. Can an attorney who is appointed by the Juvenile Court pursuant to O.C.G.A. § 15-11-103 to represent a child in a dependency proceeding, and whose representation of the child continues through "all stages of the proceedings" including postdispositional hearings after termination of parental rights as outlined in O.C.G.A.§ 15-11-322 and the subsequent placement of the child following termination of parental

- rights with DFCS for purposes of adoption pursuant to O.C.G.A.§ 15-11-321 (i.e., representation does not terminate until the child is adopted), then also simultaneously ethically represent the foster/adoptive parents in Superior Court to finalize the same child's adoption by the foster/adoptive parents pursuant to O.C.G.A.§ 19-8-4?
- 2. Can an attorney who is appointed by the Juvenile Court pursuant to O.C.G.A. § 15-11-104 to serve as the guardian ad litem (GAL) in a dependency proceeding for a child (with powers and duties as set forth in O.C.G.A. § 15-11-105), and whose representation of the child continues through "all stages of the proceedings" including post-dispositional hearings after termination of parental rights as outlined in O.C.G.A.§ 15-11-322 and the placement of the child following termination of parental rights with DFCS for purposes of adoption pursuant to O.C.G.A. § 15-11-321 (i.e., representation does not terminate until the child is adopted), then also simultaneously ethically represent the foster/adoptive parents in Superior Court to finalize the same child's adoption by the foster/adoptive parents pursuant to O.C.G.A. § 19-8-4?
- Can an attorney who is appointed by the Juvenile Court in a dependency proceeding pursuant to either O.C.G.A. § 15-11-103 or O.C.G.A. § 15-11-104 (with powers and duties as set forth in O.C.G.A. § 15-11-105), or both, and whose representation

continues "though all proceedings" including post-dispositional hearings after termination of parental rights as outlined in O.C.G.A. § 15-11-322 and the placement of the child following termination of parental rights with DFCS for purposes of adoption pursuant to O.C.G.A. § 15-11-321 (i.e., representation does not terminate until the child is adopted) ethically also simultaneously represent the foster/ adoptive parents in Superior Court to finalize the same child's adoption by the foster/adoptive parents pursuant to O.C.G.A. § 19-8-4 when the foster/adoptive parents have legal concerns/issues that could adversely affect the adoptive parents' ability to finalize the adoption or might jeopardize the placement of the child with them because advocacy for the foster/adoptive parents could be contrary to the best interest or safety of the child?

At its April 28, 2025, meeting, the Board determined that the GRPC adequately addresses the issues raised in all three questions included in the request. Accordingly, the Board declined the request for the drafting of a formal advisory opinion.

Formal Advisory Opinion Request No. 25-R1

FAO Request No. 25-R1 was received on or about Feb. 7, 2025. The requestor inquired about the following:

If a lawyer who represents a government agency has notice that an employee or former employee of the agency is sued for acts or omissions in the course of their agency employment, does the lawyer have a duty to notify the employee or former employee of the lawsuit?

At its April 28, 2025 meeting, the Board determined that the GRPC adequately addresses the issues raised in the

request. Accordingly, the Board declined 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 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 Bar members an opportunity to review the proposed opinion and submit comments to the Board through the Office of the General Counsel. The comments, any research materials and feedback from the Office of the General Counsel 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 Journal 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 the president and files the opinion with the Supreme Court of Georgia.

During the 2024-25 Bar year, pursuant to Rule 4-403, the following drafted opinion proceeded through the Board's process of consideration, approval, publication and filing.

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 drafted Proposed FAO No. 23-1. During the 2022-23 and 2023-24 Bar years, the opinion proceeded through the Board's consideration, approval and first publication process.

At its Sept. 18, 2024, meeting, the Board approved an amended version of Proposed FAO No. 23-1 for first publication. On Oct. 23, 2024, the proposed opinion appeared on the State Bar of Georgia's website for first publication. Bar members were invited to submit comments regarding the proposed opinion. On Jan. 23, 2025, based on the comments received, the Board approved a modified amended proposed opinion for second publication and filing with the Supreme Court of Georgia. The Board also voted in favor of asking the Office of the General Counsel to file a petition for discretionary review. The opinion was published for second publication on the State Bar of Georgia's website and filed with the Supreme Court of Georgia on May 22, 2025. On May 28, 2025, the Office of the General Counsel petitioned the Supreme

Court for discretionary review of the opinion pursuant to Bar Rule 4-403 (d). On July 1, 2025, the Supreme Court issued an order denying the petition for discretionary review. Accordingly, pursuant to Bar Rule 4-403 (d) and (e), FAO No. 23-1 is an opinion issued by the Formal Advisory Opinion Board binding only on the State Bar of Georgia and the person who requested the opinion, and not on the Supreme Court, which shall treat the opinion as persuasive authority only.

During the 2024-2025 Bar year, pursuant to Rule 4-403, the following drafted opinion proceeded through the Board's process of consideration, approval and first publication.

Proposed Formal Advisory Opinion No. 24-1

- 1. If the insurer through its vendor requires the attorney to provide only the name of the medical provider or other nonparty 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 nonparty 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 meeting, the Board accepted the request for the drafting of a formal advisory opinion. On May 24, 2024, the drafting subcommittee, appointed to prepare a proposed opinion, presented a draft proposed opinion for the Board's consideration. The question presented was amended 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?

On Sept. 18, 2024, the Board completed its review of the proposed opinion and approved it for first publication. The proposed opinion was published on the State Bar of Georgia's website on Oct. 23, 2024, pursuant to Bar Rule 4-403 (c). Bar members were invited to submit comments regarding the proposed opinion. On Jan. 23, 2025, based on the comment received, the Board approved an amended version of the proposed opinion for second publication and filing with the Supreme Court of Georgia. The Board also voted in favor of asking the Office of the General Counsel to file a petition for discretionary review. A petition for review has now been filed with the Court by the Office of the General Counsel.

Discretionary Review

Following the final approval and filing of the opinion, the Board decides whether to recommend that the Office of the General Counsel 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.

Issuance of a 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 on its own motion) or the Supreme Court of Georgia (if the Court grants discretionary review or reviews the opinion on its own motion 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.

Another Board matter addressed during the 2024-25 Bar year:

Formal Advisory Opinion Request No. 22-R1

Formal Advisory Opinion Request No. 22-R1 was received on April 7, 2022. The requestor presented the following question:

Ethical considerations for a lawyer who is a party in a legal matter communicating directly with an adverse party concerning the matter.

The Board considered the following scenarios that an opinion could address based on the question presented:

- 1. Under Rule 4.2, may a lawyer who is a party in a legal matter but is not representing himself or herself in the matter (the lawyer/party is represented by counsel in the matter) communicate directly with a represented adverse party concerning the matter without the consent of the adverse party's lawyer?
- 2. Under Rule 4.2, may a lawyer who is a party in a legal matter

and is representing himself or herself in the matter communicate directly with a represented adverse party concerning the matter without the consent of the adverse party's lawyer?

- Application of Rule 4.3, when a lawyer who is a party in a legal matter but is not representing himself or herself in the matter (the lawyer/party is represented by counsel in the matter) wants to communicate directly with an unrepresented adverse party concerning the matter.
- 4. Application of Rule 4.3, when a lawyer who is a party in a legal matter and is representing himself or herself in the matter wants to communicate directly with an unrepresented adverse party concerning the matter.

At its Jan. 23, 2023 meeting, the Board tabled consideration of this request pending the rule amendment process regard-

ing proposed amendments to Rule 4.2, the rule implicated in the request. On Dec. 20, 2024, the Supreme Court of Georgia issued an order approving amendments to Rule 4.2, effective Jan. 23, 2025.

At its April 28, 2025, meeting, the Board determined that the amendment to Rule 4.2 adequately addresses the ethical issues presented in scenarios 1 and 2 above. The Board determined further that Rule 4.3 adequately addresses the ethical issues presented in scenarios 3 and 4. Accordingly, the Board declined this request for the drafting of a formal advisory opinion.

Formal Advisory Opinion Board

The Board, listed below, 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.

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. The Office of the General Counsel periodically reviews these rules, advises the Board regarding whether it should consider amending the rules and suggests proposed amendments.

At its Jan. 23, 2023 meeting, the Board approved proposed amendments to Bar Rule 4-402. On Dec. 20, 2024, the Supreme Court of Georgia, after considering Motion 2023-2, which was filed with the Court on Jan. 18, 2024, issued an order approving an amendment to Bar Rule 4-402, effective Jan. 23, 2025. The amendments to Bar Rule 4-402 more clearly addressed when a Board member's term expires and removed the language that restructured the Board, since such language was merely historical and no longer relevant or applicable. The current structure, including staggering appointments, remains.

Formal advisory opinions, opinion indexes and the rules governing the Board are located on the State Bar's website at www.gabar.org/advisory-opinions.

2024-25 Formal Advisory Opinion Board

Δt-l arge

Edward B. Krugman, Atlanta Martin A. Levinson, Atlanta Letitia A. McDonald, Atlanta Mary A. Prebula, chair, Duluth Jeffrey Hobart Schneider, Atlanta

Georgia Trial Lawyers Association C. Andrew Childers, *Atlanta*

Georgia Defense Lawyers Association Jacob Edward Daly, Atlanta

Georgia Association of Criminal Defense Lawyers

Amanda Rourk Clark Palmer, vice chair, Atlanta

Georgia District Attorneys' Association Sherry Boston, *Decatur*

Young Lawyers Division Franklin Thomas Gaddy, Macon

Emory University Professor Jennifer Murphy Romig, Atlanta

University of Georgia
Professor David N. Lefkowitz, Athens

Mercer University

Professor Patrick E. Longan, Macon

Georgia State University

Professor Cassady V. Brewer,* Atlanta

Atlanta's John Marshall Law School Professor Jeffrey Alan Van Detta, *Atlanta*

State Disciplinary Board

Christopher Sutton Connelly, Summerville

State Disciplinary Review Board John Ryd Bush Long, Augusta

Executive Committee

R. Gary Spencer, Atlanta

(*Effective Feb. 1, 2025, Brewer retired from Georgia State University College of Law. Subsequently, Professor Tia Gibbs was appointed to fill Brewer's unexpired term.)

Pro Hac Vice Program

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. 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.

Applicants can submit their application and fee (check, money order or credit card) via mail or the online portal on the State Bar's website. The pro hac vice administrator creates a paper and electronic file for all applications received by mail and creates an electronic file for all applications received via the online portal. The paper files are purged annually. The pro hac vice administrator reviews the applications to determine whether the application contains the required information pursuant to the rule and its appendix and whether the attorney submitted the annual and application fees. The pro hac vice administrator also verifies the attorney's status with their home jurisdiction(s), determines if the attorney has any disciplinary history (and gets a copy if possible), and obtains the judge's name and address

If an attorney fails to provide the required fee(s) or provides an incorrect fee amount, the pro hac vice administrator will request the required fee(s) or correct fee amount via email or mail. If the attorney fails to provide information required by the applicable rule's appendix, the pro hac

vice administrator requests that the attorney file an amended application with the Court and send a copy of the same to the Office of the General Counsel.

After the contents of the application are entered into the *pro hac vice* database, the information is verified and the fees are received, the *pro hac vice* administrator drafts a letter to the Court, reviewed by counsel within the Office of the General Counsel, explaining whether the application complies with the rule and its appendix. Occasionally, counsel may conclude that the attorney appears ineligible for *pro hac vice* admission under the rule and will file a Response with the Court to that effect.

Below is a chart reflecting the average monthly *pro hac vice* caseload.

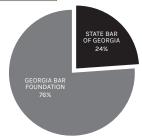
AVERAGE MONTHLY CASELOAD	# OF CASES	
Incoming calls	60	
Incoming emails	100	
Voicemails	30	
Outgoing calls	40	
Outgoing emails	100	

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(1) requires applicants to submit a late fee of \$100, along with the annual fee, by March 1. In December 2025, the pro hac vice administrator sent 2,498 annual fee notice emails and 192 annual fee notice letters to appli-

cants (and a copy to their sponsor), which includes a payment link and information on how to notify the Office of the General Counsel if the applicant is no longer admitted pro hac vice. If an applicant fails to submit the required annual and late fees, counsel provides the applicable court with a letter stating that the applicant is not in compliance with the rule.

During the period of July 1, 2024, through June 30, 2025, the Office of the General Counsel reviewed 1,520 pro hac vice applications. The Office of the General Counsel filed eight formal responses with Georgia courts regarding the apparent non-eligibility of the applicant. The Office of the General Counsel collected a total of \$455,368 from pro hac vice applicants. The fees are divided between the

State Bar of Georgia and the Georgia Bar Foundation. The State Bar of Georgia received \$109,968 from the total collected. The Georgia Bar Foundation received \$345,400 from the total collected.



Overdraft Notification Program

REGINA PUTMAN, TRUST ACCOUNT OVERDRAFT NOTICIATION COORDINATOR

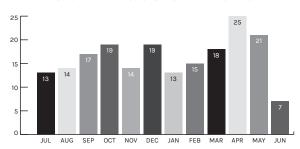
The Overdraft Notification Program

received 195 overdraft notices from financial institutions approved as depositories for Georgia attorney trust accounts. Of the total number of notices received, three overdraft reports were received on the trust accounts of disbarred lawyers and one overdraft report was received on the trust account of a lawyer ineligible to practice because of unpaid Bar license fees. A total of 124 files were dismissed based on the receipt of satisfactory responses following the initial State Bar inquiry, 11 files were referred to the Law Practice Management Program and 22 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 2024-25 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, the physical presence of a financial institution branch office location within the state of Georgia and a bank's willingness to execute the Office of the General Counsel's overdraft reporting agreement and the Georgia Bar Founda-

OF OVERDRAFT NOTICES RECEIVED IN 2024-25

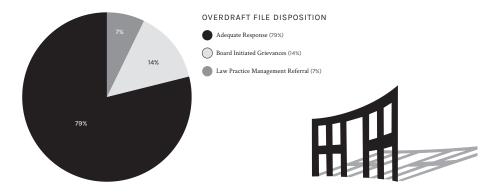


tion's interest rate comparability agreement. Currently, 195 banks and credit unions are reflected on the State Bar of Georgia's List of Financial Institutions Approved as Depositories for Attorney Trust Accounts, which can be found at www.gabar.org/banks.

State Bar of Georgia Trust Account Overdraft Notification (TAON) Program—Office of the General Counsel

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 TAON 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 State Bar of Georgia 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. The Bar rule also enables the Office of the General Counsel to counsel errant lawvers to take corrective action before the lawyer's misconduct becomes so egregious as to mandate serious sanction, including disbarment. •

	1				
MONTH 2024-25	ACTUAL # NOTICES RECEIVED	FILES CLOSED/ ADEQUATE RESPONSE	FILES CLOSED/ LPMP	GRIEVANCES INITIATED	TOTAL CLOSED
July	13	12	1	2	15
August	14	6	3	2	11
September	17	8	1	0	9
October	19	9	1	3	13
November	14	9	0	2	11
December	19	10	0	3	13
January	13	10	0	2	12
February	15	10	1	0	11
March	18	10	0	6	16
April	25	4	3	0	7
May	21	22	1	0	23
June	7	14	0	2	16
TOTAL	195	124	11	22	157
PERCENTAGE		91%	0.63%	8.59%	



Receiverships

WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

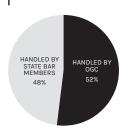
Every year, the Office of the General Counsel handles calls concerning "absent lawyers." According to Rule 4-228 of the Georgia Rules of Professional Conduct, an absent lawyer is "[a] member of the State Bar of Georgia (or a Domestic or Foreign lawyer authorized to practice law in Georgia) who has disappeared, died, been disbarred, disciplined or incarcerated, become so impaired as to be unable to properly represent clients, or who poses such 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 clients and affairs. 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 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.

In instances when 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 the Office of the General Counsel All files are inventoried once they arrive at the State Bar of Georgia Headquarters. The Office of the General Counsel catalogs the files by type, client name, if the file is pending in court and 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, staff within the Office of the General Counsel begin 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 a sworn affidavit of ownership or a lawyer presents a letter of representation of the client. The Office of the General Counsel handles hundreds of phone calls from clients, courts and others concerning receiverships and absent lawyers.

During the 2024-25 Bar year, the Office of the General Counsel handled 29 receiverships.

total # of receiverships



State Bar members also have been appointed receivers and are currently handling 27 receiverships. The Office of the General Counsel monitors these receivers and checks their progress to ensure that the client's interests are protected. Once the outside receivers have fulfilled their duties, the Office of the General Counsel arranges the removal of the remaining files and their storage at State Bar Headquarters.

All files, regardless of whether they were handled by outside receivers or the Office of the General Counsel, 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, the Office of the General Counsel arranges for a shredding company to come onsite and remove the files for proper destruction.

Amendments to Bar Rules and Bylaws

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 State Bar member. If a member of the State Bar requests an amendment, the request is typically submitted to the Office of the General Counsel, the executive director, a State Bar officer or the governing committee associated with the particular rule(s). The Office of the General Counsel then will prepare a draft of the proposed rule amendment; however, Bar members may also provide their draft of a proposed opinion.

The Office of the General 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 prepares a Notice of Motion to Amend the Rules of the State Bar of Georgia. This Notice is published 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, the Office of the General 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 at www.gabar.org/handbook.

Following is a summary of actions taken during the 2024-25 Bar year regarding proposed amendments to the Rules and Regulations for the Governance of the State Bar 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.

Motion 2023-1, as it relates to the proposed amendments to Part 7, remains pending with the Supreme Court.

Motion 2023-2

The following is the status of the proposed rule amendments that were filed with the Supreme Court of Georgia under Motion 2023-2 on Jan. 18, 2024.

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. The Supreme Court of Georgia issued an order on June 6, 2024, approving the proposed amendments effective June 20, 2024.

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. The Supreme Court of Georgia issued an order on Dec. 20, 2024, approving the proposed amendments effective Jan. 23, 2025.

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. The Supreme Court of Georgia issued an order on Dec. 20, 2024, approving the proposed amendments effective Jan. 23, 2025.

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. The Supreme Court of Georgia issued an order on Dec. 20, 2024, approving the proposed amendments effective Jan. 23, 2025.

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. The Supreme Court of Georgia issued an order on Dec. 20, 2024, approving the proposed amendments effective Jan. 23, 2025.

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 as a method of ensuring 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 service by publication 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. The proposed amendments to this rule remain pending with the Supreme Court of Georgia.

Bar Rule 4-409.1. Coordinating Special Master

The proposed amendment to this rule seeks to remove the aspirational language that suggests a special master's term should not exceed five years, in an effort to retain trained and experienced special masters.

The Supreme Court of Georgia issued an order on January 31, 2025, approving the proposed amendments effective March 6, 2025.

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. The Supreme Court of Georgia issued an order on Dec. 20, 2024, approving the proposed amendments effective Jan. 23, 2025.

Motion 2024-2

The proposed amendments to the following rules were filed with the Supreme Court of Georgia on Sept. 9, 2024, and remain pending with the Court.

Part 8. Continuing Legal Education

Comprehensive changes to Part 8. Continuing Legal Education is proposed to enhance and update the rules to include 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 concise other parts of the rules.

Motion 2025-1

The proposed amendments to the following rule were filed with the Supreme Court of Georgia on March 5, 2025.

Rule 1-302. Composition

The amendment to this rule limits the size of the Board of Governors to not exceed its current size of 160 members. The Supreme Court of Georgia issued an order on May 1, 2025, approving the proposed amendments effective May 29, 2025.

Motion 2025-2

The proposed amendments to the following rules were filed with the Supreme Court of Georgia on March 7, 2025.

Rule 1-501. License Fees

The amendments to Rule 1-501 removed the onerous process of appeal for non-payment of license fees, and aligned the State Bar of Georgia and the Office of Bar Admission Rules in order to reflect that the Board to Determine Bar Fitness is not designed to play any role in the regulation of attorneys once they have been barred. The Supreme Court of Georgia issued an order on March 13, 2025, approving the proposed amendments effective April 17, 2025.

Rule 1-501.1. License Fees - Late Fee

The amendments to Rule 1-501.1 remove the increasing schedule of late fees and create a single late payment fee. Changes to the rule also better define waiver of the late fee provision, allowing the Executive Committee to waive late fees under certain circumstances. The Supreme Court of Georgia issued an order on March 13, 2025, approving the proposed amendments effective April 17, 2025.

Motion 2025-3

The proposed amendments to Rule 4-106. Conviction of a Crime; Suspension and Disbarment and Rule 4-108. Conduct Constituting Threat of Harm to Clients or Public; Emergency Suspension was filed with the Supreme Court of Georgia on March 14, 2025. The amendments simplify the process for filing recommendations by the special master in disciplinary matters. Special masters are now required to file their recommendations with the clerk of the State Disciplinary Boards instead of the Supreme Court of Georgia. The clerk of the State Disciplinary Boards will then file the special master's recommendations with the Supreme Court along with the record of the case. The Supreme Court of Georgia issued an order on May 1, 2025, approving the proposed amendments effective May 29, 2025.

Motion 2025-4

The proposed amendments to the following rule were filed with the Supreme Court of Georgia on March 14, 2025.

Rule 1.0. Terminology.

The amendments to Rule 1.0. Terminology. clarify the definition of the term "lawyer" and add and define the terms "attorney" and "counsel." These terms are often used interchangeably; however, without the clarity this change brings, there can be some confusion because an attorney and a counselor can be a person who is not licensed to practice law. The Supreme Court of Georgia issued an order on May 1, 2025, approving the proposed amendments effective May 29, 2025.

Motion 2025-5

The proposed amendments to the following rule were filed with the Supreme Court of Georgia on March 14, 2025.

Rule 1.6. Confidentiality of

The amendments to Rule 1.6. Confidentiality of Information. ensures lawyers take the reasonable steps necessary to protect client information given the increasing use of electronic means to transmit documents. Motion 2025-5 remains pending with the Supreme Court of Georgia.

Motion 2025-6

The proposed amendments to the following rules were filed with the Supreme Court of Georgia on April 22, 2025.

Rule 4-102. Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct.

The amendment to 4-102 (d) deleted the word "Terminology" which was duplicative and unnecessary. The Supreme Court of Georgia issued an order on June 9, 2025, approving the proposed amendment effective July 10, 2025.

Rule 9.4. Jurisdiction and Reciprocal Discipline

The amendments to this rule direct the State Disciplinary Review Board to file its recommendation and final report with the clerk of the State Disciplinary Boards instead of the Supreme Court of Georgia. The clerk of the State Disciplinary Boards will then file their reports and recommendations with the Supreme Court of Georgia and serve the respondent within 10 days of the filing. The Supreme Court of Georgia issued an order on June 9, 2025, approving the proposed amendments effective July 10, 2025.

Motion 2025-7

The proposed amendments to the following rule were filed with the Supreme Court of Georgia on April 22, 2025.

Part X. Clients' Security Fund. Rule 10-106. Eligible Claims

The amendment to this rule corrects an apparent limitation that could restrict the trustees of the Fund's ability to award compensation on claims involving deceased, disabled or otherwise unavailable lawyers who could not be disciplined for their dishonest acts. As amended, Rule 10-106, allows the trustees of the Clients' Security Fund, at their discretion, to evaluate the merits of a claim based on available evidence of dishonesty and improper con-

duct regardless of the lawyer's disciplinary status. The Supreme Court of Georgia issued an order on June 9, 2025, approved the proposed amendments effective July 10, 2025.

Motion 2025-8

The proposed amendments to the following rule were approved by the Board of Governors on June 6, 2025. It was published on the State Bar of Georgia's website on June 20, 2025, and was filed with the Supreme Court of Georgia on Aug. 15, 2025.

Rule 1-202. Membership Status.

The proposed amendments to this rule permit Non-Active Status members will at least five years of legal experience to provide pro bono legal services under specified conditions. The proposed amendments also impose new requirements on Emeritus Status members seeking to perform pro bono services.

Motion 2025-9

The proposed amendments to the following rule were approved by the Board of Governors on June 6, 2025. It was published on the State Bar of Georgia's website on June 20, 2025, and was filed with the Supreme Court of Georgia on Aug. 15, 2025.

Rule 1-707. Senior Lawyers Division.

This proposed amendment creates and operates a Senior Lawyers Division of the State Bar of Georgia that consists of lawyers aged 55 years and over.

Motion 2025-10

The proposed amendments to the following rules were approved by the Board of

Governors on June 6, 2025. It was published on the State Bar of Georgia's website on June 20, 2025, and was filed with the Supreme Court of Georgia on Aug. 15, 2025.

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

This proposed amendment makes clear that a lawyer holding or managing funds in a fiduciary capacity without representing any party must notify all parties in writing that neither the funds nor the lawyer is subject to the Georgia Rules of Professional Conduct. Additionally, lawyers may not use their law firm trust or IOLTA accounts to hold fiduciary funds unless they are representing a client in a specific matter.

Approved Amendment to the Bylaws of the State Bar of Georgia

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

This amendment simplifies the language and reorganizes a long paragraph by creating subparts. (Approved by the Board of Governors on Jan. 11, 2025.)

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

This amendment adds the "good standing" language and enabling rules for foreign law consultants. (Approved by the Board of Governors on Jan. 11, 2025.)

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

This amendment removes the provision that a law student member attend a law

school in Georgia, making the bylaw consistent with Bar Rule 1-206.1. (Approved by the Board of Governors on Jan. 11, 2025.)

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

This amendment creates a new bylaw that provides authority for "Standing Board Policies." (Approved by the Board of Governors on Jan. 11, 2025.)

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

This amendment to the Executive Committee election bylaw simplifies the election process for Executive Committee members. (Approved by the Board of Governors on Jan. 11, 2025.)

Article IV. Executive Committee.

Section 3. Misconduct and Removal. This new bylaw guides the removal process for officers, board members, volunteers, guests and others who have engaged in misconduct. (Approved by the Board of Governors on Jan. 11, 2025.)

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

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

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

The amendment creates a new bylaw that provides explicit authority for a State Bar committee to establish its operation or procedural rules. (Approved by the Board of Governors on Jan. 11, 2025.)

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

This amendment creates a new bylaw that lowers the quorum requirements established by Roberts Rules of Orders (50%+1) to 40% of the committee membership. This allows committees with a large number of members (many of whom rarely or ever attend meetings) to more easily establish a quorum and conduct the business of the committee. (Approved by the Board of Governors on Jan. 11, 2025.)

Article IX. Committee. Section 2. Senior Lawyers Section.

This amendment eliminates the Senior Lawyers Section and replaces it with the Senior Lawyers Division. This amendment is only effectuated upon the Supreme Court of Georgia's order approving the adoption of Rule 1-707. Senior Lawyers Division. (Approved by the Board of Governors on June 6, 2025.) ●



2024-25 ANNUAL REPORT

Disciplinary Orders of the Supreme Court of Georgia

KATHYA S. JACKSON, CHAIR, STATE DISCIPLINARY BOARDS

REINSTATEMENTS GRANTED

Nov. 26, 2024 Walter Douglas Adams May 13, 2025 William Avriett Green

PUBLIC REPRIMANDS

Oct. 15, 2024 William Slater Vincent Feb. 18, 2025 Chadrick A. Mance

SUSPENSIONS

Indefinite Suspensions

July 16, 2024 Shelitha Renee Robertson Feb. 18, 2025 Vi Bui Feb. 18, 2025 Christopher Tyson

May 7, 2025 Jimmy Thomas Howell Jr. May 28, 2025 Patrick Bryant Hawley

Definite Suspensions

Aug. 13, 2024 Jonathan R. Melnick
Oct. 15, 2024 Curtis Lee Allen
Nov. 19, 2024 Christian Aaron Coomer
Nov. 19, 2024 Eston William Hood Jr.
March 4, 2025 James Howard Sinnott
May 28, 2025 Nathaniel Watson Cochran

Brian Ioel Aplin

Interim Suspensions

Oct. 7, 2024

Jan. 27, 2025 Angela Mary Kinley
Jan. 27, 2025 Samuel David Ozburn
Jan. 27, 2025 Christopher Michael Porterfield
Jan. 27, 2025 Melvin Raines II
March 25, 2025 Richard Eric Johnson
March 26, 2025 Mylee McKinney
May 1, 2025 Stanley A. Coburn

May 1, 2025 Nicole Jones

June 16, 2025 Matthew Jason Anderson
June 16, 2025 Sean Raymond Campbell-Champion

June 16, 2025 Scan Raymond Campbell Chi

June 16, 2025 Tripoli Aley Freeman

June 16, 2025 Emily Yost

INTERIM SUSPENSIONS LIFTED

 Aug. 5, 2024
 Gabriel Anthony Daniels

 Aug. 9, 2024
 Craig S. Bonnell

 Jan. 28, 2025
 Melvin Raines, II

 March 28, 2025
 Mylee McKinney

 April 11, 2025
 Richard Eric Johnson

 May 5, 2025
 Nicole Jones

 June 16, 2025
 Matthew Jason Anderson

 June 16, 2025
 Tripoli Aley Freeman

DISBARMENTS/VOLUNTARY SURRENDERS

Aug. 13, 2024 Anthony O. Van Johnson Sept. 4, 2024 L. Elizabeth Lane Sept. 4, 2024 Nevada Michael Tuggle Sept. 17, 2024 Cory D. Raines Oct. 1, 2024 John L.G. Herbert Ir. Oct. 22, 2024 John Weimann Oxendine Nov. 5, 2024 David Carleton Head Nov. 5, 2024 John Carl Huber Nov. 19, 2024 Austin O. Jones Dec. 10, 2024 Michael Frederick Greene Dec. 20, 2024 Wendy R. Barnes March 4, 2025 Dell Jackson May 6, 2025 Sanjay Patel May 6, 2025 Deborah Lynn Haklin May 6, 2025 Stephen Dana Morrison Jr. May 13, 2028 Alan Christopher Norton May 28, 2025 Johnbull Okechukwu Nwosu

Disciplinary History Requests

WILLIAM D. NESMITH III. DEPLITY GENERAL COLINSEL

Whenever a Georgia lawyer needs an official report on their disciplinary history, a complete history may be ordered from the State Bar of Georgia. Often, these reports are required for employment reasons or when a lawyer is seeking admission in another state as a member or admission pro hac vice.

Once the Office of the General Counsel receives the request for a lawyer's disciplinary history, staff determines that the request

has been properly submitted and that a waiver of confidentiality has been executed. Once this determination has been made, the Office of the General Counsel thoroughly searches the State Bar disciplinary files to prepare a response to the request. The request for a disciplinary history may come directly from the lawyer or an outside entity, such as another state bar. Often, disciplinary history requests involve phone calls to the requestor for more information.

During the 2024-25 Bar year, the Office of the General Counsel received 1,422 requests for disciplinary histories and handled numerous phone calls from lawyers and entities seeking further information about the process. Each disciplinary history letter includes a detailed explanation of the Rule 4-224 Expungement. Often requestors require more information about this rule beyond the explanation provided. ●

Insurance Committee

JOHN J. SHIPTENKO, SENIOR ASSISTANT GENERAL COUNSEL

Insurance Committee Mission

The Insurance Committee acts in accordance with Article VIII, Section 2 of the State Bar of Georgia Bylaws, at the direction of the president of the State Bar. The committee serves as an advisory committee to the State Bar's Executive Committee, officers, executive director and general counsel. Subject to the purposes established for this committee by the State Bar president, this committee reviews the State Bar's insurance coverage and offers input and recommendations to the executive director and Executive Committee regarding best practices, coverage types, liability amounts, protection and risk management considerations, and insurance broker retention. The committee also provides input regarding State Bar policies that concern insurance and liability, and other related matters that the committee believes the State Bar should consider.

Summary of Recommendations

Insurance Renewal

At the committee's June 2 and June 17, 2025, meetings, it made the following recommendations to Damon Elmore, executive director, regarding insurance renewal.

Renew coverage for the following policies as proposed by the State Bar of Georgia's insurance broker, Greyling Insurance Brokerage & Risk Consulting (with the incumbent company at their current limits of liability and deductibles/retentions):

- · Professional Liability
- Commercial General Liability
- Business Auto Liability
- Workers' Compensation and Employers' Liability
- Umbrella (Excess) liability
- · Property

- Workplace Violence
- Crime
- Executive Liability (Directors & Officers, Employment Practices Liability, and Fiduciary)

Move the Cyber Liability coverage from Cowbell Insurance to Tokio Marine HCC, maintaining the same terms and limits of liability. Tokio offers a lower deductible per claim and a lower premium.

Purchase an additional \$5 million of Excess Liability coverage from CNA for the 2025-2026 Bar year.

The State Bar accepted all recommendations, with one exception—the suggestion to purchase an additional \$5 million in Excess Liability coverage from CNA for the 2025–26 Bar year. Instead, it relied on guidance from Greyling, who believes the State Bar's current Excess Liability limits of liability with Hanover are adequate. •

2024-25 ANNUAL REPORT

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

Russell Willard, General Counsel 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

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 sandrad@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

Katie Knickerbocker, Program Coordinator natalieb@gabar.org

Styron Pennywell, Content Manager styronp@gabar.org

Michael Scearce, LMS Administrator michaels@gabar.org

Daisy Yue, Publishing Content Specialist daisyy@gabar.org

Mario Dones, Communications Coordinator natalieb@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 gakiik@gabar.org

Shani Brown, Coordinator shanib@gabar.org

MEMBERSHIP

Amanda Draper, Director amandad@gabar.org

Karen Nix, Assistant Director karenn@gabar.org

Gabrielle Dupiche, Senior Administrator gabrielled@gabar.org

Angela Short, Administrator angelas@gabar.org

Rachel Sinyard, Administrator rachels@gabar.org

OFFICE OF THE GENERAL COUNSEL

Russell Willard, General Counsel 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 adriennen@gabar.org

Jakarah Everett, Assistant General Counsel jakarahe@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

Rachel Williams, CAP Paralegal rachelw@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* tatyanah@gabar.org

Karen Cooper, Receivership Administrator karenc@gabar.org

OFFICE MANAGEMENT

Mary McAfee, Office Manager marym@gabar.org

 ${\bf Lesly\ Lopez}, {\it Office\ Coordinator} \\ {\it leslyl@gabar.org}$

Astley Martin, Administration Support Assistant astleym@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

lacarar@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

John Marty, Director johnm@gabar.org

Nkenge Green, Assistant Director nkengeg@gabar.org

Tom Porter, Staff Investigator tomp@gabar.org

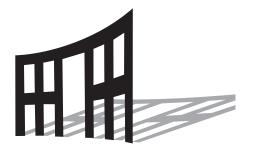
Kelsey James, Staff Investigator kelseyj@gabar.org

Lesley Gillard, Legal Secretary lesleyg@gabar.org

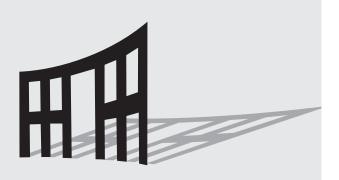
YOUNG LAWYERS DIVISION

Jessica Oglesby, Director jessicao@gabar.org

Jamie Goss, Coordinator jamieg@gabar.org



2024-25 ANNUAL REPORT



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





Lawyers Serving the Public and the Justice System

MEMORANDUM

To: ICLE Advisory Board Members

From: Julia Neighbors, ICLE Director

Date: September 2, 2025

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 cannot 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, 2024 – June 30, 2025)

- 10 Locales ICLE Hosted Programs
 - Athens; Atlanta; Amelia Island, FL; Avon, CO; Greensboro, GA; Jekyll Island; Macon; Pine Mountain, GA; Ponte Vedra Beach, Fl; Savannah
- 53- CLE Programs
 - 21 planned with Sections (some Sections involved with more than one program)
 - 25 planned with Chairs unaffiliated with Section or Committee
 - 2 planned with other groups (Georgia Association of Black Women Attorneys, Georgia Municipal Association, Association County Commissioners of Georgia)
 - o 1 planned as part of a national speakers series
 - 5 planned with State Bar Committees or Programs (Attorney Wellness Bench and Bar Committee, Attorney Wellness Committee, Law Practice Management, Transition into Law Practice Program)
- 83 Program Chairs
- 385 Hours of Educational Programming Produced
- 755 Program Speakers
- 1,826 Live-stream registrants
- 3,369 In-person registrants

HEADQUARTERS

104 Marietta St. NW, Suite 100 Atlanta, GA 30303-2743 404-527-8700 · 800-334-6865 Fax 404-527-8717 www.gabar.org

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. (31794) P.O. Box 1390 Tifton, GA 31793-1390 229-387-0446 · 800-330-0446 Fax 229-382-7435 • 13,712 - On demand programs sold

ICLE Programs (June 1 – August 31, 2025)

- Institutes
 - o Family Law Institute
 - o Fiduciary Law Institute
 - o Institute for City and County Attorneys
- Annual Meeting Programs
 - War Stories and Evidence Update
 - o Center for Lawyer Wellbeing Inaugural CLE
- On Demand Programs
 - $\circ~679$ on demand products purchased by 504 members (July 1 August 31, 2025)
 - 13,005 on demand programs purchased by 8,629 members (September 1, 2024- August 31, 2025)

Upcoming Off-Site Programs and Institutes

- Institute for City and County Attorneys September 11-12, 2025 Athens, GA
- 2025 Take Charge! Conference- September 18-19, 2025 Atlanta, GA
- Advanced Health Law October 8, 2025 Atlanta, GA
- Workers' Compensation Law Institute October 9-11, 2025 Jekyll Island, GA
- Health Care Fraud Institute October 22-23, 2025 Jekyll Island, GA
- Insurance Law Institute October 23-25, 2025- Ponte Vedra Beach, Fl
- Corporate Counsel Institute December 11-12, 2025 Atlanta, GA (contract pending)
- Update on Georgia Law (Ski LE) February 2-5, 2026 Avon, CO
- Estate Planning Institute February 5-6, 2026 Athens, GA
- General Practice & Trial Institute March 12-14, 2026 Hilton Head, SC (contract pending)
- Real Property Law Institute May 7-9, 2026 Fernandina Beach, FL
- Family Law Institute May 29-31, 2026 Fernandina Beach, FL

Program Chair Support and Training

ICLE conducted a comprehensive Program Chair Orientation on August 27, 2025, designed to provide essential support and guidance to both new and returning program chairs. This orientation ensures our volunteer leaders have the tools and knowledge necessary to deliver high-quality educational programming.

On-Demand Learning Expansion

We are pleased to announce the launch of ICLE's new one-credit-hour on-demand program series. The inaugural offerings focus on professionalism and ethics. Moving forward, we will systematically expand this on-demand catalog by creating focused "spotlight" sessions that extract key content from our full-length programs, providing members with flexible, targeted learning opportunities.

Innovation in Program Delivery

Beyond our established lecture and panel discussion formats, we are witnessing increased adoption of interactive methodologies, including breakout sessions and audience engagement activities. ICLE actively encourages program chairs to incorporate these dynamic formats while we continue exploring innovative approaches to enhance educational content delivery and member engagement.

Law Practice Management Program

(Abbreviated report for the 2025-2026 Bar Year)
Total Number of Members Served – 84
July 1, 2025 – August 31, 2025

The program has successfully engaged a total of 84 members and their staff from July 1, 2025, to August 31, 2025. During this period, we made contact with 24 existing members, 58 new members, and 2 law firm staff.

Resource Requests

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

- Starting a Law Practice 21 copies of the Starting a Georgia Law Practice Guide were
 distributed to our members by request, including 4 via email, 15 through web store orders, and 2
 during office visits to the Bar Center. Additionally, we received 1 inquiry by phone regarding
 resources for opening a law practice.
- Software Recommendation/Technology Advice We received a 1 inquiry from a member seeking law office software recommendations via email and/or phone.
- LPM Resources Assistance The program has responded to 127 phone and email inquiries, assisting members with resources on opening a law practice, program events, bar member services, library resources, form requests, and more. Of these, 16 inquiries specifically focused on best practices for various practice management topics, including effective client communication, streamlined workflow efficiency, optimized billing practices, secure and organized document management, sound financial management, proper trust account management, leveraging technology for practice improvement, and strategic succession planning.

Consultations

A total of one virtual consultation was completed during this period. Our program scheduled one general law firm assessment and no corrective action consultations to address law firm practice management matters.

Resource Library

The LPM Lending Library offers 1,443 books, CDs, and DVDs for checkout by members and their staff, with options for pickup at the Bar Center or mailing. During this period, 22 members registered for access to the library. Additionally, 2 patrons visited the resource library, 3 members checked out a total of 11 books, and we responded to 28 email inquiries and one phone call for library assistance and resource requests.

Social Media Outreach

Members can stay connected with LPM by following the GA Law Practice Advisor on LinkedIn and Instagram and subscribing to our newsletter, *The LPM Insider*, for practice tips and the latest updates on LPM events and programming. Since launching our social media channels, we have gained 214 Instagram followers, 99 LinkedIn followers, and 494 *LPM Insider* subscribers, totaling 807 followers—and growing.

Speaking Engagements and LPM Seminars

One program is scheduled for a future date during this period. See below.

Date	Event Name	Presentation(s)
	Take Charge! Conference CLE, Atlanta, GA, State Bar of Georgia Conference Center, Atlanta, GA	Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program

vLex Fastcase Platform Report

vLex Fastcase: New Platform and Documents

vLex Fastcase continues to be one of the Bar's most valuable member benefits, providing free legal research to all members. Over 50% of our 50,000+ members log into their Fastcase account annually.

As of September 26, 2024, members have access to an upgraded vLex Fastcase platform with a streamlined design that allows for faster access to expanded content. A standout feature of the upgrade is the new Cert citator, which flags negative treatment and citing references with improved detail and broader coverage—making it a more powerful tool for assessing a case's precedential value.

To help members make the most of the new platform, vLex Fastcase offers a wide range of tutorials, including videos, Smart Topics, navigation tips, and a comprehensive Knowledge Base. First-time users are encouraged to take the "Guided Tour" to become familiar with the platform's features and tools.

In addition, Docket Alarm—a database of over 650 million dockets and legal documents—is now available to members. This expanded resource has been well-received and is especially useful for litigation strategy, calendaring, research, business development, and legal risk analysis. Certain court documents have not been added yet. We have been following the developments and report in more detail during our next meeting.

In-person training is available six times a year at the State Bar of Georgia. The next session will be held on Sept. 19th, 2025, during our Take Charge! Conference.

vLex Fastcase Usage Report: Platform Data Challenges

Most members now use vLex Fastcase (VFC) but reporting tools for VFC are not yet built. Current extraction methods show errors, raising concerns about accuracy. Relying only on Fastcase data would understate usage, while including VFC risks presenting flawed data. vLex is improving reporting, but not in time for this cycle.

vLex Fastcase Reported Issues/Problems (July 2025-August 2025)

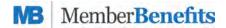
vLex rastcase Reported Issue	es/Problems (July 2025-August 2025)
vLex Fastcase Rep	oorted Issues / Problems
Issue Reported to Member Benefits Coordinator (MBC)	Response
Members were unable to access vLex Fastcase due	Fastcase (Bar Staff) Responses Staff assisted 9 members access members access vLex Fastcase by various methods, most often helping them clear old data.
MBC General Assistance Request with access and navigation help. (07/01/2025-08/31/25) Members called needing help with logging in, navigating the system, locating specific data, etc.	Staff was able to assist 13 with their needs.
	·

CloudLawyer/ReliaGuide Report

Consistent marketing efforts by the Bar's communication department and ReliaGuide continue to strengthen member engagement with the Find a Lawyer directory. Member awareness has grown, reflected in a 13.3% increase in sign-ins and a 17.4% growth in Profile Plus subscriptions compared to the previous reporting period. Additionally, the directory has seen a 10% increase in completed contact forms from the public, further demonstrating the impact of regular outreach in driving participation and reinforcing the value of the directory to members and the public.

Statistic Updates Through August 31st

- 384,500 interactions with member profiles (views, clicks, and contact requests)
- 58,460 profile views
 6,484 completed contact form requests
 7,290 clicks on lawyer's email
- 10,845 clicks on lawyer's phone number
 6,140 total sign ins
- 392 Profile Plus subscriptions
- 18 analytics products purchased
- 12 website products purchase



State Bar of Georgia Private Health Insurance Exchange September 2, 2025

INDIVIDUAL ENROLLME	NTS
Total Enrollments	8,782
• Medical	2,777
Medicare	55
• Dental	1,274
• Vision	591
• Telehealth	573
ID Theft Protection	50
Life / AD&D	3,085
• Disability	299
Critical Illness	8
Long-Term Care Enrollments	70
EMPLOYER ENROLLMEN	NTS
Total Enrollments	4,090
Medical	1,588
Ancillary	2,084
Professional Liability	416
Cyber Security	2



CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

Members
The Honorable Nels S.D. Peterson (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

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

Mrs. Veronica Rogusky Cox Federal Government Atlanta, GA

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

Mr. Jeffrey William DeLoach Epps Holloway DeLoach & Hoipkemier LLC Watkinsville, GA Ms. Anissa D. Floyd

Smurfit Westrock Atlanta, Georgia The Honorable Elizabeth D. Gobeil

Court of Appeals of Georgia Atlanta, Georgia

The Honorable Steven D. Grimberg U.S. District Court, Northern District of Georgia Atlanta, Georgia The Honorable Jeffrey B. Hanson

Bibb County State Court Macon, GA

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 Lay

Mercer University School of Law Macon, Georgia Mrs. Rizza O'Connor

Bryant & O'Connor Law Firm Vidalia, Georgia Mr. David M. "Dave" Paule Our Fundraising Search

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

Columbus, Georgia

Ms. Lauren Shubow

Atlanta Circuit Public Defender's Office

Mr. Christopher P. Twyman Cox Byington Twyman LLP Rome, GA

Atlanta, Georgia

Ms. LaToya Simone Williams Georgia Public Defender Council

Supreme Court of Georgia Advisor The Honorable Shawn Ellen LaGrua Supreme Court of Georgia Atlanta, Georgia

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: October 11, 2025

RE: Chief Justice's Commission on Professionalism

The Chief Justice's Commission on Professionalism (Commission), the first body of its kind in the nation, was created in 1989 by the Supreme Court of Georgia with the primary charge to enhance professionalism among Georgia's lawyers and judges. Chief Justice Nels S.D. Peterson serves as the current Chair of the Commission. Other judges who serve on the Commission are as follows: Judge Elizabeth Gobeil for the Court of Appeals of Georgia; Judge Benjamin S. Richardson (Chattahoochee Judicial Circuit) for the Council of Superior Court Judges; and Chief Judge Jeffrey B. Hanson (State Court of Bibb County) for the Council of State Court Judges. Judge Steven D. Grimberg serves on the Commission for the federal judiciary. Justice Shawn Ellen LaGrua is the Supreme Court of Georgia advisor to the Commission. You may find a complete list of Commission members, advisors, and liaisons at the Commission's website at https://cjcpga.org/commission-members-2025-2026/. A brief update of some of the Commission's activities as of September 2, 2025, is as follows.

NOMINATIONS FOR THE 26TH 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 26th Annual Justice Robert Benham Awards for Community Service (CSA26). The Commission will accept nominations for CSA26 from Monday, September 15, 2025, until 11:59 p.m. on Tuesday, November 11, 2025. 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. Attorney Michael D. Hobbs, Jr., Partner, Troutman, Pepper, Locke, chairs the Benham Awards Selection Committee and Attorney LaToya Simone Williams and Mr. David M. "Dave" Paule, Principal and Managing Director, Our Fundraising Search, co-chair the Benham Awards Planning Committee. The Commission and the GLHF anticipate holding the awards ceremony at the Nathan Deal Judicial Center on a date and at a time to be announced.

For more information on the nomination eligibility criteria or to nominate a deserving lawyer or judge, visit https://cjcpga.org/nominationsbenhamcsa/.



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STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM PROJECTS

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), currently chaired by **Mr. Carlos R. Vilela. Ms. J. Maria Waters** serves as the Committee's Vice-Chair. One of the Committee's projects during the 24-25 and 25-26 Bar years are summarized below.

2025 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. **Ms. Samantha Beskin-Schemer** will serve as Chair of the Law School Orientations on Professionalism sub-committee during the 25-26 Bar year.

2025 Law Schools Orient	ations on Pro	fession	alism S	ummary Chart
Name of School	Date	# of Stu- dents	# Group Leaders	Professionalism Speaker
Atlanta's John Marshall Law School	August 2, 2025	131	38	Judge Eric Richardson State Court of Fulton County
Emory University Law School	August 14, 2025	415	50	Judge Steven D. Grimberg U.S. District Court Northern District of Georgia
Georgia State University Law School	August 12, 2025	260	27	Justice Andrew A. Pinson Supreme Court of Georgia
Mercer University Law School	August 8, 2025	155	19	Justice Verda M. Colvin Supreme Court of Georgia
University of Georgia School of Law	August 15, 2025	205	31	Dean Andrea Dennis Assoc. Dean for Academic Affairs
Totals		1,166	165	

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, please visit http://cjcpga.org/law-school-orientations-on-professionalism-2025/.



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PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published four times per year. 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, 2025, the Commission welcomed new Commission members as follows: **The Honorable Jeffrey B. Hanson**, Chief Judge, State Court of Bibb County, who was designated by the Council of State Court Judges to serve on the Commission for an initial two-year term from July 1, 2025, through June 30, 2027. **Mr. David M. Paule**, Principal and Managing Director, Our Fundraising Search, who was appointed to serve on the Commission as a lay person designee of the Board of Governors for an initial three-year term from July 1, 2025, through June 30, 2028. **Mr. Jeffrey W. DeLoach** who was appointed to serve on the Commission by the Supreme Court of Georgia as a practicing lawyer for an initial three-year term from July 1, 2025, through June 30, 2028. **Mr. Christopher P. Twyman** and **Mrs. Veronica Rogusky Cox** will serve on the Commission ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively. The Commission welcomed back for an additional term Commission member Professor Nathan S. Chapman, as the designee of the University of Georgia School of Law. Beginning August 29, 2025, **Justice Shawn Ellen LaGrua** is serving as the Supreme Court of Georgia's advisor to the Commission. A complete list of Commission members, advisors, and liaisons beginning on July 1, 2025, is on the Commission's website at https://cjcpga.org/commission-members-2025-2026/.

COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS

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

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





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Media Report

PUBLISH	PUBLISHED ARTICLES 2025-2026		
Date	Newspaper	Headline	Circulation
6/10/2025	Rome News-Tribune	Twyman Installed as 63rd President of State Bar of Georgia	6,515
6/15/2025	6/15/2025 Marietta Daily Journal	William C. Gentry Installed as President-Elect of State Bar of Georgia	9,821
6/19/2025	6/19/2025 Americus Times-Recorder	Judge Rucker Smith reelected to Board of Governors of State Bar of Georgia	1,252
6/19/2025	6/19/2025 Coastal Courier, Hinesville	McCullough reelected to Board of Governors of State Bar of Georgia	3,100
6/23/2025	6/23/2025 Albany Herald	Thomas Duck elected to State Bar's Board of Governors	3,763
6/25/2025	6/25/2025 Monroe County Reporter, Forsyth	Adams reelected to Georgia Bar Board of Governors	3,788
6/30/2025	6/30/2025 Jackson Herald, Jefferson	King reelected to State Bar of Georgia board	3,307
7/1/2025	Metter Advertiser	Cadle Re-elected to Board of Governors of State Bar of Georgia	1,347
7/2/2025	Fayette County News, Fayetteville	Kreuziger Reelected to State Bar of Georgia Board of Governors	1,694
7/2/2025	Cordele Dispatch	Craig Cotton reelected to Board of Governors of State Bar of Georgia	1,590
7/2/2025	Forest-Blade, Swainsboro	Jerry Cadle Re-Elected to Board of Governors of State Bar of Georgia	3,963
7/2/2025	Times, Gainesville	Opinion: Georgia legal community mourns loss of John Cromartie	26,000
7/3/2025	Clayton Tribune	Judge Irvin re-elected to Board of Governors of State Bar of Georgia	4,306
7/8/2025	Waycross Journal-Herald	Former Chief Justice Boggs receives award	4,940
7/10/2025	//10/2025 Gwinnett Daily Post, Lawrenceville	State Bar of Georgia honors Ashley Stinson with Hines Child Advocacy Award	63,740
7/10/2025	Rome News-Tribune	Jackson reelected to State Bar of Georgia board	6,515
7/16/2025	//16/2025 Miller County Liberal, Colquitt	William Shingler Elected to Board of Governors of State Bar of Georgia	1,500
7/16/2025	Statesboro Herald	Troy Marsh re-elected to Board of Governors of State Bar of Georgia	4,429
8/1/2025	Champion, Decatur	Local attorneys elected to bar board	413
		TOTAL CIRCULATION	151,983

