



# STATE BAR OF GEORGIA

STATE BAR OF GEORGIA

2024-25

# ANNUAL REPORT

**EXECUTIVE COMMITTEE****PRESIDENT**

Ivy N. Cadle

**PRESIDENT-ELECT**

Christopher P. Twyman

**TREASURER**

William C. "Bill" Gentry

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**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 Jones

**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 1**

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 7**

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**

Joyce 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 RIDGE CIRCUIT, POST 1**

Hon. David Lee Cannon Jr.

**BLUE RIDGE CIRCUIT, POST 2**

Eric A. Ballinger

**BRUNSWICK CIRCUIT, POST 1**

Stephen Elliott Tillman

**BRUNSWICK 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

**COBB CIRCUIT, POST 1**

Katie Kiihl Leonard

**COBB CIRCUIT, POST 2**

Ronald Arthur Lowry

**COBB CIRCUIT, POST 3**

Hon. Kimberly A. Childs

**COBB CIRCUIT, POST 4**

Patrick H. Head

**COBB CIRCUIT, POST 5**

Dawn Renee Levine

**COBB CIRCUIT, POST 6**

Laura Joan Murphree

**COBB 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 1**

Hon. Nina Markette Baker

**COWETA CIRCUIT, POST 2**

Jason W. Swindle Sr.

**DOUGHERTY CIRCUIT, POST 1**

Hon. Joseph West Dent

**DOUGHERTY CIRCUIT, POST 2**

George P. Donaldson III

**DOUGLAS 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 Jr.

**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 1**

William Thomas Davis

**MEMBER-AT-LARGE, POST 2**

Rotsen Dara Diya 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**

Ashley Mackin Brodie

**OCMULGEE 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 1**

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. Collier

**PAULDING CIRCUIT**

Martin Enrique Valbuena

**PIEDMONT CIRCUIT**

Barry E. King

**ROCKDALE CIRCUIT**

Thua G. Barlay

**ROME CIRCUIT, POST 1**

Christopher Ross Jackson

**ROME CIRCUIT, POST 2**

J. Anderson Davis

**SOUTH GEORGIA CIRCUIT, POST 1**

Joseph Mulholland

**SOUTH GEORGIA CIRCUIT, POST 2**

Tabitha Edwina Payne

**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 1**

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



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# President's Report



IVY N. CADLE

2024-25 President  
State Bar of Georgia

**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 subject-matter 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 im-

portant 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.<sup>1</sup> 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

1. 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



**LICENSE FEE** FOR ACTIVE MEMBERS **\$270**

TOTAL # OF BAR MEMBERS

**55,699**

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

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# Executive Director's Message



PHOTO BY EVAN BARTLESON PHOTOGRAPHY

**DAMON E. ELMORE**

Executive Director  
State Bar of Georgia  
[damone@gabar.org](mailto:damone@gabar.org)

**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 lawyers across the state.

We made the commitment to build on this report each year, ensuring it is filled with clear, easy-to-read transparent, relevant and robust data and statistics. We are grateful to our managers and to our Communications Department for gathering the tracked data and presenting it in this format.

Your feedback is invaluable to us. If there is something significant that we may have overlooked, let us know. We are dedicated to continuous improvement, and your insights will help us further refine our efforts.

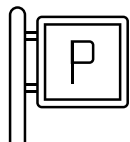
We are grateful for the leadership, influence and support of our 2024-25 President Ivy N. Cadle, the Board of Governors and our volunteer leaders in

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 ●

# 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. ●



### VENDOR DIRECTORY

[gabar.org/vendor-directory](https://gabar.org/vendor-directory)

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



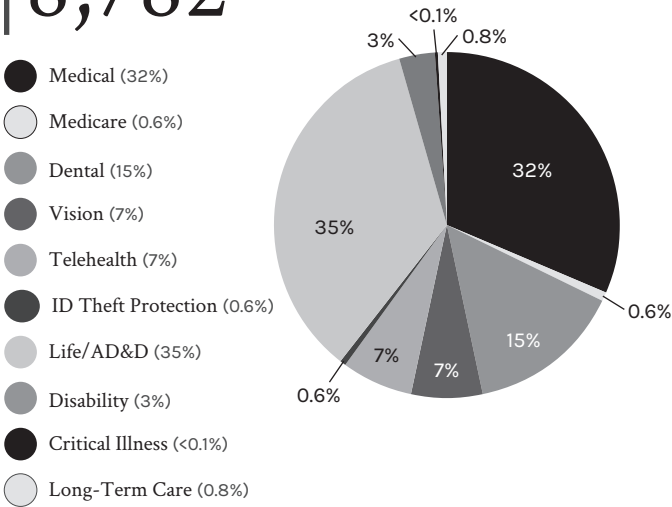
### MEMBER BENEFITS, INC.

[gabar.memberbenefits.com](https://gabar.memberbenefits.com)

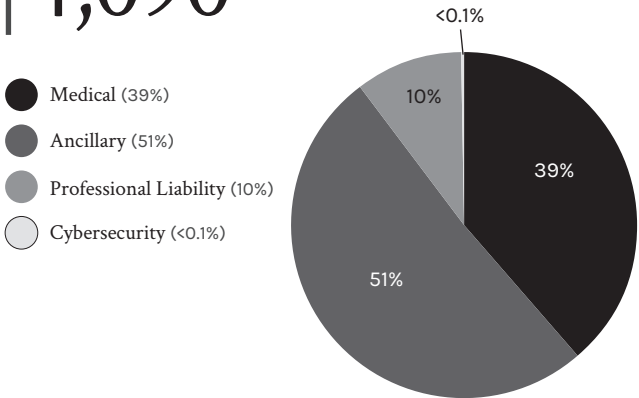
Member Benefits, Inc., is the recommended broker of the State Bar of Georgia, Health, Dental & Vision Plans, plus Long-Term Disability and Long-Term Care. From July 1, 2024, through June 30, 2025, there were 8,782 total enrollments in various individual insurance products and 4,090 enrollments in employer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

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

TOTAL # OF INDIVIDUAL  
PRODUCT ENROLLMENTS  
**8,782**



TOTAL # OF EMPLOYER  
PRODUCT ENROLLMENTS  
**4,090**





### 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. ●

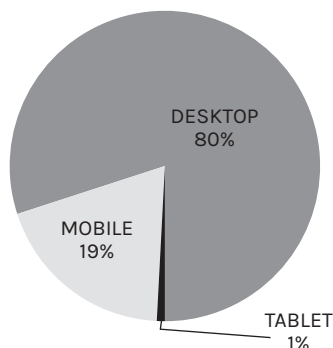


### RELIAGUIDE

[gabar.oreliaguide.com/home](http://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. ●

SEARCH DEVICE TYPE BREAKDOWN

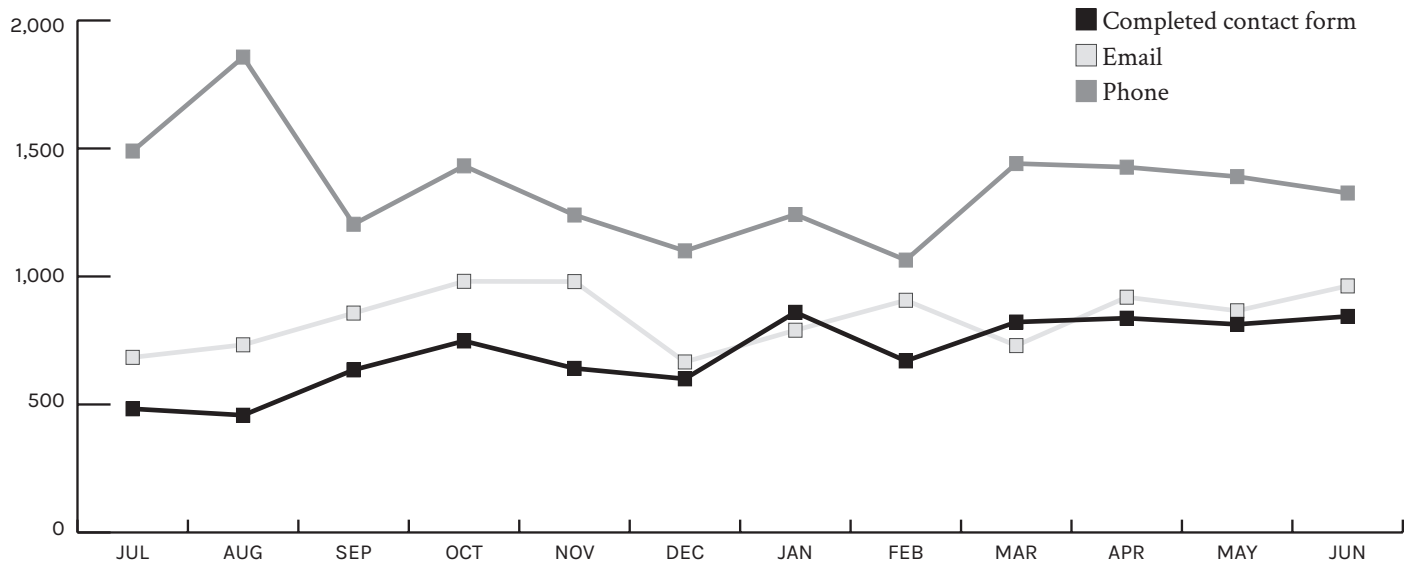


### # OF MEMBER PROFILE INTERACTIONS

**540,273** ↑9% 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



The State Bar of Georgia offers a wide range of services and programs that benefit Bar members. Members are encouraged to familiarize themselves with these services and programs, and are welcome to contact the staff members listed for further information. For more information on these programs and services, please visit [www.gabar.org](http://www.gabar.org). ●

# Bar Conference Center: Atlanta

404-419-0155 | [conferencecenter@gabar.org](mailto:conferencecenter@gabar.org)  
KYLE GAUSE, DIRECTOR

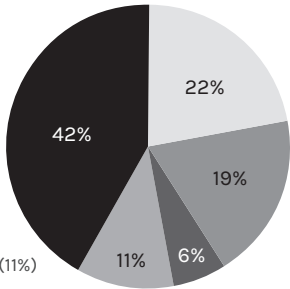
**The State Bar of Georgia Conference Center** is available for use by Bar members and legal organizations. With the recent increase in the request for hybrid and virtual offerings, the Conference Center is well-equipped to handle set-up for a number of virtual platforms (webinars, Zoom meetings, etc.), in addition to more traditional meeting formats.

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

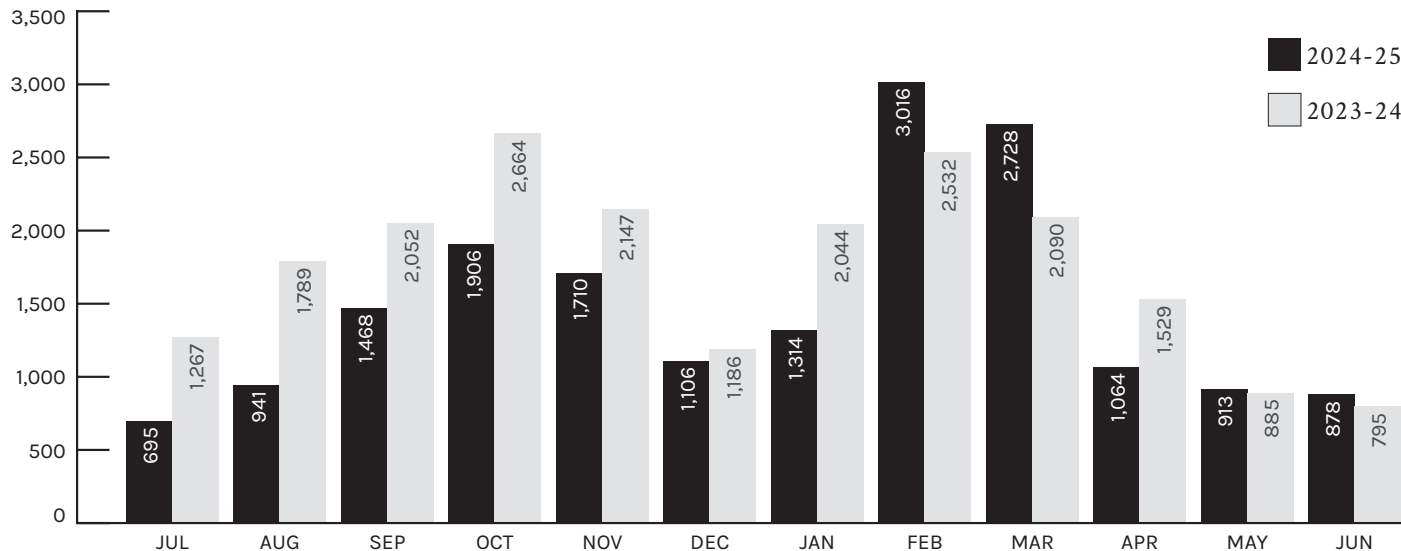
MONTHLY AVERAGE  
# OF ATTENDEES  
**1,478**

### AVERAGE MONTHLY USAGE BY EVENT TYPE

- Client Meetings and Depositions (42%)  
↑ 27% since 2023-24
- Bar Departments, Boards and Committees (22%)  
↑ 10% since 2023-24
- Seminars, CLEs and Trainings (19%)  
↑ 10% since 2023-24
- Mediations, Arbitrations and Hearings (6%)  
↓ 25% since 2023-24
- Law-Related Education, Mock Trials and Focus Groups (11%)  
↑ 22% since 2023-24



### # OF CONFERENCE CENTER VISITORS JULY 1-JUNE 30



# Center for Lawyer Wellbeing

[www.gabar.org/wellbeing](http://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.
- 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.

## 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.

*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. ●*



# Communications

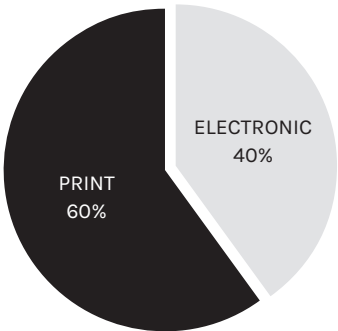
404-527-8761 | [communications@gabar.org](mailto:communications@gabar.org)

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. ●

GEORGIA BAR  
JOURNAL  
DISTRIBUTION TYPE



## # OF SOCIAL MEDIA FOLLOWERS

FACEBOOK	INSTAGRAM	LINKEDIN
7,953	2,548	9,414
↑ 2% since 2023-24	↑ 13% since 2023-24	↑ 9% since 2023-24
The State Bar’s Facebook audience is split 65% women and 35% men.	25% of the State Bar’s Instagram interactions are by non-followers.	63% of the State Bar’s LinkedIn audience is from the greater Atlanta area.

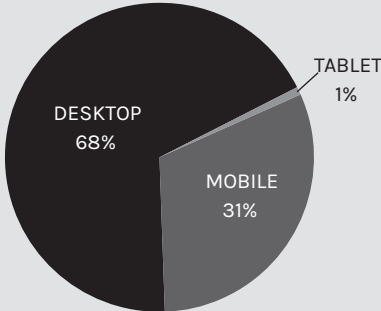
## CONNECT WITH THE BAR

- [www.gabar.org](http://www.gabar.org)
- [@statebarofgeorgia](https://www.facebook.com/statebarofgeorgia)
- [@statebarofga](https://www.instagram.com/statebarofga)
- [/state-bar-of-georgia](https://www.linkedin.com/company/state-bar-of-georgia)
- [@StateBarOfGeorgia](https://www.youtube.com/StateBarOfGeorgia)

[www.gabar.org](http://www.gabar.org)  
JULY 1, 2024-JUNE 30, 2025

- TOP FIVE PAGES VISITED
1. Member Directory
  2. Home
  3. Search
  4. Handbook
  5. Public/Find a Lawyer

DEVICE TYPE BREAKDOWN



TOTAL # OF USERS	747,564
TOTAL # OF VIEWS	5,314,639
TOTAL # OF SESSIONS	1,924,212

# Continuing Legal Education Regulation

404-527-8710 | [cle@gabar.org](mailto: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](http://www.gabar.org).

The CLE requirement is designed to help lawyers maintain their professional competence throughout their active practice of law. Active lawyers 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

32

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

869

↓ 3% since 2023-24

# OF CLE COURSES APPROVED FOR CREDIT

19,206

↑ 1% since 2023-24

# OF CLE HOURS ATTENDED BY BAR MEMBERS

460,220

↑ 3% since 2023-24



# Fee Arbitration

404-527-8750 | [feearbitration@gabar.org](mailto: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

TOTAL AMOUNT OF AWARDS

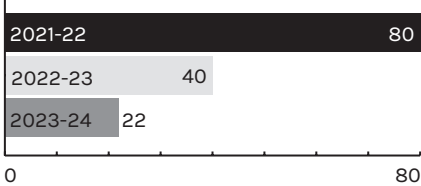
\$106,751

TOTAL # OF PETITIONS FILED

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](mailto:ront@gabar.org)

RON TURNER, CHIEF FINANCIAL OFFICER

**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.



GETTYIMAGES.COM/DNY59

## FY2025 Financial Summary

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. ●

# Georgia Diversity Program

404-219-8174 | [gadiversityprogram@gmail.com](mailto: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](http://www.gabar.org/diversity), for their continued support and acknowledge that without their dedication, the work of the program would not be possible. ●*



GETTYIMAGES.COM/STELLALEVI

# Georgia High School Mock Trial

404-527-8779 | [mocktrial@gabar.org](mailto: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](http://www.georgiamocktrial.org)



@GeorgiaMockTrial



@georgia\_hs\_mock\_trial



# Governmental Affairs // Legislative Program

404-526-8608 | [jennm@gabar.org](mailto: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 at 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](http://www.gabar.org/LEG).

*The State Bar of Georgia's Legislative Program is exclusively funded by voluntary contributions from our members. Any official position by the State Bar of Georgia, including its sections and committees, must follow the process outlined in Standing Board Policy 100, [www.gabar.org/SBP100](http://www.gabar.org/SBP100), and meet the standards set out by the U.S. Supreme Court in Keller v. State Bar of California. The State Bar and affiliated entities cannot take an official position on legislation without following these policies and standards. ●*



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# Institute of Continuing Legal Education

678-529-6688 | [icle@gabar.org](mailto: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](http://icle.gabar.org).

TOTAL # OF ON DEMAND PROGRAMS SOLD

13,712 93% completion rate

TOTAL # OF IN-PERSON REGISTRANTS

3,369 96% completion rate

TOTAL # OF LIVE-STREAM REGISTRANTS

1,826 95% completion rate

TOTAL # OF PROGRAM HOURS CREATED

385

TOTAL # OF SPEAKERS

755

↓ 11% since 2023-24

TOTAL # OF PROGRAM CHAIRS

83

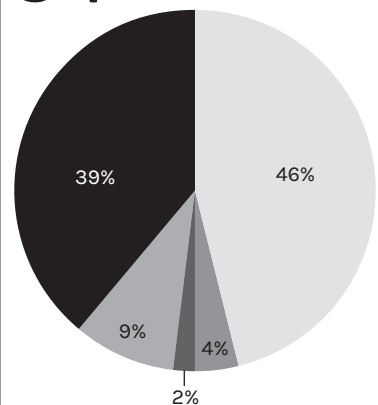
TOTAL # OF ICLE PROGRAM LOCATIONS

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

TOTAL # OF ICLE PROGRAMS OFFERED

54



- 39% planned with sections
- 46% planned with chairs unaffiliated 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](http://icle.gabar.org)

 @iclega

 @statebargaicle




 /iclega

# Law Practice Management

404-527-8770 | [lpm@gabar.org](mailto: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](https://bit.ly/lpmnewsletter)
-  [@gabarlpm](https://www.instagram.com/gabarlpm)
-  [/law-practice-management](https://www.linkedin.com/company/law-practice-management)



# OF STARTUP KITS  
DISTRIBUTED  
**198** ↑ 30% since  
2023-24

# OF LPM INSIDER  
SUBSCRIBERS  
**492**

# OF BOOKS IN THE  
RESOURCE LIBRARY  
**1,443** ↑ 1% since  
2023-24

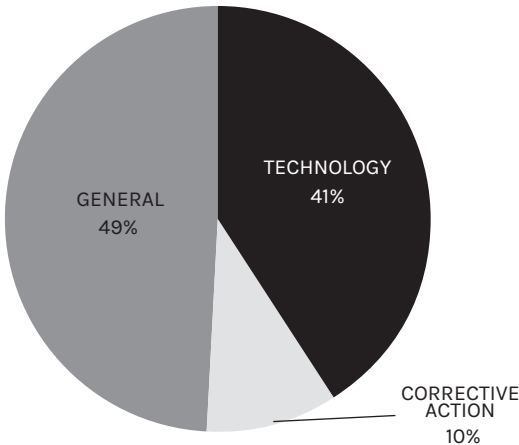
# OF ATTENDEES AT THE 2025  
TAKE CHARGE! 1-DAY SUMMIT  
**86**

## 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.

CONSULTATION TYPE BREAKDOWN



# Law-Related Education

404-527-8785 | lre@gabar.org

DEBORAH CRAYTOR, DIRECTOR



## The Law-Related Education (LRE)

Program offers K-12 teachers a wide variety of strategies for including LRE in their social studies, law, business and public safety curricula, as well as suggestions for relating LRE to language arts, science and math curricula. The program also offers the free interactive field trip known as Journey Through Justice (JTJ) for students in grades 4-12;

maintains the Virtual Museum of Law at [www.thelawmuseum.org](http://www.thelawmuseum.org); provides lesson plans, classroom resources and links to current events on more than 60 legal topics via online LiveBinders at [www.livebinders.com/s/175847](http://www.livebinders.com/s/175847); conducts teacher workshops; presents at teacher and parent conferences; and sponsors the ABA Civics and Law Honor Roll for Georgia high school students. ●

# OF JTJ FIELD TRIPS  
IN 2024-25

102 ↓2% since  
2023-24

# OF STUDENT PARTICIPANTS  
IN JTJ IN 2024-25

5,537 ↑8% since  
2023-24



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



VIDEO	# OF VIEWS
"Brown v. Board of Education"	490,528
"Marbury v. Madison"	328,373
The Lizzie Borden Case	139,056
The Amistad Case	109,886
The Scopes "Monkey" Trial	109,547

↑6% since 2023-24

↑7% since 2023-24

↑6% since 2023-24

↑7% since 2023-24

↑10% since 2023-24

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

2,102,218

↑9% since 2023-24

## TOP 5 LIVEBINDERS BASED ON # OF VIEWS

VIDEO	# OF VIEWS
"Hands Up, Don't Shoot" Free Press or Fair Trial	11,531
First Amendment: Freedom of Speech, Press and Assembly	11,145
University of California v. Bakke	8,874
Worcester v. Georgia	7,498
General Cruel and Unusual Punishment Resources	7,440

↑4% since 2023-24

↑32% since 2023-24

↑14% since 2023-24

new to the list this year

↑34% since 2023-24

TOTAL # OF VIEWS OF ALL  
LIVEBINDERS TO DATE

257,639

↑31% since 2023-24

# Lawyer Assistance Program

800-327-9631 | [gabar@curalinc.com](mailto:gabar@curalinc.com)  
CURALINC HEALTHCARE, SERVICE PROVIDER

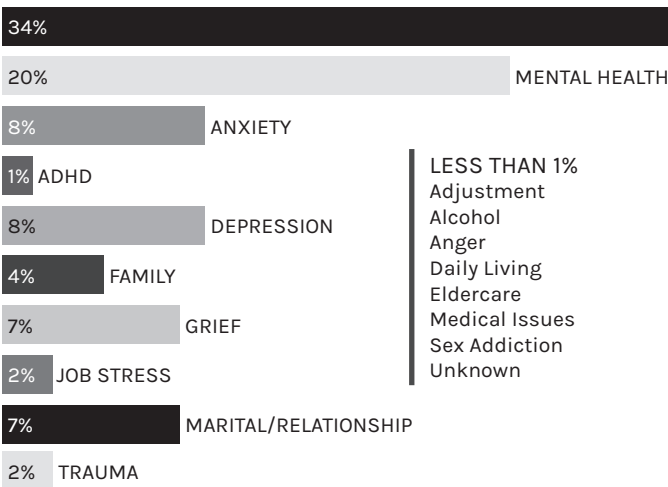
**The Lawyer Assistance Program** (LAP) provides a broad range of confidential helping services to members seeking assistance with depression, anxiety, stress, alcohol/drug misuse, family problems, workplace conflicts, psychological and other issues. Services are now provided by CuraLinc Healthcare, 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](http://www.gabar.org/lap) for more information about LAP. ●

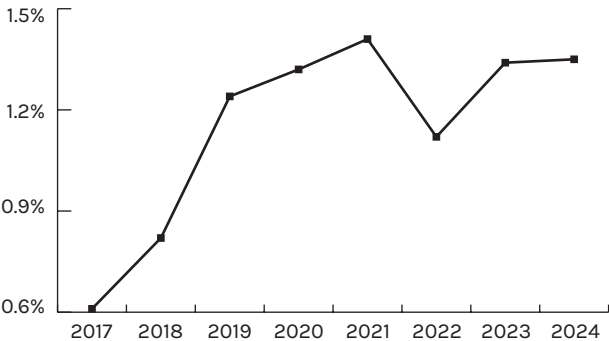
## UTILIZATION STATISTICS JULY 1, 2024-JUNE 30, 2025

# OF EAP CASES	426	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.
# OF ACTIVITIES	2,503	The total activities (contacts) from files, organizational services, information calls, etc., that have an activity date that falls between, and includes, the reporting period date range.
# OF HOURS	9,414	The total duration from all activities that have an activity date that falls between, and includes, the reporting period date range.

## PRIMARY PRESENTING PROBLEMS



## HISTORIC UTILIZATION



# Meetings

404-527-8713 | [meetings@gabar.org](mailto: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 law-related vendors are included. The Meetings Department also plans and executes monthly Executive Committee Meetings, including an annual joint meeting with the Supreme Court of Georgia. ●



FALL 2024 | NOV. 1-3



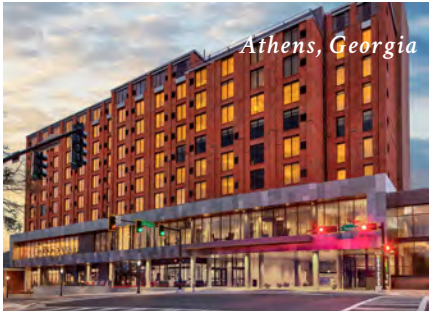
**178** ATTENDEES  
154 in 2023

MIDYEAR 2025 | JAN. 9-11



**241** ATTENDEES  
613 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  
241 in 2024

ANNUAL 2025 | JUNE 5-8



**644** ATTENDEES  
731 in 2024

# Membership

404-527-8777 | [membership@gabar.org](mailto:membership@gabar.org)  
AMANDA DRAPER, DIRECTOR

The mission of the Membership Department 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 MEMBERS

42,777

↑ 1% since 2023-24

# OF EMERITUS MEMBERS

5,095

↑ 9% since 2023-24

# OF INACTIVE MEMBERS

7,827

↓ 2% since 2023-24

# OF NEW MEMBERS

1,410

↑ 15% since 2023-24

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.

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

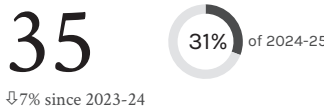
KINDALL HARVILLE, OFFICE MANAGER

**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. ●

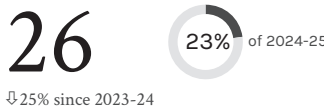
# OF CLIENT/MISCELLANEOUS MEETINGS



TOTAL # OF EVENTS



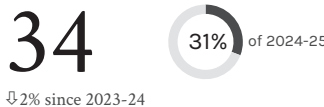
# OF DEPOSITIONS



TOTAL # OF PEOPLE USING THE FACILITY



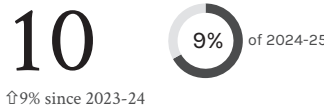
# OF MEDIATIONS/ ARBITRATIONS



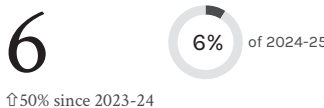
# OF INBOUND TELEPHONE CALLS



# OF WALK-INS



# OF CLE OPPORTUNITIES/ TRAININGS



ATTORNEY LOCATIONS

Alpharetta	Marietta
Atlanta	Milledgeville
Augusta	New Orleans (LA)
Brunswick	Peachtree Corners
Columbus	Richmond (VA)
Dallas (TX)	Rincon
Duluth	Savannah
Dunwoody	Statesboro
Gainesville	Tucker
Hinesville	Valdosta
Lancaster (SC)	Vidalia
Macon	

SATELLITE OFFICE

# South Georgia Office: Tifton

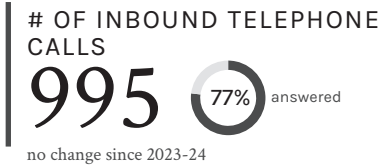
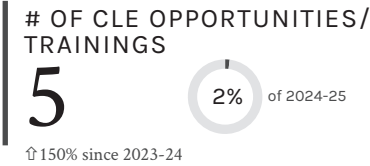
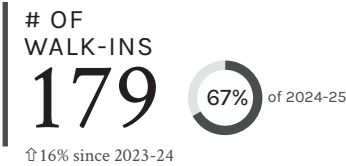
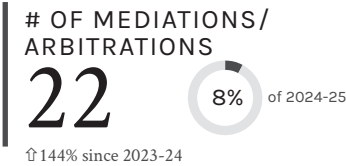
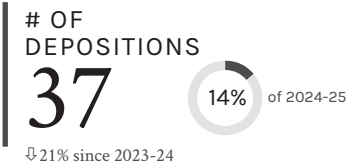
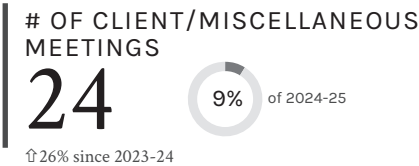
229-387-0446 // 800-330-0446 | lacarar@gabar.org

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 I-75 and several U.S. highways.

The Tifton office has two conference rooms equipped with Aver IP-based video conferencing systems and other technology to offer a broad array of virtual conferencing options. One unit is permanently fixed in our main conference room, with two mobile units for use in the small conference room and as a backup. 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. ●



ATTORNEY LOCATIONS		
Adel	Douglas	Pooler
Albany	Dublin	St. Simon
Alpharetta	Fitzgerald	Savannah
Ashburn	Gaineville	Senoia
Atlanta	Hazlehurst	Sylvester
Buckhead	Jonesboro	Thomasville
Brunswick	Lakeland	Tifton
Canton	Lawrenceville	Tucker
Cartersville	Macon	Valdosta
Cobb	Marietta	Waycross
Columbus	Moultrie	Woodstock
Cordele	Norcross	Zebulon
Covington	Peachtree City	
Decatur	Pembroke	

# Sections

404-527-8782 | [sections@gabar.org](mailto: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)
- **Insurance Law**  
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](mailto: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:

## 1 Inside Mentoring

For an attorney who works in a law firm or organization and has a mentor within that firm or organization.

## 2 Outside Mentoring

For an attorney who is a sole practitioner with a mentor from another firm or organization.

## 3 Group Mentoring

For an attorney who is employed in a non-legal setting, unemployed or who otherwise does not have an individual mentor.

New lawyers must also complete 12 hours of CLE. Most will attend the Beginning Lawyers Program to fulfill 6 of those hours and their choice for the additional 6 hours. Lawyers who are prosecutors or public defenders must attend their applicable training, which will satisfy their CLE requirement for the year. ●

## Did You Know?

The State Bar of Georgia was the first in the country to have a mandatory mentoring program for lawyers.

TOTAL # OF LAWYERS ENROLLED IN TILPP

845

↑ 4% since 2023-24

# OF PROSECUTORS

21

2.5% of 2024-25

↓ 52% since 2023-24

# OF PUBLIC DEFENDERS

30

3.5% of 2024-25

↓ 3% since 2023-24

# OF GROUP MENTORING

109

13% of 2024-25

↓ 20% since 2023-24

# OF INSIDE MENTORING

602

71% of 2024-25

↑ 16% since 2023-24

# OF OUTSIDE MENTORING

24

3% of 2024-25

↓ 33% since 2023-24

# OF DEFERRED

59

7% of 2024-25

↑ 5% since 2023-24

# 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-and-desist affidavit within the last two years may be found on the Bar's website. ●

# OF PRELIMINARY UPL  
INVESTIGATIONS INITIATED

198

# OF PRELIMINARY UPL  
INVESTIGATIONS CLOSED

215

# OF FORMAL UPL  
CASES OPENED

65

# OF FORMAL UPL  
CASES CLOSED

117

85% resulting in voluntary compliance or no further necessary action

# OF SUBPOENAS  
PROCURED

28

# OF ATTORNEYS INELIGIBLE  
TO PRACTICE EXAMINED

>250

due to CLE non-compliance or unpaid license fees

# OF NOTARY LISTINGS ON HIGH-  
TRAFFIC WEBSITES REVIEWED

>500



# Young Lawyers Division

404-527-8778 | [yld@gabar.org](mailto: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 automatically a member.**

The Young Lawyers Division provides service, networking and leadership opportunities through 30 committees and 10 affiliate organizations from around the state. With almost 10,000 active young lawyers, committees and affiliates offer local opportunities for young lawyers to be involved in their community.

## 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/theylreview](http://www.gabar.org/theylreview) 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 six-month cohort that begins in January each year and ends with a graduation ceremony at the State Bar of Georgia Annual Meeting. The program began in 2006 with 32 academy participants. The selected participants go through a competitive application process.

Applicants must be YLD members who have a history of involvement and leadership in their communities, offices and/or profession; who want to become more involved in the YLD and State Bar; and who want to network with state and national leaders and hear their perspectives on effective lawyering and leadership. Young lawyers selected for the Leadership Academy attend monthly sessions around the state, which include CLE programming, a community service project and networking. To date, the program boasts more than 600 Leadership Academy alumni members, many 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.*

SPRING 2025 | MARCH 28-30



CONNECT WITH THE YLD

 [www.georgiayld.org](http://www.georgiayld.org)

 @GeorgiaYLD

 @georgiayld

 /georgiayld

MIDYEAR 2025 | JAN. 9-11



*In conjunction with the Board of Governors.*

ANNUAL 2025 | JUNE 5-8



*In conjunction with the Board of Governors.*



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# Board Action Items

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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, majority.
- 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 Committee.

- Active Fees \$270. (\$6 increase from 2024-25.)
- 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

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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. Thirty-nine 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 Board 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. ●

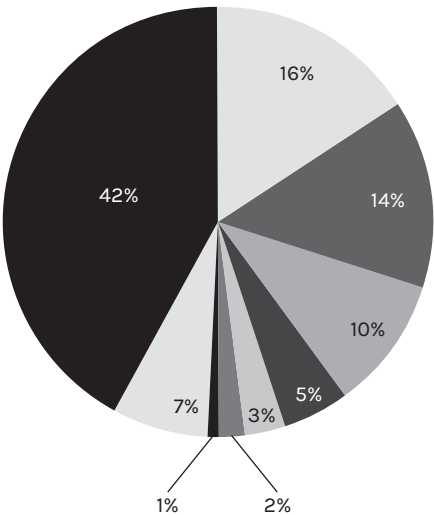
TOTAL # OF NEW COMPLAINTS  
**6,800** ↓17% since 2023-24

# OF ENGLISH/SPANISH TRANSLATIONS  
**243**

TOTAL # OF CASES CLOSED  
**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 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

Lawyers Division; 12 investigating members—four lawyers from each of the three federal judicial districts of Georgia; and four non-lawyer, public members. During the 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 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



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**TOTAL # OF GRIEVANCE  
FORMS RECEIVED**

**3,080** +179 since  
2023-24

**TOTAL # OF GRIEVANCE  
FORMS DISMISSED**

**2,814** \*some pending  
at the beginning  
of the Bar year

**TOTAL # OF GRIEVANCE FORMS  
REFERRED FOR INVESTIGATION**

**215** +30 since  
2023-24

Board dismissed 43 grievances, 22 of those with a letter of instruction to educate and inform the lawyer 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 Peyton 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



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Court. The Board also provides input on amendments to the Bar Rules involving the disciplinary process.

The Supreme Court approved amendments to the disciplinary rules which became effective July 1, 2018. Under these rules, the former Review Panel was renamed the State Disciplinary Review Board, and the size of the Board was reduced from 15 to 11 members. In particular, the number of lawyer members who serve on the Board from around the state was reduced from nine to seven. The Review Board is currently composed of two lawyers from each of the three federal judicial districts in Georgia, one at-large lawyer member and two non-lawyer members. These members are appointed in alternate years by the Supreme Court of Georgia and the president of the State Bar. Two ex-officio members also serve on the Board in their capacity as officers of the State Bar.

The following is a brief summary of public disciplinary action taken by the Supreme Court of Georgia during the period from July 1, 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-



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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](http://www.gabar.org/handbook)).

#### **Payee Notification**

During the 1993 legislative session, with the urging of the Board of Trustees, the Board of Governors endorsed legislation specifically designed to prevent lawyer theft of personal injury settlement funds. As a result of these efforts, the "payee notification rule" was approved as an amendment to the Insurance Code. This statute requires insurers to 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-lawyer or fiduciary relationship and was caused by the lawyer's dishonest conduct. The rules define "dishonest conduct" as acts "committed by a lawyer like theft or embezzlement of money, or the wrongful taking or conversion of money, property, or other things of value." The lawyer's "dishonest" conduct must result in their disbarment, indefinite suspension or voluntary surrender of their license. The final disposition does not need to result from a 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

	2023-24	2023-24
<b>Balance on July 1, 2023</b>	\$2,212,202	\$2,782,908
<b>Income to Fund</b>		
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
<b>Distributions from Fund</b>		
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 Involved 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 post-dispositional 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?*
3. *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?

3. 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](http://www.gabar.org/advisory-opinions). ●

## 2024-25 Formal Advisory Opinion Board

### At-Large

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 for the case.

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.

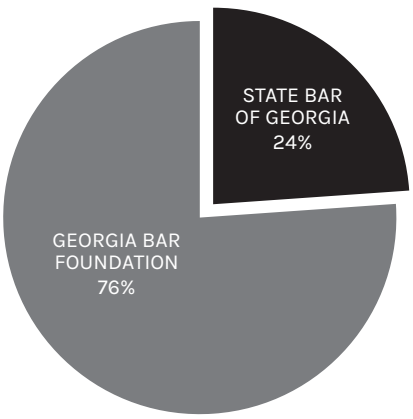
AVERAGE MONTHLY CASELOAD	# OF CASES
Incoming calls	60
Incoming emails	100
Voicemails	30
Outgoing calls	40
Outgoing emails	100

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(l) 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. ●



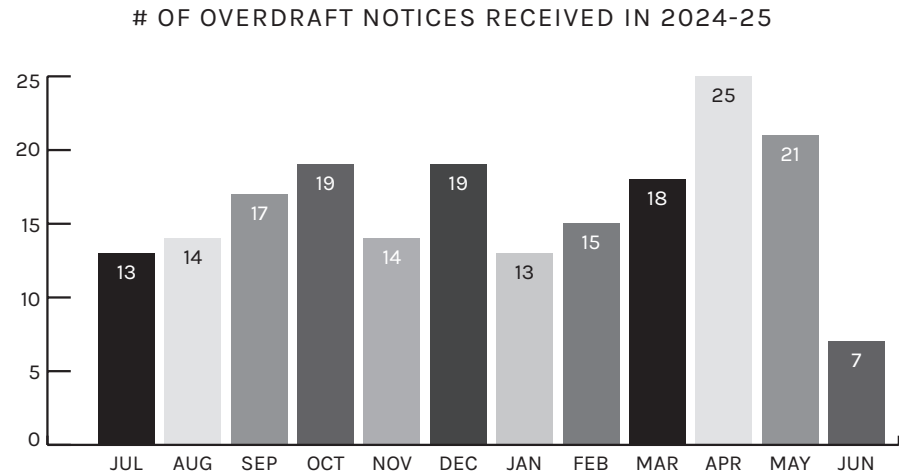
# Overdraft Notification Program

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-



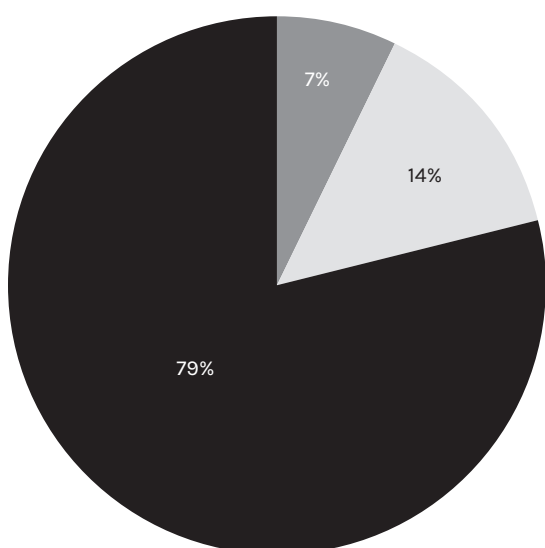
tion's interest rate comparability agreement. Currently, 195 banks and credit unions are reflected on the State Bar of Georgia's List of Financial Institutions Approved as Depositories for Attorney Trust Accounts, which can be found at [www.gabar.org/banks](http://www.gabar.org/banks).

## 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

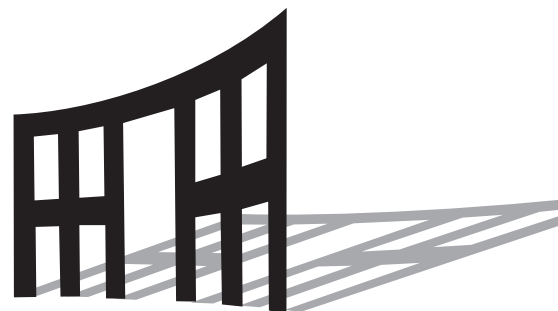
is an early warning that a lawyer is engaging in conduct likely to injure clients. The TAON Program acts to significantly reduce the level of lawyer misappropriations. Financial institutions that maintain lawyer trust accounts are required to notify the State Bar of Georgia's Office of the General Counsel 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 lawyers to take corrective action before the lawyer's misconduct becomes so egregious as to mandate serious sanction, including disbarment. ●

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%	



#### OVERDRAFT FILE DISPOSITION

- Adequate Response (79%)
- Board Initiated Grievances (14%)
- Law Practice Management Referral (7%)



# 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.

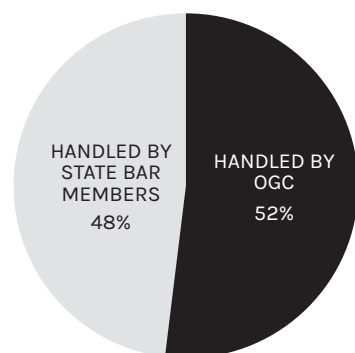
In instances when a lawyer from the Office of the General Counsel is appointed receiver by the Supreme Court of Georgia, the first order of business is to

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

56



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



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**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](http://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*

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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 Information.**

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 with 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.) ●



# 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

May 1, 2025 Nicole Jones  
June 16, 2025 Matthew Jason Anderson  
June 16, 2025 Sean Raymond Campbell-Champion  
June 16, 2025 Tripoli Aley Freeman  
June 16, 2025 Emily Yost

## PUBLIC REPRIMANDS

Oct. 15, 2024 William Slater Vincent  
Feb. 18, 2025 Chadrick A. Mance

## 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

## 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 Christopher Ryan Breault  
March 4, 2025 James Howard Sinnott  
May 28, 2025 Nathaniel Watson Cochran

### Interim Suspensions

Oct. 7, 2024 Brian Joel Aplin  
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

## 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 Jr.  
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, DEPUTY GENERAL COUNSEL

**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. ●

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