



State Bar
of Georgia

BOG BOARD BOOK

**2022 Annual Meeting
Amelia Island, FL**

This book serves as the agenda and materials for the State Bar of Georgia's 2022 Annual Meeting.



State Bar of Georgia

292nd BOARD OF GOVERNORS MEETING

Friday, June 3, 2022

9:00 a.m. – 12:00 p.m.

Omni Amelia Island Resort

Amelia Island, Florida

<https://gabar.zoom.us/j/83885099241?pwd=YmhzQkx4aEFXU3Nyczc0TzNlbgIWIWQT09>

Webinar ID: 838 8509 9241

Passcode: 846214

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page Number</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	Elizabeth L. Fite, President	1-16
b) Pledge of Allegiance	Hon. Rebecca Grist, Macon Circuit, Post 3 Solicitor-General, Bibb County	
c) Invocation	Amanda R. Clark-Palmer Atlanta Circuit, Post 25	
d) Recognition of Past Presidents, Judges, and Special Guests	Elizabeth L. Fite	
e) Recognition of Retiring Executive Committee Members and Retiring Board Members.....	Elizabeth L. Fite.....	17
	<ul style="list-style-type: none"> • Dawn M. Jones, Immediate Past President, 12 years on the Board • Bert Hummel, Immediate YLD Past President, 3 years on the Board • Austin O. Jones, Loganville, Alcovy Circuit, Post 2, 2 years on the Board • Foy R. Devine, Atlanta, Atlanta Circuit, Post 18, 34 years on the Board • Michael Brian Terry, Atlanta, Atlanta Circuit, Post 31, 10 years on the Board • Terrence Lee Croft, Atlanta, Atlanta Circuit, Post 35, 22 years on the Board • Carol V. Clark, Atlanta, Atlanta Circuit, Post 40, 10 years on the Board • Christopher Sutton Connelly, Summerville, Lookout Mountain Circuit, Post 3, 4 years on the Board • Josh I. Bosin, Atlanta, Member-at-Large, Post 3, 2 years on the Board • Christopher Frank West, Thomasville, Southern Circuit, Post 1, 6 years on the Board • Amy Viera Howell, Atlanta, Stone Mountain Circuit, Post 5, 14 years on the Board 	
f) Roll Call	Ivy Cadle, Secretary.....	18-21
g) Future Meetings Schedule.....	Elizabeth L. Fite.....	22-23

Topics

Presenter

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2) ACTION

- a) Minutes of the 291st Meeting of the Ivy Cadle..... 24-27
Board of Governors on April 2, 2022

3) AWARDS AND PRESENTATIONS

- a) Judge Willie Lovett Jr. Advancing the
Field of Juvenile Law Award.....Elizabeth L. Fite/Hon. Charles Bethel
- b) Chief Justice Harris Hines Outstanding Advocacy
for Children in Dependency AwardElizabeth L. Fite/Hon. Charles Bethel
- c) Chief Justice Thomas O. Marshall
Professionalism Awards.....Elizabeth L. Fite
- d) Georgia Legal Services Program
Check PresentationElizabeth L. Fite
- e) Presentation of Other Awards.....Elizabeth L. Fite
(Awards and recipients are listed in Annual Meeting Brochure.)

4) PRESIDENT’S ADDRESS

- a) State Bar of Georgia President’s Address.....Elizabeth L. Fite

5) SPECIAL REPORTS

- a) Supreme Court of Georgia.....Hon. David Nahmias
Chief Justice
Supreme Court of Georgia
- b) Court of Appeals of GeorgiaHon. Brian Rickman
Chief Judge
Court of Appeals of Georgia
- c) Office of the Attorney GeneralHon. Christopher Carr
Attorney General
- d) Office of Governor Brian KempDavid Dove
Executive Counsel
- e) Georgia General Assembly
 - (1) House Judiciary CommitteeRep. Chuck Efstrotation, Chair
 - (2) Senate Judiciary CommitteeSen. Brian Strickland, Chair

Topics

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6) INFORMATIONAL REPORTS

a) Young Lawyers Division	Elissa B. Haynes	28-31
	YLD President, 2021-2022	
b) Memorials	Elizabeth L. Fite	

7) ADJOURNMENT

The Board of Governors will meet again at 9:00 a.m. on Saturday, June 4, 2022.



State Bar of Georgia

293rd BOARD OF GOVERNORS MEETING

Saturday, June 4, 2022

9:00 a.m. – 12:00 p.m.

Omni Amelia Island Resort

Amelia Island, Florida

<https://gabar.zoom.us/j/82813726257?pwd=VUV6c1Q3Z3JldTZkV25ORm5YMmdzUT09>

Webinar ID: 828 1372 6257

Passcode: 301670

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page Number</u>
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1) ADMINISTRATION

- | | | |
|--|---|------|
| a) Welcome and Call to Order | Sally Akins, President, 2022-2023 | 1-16 |
| b) Pledge of Allegiance | Lester B. Johnson, III
Eastern Circuit, Post 2 | |
| c) Invocation | Paul W. Painter, III
Eastern Circuit, Post 1 | |
| d) Recognition of Past Presidents, Judges, and
Special Guests | Sally Akins | |
| e) Welcome to New Officers & Board Members..... | Sally Akins | |

New Officers

Sally Akins, President	Elizabeth L. Fite, Immediate Past President
Tony DelCampo, President-Elect	Ron Daniels, YLD President
Ivy Cadle, Treasurer	Brittanie Browning, YLD President-Elect
Christopher P. Twyman, Secretary	Elissa B. Haynes, YLD Immediate Past President

New Board Members

- Anne Templeton LaMalva, Alcovy Circuit, Post 2
- Hon. Rachel B. Krause, Atlanta Circuit, Post 18
- Robert David "Bobby" Wolf, Atlanta Circuit, Post 31
- N. John Bey, Atlanta Circuit, Post 35
- Hon. Shukura L. Ingram, Atlanta Circuit, Post 40
- Hon. Ralph Lee Van Pelt Jr., Summerville, Lookout Mountain Circuit, Post 3
- Michael Prieto, Member-at-Large, Post 3
- Paul William Hamilton, Southern Circuit, Post 1
- Keith E. Adams, Stone Mountain Circuit, Post 5

<u>Topics</u>	<u>Presenter</u>	<u>Page Number</u>
f) Roll Call	Christopher P. Twyman Secretary, 2022-2023	
g) Future Meetings Schedule.....	Sally Akins	22-23

2) PRESIDENT’S REPORT Sally Akins

- a) Approval of the Members of the State Disciplinary Boards (action)
 - (1) State Disciplinary Board & State Disciplinary Review Board
 - (2) Formal Advisory Opinion Board
- b) Approval of ICJE Board Appointment (action)
 - (1) C. Bradford Marsh
- c) Approval of 2022-2023 Committees (action)
 - (1) Standing Committees
 - (2) Special Committees
 - (3) Program Committees and Boards
- d) President’s Remarks

3) ACTION

- a) Nominations to the Judicial Qualifications Committee..... Sally Akins
- b) Revisions to Pending Rule Change Elizabeth L. Fite.....32-33
(Rule 1.2, Comment 9)
- c) Proposed Change to Standing Board Policy 600 Bill NeSmith34-39
(Conflicts of Interest)
- d) Treasurer’s Report..... Ivy Cadle.....40-54
Treasurer, 2022-2023
- e) 2022-2023 State Bar Budgets..... Ivy Cadle.....55-84
Sally Akins
- f) Financial Resolutions..... Ivy Cadle..... 85
 - Authorization for president to secure blanket position bonds for officers and staff.
 - Designation of depositories for general operations of the State Bar of Georgia.
 - Employment of independent auditing firm to audit the financial records of the State Bar for the fiscal year 2021-2022.

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h) Investment Policy Proposed Changes	Tony DelCampo	87-96
	President-Elect, 2022-2023	
i) Executive Committee Election.....	Sally Akins	
(Please keep nominations to under 5 minutes. Please keep seconds to under 2 minutes.)		
<u>Two-Year Term 2022-2024</u>		
(1) Expired term of William C. Gentry		
(2) Expired term of Martin Valbuena		
(3) Expired term of Nicki N. Vaughan		
j) Georgia Legal Services Program Appointments (action).....	Sally Akins	97
(1) Seth Bruckner, Atlanta (appointment for 2-year term)		
(2) Marquette Bryan, Atlanta (appointment for 2-year term)		
(3) Laverne Lewis Gaskins, Augusta (appointment for 2-year term)		
(4) Matthew Howell, Atlanta (appointment for 2-year term)		
k) Chief Justice’s Commission on Professionalism	Sally Akins	
Appointments (action)		
(1) Cathy Clark Tyler (appointment for 3-year term)		
l) Executive Director’s Election	Sally Akins	

4) INFORMATIONAL REPORTS

a) Executive Director’s Report.....	Damon Elmore Executive Director	
b) Officer and Executive Committee Expense and	Elizabeth L. Fite.....	98-105
Reimbursement Policy		
c) Young Lawyers Division Report	Ron Daniels YLD President, 2022-2023	
d) Chief Justice’s Commission on Professionalism Report	Karlise Y. Grier	106-110
Executive Director		
e) Legislative Report	Christine Butcher Hayes Director of Governmental Affairs	
f) Wellness Section Application	R. Javoyne Hicks.....	111-117
Attorney Wellness Committee Chair		
Joyce Gist Lewis		
Attorney Wellness Committee Member		

5) WRITTEN REPORTS

a) State Bar of Georgia Audit Report for Year End 2021
and Related Auditor’s Letter Regarding Governance118-144

b) Executive Committee Minutes145-158
 (1) February 18, 2022
 (2) March 11, 2022
 (3) April 14, 2022

c) Strategic Plan Closure Memo 159

d) Unauthorized Access of State Bar Network and Systems Memo160-162

e) Fee Arbitration Program.....163-165

f) Law Practice Management166-170

g) Sections’ Annual Reports.....171-314
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 (2) Antitrust Law Section
 (3) Appellate Practice Law Section
 (4) Aviation Law
 (5) Child Protection and Advocacy Section
 (6) Construction Law Section
 (7) Consumer Law Section
 (8) Creditors’ Rights Section
 (9) Dispute Resolution Law Section
 (10) Employee Benefits Law Section
 (11) Equine Law Section
 (12) Family Law Section
 (13) Fiduciary Law Section
 (14) Franchise & Distribution Law Section
 (15) Health Law Section
 (16) Insurance Law Section
 (17) Intellectual Property Law Section
 (18) Local Government Law Section
 (19) Nonprofit Law Section
 (20) Privacy & Technology Law Section
 (21) Real Property Law Section
 (22) Taxation Law Section
 (23) Worker’s Compensation Law Section

h) Unlicensed Practice of Law315-316

i) Roadmap to Law School Program.....317-322

j) State Bar of Georgia Satellite Office Reports323-324

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k) Media Report325-326

6) CLOSING

a) Old Business.....Sally Akins

b) New BusinessSally Akins

c) Executive SessionSally Akins

d) Remarks / Q&A / Comments / SuggestionsSally Akins

e) AdjournmentSally Akins

f) Pictures (Very Important)

Immediately following the meeting, photos will be made of:

- (1) All new Board of Governors Members*
- (2) All Returning Board of Governors Members who want updated photos*
- (3) 2022-2023 Officers and Executive Committee

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

2022 STATE BAR OF GEORGIA

AMELIA ISLAND, FLORIDA

ANNUAL MEETING

JUNE 2-5
Omni Amelia
Island Resort



State Bar
of Georgia

PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

HYBRID MEETING

Hotel Cut-off Date | May 12

Registration Cut-off Date | May 25



JOIN US AT AMELIA ISLAND!

On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2022 Annual Meeting of the State Bar of Georgia to be held June 2-5 at the Omni Amelia Island Resort on Amelia Island, Florida.

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

The world-class accommodations of the beautiful Omni Amelia Island Resort will again meet our every need for an outstanding program, as well as provide you and your family with a wonderful vacation experience.



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

I encourage you to take advantage of the CLE opportunities that have been planned, in addition to the section events, business meetings, alumni receptions and other social functions. The festivities will begin with Thursday evening's Opening Night Festival, which will include fun for all ages, and culminate with Saturday night's Presidential Inaugural Gala, where Sarah B. "Sally" Akins will be sworn in as the 2022-23 Bar president.

There will be plenty of time for you to focus on your family and recharge while at Amelia Island with the number of recreational opportunities available—including golf, tennis, biking or simply relaxing with your family and friends in a beautiful setting. The State Bar has secured discounted rates for a number of activities and services. You can find that information on page 11 of this brochure.

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

It has been an honor and a privilege to serve as your 2021-22 State Bar president. I am grateful for the opportunity. Thank you for your support and your trust.

See you on Amelia Island!

ELIZABETH L. FITE
President, State Bar of Georgia

OPENING NIGHT FESTIVAL



Opening Night Festival Thursday, June 2 | 6:30 – 9:30 p.m.

The weekend begins with the ultimate outdoor summer party on the Magnolia Terrace (location weather permitting). Join your colleagues, their families and guests for a relaxing, fun-filled evening dedicated to good food, great music and a chance to catch up with old friends and make new ones. Festival activities include face painting, games (for the young and young at heart) and more, surrounded by a rustic but glamorously decorated space, complete with fire pits, tent chalets and canoe bars. The Band Be Easy—a State Bar favorite—is returning to provide the soundtrack for the evening.

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



PRESIDENTIAL INAUGURAL GALA

Presidential Inaugural Gala Installation of Sarah B. "Sally" Akins Saturday, June 4 | 6 – 11:30 p.m.

The evening will begin with a reception honoring Supreme Court of Georgia justices and Court of Appeals of Georgia judges, followed by the Awards and Inauguration Ceremony where Sarah B. "Sally" Akins will be sworn in as the 2022-23 State Bar president. Following the inauguration and the presentation of the Distinguished Service and Employee of the Year awards, dinner will be served buffet style after which we invite you to spend the remainder of your evening at this Savannah Garden Party-themed event in one of the following featured rooms of entertainment.

Dance Club with Cashmere

Come ready to dance the night away with Cashmere, a band with a special blend of talent, youthful energy, experience and a true passion for entertaining. Originating in Atlanta, Georgia, this band has been performing together since 2012. Cashmere delivers a wide array of genres spanning from classics to country, and specializes in oldies, Motown, light rock, light hip-hop and current hits. This group will have you gasping for air as you walk from the dance floor.

Bourbon, Cigar and Scotch Lounge

Take a moment to join your friends in the ever-popular bourbon, cigar and scotch lounge. Sit back and relax with your preferred brand or find a new favorite while our master Cuban cigar roller prepares cigars onsite.



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SCHEDULE OF EVENTS

Thursday, June 2

8 a.m. – 7:30 p.m.
Registration

8 a.m. – 12 p.m.
Exhibitor Setup

10 a.m. – 4 p.m.
State Disciplinary Board Meeting

1 – 2 p.m.
Bench and Bar Committee Meeting

1 – 6 p.m.
Legal Exposition Open

2 – 5:30 p.m.
CLE—War Stories and Georgia
Evidence Update

3 – 4 p.m.
Budget Hearing

6:30 – 9:30 p.m.
Opening Night Festival

Friday, June 3

6 a.m. – 8 p.m.
Registration

7 a.m. – 7 p.m.
Legal Exposition Open

7 – 8 a.m.
🌿 Eco Bike Hike—Bike Law Section

7 – 8 a.m.
🌿 YLD/Pro Bono 5K Fun Run

7 – 9 a.m.
General Practice & Trial Law Section
Tradition of Excellence Breakfast

8 – 9 a.m.
Dispute Resolution Section
Breakfast

9 a.m. – 12 p.m.
Plenary Session: Awards
Presentations, Annual Members
Meeting and the 2021-22 Board
of Governors Meeting

11:30 a.m. – 12:30 p.m.
ICLE Board Meeting

12 – 1 p.m.
Law Practice Management Advisory
Committee Meeting

12 – 1:30 p.m.
YLD Leadership Academy Luncheon
and CLE

12 – 2 p.m.
Clients' Security Fund Board
of Trustees Meeting

12 – 2 p.m.
Joint Luncheon of the Appellate
Practice and Judicial Sections

12 – 4 p.m.
State Disciplinary Review
Board Meeting

12:30 – 1:30 p.m.
ICLE and CCLC Joint Luncheon

12:30 – 3 p.m.
Commission on Continuing
Lawyer Competency Meeting

🌿 Denotes Wellness Activity



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

1:30 – 3 p.m.

YLD General Session

2 – 4 p.m.

Disciplinary Rules and Procedures
Committee Meeting

2 – 5 p.m.

Board of Bar Examiners Meeting

2 – 5:30 p.m.

CLE—Environmental Justice: What
Can We Do to Protect the Air, Land
and Water?

3 – 5 p.m.

Member Benefits
Committee Meeting

3:30 – 5 p.m.

YLD Beach Party and
Meet the Candidates Reception

5 – 7 p.m.

General Practice & Trial Law Section
Tradition of Excellence Reception

5:30 – 6:30 p.m.

Construction Law Section Reception

5:30 – 6:30 p.m.

Emory University School of Law
Alumni Reception

5:30 – 6:30 p.m.

Mercer University School of Law
Alumni Reception Honoring
Sarah B. “Sally” Akins and
Ronald Edward “Ron” Daniels

5:30 – 6:30 p.m.

Samford University Cumberland
School of Law Alumni Reception

5:30 – 6:30 p.m.

University of Georgia School of Law
Alumni Reception

5:30 – 7 p.m.

Georgia State College of Law
Alumni Reception

5:30 – 7 p.m.

Atlanta’s John Marshall Law School
Alumni Reception

7:30 – 9:30 p.m.

YLD Dinner and
Swearing-In Ceremony

Saturday, June 4

7 a.m. – 1 p.m.

Registration

7:30 a.m. – 1 p.m.

Legal Exposition Open

7:30 – 8:30 a.m.

New Board Members Breakfast
with the President

7:30 – 8:30 a.m.

SOLACE Committee Meeting

9 a.m. – 12 p.m.

2022-23 Board of Governors Meeting

12:30 – 2 p.m.

Diversity of Bars Meeting

2 – 3 p.m.

Road Map to Law School
Workshop Overview

6 – 11:30 p.m.

Reception honoring the Supreme
Court justices and Court of Appeals
judges; Presidential Inaugural Gala:
Installation of Sarah B. “Sally” Akins;
Dinner; Entertainment: Dance Club
with Cashmere; Bourbon, Cigar and
Scotch Lounge



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

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CONTINUING LEGAL EDUCATION

WAR STORIES AND GEORGIA EVIDENCE UPDATE

Thursday, June 2 | 2 – 5:30 p.m. | \$175

☉ 3 CLE hours, including 1 ethics, 1 professionalism and 1 trial practice

PRESIDING

Hon. Robert W. Chasteen Jr., *Chief Judge, Superior Court, Cordele Judicial Circuit, Fitzgerald, Co-Chair, State Bar of Georgia Bench and Bar Committee*;
David B. Bell, *The David Bell Law Firm, Augusta, Co-Chair, State Bar of Georgia Bench and Bar Committee*

SEMINAR DESCRIPTION

Litigation, like life, is challenging. Hone your Georgia evidence skills to tackle those challenges with the Georgia Evidence Update. Learn from the challenges faced by practitioners and judges as told in their “war stories” of skirmishes, battles, wounds and victories experienced personally or witnessed in the lives of clients and litigants. The age old stories remain relevant over time, surrounding the practice of law and the ethical and professional considerations that are incumbent upon being a successful lawyer.

KEY SPEAKER

Prof. Julian A. Cook III, *J. Alton Hosch Professor of Law, University of Georgia School of Law, Athens*

PANELISTS

Hon. Sheryl B. Jolly, *Judge, Superior Court, Columbia Judicial Circuit, Evans*;
Hon. Bonnie Chessher Oliver, *Judge, Superior Court, Northeastern Judicial Circuit, Gainesville*; Hon. Charles P. Rose Jr., *Judge, Superior Court, Atlantic Judicial Circuit, Hinesville*; Hon. Lawton E. Stephens, *Judge, Superior Court, Western Judicial Circuit, Athens*; Amy Lee Copeland, *Rouse + Copeland LLC, Savannah*; Katherine L. McArthur, *McArthur Law Firm, Macon*; Michael D. St. Amand, *Gray Rust St. Amand Moffett & Brieske LLP, Atlanta*; Michael B. Terry, *Bondurant Mixson & Elmore LLP, Atlanta*

HOSTED BY

State Bar of Georgia Bench and Bar Committee

ENVIRONMENTAL JUSTICE: WHAT CAN WE DO TO PROTECT THE AIR, LAND AND WATER?

Friday, June 3 | 2 – 5:30 p.m. | \$175

☉ 3 CLE hours

PRESIDING

Hon. Joy Lampley-Fortson, *Assistant Chief Immigration Judge, U.S. Department of Justice, Atlanta*; Jacqueline F. Bunn, *State Board of Pardons and Paroles, Atlanta*; Avarita L. Hanson, *Attorney at Law, Atlanta*

SEMINAR DESCRIPTION

This CLE will explore federal and state case law and administrative actions that address environmental justice. The panels will review how the EPA requires regulated entities to analyze the environmental effects of business operations that have disproportionately impacted underserved communities. The panels will suggest concrete measures that can be taken to address inequities. The status of environmental justice and emerging trends in the area will be discussed.

PANELISTS

Daniel Blackman, *Regional Administrator, U.S. Environmental Protection Agency, Region 4, Atlanta*; Kim Jones-Snipe, *Associate Regional Counsel, U.S. Environmental Protection Agency, Smyrna*; J. Wyatt Kendall, *Partner, Morris, Manning & Martin, LLP, Atlanta*; Gwendolyn Keyes Fleming, *Partner, Van Ness Feldman LLP, Washington, D.C.*; C. Jade Rutland, *Associate Regional Counsel, U.S. Environmental Protection Agency, Region 4, Atlanta*; Kimberly “Kim” Scott, *Executive Director, Georgia WAND, Atlanta*; R. Gary Spencer, *NAACP Legal Defense and Educational Fund, Inc., Atlanta*; Chandra Taylor-Sawyer, *Senior Attorney, Leader of SELC Environmental Justice Initiative, Southern Environmental Law Center, Chapel Hill, North Carolina*; Prof. Tanya Washington, *Georgia State University College of Law, Atlanta*

HOSTED BY

Georgia Association of Black Women Attorneys; Georgia Diversity Program; State Bar of Georgia Committee to Promote Inclusion in the Profession; State Bar of Georgia Seeking Equal Justice and Addressing Racism & Racial Bias Committee

Please note: As a courtesy to speakers and other attendees in this educational setting, we do not allow children at continuing legal education seminars. Thank you!



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

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**YLD LEADERSHIP ACADEMY
LUNCHEON AND CLE: MOVING
FORWARD IN LEADERSHIP**

Friday, June 3 | 12 – 1:30 p.m.

YLD Leadership Academy alumni are encouraged to join the current class for a luncheon and CLE.

YLD GENERAL SESSION

Friday, June 3 | 1:30 – 3 p.m.

The General Session is open to all members. YLD officers will give reports and members of the council will provide updates on projects and events. The YLD Leadership Academy Class of 2022 will receive their graduation plaques.

**YLD POOL PARTY AND MEET THE
CANDIDATES RECEPTION**

Friday, June 3 | 3:30 – 5 p.m.

Catch some rays poolside while you meet candidates running for the YLD Representative Council. The winners of the election will be announced at the YLD Dinner and Swearing-In Ceremony.

**YLD DINNER AND SWEARING-IN
CEREMONY**

Friday, June 3 | 7:30 – 9:30 p.m.

Please join the Young Lawyers Division for its annual dinner and swearing-in ceremony to be held at the Omni Amelia Island Resort Conference Center. Following dinner, the YLD will present its outgoing officers and directors with gifts commemorating their service. The awards ceremony will highlight the service of the YLD's many outstanding members, as President Elissa B. Haynes presents the awards of achievement, as well as the Ethics and Professionalism Award, the Distinguished Judicial Service Award and the Ross Adams Award. The evening culminates with the swearing-in of the 2022-23 officers. Incoming YLD President Ronald Edward "Ron" Daniels will then highlight his plans for the YLD during the upcoming Bar year. This event is open to all lawyers—members of the YLD and otherwise.



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT



ECO BIKE HIKE—BIKE LAW SECTION

Friday, June 3 | 7 – 8 a.m.

Join members of the Bike Law Section for a guided family-friendly cruise around Amelia Island. Be sure to pack your gear. Riders are encouraged to bring your own bike, or Amelia's Wheels is offering discounted rates of \$25 for 24 hours for this event. No reservations for rentals; first come, first served. Limit of 10 participants.

YLD/PRO BONO 5K FUN RUN

Friday, June 3 | 7 – 8 a.m.

Get up early and start your day with this complimentary run on the beach. There will be T-shirts for all finishers—don't forget to sign up. Sponsored by the Capitol Partners Public Affairs Group, Pro Bono Resource Center and the Young Lawyers Division. #LawyersLivingWell

SPA

Enjoy a 10% discount off the full-priced spa menu (not available with any other discounts or spa packages) during your stay. From the moment you step inside The Spa at Omni Amelia Island Resort, you'll have the opportunity to enter a relaxation area and garden, perfect for before and after your treatments. Enjoy our vast array of herbal teas and organic citrus water, then rejuvenate with our men's and women's spa treatments that include couple massages, facials and steam showers as well as our signature Quartz Sand Table massage and Tropical Blossom Ritual. Email aispa@omnihotels.com or call 904-432-2220 to make reservations.

HEALTH AND FITNESS CENTER

Located under the shady oaks of Racquet Park, the Health and Fitness Center is fully equipped with state-of-the-art exercise equipment, a 20-yard indoor heated lap pool, accessory shop and full-service locker rooms at no charge to resort guests. A dynamic range of fitness sessions is offered weekly, including yoga, water aerobics and body tone classes.

VISIT THE WEBSITE FOR ADDITIONAL RESORT ACTIVITY OPTIONS AND INFORMATION
www.omnihotels.com/hotels/amelia-island/things-to-do/resort-activities

GOLF

Enjoy 20% off green fees at the Oak Marsh Golf Course. Oak Marsh is one of the truly classic Pete Dye-designed golf courses in the world. The course is noted for its tight fairways and small greens, meandering along serpentine salt marsh creeks and through the moss draped heritage oaks for which Amelia Island is famous. At par 72, this 6,500-yard course has 14 holes with water hazards and numerous bulk-headed greens. A variety of bunkers are placed throughout the course to add to the challenge, and a natural approach has been maintained as well with the use of coquina shell cart paths, native plant life and preserved habitats for the local wildlife. If you're short on time, try out the Little Sandy Short Course, featuring 10 holes nestled around Red Maple Lake, ranging from 70 to 125 yards, and an 18-hole putting green. Playing through a picturesque lowland oak marsh habitat, the resort's new short course provides a traditional, yet fun-focused golf experience for all ages and abilities. *Discounted green fees not available for Little Sandy Short Course.* To book a tee time, call the Omni Golf Pro Shop at 904-277-5907.

TENNIS AND PICKLEBALL

The Omni Amelia Island Resort tennis program has been recognized as one of the finest in the world, named the "No. 2 Tennis Resort on Florida's East Coast" and a "Top 50 Tennis Resorts in the U.S." by *Tennis Magazine*. Looking for something a little different? Give Pickleball a try on one of seven courts surrounded by a canopy of oak trees. This combination of tennis, ping pong, badminton and racquetball is fast paced, easy to learn, great exercise and fun for all ages. For those interested in a friendly or competitive game of tennis or pickleball, call the Pro Shop at 904-277-5145 to make reservations. *Please note: court reservations require pre-registration.*

Enjoy State Bar secured discounts* on the following:

Beach Rentals 10%	Self-Parking \$3 per vehicle, per night
Spa Services 10%	<small>(Current rate is \$20)</small>
Green Fees 20% <small>(Oak Marsh Course only)</small>	Valet Parking \$20 per vehicle, per night
Putt Putt 20%	<small>(Current rate is \$35)</small>

*Mention you are with the State Bar of Georgia to received these special discounts.

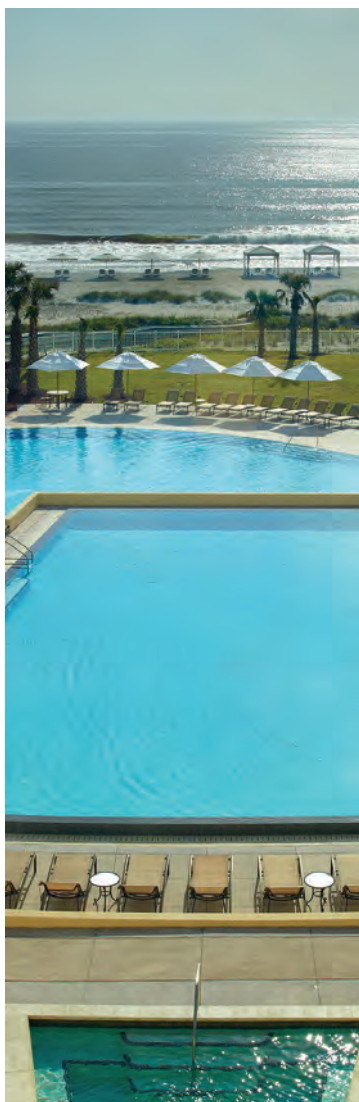


PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

SOCIAL AND SPECIAL EVENTS

OPENING NIGHT FESTIVAL

Thursday, June 2 | 6:30 – 9:30 p.m.

Don't miss the Opening Night Festival. Bring your family and enjoy the ultimate luxury summer party. See page 4 for a description of the event.

ROAD MAP TO LAW SCHOOL WORKSHOP OVERVIEW

Saturday, June 4 | 2 – 3 p.m.

Recent American Bar Association data indicates that the percentage of African American attorneys in the legal profession has decreased from 5% to 4.7% in the past 10 years. The Road Map to Law School Workshop was originally developed by Georgia Legal Services Program General Counsel Ira L. Foster to help advise minority college and high school students on the law school admission process and career opportunities available after law school. Foster and 2020-21 State Bar of Georgia President Dawn M. Jones will present an overview of the workshop to educate Bar members on how they can help tackle the declining numbers of African Americans working as lawyers.

PRESIDENTIAL INAUGURAL GALA

Saturday, June 4 | 6 – 11:30 p.m.

Be sure to register for the Presidential Inaugural Gala, which includes the reception for the Supreme Court justices and Court of Appeals judges, the inauguration of Sarah B. "Sally" Akins as the 2022-23 president of the State Bar, and the dinner, dancing and entertainment with a Savannah Garden Party theme that traditionally closes out the evening. See page 5 for a description of the event.



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

OMNI AMELIA ISLAND RESORT

39 BEACH LAGOON ROAD
FERNANDINA BEACH, FL 32034
904-261-6161 | FAX 904-432-1467
CUT-OFF DATE IS THURSDAY, MAY 12

Omni Amelia Island Resort will be the Bar's host hotel, offering discounted room rates. A block of rooms has been reserved for the meeting. The room rates are \$235 single/double resort view. Ocean view rooms are \$257 up to \$535 for a three-bedroom ocean view villa. Rooms are subject to a \$12 resort fee per night plus 12% sales tax. To make reservations, please call the hotel at 904-261-6161 and mention you are with the State Bar of Georgia to receive the special rate. Or to make reservations online, for the hotel, visit bit.ly/amelia_hotel; for the villas, visit bit.ly/amelia_villas. Reservations must be made by Thursday, May 12, as rooms will be on a space and rate availability basis after this date.

Check-in time is 4 p.m. | Check-out time is 12 p.m.

DIRECTIONS TO AMELIA ISLAND

Visit www.omnihotels.com/hotels/amelia-island/property-details/directions, for driving directions.

Please Note | COVID-19 Precautions

We are mindful that COVID-19 guidance and recommendations continue to change and we remain prepared to adjust as necessary. We are continuing to keep the safety of our members a top priority and encourage attendees to consider wearing masks indoors, being vaccinated, testing and knowing your status prior to arrival at all meetings, and practicing distancing measures.

To the extent permitted by applicable and existing law, there is no liability for loss, damage, injury or death of an individual entering State Bar of Georgia premises, or premises occupied by the State Bar of Georgia if such loss, damage, injury or death results from the inherent risks of contracting COVID-19. Attendees and guests recognize this risk by entering such premises and assume full responsibility for loss, damage, injury or death arising out of their use of or presence at such premises.



PHOTO PROVIDED BY OMNI AMELIA ISLAND RESORT

ADDITIONAL INFORMATION

WHAT TO PACK

Opening Night Festival: Casual Summer Attire

Daytime meetings and events: Casual Attire

Plenary Session and Board of Governors Meetings: Business Casual Attire

Young Lawyers Division Dinner: Business Casual Attire

Supreme Court Reception/Inaugural Dinner: Cocktail Attire

JUST FOR KIDS

KIDS AND TEENS

Omni Amelia Island Resort offers a variety of age-specific supervised recreational activities. Please visit www.omnihotels.com/hotels/amelia-island/things-to-do/resort-activities/family-fun for information, pricing and scheduling.

AMELIA ISLAND NANNY, INC.

Babysitting Services for ages 3 and under are available through Amelia Island Nanny, Inc. Please call 904-229-5854 or visit www.ameliaislandnanny.com for more information, including rates. You can also email ameliaislandnanny@gmail.com.

DINING ON AMELIA ISLAND

If you are planning to head off the resort to dine at any of the restaurants located around Amelia Island, please take note that most establishments have changed their policy to require reservations.

EXHIBITORS*

*At time of printing

Atlanta Custom Tailors

CGA Solutions

Donabelle Halopoff & Associates Legal
Nurse Consulting

Law Practice Management/Fastcase

LawPay

Legus International

Member Benefits

PeachCourt

Southern First Bank

Steno Court Reporting

That Video Thing

University of Georgia School of Law

Worldox

All registration packets include an exhibitor card. Visit 75 percent of the exhibitors and get the card stamped for entry into a drawing.



State Bar
of Georgia

2022 ANNUAL MEETING
104 Marietta St. NW, Suite 100
Atlanta, GA 30303-2743

PRST First-Class
U.S. Postage
PAID
Permit 1447
Atlanta, GA



PHOTO PROVIDED BY OWNI AMELIA ISLAND RESORT

SPECIAL THANKS

Special thanks to our corporate sponsors for their support of the State Bar of Georgia.

5-GAVEL

MB | MemberBenefits

Many thanks to the State Bar Sections and others that have contributed to the success of the 2022 Annual Meeting.

COPPER LEVEL

Intellectual Property Law Section

FRIEND LEVEL

Animal Law Section

Thank you, Antitrust Law Section, for sponsoring the Friday afternoon coffee break.

Retiring Executive Committee Members (term ends June 3, 2022)

Dawn M. Jones

Norbert D. Hummel IV

Retiring Board of Governors Members (term ends June 3, 2022)

Alcovy Circuit, Post 2	Austin O. Jones	Loganville
Atlanta Circuit, Post 18	Foy R. Devine	Atlanta
Atlanta Circuit, Post 31	Michael Brian Terry	Atlanta
Atlanta Circuit, Post 35	Terrence Lee Croft	Atlanta
Atlanta Circuit, Post 40	Carol V. Clark	Atlanta
Lookout Mountain Circuit, Post 3	Christopher Sutton Connelly	Summerville
Member-at-Large, Post 3	Joshua I. Bosin	Atlanta
Southern Circuit, Post 1	Christopher Frank West	Thomasville
Stone Mountain Circuit, Post 5	Amy Viera Howell	Atlanta

2021-2022 Officers (term begins June 4, 2022)

President	Sarah Brown "Sally" Akins	Savannah
President-elect	J. Antonio "Tony" DelCampo	Atlanta
Immediate Past President	Elizabeth L. Fite	Atlanta
Secretary	Christopher Paul Twyman	Rome
Treasurer	Ivy Neal Cadle	Macon
YLD President	Ronald Edward Daniels	Eastman
YLD President-elect	Brittanie Browning	Atlanta
YLD Immediate Past President	Elissa Blache Haynes	Atlanta

2021-2022 New Board of Governors Members (term begins June 4, 2022)

Alcovy Circuit, Post 2	Anne Templeton LaMalva	Monroe
Atlanta Circuit, Post 18	Rachel R. Krause	Atlanta
Atlanta Circuit, Post 31	Robert David "Bobby" Wolf	Atlanta
Atlanta Circuit, Post 35	N. John Bey	Atlanta
Atlanta Circuit, Post 40	Shukura L. Ingram	Atlanta
Lookout Mountain Circuit, Post 3	Ralph Lee Van Pelt Jr.	Ringgold
Member-at-Large, Post 3	Michael Prieto	Atlanta
Southern Circuit, Post 1	Paul William Hamilton	Valdosta
Stone Mountain Circuit, Post 5	Keith E. Adams	Decatur

Board of Governors Attendance Record

	4-20	6-20	10-20	1-21	3-21	6-21	6-21	10-21	1-22	4-22
	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar	Zoom Webinar/Zoom Webinar/Zoom Webinar
Sarah Brown Akins	*	*	*	*	*	*	*	*	*	*
Mark W. Alexander	*	*	*	*	*	*	*	*	*	*
Kent Edward Altom	*	*	*	*	*	*	*	*	*	*
Anthony B. Askew	*	*	*	*	*	*	*	*	*	*
Jadaunya Cinelle Baker	*	*	*	*	*	*	*	*	*	*
Nina M. Baker	*	*	*	*	*	*	*	*	*	*
Eric A. Ballinger	*	*	*	*	*	*	*	*	*	*
Donna G. Barwick	*	*	*	*	*	*	*	*	*	*
Tracee Resady Benzo	*	*	*	*	*	*	*	*	*	*
James D. Blitch IV	*	*	*	*	*	*	*	*	*	*
Joshua L. Bosin	n/a	*	*	*	*	*	*	*	*	*
Sherry Boson	*	*	*	*	*	*	*	*	*	*
Sherry Macken Brodie	*	*	*	*	*	*	*	*	*	*
Ben B. Burns	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Thomas R. Burnside	*	*	*	*	*	*	*	*	*	*
Stephanie D. Burton	*	*	*	*	*	*	*	*	*	*
Ivy Neal Cadle	*	*	*	*	*	*	*	*	*	*
Jerry Neal Cadle	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Richard D. Campbell	*	*	*	*	*	*	*	*	*	*
David L. Cannon	*	*	*	*	*	*	*	*	*	*
Carl S. Canino	*	*	*	*	*	*	*	*	*	*
Chris M. Carr	*	*	*	*	*	*	*	*	*	*
Carol V. Clark	*	*	*	*	*	*	*	*	*	*
Edward R. Collier	*	*	*	*	*	*	*	*	*	*
Daniel Jackson Connell III	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Christopher S. Connelly	e	*	*	*	*	*	*	*	*	*
Marin L. Cowen III	*	*	*	*	*	*	*	*	*	*
Kenneth B. Crawford	n	*	*	*	*	*	*	*	*	*
Terrence Lee Croft	*	*	*	*	*	*	*	*	*	*
Ronald E. Daniels	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Gerald Davidson Jr.	*	*	*	*	*	*	*	*	*	*
C. Lee Davis	*	*	*	*	*	*	*	*	*	*
J. Anderson Davis	*	*	*	*	*	*	*	*	*	*
Randall H. Davis	*	*	*	*	*	*	*	*	*	*
William T. Davis	*	*	*	*	*	*	*	*	*	*
J. Antonio Delcampo	*	*	*	*	*	*	*	*	*	*
Joseph W. Dent	*	*	*	*	*	*	*	*	*	*
Foy R. Devine	u	*	*	*	*	*	*	*	*	*
Daniel S. Digby	*	*	*	*	*	*	*	*	*	*
George P. Donaldson, III	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Danny L. Durham	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
V. Sharon Edenfield	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Susan E. Edlein	*	*	*	*	*	*	*	*	*	*
Christopher Edwards	*	*	*	*	*	*	*	*	*	*
Archibald A. Farrar	*	*	*	*	*	*	*	*	*	*
Elizabeth L. Fife	*	*	*	*	*	*	*	*	*	*
Amanda Renee Flora	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	*	*
Harold Eugene Franklin Jr.	*	*	*	*	*	*	*	*	*	*
Keith E. Gammage	*	u	*	*	*	*	*	*	*	u

To request an excused absence, please email Secretary Ivy Cadle (icadle@bakerdonelson.com)

Board of Governors Attendance Record

	4-20	6-20	10-20	1-21	3-21	6-21	6-21	6-21	10-21	1-22	4-22
	Zoom Webinar/Zoom	Webinar/Zoom	Webinar/Zoom	Webinar/Zoom	Zoom Webinar	Wild Dinnes/Zoom	Saturday	Wild Dinnes/Zoom	Savannah/Zoom	Zoom Webinar	Althems/Zoom
William C. Gentry	*	*	*	*	*	*	*	*	*	*	*
Michael G. Geoffroy	*	*	*	*	*	u	*	*	*	*	*
Patricia A. Gorham	*	*	*	*	*	*	*	*	*	*	*
Rebecca Holmes Liles Grist	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Thomas B. "Britt" Hammond	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
John Haubeneich	*	*	*	*	*	*	*	*	*	*	*
Elissa B. Haynes	*	*	*	*	*	*	*	*	*	*	*
Patrick H. Head	θ	*	*	*	*	*	*	*	*	*	*
Lawton C. Heard, Jr.	*	*	u	*	*	*	*	*	*	*	*
Roder W. Heard, Jr.	*	θ	*	*	*	*	*	*	*	*	*
Amanda Nicole Heath	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Matthew J. Hennessy	n	*	*	*	*	*	*	*	*	*	*
Thomas W. Herman	*	*	u	*	*	*	*	*	*	*	*
R. Jayvonne Hicks	*	*	*	*	*	*	*	*	*	*	*
Kimberly Wilkerson Higginbotham	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Anna S. Hix	*	*	*	*	*	*	*	*	*	*	θ
Michelle D. Hobbs	*	*	*	*	u	θ	*	*	*	*	*
Amy V. Howell	*	*	*	*	*	*	*	*	*	*	*
Bert Hummel IV	*	*	*	*	*	*	*	*	*	*	*
James W. Hurt	u	u	u	u	u	*	*	*	*	u	*
Christopher Huskins	u	u	u	u	u	*	*	*	*	u	e
Stacey K. Hydrick	*	*	*	*	*	*	*	*	*	*	*
James T. Irvin	*	*	*	*	*	*	*	*	*	*	e
William Dixon James	*	*	*	*	*	u	*	*	*	*	*
Curtis S. Jenkins	*	*	u	*	*	*	*	*	*	*	*
Charles Michael Johnson	*	*	*	*	u	*	*	*	*	*	*
Lester B. Johnson, III	*	*	*	*	*	*	*	*	*	*	*
Shirki L. Cavitt Jones	*	*	*	*	*	*	*	*	*	*	*
Dawn M. Jones	*	*	*	*	*	*	*	*	*	*	*
Austin O. Jones	n	*	u	*	*	*	*	*	*	u	e
Jennifer A. Jordan	u	u	u	u	u	*	*	*	*	*	e
Zahra S. Karimshah	*	*	*	*	*	*	*	*	*	*	*
John F. Kennedy	*	u	u	u	u	u	*	*	*	*	e
Barry E. King	*	*	*	*	*	*	*	*	*	*	*
Judy C. King	*	*	*	*	*	*	*	*	*	*	*
Seth Kirshenbaum	*	*	*	*	*	*	*	*	*	*	*
Catherine Koura	u	*	*	*	*	*	*	*	*	*	*
Edward B. Krugman	*	*	*	*	*	*	*	*	*	*	*
Jeffrey R. Kuester	*	*	*	*	*	*	*	*	*	*	*
Roslen Dara Dya "Chinny" Law	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Allegra Lawrence-Hardy	*	*	*	*	*	*	e	*	*	*	*
Nicole C. Leet	*	*	*	*	*	*	*	*	*	*	*
Katie K. Leonard	*	*	*	*	*	*	*	*	*	*	*
Dawn Renee Levine	*	*	*	*	*	u	*	*	*	*	*
Joyce Gist Lewis	*	*	*	*	*	*	*	*	*	*	*
Lisa Katsuko Liang	*	*	*	*	*	u	*	*	*	*	*
David S. Lipscomb	*	*	*	*	*	*	*	*	*	*	*
John R. B. Long	*	*	*	*	*	*	*	*	*	*	*
Dax Eric Lopez	*	*	*	*	*	u	*	*	*	e	*

To request an excused absence, please email Secretary Ivy Cagle (icagle@bakerdonelson.com)

Board of Governors Attendance Record

	4-20	6-20	10-20	1-21	3-21	6-21	6-21	6-21	10-21	1-22	4-22
	Zoom Webinar/Zoom	Webinar/Zoom	Webinar/Zoom	Webinar/Zoom	Webinar/Zoom	Wild Dunes/Zoom	Wild Dunes/Zoom	Wild Dunes/Zoom	Savannah/Zoom	Zoom Webinar	Athens/Zoom
Ronald A. Lowry											
John Bell Manly	e	u	u	*	*	u	u	u	*	e	*
Hugh J. McCullough	n	*	*	u	*	*	*	*	*	*	e
Graham Elliot McDonald	*	*	*	*	*	*	*	*	*	*	*
Letitia A. McDonald	*	*	*	*	*	*	*	*	*	*	*
Brad J. McFall	*	*	*	*	*	*	*	*	e	*	*
Scott R. McMillen	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Michael D. McRate	*	*	*	u	u	u	u	u	u	u	*
Terry L. Miller	*	u	*	u	*	*	*	*	*	*	*
William J. Monahan	*	u	*	*	*	*	*	*	*	*	*
Shondreaa Crews Morris	n/a	*	*	*	*	*	*	*	*	*	*
John T. Mrozko	u	u	u	u	u	u	u	u	u	e	*
Laura J. Murphy	*	*	*	*	*	*	*	*	*	*	*
Paul Ryan Parter III	*	*	*	*	*	*	*	*	*	*	*
Amanda South Clark Palmer	*	*	*	*	*	*	*	*	e	*	*
Amanda B. Pennell	*	*	*	*	*	*	*	*	*	*	*
John B. Pinnell	*	*	*	*	*	*	*	*	*	*	*
Joshua Edwards Payne	*	*	*	*	*	*	*	*	*	*	u
Brandon Lee Peak	*	*	*	*	*	*	*	*	*	*	u
Edward Piasta	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	e	*
Will H. Pickett, Jr.	u	u	*	u	u	u	u	u	*	u	*
Robert Allen Plumb, Jr.	*	*	*	*	*	*	*	*	*	*	*
Kathryn Lauranne Powers	*	*	*	*	*	*	*	*	*	*	*
Jill Pryor	*	*	*	*	*	*	*	*	*	*	*
William M. Ragland	*	*	*	*	*	u	u	u	*	*	*
Tina S. Roddenberry	*	*	*	*	*	*	*	*	*	*	*
Joseph Roseborough	*	*	*	u	u	u	u	u	u	u	u
Wesley Charles Ross	*	*	*	*	*	*	*	*	*	*	*
Claudia S. Saari	*	*	*	*	*	*	*	*	*	*	*
Alex Musole Shalishali	n/a	*	*	u	*	*	*	*	*	*	*
H. Burke Sherwood	*	*	*	*	*	*	*	*	u	u	*
Mitchell McKinley Shook	n/a	*	*	*	*	*	*	*	*	*	*
Robert H. Smalley, III	*	*	*	*	*	*	*	*	*	*	*
Philip C. Smith	*	*	*	*	*	*	*	*	*	*	*
R. Rucker Smith	*	*	*	*	*	*	*	*	*	*	*
Daniel B. Snipes	u	u	u	u	u	*	*	*	*	u	*
R. Gary Spencer	*	*	*	*	*	*	*	*	*	*	*
H. Craig Stafford	*	*	*	*	*	*	*	*	*	*	*
Lawton E. Stephens	*	*	*	*	*	*	*	*	*	*	*
Donna Coleman Stribling	*	*	*	*	*	*	*	*	*	*	*
C. Deen Strickland	*	*	*	*	*	*	*	*	*	*	*
Frank B. Strickland	*	*	*	*	*	*	*	*	*	*	*
Joseph C. Sumner, Jr.	u	u	u	u	u	u	u	u	u	u	u
Jason W. Swindle	u	u	u	u	u	u	u	u	u	u	u
Michael B. Terry	*	*	*	*	*	*	*	*	*	*	*
Anita W. Thomas	u	u	u	u	u	*	*	*	*	*	*
Stephen Elliot Tillman	n/a	n/a	n/a	n/a	n/a	*	*	*	*	*	*
Edward D. Tolley	n/a	u	u	u	u	u	u	u	u	u	e
Clayton Tomlinson	*	e	*	*	*	*	*	*	*	*	*

To request an excused absence, please email Secretary Ivy Cudde (cudde@bakerdonelson.com)

Board of Governors Attendance Record

	4-20	6-20	10-20	1-21	3-21	6-21 Friday	6-21 Saturday	10-21	1-22	4-22
	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Wild Dunes/Zoom	Savannah/Zoom	Zoom Webinar	Althens/Zoom
Chris P. Twyman	*	*	*	*	*	*	*	*	*	*
Martin E. Valbuena	*	*	*	*	*	*	*	*	*	*
Nicki N. Vaughan	*	*	*	*	*	*	*	*	*	*
Carl A. Velina, Jr.	*	*	*	*	u	*	*	*	u	*
J. Henry Walker	*	*	*	*	u	*	*	*	*	*
Jamice M. Wallace	*	*	*	*	*	*	*	*	*	*
Amy Carol Walters	*	*	*	*	*	*	*	*	*	*
Harold B. Watts	*	*	*	*	*	*	*	*	*	*
John P. Webb	*	*	*	*	*	*	*	*	*	*
Christopher F. West	u	u	u	u	u	u	u	u	u	u
Nancy J. Whaley	*	*	*	*	*	*	*	*	*	*
Paige Reese Whitaker	*	*	*	*	*	*	*	*	*	*
Martha Wilson Williams	*	*	*	*	*	*	*	*	*	*
Douglas Woodruff	*	*	*	u	*	*	*	*	*	*

* = attended meeting

Future Meetings Schedule



State Bar
of Georgia

Executive Committee

August 18-19, 2022

Supreme Court/Executive Committee
Joint Meeting, Barnsley Resort
Adairsville, GA

Board of Governors

Annual 2022

June 2-5, 2022

Omni Amelia Island Resort
Amelia Island, FL

Fall 2022

October 1, 2022

Virtual

Midyear 2023

January 12-14, 2023

Westin Buckhead, Atlanta, GA

Spring 2023

March 23-26, 2023

Callaway Gardens, Pine Mountain, GA

Annual 2023

June 8-11, 2023

Westin Savannah Harbor Resort & Savannah
Convention Center, Savannah, GA

Annual 2024

June 6-9, 2024

Omni Amelia Island Resort
Amelia Island, FL

Young Lawyers Division

Annual 2022	June 2-5, 2022	Omni Amelia Island Resort Amelia Island, FL
Fall 2022	Sept. 23-25, 2022	Orlando, FL (pending approval) In conjunction with the ABA YLD
Midyear 2023	January 12-14, 2023	Westin Buckhead, Atlanta, GA
Spring 2023	March 23-26, 2023	Callaway Gardens, Pine Mountain, GA
Annual 2023	June 8-11, 2023	Westin Savannah Harbor Resort & Savannah Convention Center, Savannah, GA
Annual 2024	June 6-9, 2024	Omni Amelia Island Resort Amelia Island, FL

American Bar Association Meetings

Annual 2022	August 3-9, 2022	Chicago, IL
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Southern Conference Meetings

2022	Oct. 27-30, 2022	Omni Resorts, Barton Creek, Austin, TX
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2023	Oct. 19-22, 2023	The Greenbrier Hotel White Sulphur Springs, WV
------	------------------	---

2024 Mississippi

2025 South Carolina

2026 Alabama

2027 Maryland

DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, April 2, 2022, 9:00 a.m.
Hyatt Place Athens & The Classic Center
Athens, Georgia/Zoom Hybrid

The 291st meeting of the Board of Governors of the State Bar of Georgia was held at the date and time shown above. President Elizabeth L. Fite presided and called the meeting to order at 9:00 a.m.

Pledge of Allegiance

Hon. Charles E. Auslander III, Judge, Athens-Clarke County State Court, led the pledge of allegiance.

Invocation

R. Chinny Law, Board of Governors Member-at-Large, Post 2, gave the invocation.

Special Recognition

President Elizabeth L. Fite recognized the members of the judiciary, the past presidents of the State Bar and other special guests in attendance.

Roll Call

Secretary Ivy N. Cadle circulated the roll for signature. He reminded everyone participating by Zoom that it automatically creates a report of attendees. However, he asked those who telephoned into the meeting to email him to ensure they are reflected in the attendance record as being present. The list of those in attendance is attached as Exhibit A.

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule. She pointed out the meetings that have a note of “contract pending” are all still on schedule.

Minutes of the 290th Meeting of the Board of Governors

Secretary Ivy N. Cadle presented the minutes of the Board of Governors meeting held January 8, 2022, which were approved as presented by majority vote.

Dues 2022-2023

After a report from Finance Committee Chair Elena Kaplan, the Board of Governors, by majority vote, approved Active Dues at \$260 (a \$6 increase from fiscal year 2021-2022) and Inactive Dues at \$130 (a \$3 increase from fiscal year 2021-2022) for fiscal year 2022-2023.

Approval of Other Dues Items

The Board of Governors, by majority vote, approved the following other dues items:

- 1) Section Dues (\$10 to \$40).
- 2) Clients’ Security Fund (\$15 per member per Rule 1-506).
- 3) Professionalism Fee (\$11/year).
- 4) Legislative and Public Education Fund Contribution (\$100 optional contribution).
- 5) Georgia Legal Services Program (\$400 suggested individual contribution/\$100 suggested contribution for young lawyers).

Executive Director's Report

Executive Director Damon Elmore reported updates on the Bar Center and said the Conference Center is active and being used with more frequency each week. Staff has been in the building since July, in some form or fashion, and will now switch from a COVID policy to a new telework policy effective April 4, 2022. He said that over the past year, the Bar has had as many as 18 open positions and currently there are only four. Executive Director Elmore said that ICLE was impacted the most from the pandemic, but the numbers are increasing as more programming is offered in person, virtually and in hybrid formats. He reported the search for new office space for the Coastal Georgia Office in Savannah is going well, and two spaces are being considered that offer better parking, office space and handicap accessibility. Executive Director Damon Elmore reported on renting the 30,000 square feet of available space in the Bar Center, also noting that there is 40,000 square feet on the fifth floor that is completely empty and requires renovation to rent. He said that this item is top priority, and he is working with a small subcommittee to help fill that space, along with Cushman & Wakefield and their internal broker.

Treasurer's Report

Treasurer Tony DelCampo reported on the finances of the Bar and that the Bar is sound. He asked everyone to review the list of variances in the Board Book. He commended Chief Financial Officer Ron Turner and Bar staff for their diligence in keeping the finances of the Bar on track.

Young Lawyers Division

YLD President Elissa Haynes reported the YLD Spring Meeting in Chattanooga, "Networking Across State Lines," was a great success. The YLD Leadership Academy will meet in Dahlonega next week. She said the YLD is focusing on the well-being of young attorneys and is hoping to begin a podcast. The YLD will host a federal judge's reception in conjunction with the 11th Circuit Judicial Conference. YLD President Haynes asked everyone to support and attend the YLD Signature Fundraiser, which will be held on April 30 at 433 Bishop. The fundraiser will benefit Kate's Club, an organization that helps children who have lost a loved one.

Investment Policy Proposed Changes

President Elizabeth L. Fite reported on the Investment Committee's proposed changes to the Investment Policy. She said the goal of updating the policy is to move from a very conservative model to something more in line with the current financial climate to provide an optimal investment mix for the State Bar. This report was informational and required no action by the Board of Governors, but will come before the Board at the Annual Meeting for a vote.

President's Report

President Elizabeth L. Fite spoke on attorney wellness. In light of recent attorney suicides, she said to take a moment and think about how you can connect with others and use your voice and position to help spread the word about resources, which include the Wellness Committee, the Suicide Prevention Committee and the Lawyer Assistance Program. Although these resources are excellent, each of us can help raise awareness and provide support for those in crisis. President Fite said everyone is capable of checking on someone else. You never know when that will be the day that saves them.

She also encouraged more members to attend in-person meetings as it is important for the comradery of the Board.

President Fite reported that the State Bar Elections are open through April 22 and that May 24 is an election for our judges in the state. She moved on to "Know Your Bar" and highlighted the "Find a Lawyer" directory that is a collaboration between the State Bar of Georgia and ReliaGuide (formerly known as CloudLawyers).

ACL/Legislative Report

Director of Governmental Affairs Christine Butcher Hayes reported that Friday was Day 39 of the legislative session and Monday is Day 40. All items in the State Bar's legislative package have crossed over, and the Psychiatric Advance Directive Act (HB 752) that the Fiduciary Law Section has been working on has been well received and will hopefully pass without any issues. All funding requests that the Bar voted to support have been approved for full funding. The Remote Online Notary bill (HB 334) continues to be worked on, and the legislative team will watch it, along with other bills of interest.

Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on December 10, 2021, and February 18, 2022.

Law Practice Management Program

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

Office of the General Counsel

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

Communications Update

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

Chief Justice's Commission on Professionalism Report

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

Old Business

There was no old business.

New Business

Board Member Joyce Gist Lewis reported that the Attorney Wellness Committee is working to establish themselves as a section of the Bar in order to put more emphasis on attorney wellness. As a section, they would be able to collect dues to help promote and hold better programming centered around attorney well-being. The committee will be submitting an application with proposed bylaws and asking to vote at the Annual Meeting.

Announcements

There were no announcements.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

President Elizabeth L. Fite opened the floor to remarks, questions, comments and suggestions.

Adjournment

There being no additional business, the meeting was adjourned at 10:38 a.m.

Ivy Cadle, Secretary

Approved:

Elizabeth L. Fite, President

Board of Governors,

It is my privilege to provide you with a brief recap on what the YLD has accomplished during the 2020-2021 Bar year. We were fortunate to have been able to resume in-person programming this year, while also remaining cognizant of the ongoing pandemic. My main goals for this year were to increase interaction between the “Big Bar” and the YLD, encourage and expand YLD involvement to government employees and young lawyers who are not just in the first few years of their careers, promote legislative involvement, and continue to use technology to enhance our programming. In addition to these goals, advocating for the mental health of our YLD leaders and members became a central focus of my presidency year.

While some of our committees have prepared more in-depth reports for your review below, there are a few things I wanted to highlight:

Recognizing that the holidays can be tough for many of our members, myself included as my father passed away during the holidays 22 years ago, I launched an initiative - #YLDLunchandListen – where I asked young lawyers to take another young lawyer out to lunch or coffee to check in, talk about stressors, plans for the new year, or anything else on their mind. These small but meaningful connections are critical and can truly be the saving grace for someone, especially those who may be silently struggling.

The Public Interest Internship Program (PIIP) Committee solicited applications for the summer 2022 PIIP grant from Georgia law students and recent graduates. We received 51 applications and the Committee’s team of volunteer graders evaluated each application. We are proud to report that this year, PIIP was able to award four grants. We applaud each applicant and our grant winners for their dedication to a career in public service.

Our YLD members and YLD Leadership Academy class traveled to Chattanooga for our Spring Meeting March 17-20, 2022. With a “Networking Across State Lines” theme, we were able to host a joint networking reception with the Tennessee YLD which was followed by a 90’s-themed Trivia and Dinner. Our Leadership Academy also enjoyed a rewarding service project where they painted doors and walls and sanded railings for the Chattanooga Room in the Inn which empowers women and children experiencing homeless by offering temporary housing and programs/services necessary to meet their goals.

On April 30, 2022, we brought back the YLD Signature Fundraiser with a “casual twist” which benefitted Kate’s Club. Kate’s Club empowers children and teens facing life after the death of a parent, sibling, or caregiver. The Fundraiser was held at 433 Bishop in Atlanta and featured live music from JB Strauss, Fox Bros BBQ, and a photo booth camper. More importantly, while we are still awaiting final numbers, I am pleased to report that we were able to raise over \$10,000.00 which will go directly to Kate’s Club.

The 11th Annual Legal Food Frenzy ran from April 18-29 and like last year, was entirely virtual again this year. Final numbers are still being tallied but according to the Leaderboard on galegalfoodfrenzy.com, we raised over \$728,000.00. Final results will be available soon once all mail-in donations have been accounted for. For every \$1 raised, our local food banks are able to

distribute \$8 worth of groceries into the community. Since the Legal Food Frenzy's inception, Georgia lawyers have raised \$4.2 million dollars and the equivalent of over 16 million meals for our local communities.

On May 6-7, 2022, the YLD was invited by Magistrate Judge Linda T. Walker to participate in this year's Eleventh Circuit Judicial Conference which took place at the Renaissance Atlanta Waverly Hotel. We kicked off our portion of the Conference with a Networking Reception with our federal judges, followed by a YLD Roundtable the next morning. We had a record 86 federal judges from Georgia, Alabama, and Florida in attendance. In addition to getting to know our federal judges, our members were given an opportunity to be sworn into the Eleventh Circuit by Chief Circuit Judge William H. Pryor, Jr. and the Northern District of Georgia by Chief District Judge Timothy C. Batten, Sr. There was also a special swearing-in ceremony for the Supreme Court of the United States which was presided over by Justice Clarence Thomas, who then offered his words of wisdom to the group.

YLD Corporate Counsel Committee

Raquel Crump and Tanesha Steward, Co-Chairs

On October 18, 2021, the YLD Corporate Counsel Committee hosted a virtual lunch panel, A Peek Behind the Curtain—An Intimate Conversation with In-House Counsel. The panel discussed their career paths and practice areas, the differences between law firms and in-house, where to search for in-house opportunities and how to network within and outside of the organization. Panelists included Ling-Ling Nie, General Counsel and Vice President for Ethics and Compliance at Georgia Tech Institute of Technology; Jenifer Curtis, Corporate Counsel with UPS; and Donna Robinson, Managing Partner of Robinson Law Office. This virtual event had the most attendees for any virtual YLD event during COVID-19.

YLD Inclusion in the Profession Committee

Chanel Chauvet, Essie Lazarus and Mishael Najm, Co-Chairs

On April 7, 2022 and in honor of the anniversary of the Fair Housing Act, Cole Thaler, Attorney and Co-Director of Safe and Stable Homes Project of the Atlanta Volunteer Lawyers Foundation, discussed the history of affordable housing in Atlanta, the effects of gentrification on formerly-affordable Atlanta neighborhoods, and the core protections offered by Georgia law.

We have several events lined up as we wrap up another Bar year! We are currently organizing an event for Asian American and Pacific Islander Heritage Month in May, please stay tuned for more details. On June 8, 2022, we will be hosting a Lunch and Learn on diversity and the judicial bench. Attendees will hear from notable Cobb County Judges about their personal journey to the bench. In honor of Juneteenth and Pride, on June 20, 2022 at 7:00 pm, we are getting together to watch the Atlanta Braves play ball. The first fifteen folks to sign up receive a free ticket and meal voucher. Attendees will also receive festive goodies. Lastly, on July, 23, 2022 at 10:00 am we will be hosting a Golf Clinic, led by instructor Patrina King, owner of Golf Women Mean Business. The clinic will be held at SugarCreek Golf Course. We will learn the basics of golf and then practice on the range. We encourage participants to come dressed to practice. Refreshments will be provided. The first ten people to reserve will receive a free spot.

In addition to these events, the Inclusion Committee anticipates holding one to two more committee member meetings. Those who register receive a free Starbucks refreshment of their choice.

YLD Intrastate Moot Court Competition Committee

J.D. Fichtner and Allison White, Co-Chairs

We are happy to announce that the 2022 State Bar of Georgia YLD Intrastate Moot Court Competition was a great success. In a welcome return to normal, this year's competition took place in-person on April 1-2 at the Mercer University School of Law. We would like to thank our multiple committee members, judges, Mercer for hosting us, and the remaining multitude of practicing attorneys and judges who graciously took time from their busy schedules to ensure the success and continuity of the Georgia Intrastate Moot Court Competition.

We would also like to thank the schools and students who competed and did an excellent job competing this year. The competition this year was top notch all around and all of the competitors deserve commendation.

Finally, we would like to extend a special "Thank You" to our final round panel who graciously volunteered their expertise and time:

The Honorable Leslie Abrams Gardner, *U.S. District Court - Middle District of Georgia*

The Honorable Ken Hodges, *Georgia Court of Appeals*

The Honorable Andrew Pinson, *Georgia Court of Appeals*

Allen Wallace, *Intrastate Co-Chair Emeritus*

Morgan E. Lyndall, Butler Law Firm

Without further ado, the results of the 2022 competition are as follows:

Best Oralist: Nick Lewis (UGA)

Best Brief: Betsy Hicks, Melissa Cairatti (GSU)

Semifinalist: Betsy Hicks, Melissa Cairatti (GSU)

Nick Lewis, Kiyah Bussie, Claire Kimbrell (UGA)

Christian Sullivan, Alex Balser, Briana Barnett (UGA)

Joe Freeman, Ian LaCroix (GSU)

Runner-up: Joe Freeman, Ian LaCroix (GSU)

Best Overall: Nick Lewis, Kiyah Bussie, Claire Kimbrell (UGA)

YLD Workers' Compensation Committee

Oliver Ladd and Elizabeth Phrampus, Co-Chairs

The YLD Workers' Compensation Committee continued the virtual Lunch & Learn series, initially launched in May of 2021, and with two additional events held in the fall and spring quarters. In the fall, committee co-chairs asked questions of the featured panelist, State Board of Workers' Compensation Judge Kimberly Boehm. Topics included preparing for hearings, general litigation technique, and touched upon mediation. In April 2022, committee co-chairs asked questions of featured panelist Judge Edwina Charles. Judge Charles has extensive experience in mediation and

arbitration, and questions focused on alternative dispute resolution, utilizing consent orders in litigation, and resolving attorney's fees. Attendees were eligible for 1 hour of CLE credit in the Trial area for each event.

MEETINGS

Officer and Directors Meeting | Aug. 13 - 15 | Douglasville, GA

Fall Meeting | Oct. 22 -24 | Savannah, GA

Midyear Meeting | Jan. 6-8 | Virtual

Spring Meeting | March 17-20 | Chattanooga, TN.

Annual Meeting | June 2 -5 | Amelia Island, Florida

It has been one of the greatest honors and experiences to serve as the 75th President of the YLD. I could not have done it without the support of my officers, directors, committee chairs, and each of our members. I am continuously blown away by seeing the good that 10,000-plus young lawyers can bring to our community and the legal profession.

I hope each of you will continue to support the YLD while encouraging our members to get involved with the State Bar's Board of Governors as they age out of the YLD. Lastly, as leaders in our profession, we tend to place an unreasonable amount of pressure on ourselves while trying to appear as though we have it all together. Let's continue to support one another and make sure we are doing everything we can to keep each other and ourselves mentally and physically healthy. Thank you for doing the same for me this year and I look forward to serving my third and final year on the Executive Committee as YLD Immediate Past President for the 2022-23 Bar year.

Thank you again for your continued support.

Sincerely,



Elissa B. Haynes
2021-22 YLD President

Memorandum to: Members, Executive Committee
From: Paula Frederick
Date: April 22, 2022
Re: Revisions to pending rule change, Rule 1.2 Comment 9

The Board of Governors approved the following proposed amendment to Comment 9 of Rule 1.2 at the Spring 2020 meeting:

**Rule 1.2. Scope of Representation and Allocation of Authority
Between Client and Lawyer**

[9] Paragraph (d) prohibits a lawyer from knowingly counseling or assisting a client to commit a crime or fraud. A lawyer's knowledge may be inferred from the circumstances. See Rule 1.0 (m). Knowledge of the fact in question may be shown by actual knowledge or deliberate ignorance. This prohibition, however, does not preclude the lawyer from giving an honest opinion about the actual consequences that appear likely to result from a client's conduct. Nor does the fact that a client uses advice in a course of action that is criminal or fraudulent of itself make a lawyer a party to the course of action. There is a critical distinction between presenting an analysis of legal aspects of questionable conduct and recommending the means by which a crime or fraud might be committed with impunity.

After publication, Bar Counsel filed the proposal with the Court in November 2020. The Court has not yet approved the amendment but Justice Peterson reached out to Bar Counsel to discuss the possibility of rewording it. He has twice met with representatives of the International Trade in Legal Regulation Committee (who originally proposed the amendment). The ITLS Committee has approved a revised version of the proposed amendment and would like to take the proposal to the Board at the Annual Meeting.

**Rule 1.2. Scope of Representation and Allocation of Authority
Between Client and Lawyer**

[9] Paragraph (d) prohibits a lawyer from knowingly counseling or assisting a client to commit a crime or fraud. Depending on the circumstances, deliberate ignorance or willful blindness may

be evidence of actual knowledge. This prohibition, however, does not preclude the lawyer from giving an honest opinion about the actual consequences that appear likely to result from a client's conduct. Nor does the fact that a client uses advice in a course of action that is criminal or fraudulent of itself make a lawyer a party to the course of action. There is a critical distinction between presenting an analysis of legal aspects of questionable conduct and recommending the means by which a crime or fraud might be committed with impunity.

Instead of returning to the Disciplinary Rules & Procedures Committee (which does not meet until June), ITLS asks that the Executive Committee approve this revised amendment so that it can go on the agenda for the Annual Meeting for Board approval. In the meantime Bar Counsel will circulate this memo to the members of the Disciplinary Rules Committee so that they can raise any objection at the Board level.

pjf

1 STANDING BOARD POLICY 600 (CONFLICTS OF INTEREST)

2 POLICY ON CONFLICTS OF INTEREST

3 **Preamble**

4 The State Bar of Georgia is an administrative agency created by the Supreme Court of Georgia
5 for the purposes of: (a) fostering among the members of the State Bar the principles of duty and
6 service to the public; (b) improving the administration of justice; and (c) advancing the practice
7 of law. The State Bar of Georgia and a family of separately organized non-profit organizations
8 (including, without limitation, the Georgia Bar Foundation, Inc., the Institute of Continuing
9 Legal Education ~~in of the State Bar of~~ Georgia, ~~the Georgia Legal Services Program, Inc.,~~ the
10 Commission on Continuing Lawyer Competency, ~~the State Bar of Georgia Foundation, Inc.,~~ and
11 the Lawyers Foundation of Georgia, Inc.) (the "Affiliated Organizations") work together for the
12 benefit of the members of the Bar, the judicial branch of Georgia government, and the public
13 they serve.

14 The Conflicts of Interest Policy of the State Bar of Georgia establishes certain standards
15 regarding conflicts of interest for the following persons: ~~who are elected, appointed, or serve ex~~
16 ~~officio~~-elected State Bar officers; members of the Board of Governors; members of the Bar's
17 Executive Committee; officers and other members of the Executive Committee and Executive
18 Council of the Young Lawyers Division; and employees and staff of the State Bar ("Covered
19 Persons"). This ~~Policy~~-policy is intended to supplement, but not replace, any applicable state or
20 federal laws or regulations applicable to the State Bar of Georgia or its members, ~~and~~ the
21 Georgia Rules of Professional Conduct, and any other ~~ethical~~-rules or obligations governing
22 Georgia lawyers.

23 The purpose of this policy is to ensure that volunteers and staff who are conducting
24 business on behalf of the State Bar of Georgia do so without any undisclosed conflict of interest.
25 This policy discourages any appearance of impropriety or conflict of interest resulting from a
26 Covered Person receiving "kickbacks," gifts, rewards, promotion, or favorable hiring decisions.

27

28 Conflicts of Interest

29 1. When conducting State Bar of Georgia business, Covered Persons must not use their
30 positions with the State Bar for improper personal or financial gain. A Covered Person is
31 required to exercise powers and discharge duties in the interest of the State Bar and/or the
32 Affiliated Organizations, and not in the Covered Person's ~~own~~ interest or ~~in~~ the interest of
33 another entity or person.

34 2.
35 a. A Covered Person is expected to exercise reasonable diligence in identifying and
36 disclosing any conflicting interest, if:

37 i. The Covered Person, a Related Person or Entity is either (a) a party to, ~~or~~
38 (b) has a beneficial interest in, or (c) is so closely linked to a transaction,
39 gift, or favor which is of such financial significance to the Covered
40 Person, Related Person, or Entity as to create a reasonable expectation that
41 such circumstances would exert an influence on the Covered Person's
42 judgment if called to vote upon, approve, or enter into such a transaction,
43 or

44 ~~— To the actual knowledge of the Covered Person a Related Person or entity~~
45 ~~is either (a) a party to, or (b) has a beneficial interest in, or (c) is so closely~~
46 ~~linked to a transaction, gift, or favor, which is of such financial~~
47 ~~significance to the Covered Person as to create a reasonable expectation~~
48 ~~that such circumstances would exert an influence on the Covered Person's~~
49 ~~judgment if called to vote upon, approve, or enter into such a transaction.~~

50 ii. The Covered Person may receive perks or incentives for hiring certain
51 companies not owned by the Covered Person or holding meetings at
52 certain locations or facilities. Perks or incentives can be monetary or any
53 other gratuitous gifts given to the Covered Person.

54 b. "Related Person or Entity" is defined as: (a) ~~your~~ a spouse, domestic partners,
55 close personal relationships such as dating or live-in relationships, and those
56 individuals related ~~to you or your spouse~~ by blood or marriage, including
57 ancestors, parents, children, siblings, grandparents, grandchildren, great-

58 grandchildren, aunts, uncles, nieces, nephews, and the spouses of those relatives,
59 or any household member of your household; (b) entities of which Covered
60 Persons are directors, general partners, agents, or employees, and entities that are
61 under the control of, or under common control with, entities of which Covered
62 Persons are directors, general partners, agents, or employees; (c) individuals who
63 are general partners, principals, or employers of Covered Persons; (d) trusts,
64 estates, incompetents, conservatees, or minors of which Covered Persons are
65 fiduciaries; and (e) trusts and estates of which Related Persons, as defined above,
66 are substantial beneficiaries. However, a Covered Person will not beis not
67 considered to have a close personal or financial relationship with those persons or
68 entities represented by the Covered Person's law firm unless the Covered Person's
69 actions or vote will directly and positively affect a client of his or her firm.

70 3. The performance of simultaneous governance roles for both the State Bar and an
71 Affiliated Organization, or any of them, shall not in and of itself be deemed to constitute
72 conflicting interests or ~~to~~ give rise to conflicting interest transactions.

73 4. A Covered Person shall disclose any conflicting of interest to the officer or chairperson
74 the entire deliberative body at a meeting immediately presiding over the business of the
75 Bar before the deliberative body considers and votes on the issue to which the conflict
76 may relate. A Covered Person with a disclosed conflict of interest may remain in the
77 room or location where the deliberative body is conducting business and may answer
78 questions or provide comments. However, such a Covered Person may not vote on the
79 issue that is the subject of the conflict of interest. The Covered Person's attendance shall
80 continue to count toward the number of members needed to establish a quorum.

81 4.5. If a Covered Person does not wish to disclose the nature of the conflict of interest, the
82 Covered Person shall declares a conflict of interest to the entire deliberative body and
83 exusesexcuse themselves from the room ofr the location of the meeting until the
84 members have resolved the issue. A Covered Person who declares a conflict of interest
85 without disclosing the nature of the conflict cannotmay not remain in the room or
86 location of the deliberations or participate by answering questions or providing
87 comments. The Covered Person's attendance shall continue to count toward the number
88 of members needed to establish a quorum.

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7 of law. The State Bar of Georgia and a family of separately organized non-profit organizations
8 (including, without limitation, the Georgia Bar Foundation, Inc., the Institute of Continuing
9 Legal Education of the State Bar of Georgia, the Commission on Continuing Lawyer
10 Competency, the State Bar of Georgia Foundation, Inc., and the Lawyers Foundation of Georgia,
11 Inc.) (the "Affiliated Organizations") work together for the benefit of the members of the Bar, the
12 judicial branch of Georgia government, and the public they serve.

13 The Conflicts of Interest Policy of the State Bar of Georgia establishes certain standards
14 regarding conflicts of interest for the following persons: elected State Bar officers; members of
15 the Board of Governors; members of the Bar's Executive Committee; officers and other members
16 of the Executive Committee and Executive Council of the Young Lawyers Division; and
17 employees and staff of the State Bar ("Covered Persons"). This policy is intended to supplement,
18 but not replace, any applicable state or federal laws or regulations applicable to the State Bar of
19 Georgia or its members, the Georgia Rules of Professional Conduct, and any other rules or
20 obligations governing Georgia lawyers.

21 The purpose of this policy is to ensure that volunteers and staff who are conducting
22 business on behalf of the State Bar of Georgia do so without any undisclosed conflict of interest.
23 This policy discourages any appearance of impropriety or conflict of interest resulting from a
24 Covered Person receiving "kickbacks," gifts, rewards, promotion, or favorable hiring decisions.

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27

28 **Conflicts of Interest**

- 29 1. When conducting State Bar of Georgia business, Covered Persons must not use their
30 positions with the State Bar for improper personal or financial gain. A Covered Person is
31 required to exercise powers and discharge duties in the interest of the State Bar and/or the
32 Affiliated Organizations, and not in the Covered Person's interest or the interest of
33 another entity or person.
- 34 2.
- 35 a. A Covered Person is expected to exercise reasonable diligence in identifying and
36 disclosing any conflicting interest, if:
- 37 i. The Covered Person, a Related Person or Entity is either (a) a party to, ~~or~~
38 (b) has a beneficial interest in, or (c) is so closely linked to a transaction,
39 gift, or favor which is of such financial significance to the Covered
40 Person, Related Person, or Entity as to create a reasonable expectation that
41 such circumstances would exert an influence on the Covered Person's
42 judgment if called to vote upon, approve or enter into such a transaction,
43 or
- 44 ii. The Covered Person may receive perks or incentives for hiring certain
45 companies not owned by the Covered Person or holding meetings at
46 certain locations or facilities. .
- 47 b. "Related Person or Entity" is defined as (a) a spouse, domestic partner, or live-in
48 relationship, and those individuals related by blood or marriage, including
49 ancestors, parents, children, siblings, grandparents, grandchildren, great-
50 grandchildren, aunts, uncles, nieces, nephews, and the spouses of those relatives,
51 or any household member; (b) entities of which Covered Persons are directors,
52 general partners, agents, or employees, and entities that are under the control of,
53 or under common control with, entities of which Covered Persons are directors,
54 general partners, agents, or employees; (c) individuals who are general partners,
55 principals, or employers of Covered Persons; (d) trusts, estates, incompetents,
56 conservatees, or minors of which Covered Persons are fiduciaries; and (e) trusts
57 and estates of which Related Persons, as defined above, are substantial

58 beneficiaries. However, a Covered Person is not considered to have a close
59 personal or financial relationship with those persons or entities represented by the
60 Covered Person's law firm unless the Covered Person's actions or vote will
61 directly and positively affect a client of his or her firm.

62 3. The performance of simultaneous governance roles for both the State Bar and an
63 Affiliated Organization, or any of them, shall not in and of itself be deemed to constitute
64 conflicting interests or give rise to conflicting interest transactions.

65 4. A Covered Person shall disclose any conflict of interest to the entire deliberative body at
66 a meeting before the deliberative body considers and votes on the issue to which the
67 conflict may relate. A Covered Person with a disclosed conflict of interest may remain in
68 the room or location where the deliberative body is conducting business and may answer
69 questions or provide comments. However, such a Covered Person may not vote on the
70 issue that is the subject of the conflict of interest. The Covered Person's attendance shall
71 continue to count toward the number of members needed to establish a quorum.

72 5. If a Covered Person does not wish to disclose the nature of the conflict of interest, the
73 Covered Person shall declare a conflict of interest to the entire deliberative body and
74 excuse themselves from the room or the location of the meeting until the members have
75 resolved the issue. A Covered Person who declares a conflict of interest without
76 disclosing the nature of the conflict may not remain in the room or location of the
77 deliberations or participate by answering questions or providing comments. The Covered
78 Person's attendance shall continue to count toward the number of members needed to
79 establish a quorum.

80



State Bar of Georgia

To: Bar Officers
Finance Committee

From: Ron Turner RWT

Date: April 27, 2022

Re: March 2022 Financial Statements-Bar Operations and Bar Center

Attached please find the March 2022 financial statements. These financial statements are presented at a summary level for clarity and to convey overall trends. Full departmental detail is attached at year-end (6/30) and upon request.

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

New and revised items are highlighted in bold.

Savings will be realized in each department to offset these overages.

Office of General Counsel and Client Assistance Program

Subscriptions and books is in excess of the budget by **\$4,973** primarily due to the purchase of Shepard's Georgia Citations **in the amount of \$5,165**. The Bar does not know exactly when a new bound set will come out, but when they do the Bar purchases them. This purchase was not included in the original budget.

Computer software exceeded the budget by \$2,421 primarily due to (1) the purchase of Adobe VIP Acrobat Pro for the department and (2) the purchase of licenses for voting software to be used in voting at various meetings. These overages are because these expenditures were not originally budgeted.

Contract special master are \$1,297 in excess of the budget primarily due to the payment of approximately \$8,800 related to one individual case. The amount associated with this case was not anticipated to be this significant when the budget was originally prepared.

Communications

Costs for the website server/redesign are \$918 in excess of the budget due to certain website server costs incurred by other departments that have not been charged to those departments as of the end of February. After we obtain appropriate documentation, those departments were billed in **April and will be reflected in the April financial statements.**

Law Practice Management

Postage and freight costs have exceeded the budget due to increase in postage costs to send our resource materials. We have adjusted the cost to be charged to the member to more closely match the actual postage costs incurred to mail the resource materials. In addition, we have offered to email the information to the member at no additional cost.

Tifton

Taxes and benefits have exceeded the budget by **\$2,934** primarily due to the cost of health insurance for the office manager. The previous office manager had health insurance coverage through another source. As such, she did not need coverage through the Bar and there was no cost. The current office manager has health coverage through the Bar.

Costs incurred for computer hardware are \$1,776 in excess of the budget due to the purchase of emergency equipment for the firewall. This overage is because this expenditure was not originally budgeted.

High School Mock Trial

Law Academy expenses have exceeded the budget by \$963. This overage is primarily due to being consistent with COVID and other safety protocols, we used more hotel rooms to place two students to a room instead of the normal three to four students to a room.

Fastcase

Total costs for Fastcase exceeded the budget by \$2,738 due to an increase greater than anticipated in the number of members along with an increase in the price per member.

Conference Center

Furniture and equipment is over budget by \$672 due to the purchase of a lectern. This purchase was not included in the original budget.

Other Bar Center Operations

Audio Video exceeded the budget by \$650 due to the purchase of projector bulbs. This purchase was not originally budgeted.

Building rehab costs incurred have exceeded the budget by **\$26,080**. This overage is due to the following items: (1) an amount incurred of \$1,128 was due to the repair of a broken window in the security center (2) an additional amounts incurred \$16,666 in costs associated with the security office and (3) costs of **\$8,285** associated with additional building costs for tenant improvements on the second floor. Georgia Legal Services agreed in principal to a new five-year lease and the Bar agreed to make certain tenant improvements for them. We anticipate making additional tenant improvements for this space over the next two to three months. These expenditures were not originally anticipated.

Parking

Payroll taxes and workers' compensation were both in excess of the budget by \$1,221 and \$1,480, respectively. These overages are due to additional salary costs associated with special event parking. Due to the pandemic, it was uncertain as the number of events that would take place downtown in which the parking garage would be utilized. More events have taken place than what was originally anticipated and there has been a larger volume of cars in the parking garage.. As such, an additional parking attendant was added. Corresponding with this increase in expenses, special event parking revenue is also in excess of the amount originally budgeted. While salaries did not exceed the budget as of the end of March, it is anticipated that by the end of April, such salary costs will also be in excess of the budget.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately \$85,900. This is a positive variance. This number will fluctuate throughout the year.

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

cc: Damon Elmore
Paula Frederick
Sarah Coole

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2022

	Year Ending	Year To Date	Year Ending
	06/30/2021 Actual	March 31, 2022 Actual	06/30/2022 Annual Budget
Membership Numbers			
Active Members	40,611	41,154	40,800
Inactive Members	8,459	8,262	8,560
Provisional Members	28	32	200
Associates/Affiliates	15	14	12
Foreign Legal Consultants	7	6	6
Students	344	406	360
Emeritus	3,434	3,690	3,300
Total Membership Numbers	52,898	53,564	53,258
Revenue			
Dues Active	10,242,211	10,417,350	10,363,200
Dues Inactive	1,115,041	1,079,696	1,089,660
Dues Provisional	32,004	16,129	25,400
Dues Associates	1,350	1,300	1,200
Dues Foreign Legal Consultant	1,270	1,524	1,524
Dues Late Fees	66,060	278,995	67,000
Dues NSF Check Fee	180	80	200
Dues Prior Years	6,309	6,572	5,000
Total License and Dues	11,464,425	11,801,646	11,553,184
Program Registration Income	4,464,018	4,197,348	3,782,858
Section Expense Reimbursement	187,835	188,676	188,676
CSF Expense Reimbursement	73,000	54,749	73,000
Advertising and Sales	47,225	41,848	59,400
Membership Income	167,079	114,328	140,050
Credit Card Processing Fees	50,754	50,034	90,000
Interest Income	213,145	(7,591)	293,156
Miscellaneous Revenues	490	467	8,000
Total Bar Revenue	16,667,971	16,441,505	16,188,324
Total Bar Expenses	14,134,578	10,200,031	16,375,506
SBG Net Gain (Loss)	\$ 2,533,393	\$ 6,241,474	\$ (3,334,444)
			% of Budget
			100.87 %
			96.29 %
			100.00 %
			116.67 %
			100.00 %
			112.78 %
			111.82 %
			100.57 %
			100.52 %
			99.09 %
			63.50 %
			108.33 %
			100.00 %
			416.41 %
			40.00 %
			131.44 %
			102.15 %
			110.96 %
			100.00 %
			75.00 %
			70.45 %
			81.63 %
			55.59 %
			(2.59) %
			5.85 %
			101.56 %
			62.29 %
			(3,334.44) %

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

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2022

	Year Ending	Year To Date		Year Ending
	06/30/2021	March 31, 2022	Actual	06/30/2022
	Actual			Annual Budget
Total Bar Center Operations Revenue	2,663,244	1,162,575		2,529,300
Total Bar Center Operations Expenses	2,163,117	1,605,884		2,309,152
Total Bar Center Operations Net Gain (Loss)	\$ 500,127 \$	(443,309)	(201.37) % \$	220,148
Combined Revenue	19,331,215	17,604,080		18,717,624
Combined Expenses	16,297,695	11,805,914		18,684,658
Total Combined Net Income (Loss)	\$ 3,033,520 \$	5,798,166	17,588.32 % \$	32,966

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

State Bar of Georgia
Total Bar Center Operations
Revenues and Expenditures - Executive Summary
For the Year To Date Period Ending March 31, 2022

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts							
Bar Center Assessments	0	0.00 %	350	0.00 %	0	(350)	100
Conference Center Copier	0	0.00 %	0	0.00 %	500	500	0
Gain/Loss Investment Interest Allocation	(214,495)	0.00 %	(280,439)	0.00 %	0	280,439	(51,762)
CCLC Contributions to Bar Center	0	0.00 %	500,000	39.22 %	1,275,000	775,000	1,291,495
Interest Income	29,307	31.18 %	84,075	89.44 %	94,000	9,925	97,965
Bar Center Income and Cash Receipts	\$ (185,188)	(13.52) %	\$ 303,986	22.20 %	\$ 1,369,500	\$ 1,065,514	\$ 1,337,798
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	5,421	20.08 %	25,387	94.03 %	27,000	1,613	30,561
Investment Service Fees	7,673	47.96 %	18,129	113.31 %	16,000	(2,129)	16,866
Conference Center Renovations	0	0.00 %	12,911	71.73 %	18,000	5,089	36,792
Museum and 1st Floor Exhibit	0	0.00 %	0	0.00 %	3,000	3,000	300
Audio Video, Furniture and Equipment	0	0.00 %	650	0.00 %	0	(650)	16,317
Building Rehabilitation	5,786	0.00 %	26,080	0.00 %	0	(26,080)	70,622
Bar Center Expenses and Cash Disbursements	18,880	29.50 %	83,157	129.93 %	64,000	(19,157)	171,458
Bar Center Combined Net Cash Flow	\$ (204,068)	(15.63) %	\$ 220,829	16.92 %	\$ 1,305,500	\$ 1,084,671	\$ 1,166,340
Conference Center Income and Expenses							
Room Rentals and Various Charges	1,289	11.21 %	4,149	36.08 %	11,500	7,351	0
Conference Center Operating Expenses	42,917	9.86 %	308,744	70.94 %	435,223	126,479	383,815
Conference Center Combined Net Cash Flow	\$ (41,628)	9.82 %	\$ (304,595)	71.89 %	\$ (423,723)	\$ (119,128)	\$ (383,815)
Rental Income and Expenses							
Rental Income	76,456	7.97 %	723,477	75.38 %	959,800	236,323	1,301,083
Building Operating Expenses	112,100	7.10 %	1,007,650	63.80 %	1,579,359	571,709	1,481,971
Rental Combined Net Cash Flow	\$ (35,645)	5.75 %	\$ (284,172)	45.87 %	\$ (619,559)	\$ (335,387)	\$ (180,888)
Parking Income and Expenses							
Parking Income	18,128	9.62 %	130,963	69.48 %	188,500	57,537	24,363
Parking Deck Operating Expenses	24,291	10.54 %	206,333	89.49 %	230,570	24,237	125,872
Parking Combined Net Cash Flow	\$ (6,163)	14.65 %	\$ (75,370)	179.15 %	\$ (42,070)	\$ 33,300	\$ (101,509)
Total Bar Center Operations Net Gain (Loss)	\$ (287,504)	(130.60) %	\$ (443,309)	(201.37) %	\$ 220,148	\$ 663,457	\$ 500,127

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

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2022

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 10,417,350	\$ 10,363,200	100.52 %	\$ 10,242,211
Dues - Inactive	1,079,696	1,089,660	99.09 %	1,115,041
Dues - Provisional	16,129	25,400	63.50 %	32,004
Dues - Misc. Types	2,824	2,724	103.67 %	2,620
Dues - Late Fees	285,647	72,200	395.63 %	72,549
Total Dues & Licenses	11,801,646	11,553,184	102.15 %	11,464,425
Program Registration Income	4,197,348	3,782,858	110.96 %	4,464,018
Section Expense Reimbursement	188,676	188,676	100.00 %	187,835
CSF Expense Reimbursement	54,749	73,000	75.00 %	73,000
Advertising and Sales	41,848	59,400	70.45 %	47,225
Membership Income	55,703	68,250	81.62 %	70,354
Pro Hac Vice	341,625	313,000	109.15 %	411,725
Pro Hac Vice Contra	(283,000)	(241,200)	117.33 %	(315,000)
Credit Card Processing Fees	50,034	90,000	55.59 %	50,754
Interest Income	(7,591)	293,156	(2.59) %	213,145
Miscellaneous Revenues	467	8,000	5.85 %	490
Total Revenues	16,441,505	16,188,324	101.56 %	16,667,971
Expenses				
Administration	1,777,608	2,511,998	70.76 %	2,463,115
General Counsel	3,047,351	4,277,317	71.24 %	4,081,949
Communications	549,155	854,097	64.30 %	745,962
Lawyer's Assistance Program	63,750	85,000	75.00 %	85,000
Fee Arbitration	402,638	579,905	69.43 %	548,940
Law Practice Management	270,880	472,299	57.35 %	408,396
Sections	138,123	188,676	73.21 %	187,292
Savannah Office	195,270	268,805	72.64 %	263,175
Tifton Office	98,870	140,777	70.23 %	129,140
Young Lawyers	232,464	410,304	56.66 %	276,040
Unauthorized Practice of Law	634,090	867,115	73.13 %	834,443
Law Related Education	234,031	372,417	62.84 %	288,293
High School Mock Trial	98,062	164,409	59.65 %	116,482
ICLE	1,840,761	3,802,496	48.41 %	2,434,549

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2022

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	159,162	212,216	75.00 %	212,216
Fastcase	267,738	265,000	101.03 %	253,598
Officers' Expenses	14,336	101,809	14.08 %	29,781
BASICS Program Contribution	0	0	0.00 %	37,500
Resource Center Contribution	55,166	55,166	100.00 %	110,332
Total Other Expenses	206,450	745,700	27.69 %	720,120
Unallocated Services	(85,874)	0	0.00 %	(91,746)
Total Expenses	10,200,031	16,375,506	62.29 %	14,134,578
Net Income	\$ 6,241,474	\$ (187,182)	(3,334.44) %	\$ 2,533,393

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2022

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Other Expenses				
BOG and Member Meetings	\$ 48,882	\$ 395,000	12.38 %	\$ 347,883
Supreme Court Meetings	14,753	40,000	36.88 %	15,549
Executive Committee Meetings	36,666	50,000	73.33 %	7,091
State Disciplinary Board Lawyers	15,688	20,000	78.44 %	31,888
Electronic Ballots	11,728	34,000	34.49 %	34,898
Dues Notice	4,604	34,000	13.54 %	27,904
Letters of Good Standing	1,963	2,500	78.52 %	2,073
Bar Membership Cards	7,097	10,500	67.59 %	7,895
50 Year Certificates	1,826	2,700	67.66 %	2,033
Membership Database Project	0	0	0.00 %	12,605
Recruitment Costs	0	0	0.00 %	74,934
State Bar Committees	2,862	20,000	14.31 %	7,491
Georgia Diversity Program	10,000	10,000	100.00 %	20,000
ABA Delegate Breakfast	0	2,500	0.00 %	0
1st Floor Office Furniture Project	0	0	0.00 %	15,137
1st Floor Painting	0	3,000	0.00 %	0
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	30,636	75,000	40.85 %	70,759
Investment Service Fees	17,246	44,000	39.19 %	39,480
Total Other Expenses	\$ 206,451	\$ 745,700	27.69 %	\$ 720,120

State Bar of Georgia
Status and Use of Cash and Investments as of March 31, 2022

Cash and Investments - March 31, 2022 - Bar **32,431,427**

Less:

Georgia Bar Foundation Cash Included in Above Amount (6,520)
 CCLC Cash and Investments Included in Above Amount (5,324,586)

Net Cash Available for State Bar **27,100,321**

Use of Cash:

Less:

Board Designated - See Separate Schedule Attached (8,813,174)
 Temporarily Restricted - See Separate Schedule Attached (2,292,428)

Total Board Designated and Temporarily Restricted **(11,105,602)**

Other - Cash Allocated:

Collection of Outstanding Accounts Receivable 141,242
 Payment of Accounts Payable (38,651)
 Payment of Accrued Vacation (691,188)
 Deferred Income (30,725)
 Payment of Credit Card Bill (91,612)
 Payment of Accrued Salary (446,825)
 Payment of Accrued Taxes (34,182)
 Other Accrued Expenses (primarily pension) (524,103)
 Payment to Client Security Fund (1,719,527)
 Operational Expenses for Remaining Bar Year (5,766,087)
 Additional Revenue for Bar Operations (Excluding Bar Center) 0
 Net Amount to be paid to Related Entities (368,272)

Total Other - Cash Allocated **(9,569,929)**

Estimated Cash and Investments - June 30, 2022 - Bar **6,424,790**

Cash and Investments - March 31, 2022 - Bar Center **204,880**

Other Cash Allocated - Bar Center:

Collection of Outstanding Accounts Receivable 25,319
 Payment of Accounts Payable (9,424)
 Deferred Income (23,876)
 Other Accrued Expenses (162,045)
 Additional Revenue for Bar Operations 663,457

Total Other - Cash Allocated - Bar Center **493,431**

Estimated Cash and Investments - June 30, 2022 - Bar Center **698,310**

Total Estimated Cash Balance at June 30, 2022 **7,123,101**

Note: The above schedule reflects the status of cash and investments as of the month end indicated above. There are no other State Bar funds or investments held in any institution that are not included on this schedule.

Also included in the above are the following assumptions: (1) Actual expenses for 2021 - 2022 would be 97.5% of budget. This is for Bar operations only and not Bar Center. (2) Additional revenue for Bar operations is based upon the assumption of achieving additional revenue through June 30, 2022 to equal 100% of the total budgeted revenue. (3) Bar Center would contribute additional cash flow through June 30, 2022 to equal their budget.

State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Year To Date Period Ending March 31, 2022

	June 30, 2019	June 30, 2020	June 30, 2021	March 31, 2022
Board Designated				
Board Designated - General Operations - Bar	2,750,000	2,750,000	2,750,000	2,750,000
Board Designated - General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	52,383
Board Designated - Sections	2,793,142	3,097,034	3,431,439	3,886,771
YLD Meetings	29,717	87,820	116,852	124,020
Total Board-Designated excludes ICLE	\$ 7,872,859	\$ 8,234,854	\$ 8,598,291	\$ 8,813,174
Donor Temporarily Restricted				
Legislative	1,285,674	1,094,092	1,350,873	1,667,339
Law Related Education/Marshall fund	316,570	233,708	231,160	219,118
High School Mock Trial	14,095	15,486	15,482	17,873
Basics Program	67,032	69,517	119,460	103,384
Younger Lawyers	125,032	170,213	115,020	138,281
Lawyers Assistance	32,553	34,698	34,650	34,059
Georgia Diversity Program	18,957	13,596	55,807	52,857
Bar Media Conference	18,697	20,839	21,834	21,150
Justice Hunstein's Portrait	7,813	15,152	25,651	2,299
Law Day	6,356	6,517	6,516	6,312
Access to Justice	1,456	1,493	1,492	1,445
iCivics Program	603	868	0	0
Promote Inclusion	11,120	14,211	13,285	12,698
State Bar of Georgia Foundation	0	100	3,134	1,270
Military Vet Pro Bono	13,854	14,711	14,807	14,343
Total Donor Temporarily Restricted	\$ 1,919,812	\$ 1,705,201	\$ 2,009,171	\$ 2,292,428
Net Board Designated and Donor Temporarily Restricted	\$ 9,792,671	\$ 9,940,054	\$ 10,607,462	\$ 11,105,602

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through March 31, 2022

Dues	2021-22 Dues Season	2020-21 Dues Season	2019-20 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	<u>48,965</u>	<u>48,538</u>	<u>47,964</u>
Active - Number Paid	41,572	41,043	40,379
Inactive - Number Paid	<u>8,558</u>	<u>8,780</u>	<u>8,929</u>
Total Number of Members With Dues Paid	<u>50,130</u>	<u>49,823</u>	<u>49,308</u>
Percent of Total Members With Dues Paid	<u>102.4%</u>	<u>102.6%</u>	<u>102.8%</u>
Number of Members Who Made A Contribution	<u>8,148</u>	<u>8,325</u>	<u>3,704</u>
Percent of Members Who Made A Contribution	<u>16.3%</u>	<u>16.7%</u>	<u>7.5%</u>
Total Contribution Amount	<u>\$ 760,350</u>	<u>\$ 766,123</u>	<u>\$ 322,708</u>
Average Amount Paid	<u>\$ 93</u>	<u>\$ 92</u>	<u>\$ 87</u>

Legislative Contribution Amounts by Dues Year

2021 - 2022	<u>\$ 760,350</u>
2020 - 2021	<u>\$ 766,123</u>
2019 - 2020	<u>\$ 322,708</u>
2018 - 2019	<u>\$ 494,906</u>
2017 - 2018	<u>\$ 546,905</u>
2016 - 2017	<u>\$ 557,991</u>
2015 - 2016	<u>\$ 565,004</u>
2014 - 2015	<u>\$ 640,505</u>
2013 - 2014	<u>\$ 691,736</u>
2012 - 2013	<u>\$ 685,283</u>

Purpose: The purpose of the above schedule is to reflect donations to the Legislative Fund for each period shown. The information reflects the total number of members who have made a contribution along with applicable percentages. The number of members above reflect the members who paid during the dues season indicated above. The dues season does not correspond to the fiscal year but starts in advance of the fiscal year. In addition, if members change status (active, inactive, emeritus, etc), this change will be reflected in the membership counts at month end but will not be reflected in the above schedule.

State Bar of Georgia
Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)
With Contributions Paid Through March 31, 2022

Dues	2021-22 Dues Season	2020-21 Dues Season	2019-20 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	48,965	48,538	47,964
Active - Number Paid	41,572	41,043	40,379
Inactive - Number Paid	8,558	8,780	8,929
Total Number of Members With Dues Paid	50,130	49,823	49,308
Percent of Total Members With Dues Paid	102.4%	102.6%	102.8%
Number of Members Who Made A Contribution	3,647	3,509	3,001
Percent of Members Who Made A Contribution	7.3%	7.0%	6.1%
Total Contribution Amount	\$ 478,287	\$ 436,815	\$ 366,674
Average Contribution Amount	\$ 131	\$ 124	\$ 122

GLSP Contribution Amounts by Dues Year

2021 - 2022	<u>\$ 478,287</u>
2020 - 2021	<u>\$ 436,815</u>
2019 - 2020	<u>\$ 366,674</u>
2018 - 2019	<u>\$ 295,454</u>
2017 - 2018	<u>\$ 312,251</u>
2016 - 2017	<u>\$ 276,487</u>
2015 - 2016	<u>\$ 264,492</u>
2014 - 2015	<u>\$ 255,713</u>
2013 - 2014	<u>\$ 241,362</u>
2012 - 2013	<u>\$ 244,707</u>

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

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

**State Bar of Georgia
Income Statement
From July 1, 2021 Through March 31, 2022**

July 1, 2021 Beginning Balance	\$ 1,350,873
Income:	
Interest Income	19,334
Gain/Loss Investment Interest Allocation	(66,258)
Miscellaneous Income	759,850
Total Income	712,926
Expenditures:	
Staff and Contract Lobbyists	352,974
Grassroots Efforts	6,632
Travel	747
Shared Office Allocation	12,735
Miscellaneous	23,372
Total Expenditures	396,460
Net Donor Temporarily Restricted Balance	\$ 1,667,339

Client Security Fund

**State Bar of Georgia
Summary of Client Security Fund Activity
For the Year To Date Period Ending March 31, 2022**

	2019 June 30	2020 June 30	2021 June 30	March 31, 2022
Fund Balance, Beginning of Year	\$ 1,450,249	\$ 1,031,012	\$ 1,009,586	\$ 1,798,187
Income:				
Interest Income	11,922	13,214	17,568	19,211
Gain/Loss Investment Interest Allocation	4,544	13,064	(9,942)	(64,534)
Client Security Fund Assessments	102,884	85,896	78,279	77,261
Restitution Income	30,451	30,027	23,095	53,706
Total Income	\$ 149,801	\$ 142,201	\$ 109,000	\$ 85,644
Transfer from Others				
Miscellaneous Income	0	388,000	0	0
Operating Transfer In	0	0	1,000,000	0
Total Transfer from Others	\$ 0	\$ 388,000	\$ 1,000,000	\$ 0
Expenses:				
Restricted Expenses	73,000	73,000	73,000	54,750
Client Security Fund Claims Payments	496,038	474,387	238,713	99,619
Bond Premium Amortization	0	2,341	5,630	5,787
Investment Service Fees	0	1,900	3,056	4,148
Total Expenses	\$ 569,038	\$ 551,628	\$ 320,399	\$ 164,304
Net Income	\$ (419,237)	\$ (21,427)	\$ 788,601	\$ (78,660)
Fund Balance, End of Period	\$ 1,031,012	\$ 1,009,586	\$ 1,798,187	\$ 1,719,527

2022-2023 Budget Assumptions

1. Dues at \$260. Information about budget impact of lower increases is also included. Number of members was estimated based upon December 31, 2021 members and estimated additional members based upon the historical passing rate of the Bar exams along with estimated dates of joining the Bar, as well as expected attrition.
2. In the fiscal year 2020-2021, CCLC offered to provide up to \$300,000 of a grant to cover Bar operational expenses. The Bar returned this grant to CCLC and did not use any of it. No such grant is included in the 2022-2023 assumptions.
3. Investment (interest) income, bond amortization premium and investment expenses are based upon the annualization of available actual results. Since investments are not sold but are held until maturity, no gains or losses are budgeted. However, accounting rules dictate that all gains and losses whether realized or not must be recorded.
4. Inflation has been at 5.08% based on Annual CPI—BLS South Region. Salary increases are included at 5%. Expected total impact of salary increases and new position is approximately \$500,000. The last general salary increase occurred in 2019.
5. Vendor quotes or actual contracted amounts used whenever information was available.
6. The Bar does not pay rent to any independent company or organization for the Bar Center in Atlanta. In the fiscal year 2018-2019, the Bar charged itself rent. Rent expense was recognized by the Bar, and rental income was recognized by the Bar Center. This imputed rent transfer from State Bar to Bar Center has been eliminated in all years subsequent to 2018-2019.
7. For building rental income, assumed all tenants in building as of January 1, 2022 will continue to be in building for the 2022-2023 year and that the amount of leased space would be the same.
8. Due to the effects of the pandemic, the parking deck has not been substantially used since March 2020. Assumed that parking operations will begin to return to a more normal operation beginning July 1, 2022.
9. Excludes any income associated with Bar assessments (e.g. Bar Facility (Building Assessment)).
10. Includes the effects of items recommended by the Programs Committee.
11. Includes estimated income of a \$3.00 per transaction credit card convenience fee associated with the payment of the annual dues. This fee is only charged if the member pays by the use of a credit card.
12. Includes officer reimbursement for projected officer slate.
13. Assumes that ICLE has an estimated profit of \$216,900.

State Bar of Georgia
2022-2023 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$260 and Inactive dues \$130 in 2022-2023)
For the Fiscal Year 2022-2023

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Membership Numbers							
Active Members	39,193	39,892	40,611	41,147	40,200	40,800	41,500
Inactive Members	8,838	8,713	8,459	8,243	8,650	8,580	8,175
Provisional Members	0	15	28	31	250	200	185
Associates/Affiliates	13	17	15	13	14	12	12
Foreign Legal Consultants	6	6	7	6	6	6	6
Students	274	362	344	396	400	360	325
Emeritus	2,745	3,127	3,434	3,704	2,950	3,300	3,970
Total Membership Numbers	51,069	52,132	52,898	53,540	52,470	53,258	54,173
Revenue							
Dues Active	9,896,539	10,097,880	10,242,211	10,408,457	10,210,800	10,363,200	10,790,000
Dues Inactive	1,144,650	1,127,351	1,115,041	1,078,089	1,098,550	1,089,660	1,062,750
Dues Provisional	0	2,159	32,004	15,748	31,750	25,400	24,050
Dues Associates	1,400	1,550	1,350	1,250	1,400	1,200	1,200
Dues Foreign Legal Consultant	0	1,524	1,270	1,524	1,524	1,524	1,560
Dues Late Fees	197,730	248,175	66,060	274,670	220,000	67,000	260,000
Dues NSF Check Fee	320	140	180	80	300	200	200
Dues Prior Years	5,550	6,615	6,309	5,943	6,000	5,000	5,000
Total License and Dues	11,246,189	11,485,394	11,464,425	11,785,761	11,570,324	11,553,184	12,144,760
CLE Contributions to SBG	0	0	0	0	300,000	0	0
Program Registration Income	6,380,881	5,852,321	4,464,018	2,552,598	5,530,000	3,782,858	4,150,000
Section Expense Reimbursement	191,196	190,644	187,835	188,676	187,835	188,676	301,403
CSF Expense Reimbursement	73,000	73,000	73,000	48,666	73,000	73,000	73,000
Advertising and Sales	36,716	49,895	47,225	27,590	45,200	59,400	45,600
Membership Income	158,266	129,012	167,079	96,968	121,000	140,050	140,300
Credit Card Processing Fees	0	0	50,754	49,794	0	90,000	102,000
Interest Income	228,618	554,231	213,145	(181,769)	235,000	293,156	230,000
Miscellaneous Revenues	35,234	35,154	490	402	5,900	8,000	6,000
Total Bar Revenue	18,350,100	18,369,651	16,667,971	14,568,676	18,068,259	16,188,324	17,193,063
Total Bar Expenses	18,555,680	15,997,912	14,134,578	8,915,268	17,320,842	16,375,506	17,258,364

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

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State Bar of Georgia Board of Governors Meeting

State Bar of Georgia
2022-2023 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$260 and Inactive dues \$130 in 2022-2023)
For the Fiscal Year 2022-2023

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
SBG Net Gain (Loss)	\$ (205,580)	\$ 2,371,739	\$ 2,533,393	\$ 5,653,408	\$ 747,417	\$ (187,182)	\$ (65,301)
Total Bar Center Operations Revenue	4,042,903	3,241,522	2,663,244	1,251,891	3,231,138	2,529,300	2,487,700
Total Bar Center Operations Expenses	2,500,072	2,589,261	2,163,117	1,407,696	2,680,546	2,309,152	2,356,732
Total Bar Center Operations Net Gain (Loss)	\$ 1,542,831	\$ 652,261	\$ 500,127	\$ (155,805)	\$ 550,592	\$ 220,148	\$ 130,968
Combined Revenue	23,393,003	21,611,173	19,331,215	15,820,567	21,299,397	18,717,624	19,680,763
Combined Expenses	21,055,752	18,587,173	16,297,695	10,322,963	20,001,389	18,684,658	19,615,096
Total Combined Net Income (Loss)	\$ 1,337,251	\$ 3,024,000	\$ 3,033,520	\$ 5,497,604	\$ 1,298,009	\$ 32,966	\$ 65,667

Note: Non-Cash depreciation expenses are excluded from this schedule.
 Created on: 04/19/2022, 8:50 AM EST
 State Bar of Georgia Board of Governors Meeting

**State Bar of Georgia
2022-2023 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2022-2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Bar Center Income and Cash Receipts							
Bar Center Assessments	206,173	1,150	100	350	1,000	0	200
Conference Center Copier	738	506	0	0	850	500	0
Gain/Loss Investment Interest Allocation	23,210	96,937	(51,762)	(65,944)	0	0	0
CCLC Contributions to Bar Center	1,339,560	1,322,797	1,291,495	500,000	1,325,000	1,275,000	1,325,000
Transfer from Operations	628,512	0	0	0	0	0	0
Interest Income	51,941	92,296	97,965	54,768	64,000	94,000	100,000
Bar Center Income and Cash Receipts	\$ 2,250,134	\$ 1,513,686	\$ 1,337,798	\$ 489,174	\$ 1,390,850	\$ 1,369,500	\$ 1,425,200
Bar Center Expenses and Cash Disbursements							
Furniture/Equipment	0	0	0	0	0	0	0
Bond Premium Amortization	0	16,918	30,561	19,966	12,000	27,000	40,000
Investment Service Fees	0	13,312	16,866	10,456	12,000	16,000	22,000
Parking Deck Construction	0	2,510	0	0	0	0	0
Conference Center Contingency	5,780	37	0	0	0	0	0
Conference Center Renovations	93,304	29,299	36,792	12,911	54,400	18,000	0
Museum and 1st Floor Exhibit	0	0	300	0	0	3,000	5,000
Audio Video, Furniture and Equipment	71,666	0	16,317	650	16,000	0	28,000
Building Rehabilitation	84,504	350,650	70,622	20,294	0	0	0
President's Boardroom	2,848	610	0	0	5,000	0	0
Bar Center Expenses and Cash Disbursements	258,102	413,336	171,458	64,277	99,400	64,000	95,000
Bar Center Combined Net Cash Flow	\$ 1,992,032	\$ 1,100,349	\$ 1,166,340	\$ 424,897	\$ 1,291,450	\$ 1,305,500	\$ 1,330,200
Conference Center Income and Expenses							
Room Rentals and Various Charges	16,113	12,284	0	2,860	15,800	11,500	11,500
Conference Center Operating Expenses	429,191	428,618	383,815	265,827	448,526	435,223	463,462
Conference Center Combined Net Cash Flow	\$ (413,078)	\$ (416,335)	\$ (383,815)	\$ (262,967)	\$ (432,726)	\$ (423,723)	\$ (451,962)
Rental Income and Expenses							
Rental Income	1,365,050	1,422,142	1,301,083	647,022	1,447,488	959,800	875,000
Building Operating Expenses	1,493,785	1,477,412	1,481,971	895,549	1,805,430	1,579,359	1,512,300
Rental Combined Net Cash Flow	\$ (128,735)	\$ (55,270)	\$ (180,888)	\$ (248,528)	\$ (357,942)	\$ (619,559)	\$ (637,300)

**State Bar of Georgia
2022-2023 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2022-2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Parking Income and Expenses							
Parking Income	411,606	293,411	24,363	112,835	377,000	188,500	176,000
Parking Deck Operating Expenses	318,992	269,894	125,872	182,042	327,190	230,570	285,970
Parking Combined Net Cash Flow	\$ 92,613	\$ 23,517	\$ (101,509)	\$ (69,207)	\$ 49,810	\$ (42,070)	\$ (109,970)
Total Bar Center Operations Net Gain (Loss)	\$ 1,542,833	\$ 652,261	\$ 500,127	\$ (155,805)	\$ 550,592	\$ 220,148	\$ 130,968

Administration

State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 1,219,504	\$ 1,253,756	\$ 1,306,438	\$ 799,012	\$ 1,283,046	\$ 1,208,183	\$ 1,220,586
Salaries-Hourly PT	441	0	0	0	0	0	0
Overtime	7,404	5,758	4,649	3,456	7,200	7,200	7,200
Taxes and Benefits	342,793	349,917	308,095	208,858	353,815	363,857	362,348
Pension	75,958	94,304	82,416	59,875	97,793	89,813	93,855
Total Personnel Services	1,646,100	1,703,735	1,701,598	1,071,201	1,741,854	1,669,053	1,683,989
Operating Expenses							
Shared Office Allocation	370,460	391,579	388,008	294,320	388,008	441,480	503,989
Postage and Freight	9,052	9,105	4,905	1,497	11,000	4,800	4,800
Printing	375	54	100	0	150	100	100
Supplies	2,720	2,848	1,606	1,714	2,400	2,800	3,200
Telephone	3,600	3,600	3,525	2,850	3,600	3,600	3,600
Subscriptions and Books	374	725	1,791	1,129	650	1,630	3,150
Dues and Memberships	2,519	1,070	1,805	1,125	2,800	1,560	1,560
Licenses and Certifications	0	30	90	0	0	0	0
Seminars and Training	78	189	598	325	2,000	3,900	6,850
Miscellaneous	1,144	1,701	2,689	1,988	2,000	2,500	4,000
Attorney and Staff Travel	39,241	23,020	14,442	10,318	40,650	43,850	43,990
Executive Director Travel	10,990	12,917	5,192	5,111	12,600	9,500	15,000
Luncheons	176	208	205	713	600	500	1,600
Bank Fees	1,853	2,449	20,638	6,230	1,900	10,800	15,000
Credit Card Discount and Fees	207,574	220,620	221,634	127,781	197,000	228,000	250,000
Computer Hardware	3,895	1,713	17,038	4,077	9,800	5,650	0
Computer Software	339	349	523	1,244	900	975	600
Membership Software License	75,242	75,242	75,242	50,828	75,300	75,300	75,300
Contract Programming	2,281	2,687	843	2,219	7,500	6,000	6,000
Total Operating Expenses	731,893	750,106	760,874	513,469	758,858	842,945	938,739
Furniture/Equipment	1,499	1,587	643	0	2,000	0	0
Total Expenses	\$ 2,379,493	\$ 2,455,429	\$ 2,463,115	\$ 1,584,670	\$ 2,502,712	\$ 2,511,998	\$ 2,622,728

OGC & CAP Income Statement Combined

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 2,552,734	\$ 2,605,018	\$ 2,528,063	\$ 1,675,814	\$ 2,552,468	\$ 2,572,436	\$ 2,687,661
Salaries-Hourly PT	27,534	27,623	28,413	16,317	45,933	45,933	47,486
Overtime	4,336	1,010	0	1,145	4,300	4,300	4,300
Taxes and Benefits	646,414	735,833	705,760	415,453	707,067	729,528	728,942
Pension	171,828	180,284	184,345	124,522	186,929	186,783	196,436
Total Personnel Services	3,402,846	3,549,768	3,446,581	2,233,251	3,496,697	3,538,980	3,664,825
Operating Expenses							
Shared Office Allocation	488,333	463,501	450,089	328,280	450,089	492,420	562,142
Postage and Freight	22,588	16,835	13,174	8,344	24,000	15,000	15,000
Printing	863	122	0	0	1,000	500	500
Supplies	7,816	6,716	3,476	7,586	9,800	8,000	12,000
Telephone	2,330	2,530	3,316	2,190	2,100	3,600	3,600
Subscriptions and Books	12,632	14,790	15,121	20,166	22,260	16,000	17,400
Dues and Memberships	9,353	8,040	8,098	6,605	10,000	11,000	11,000
Seminars and Training	6,945	6,582	4,972	3,489	9,400	7,000	7,000
Miscellaneous	1,888	2,365	160	47	3,000	2,000	2,000
Recruitment Costs	0	2,000	0	0	0	0	2,000
Attorney and Staff Travel	51,975	28,046	13,660	4,080	65,849	30,000	50,000
Investigator Travel	1,300	4,745	377	974	5,000	2,500	4,000
Lunches	899	2,298	0	0	1,300	1,300	1,300
Computer Hardware	10,559	16,330	25,807	19,432	12,300	23,950	0
Computer Software	1,875	3,504	1,131	3,422	2,000	1,000	4,000
Contract Labor	10,384	6,938	25	0	4,000	4,000	4,000
Contract Programming	7,429	4,000	20,875	7,687	8,500	8,000	10,000
Receiverships	3,189	5,740	2,662	450	10,000	6,000	6,000
State Disciplinary Board Panel	67,295	27,897	33,470	7,383	75,000	40,000	50,000
Contract Special Master	28,413	14,390	18,153	23,567	40,500	40,000	40,000
Lexis Online	16,262	20,413	19,160	12,025	19,875	21,067	21,488
Total Operating Expenses	752,328	657,782	633,726	455,727	826,798	733,337	823,430
Furniture/Equipment	4,675	22,638	1,642	0	15,000	5,000	5,000
Total Expenses	\$ 4,159,849	\$ 4,230,188	\$ 4,081,948	\$ 2,688,977	\$ 4,338,495	\$ 4,277,317	\$ 4,493,255

Communications

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	279,240	320,305	238,345	158,536	277,262	275,413	269,010
Overtime	887	51	0	714	1,600	1,600	1,600
Taxes and Benefits	104,224	126,056	75,600	49,364	109,061	98,271	92,585
Pension	11,853	18,255	8,235	7,152	15,871	10,728	17,166
Total Personnel Services	396,204	464,667	322,180	215,766	403,794	386,012	380,361
Expenses							
Shared Office Allocation	67,356	79,914	62,081	45,280	62,081	67,920	77,537
Postage and Freight	2,087	1,017	1,289	969	1,500	1,100	1,100
Supplies	951	519	532	124	1,000	1,000	1,000
Telephone	900	900	450	525	900	900	900
Subscriptions and Books	1,934	2,509	3,498	3,073	3,125	6,760	6,920
Dues and Memberships	320	405	405	270	405	405	405
Seminars and Training	1,322	2,465	390	50	5,200	3,500	3,500
Miscellaneous	1,571	1,915	487	53	1,650	1,300	1,300
Attorney and Staff Travel	16,714	7,950	6,092	1,107	17,900	6,900	11,700
Luncheons	2,791	0	0	0	100	100	100
Computer Hardware	246	2,028	5,427	1,358	4,150	1,700	0
Computer Software	1,861	1,816	1,817	1,458	1,600	1,600	1,600
Media Consultants	0	39,263	46,336	16,350	50,000	65,000	50,000
Website Server/R redesign	28,884	32,927	31,502	30,768	29,600	29,850	30,000
Local and Voluntary Bars	494	0	0	0	0	0	0
Membership Certificates	2,420	1,221	2,929	1,421	2,000	2,000	2,000
Subtotal	129,851	174,849	163,235	102,806	181,211	190,035	188,062
Furniture/Equipment	269	500	0	0	0	0	4,600
Subtotal	526,324	640,016	485,415	318,572	585,005	576,047	573,023
Publications							
Bar Journal	273,853	267,415	253,874	180,452	291,000	269,550	276,750
Supplemental Directory	5,746	5,446	6,673	6,353	6,000	6,000	7,300
Special Publications and Printing	0	0	0	0	3,000	2,500	1,500
Total Publications	279,599	272,861	260,547	186,805	300,000	278,050	285,550
Total Communications	805,923	912,876	745,962	505,376	885,005	854,097	858,573

Fee Arbitration

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 264,384	\$ 261,277	\$ 270,971	\$ 180,351	\$ 272,557	\$ 270,053	\$ 283,555
Overtime	641	390	0	49	1,500	1,500	1,500
Taxes and Benefits	97,396	96,887	110,736	73,547	105,314	116,700	123,956
Pension	18,071	18,151	18,592	12,398	18,857	18,597	16,072
Total Personnel Services	380,492	376,705	400,299	266,345	398,228	406,850	425,083
Operating Expenses							
Shared Office Allocation	67,356	63,931	62,081	45,280	62,081	67,920	77,537
Postage and Freight	7,799	4,863	6,954	4,703	8,200	8,200	7,500
Printing	2,617	0	0	0	2,800	2,800	3,000
Supplies	1,537	545	746	798	2,200	1,900	1,900
Subscriptions and Books	326	327	1,346	0	500	1,010	1,010
Dues and Memberships	305	0	305	305	400	400	400
Seminars and Training	68	0	0	0	400	400	400
Miscellaneous	1,233	72	337	617	1,200	1,200	1,200
Attorney and Staff Travel	2	22	0	0	2,500	2,500	2,500
Luncheons	2,802	1,369	0	0	3,400	3,000	3,000
Computer Hardware	0	4,492	3,528	4,077	0	5,925	1,000
Contract Labor	68,000	72,248	72,000	48,000	75,000	75,000	75,000
Contract Programming	100	843	1,344	0	2,000	2,000	2,000
Total Operating Expenses	152,145	148,712	148,641	103,780	160,681	172,255	176,447
Furniture/Equipment	814	844	0	0	550	800	500
Total Expenses	\$ 533,450	\$ 526,262	\$ 548,940	\$ 370,125	\$ 559,459	\$ 579,905	\$ 602,030

Law Practice Management

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Consultation	\$ 1,631	\$ 913	\$ 450	\$ 0	\$ 1,800	\$ 750	\$ 8,000
Publications	534	99	26	0	250	100	100
In-House Training Income	0	0	0	0	150	0	0
Vendor Directory	13,650	18,900	14,150	10,500	8,500	8,000	8,000
Miscellaneous Income	533	1,497	873	798	3,500	250	250
Total Revenues	16,348	21,409	15,499	11,298	14,200	9,100	16,350
Personnel Services							
Salaries	245,895	260,074	237,525	127,481	260,095	260,095	259,727
Overtime	2,486	1,103	0	1,574	2,300	2,300	3,300
Taxes and Benefits	92,452	102,571	95,961	43,886	104,403	105,124	122,631
Pension	14,137	17,096	9,281	11,495	17,353	17,243	14,364
Total Personnel Services	354,970	380,844	342,767	184,436	384,151	384,762	400,022
Operating Expenses							
Shared Office Allocation	67,356	63,931	62,081	45,280	62,081	67,920	77,537
Postage and Freight	1,427	1,184	0	2,222	1,800	750	1,800
Printing	483	1,832	0	0	600	200	600
Supplies	573	1,160	27	347	750	450	1,395
Telephone	0	0	0	0	100	100	100
Subscriptions and Books	8,853	8,451	6,945	4,202	9,700	6,000	6,000
Dues and Memberships	125	485	725	525	1,500	1,000	1,500
Seminars and Training	149	338	1,176	316	500	1,300	1,300
Miscellaneous	68	(80)	0	163	350	350	350
Attorney and Staff Travel	8,137	3,303	3,812	292	10,000	7,850	9,550
Lunches	0	0	0	0	200	150	200
Computer Hardware	1,588	10,216	1,441	4,077	1,000	5,175	0
Computer Software	3,344	4,363	5,161	2,963	5,382	5,392	6,786
Total Operating Expenses	92,703	94,823	81,128	60,387	93,763	96,637	107,118
Total Expenses	447,673	475,667	423,895	244,823	477,914	481,399	507,140
Furniture & Equipment	1,314	0	0	0	0	0	0
Solo and Small Firm	2,862	25,703	0	0	25,000	0	11,000

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Net Income	\$ (429,777)	\$ (428,555)	\$ (408,396)	(233,526)	\$ (438,714)	\$ (472,299)	\$ (479,790)

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 103,115	\$ 102,164	\$ 108,725	\$ 58,362	\$ 108,308	\$ 108,308	\$ 109,900
Overtime	168	0	0	893	500	500	500
Taxes and Benefits	31,806	30,805	32,317	22,381	32,602	31,884	54,825
Pension	6,130	6,033	6,510	4,360	6,539	6,539	6,635
Total Personnel Services	141,219	139,002	147,552	85,996	147,949	147,231	171,860
Operating Expenses							
Shared Office Allocation	33,678	31,966	31,041	22,640	31,041	33,960	38,768
Postage and Freight	0	0	30	13	0	0	0
Supplies	993	0	25	229	1,400	1,000	700
Telephone	900	900	900	450	900	900	900
Subscriptions and Books	0	60	1,898	1,102	0	2,640	2,500
Dues and Memberships	0	135	0	90	150	150	150
Seminars and Training	874	295	0	88	300	300	500
Attorney and Staff Travel	9,240	5,768	4,632	1,762	7,055	7,000	9,450
Luncheons	0	0	0	42	0	0	0
Computer Hardware	904	0	1,414	1,359	1,000	1,700	0
Computer Software	477	363	363	364	365	365	570
Committee Brochures	7,435	6,263	0	6,963	7,500	7,500	7,500
President	38,689	14,683	6,112	3,047	27,813	25,032	23,800
President Elect	23,185	10,391	4,540	2,336	21,277	19,149	18,200
Immediate Past President	19,572	10,896	4,134	1,568	18,065	16,277	14,600
Immed. Past President Carryover	8,511	0	0	0	0	0	0
Treasurer	1,033	929	1,300	0	1,300	1,300	1,300
Secretary	1,032	499	1,300	0	1,300	1,300	1,300
Meetings	52,730	52,730	47,500	47,500	47,500	47,500	47,500
Newsletter	48,181	13,437	890	0	49,500	0	0
Total Operating Expenses	247,434	149,115	106,079	89,553	216,486	166,073	167,738
Committees Activities							
Committees Income	(3,910)	(9,063)	0	(1,470)	(10,000)	(6,000)	(2,000)
Committees Expense	95,893	55,821	22,409	28,400	103,000	103,000	103,000
Total Committees Activities	91,983	46,758	22,409	26,930	93,000	97,000	101,000
Total Expenses	\$ 480,635	\$ 334,875	\$ 276,039	\$ 202,478	\$ 457,435	\$ 410,304	\$ 440,598

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 498,345	\$ 516,948	\$ 514,975	\$ 341,344	\$ 513,002	\$ 523,002	\$ 538,652
Overtime	153	86	0	0	255	255	255
Taxes and Benefits	163,617	181,707	180,188	115,882	181,159	183,336	193,596
Pension	34,710	35,855	35,691	23,852	35,706	35,778	37,231
Total Personnel Services	696,825	734,596	730,854	481,078	730,122	742,371	769,734
Operating Expenses							
Shared Office Allocation	101,034	95,897	93,122	67,920	93,122	101,880	116,305
Postage and Freight	1,107	675	780	654	1,700	800	800
Printing	66	0	0	0	150	100	100
Supplies	397	679	1,969	606	1,500	800	800
Subscriptions and Books	801	750	188	60	500	800	800
Dues and Memberships	775	675	350	400	714	714	714
Seminars and Training	300	300	89	300	500	500	500
Miscellaneous	1,249	1,634	0	310	1,500	1,100	1,100
Attorney and Staff Travel	251	1,240	0	0	1,000	800	800
Investigator Travel	2,310	2,610	1,348	759	5,200	3,750	3,750
Luncheons	600	0	0	0	2,200	1,200	1,200
Computer Hardware	3,125	2,634	2,045	6,794	0	8,500	0
Lexis Online	3,252	4,051	3,699	2,208	3,800	3,800	3,800
Total Operating Expenses	115,267	111,145	103,590	80,011	112,186	124,744	130,669
Total Expenses	\$ 812,093	\$ 845,741	\$ 834,444	\$ 561,090	\$ 842,308	\$ 867,115	\$ 900,403

Savannah Office

State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 81,892	\$ 86,165	\$ 88,154	\$ 61,016	\$ 87,816	\$ 87,816	\$ 94,307
Overtime	179	86	0	0	250	250	250
Taxes and Benefits	49,441	43,755	39,323	29,327	38,800	39,276	53,435
Pension	4,859	3,323	3,355	3,528	5,293	5,293	5,683
Total Personnel Services	136,371	133,329	130,832	93,871	132,159	132,635	153,675
Operating Expenses							
Shared Office Allocation	16,839	15,983	15,520	11,320	15,520	16,980	19,384
Postage and Freight	50	7	30	78	100	100	80
Printing	0	0	0	0	100	100	100
Supplies	1,130	1,557	0	197	1,300	1,300	1,000
Telephone	12,087	13,727	19,429	8,885	15,700	15,000	15,000
Subscriptions and Books	0	0	0	127	0	0	180
Miscellaneous	28	406	57	38	500	500	4,500
Attorney and Staff Travel	1,782	1,249	1,953	0	2,600	2,000	2,000
Parking Savannah	3,414	2,321	2,220	1,480	4,000	3,500	3,000
Luncheons	29	17	0	0	100	100	100
Computer Hardware	905	0	2,583	1,359	3,750	1,700	0
Computer Software	74	74	0	0	90	90	100
Equipment Maintenance	7,077	3,086	1,878	681	4,000	4,000	4,000
Equipment Rental	0	34	0	339	100	100	100
Rent and Utilities	63,917	70,925	83,216	50,997	71,000	83,500	83,500
Facilities Maintenance	4,489	4,521	2,905	1,760	4,500	4,500	4,500
Building and Other Insurance (Not Group)	2,372	2,428	2,553	0	2,600	2,700	0
Total Operating Expenses	114,193	116,335	132,344	77,261	125,960	136,170	137,544
Furniture/Equipment	0	1,752	0	0	0	0	0
Total Expenses	\$ 250,564	\$ 251,416	\$ 263,175	\$ 171,132	\$ 258,119	\$ 268,805	\$ 291,219

Tifton

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Personnel Services							
Salaries	\$ 81,197	\$ 74,230	\$ 46,600	\$ 30,077	\$ 52,000	\$ 52,000	\$ 58,538
Salaries-Hourly PT	16,662	19,090	20,080	13,282	20,408	20,408	21,428
Taxes and Benefits	18,206	12,076	7,549	8,155	6,733	6,733	18,929
Pension	6,510	4,557	1,203	2,901	1,227	4,352	4,806
Total Personnel Services	122,575	109,953	75,432	54,415	80,368	83,493	103,701
Operating Expenses							
Shared Office Allocation	12,629	11,987	11,640	8,490	11,640	12,734	14,538
Postage and Freight	236	479	344	158	300	300	300
Printing	0	65	4	0	0	100	100
Supplies	1,694	1,684	442	1,351	2,000	2,000	2,500
Telephone	13,218	13,655	14,462	5,715	13,300	14,000	14,000
Subscriptions and Books	116	127	99	228	100	100	350
Miscellaneous	0	1	55	34	300	200	200
Attorney and Staff Travel	2,397	1,158	488	75	2,400	2,000	2,500
Luncheons	0	74	0	0	50	50	100
Computer Hardware	0	776	2,828	1,776	2,000	0	0
Computer Software	90	100	0	0	200	200	200
Equipment Maintenance	1,891	1,364	1,534	678	1,700	1,700	1,500
Equipment Rental	0	18	0	337	100	100	100
Rent and Utilities	20,252	19,637	18,990	12,936	21,500	20,300	20,300
Facilities Maintenance	829	346	270	180	1,000	800	1,000
Building and Other Insurance (Not Group)	2,372	2,428	2,552	0	2,600	2,700	0
Total Operating Expenses	55,724	53,899	53,708	31,958	59,190	57,284	57,688
Furniture/Equipment	0	0	0	0	1,000	0	1,100
Total Expenses	\$ 178,298	\$ 163,852	\$ 129,140	\$ 86,373	\$ 140,558	\$ 140,777	\$ 162,489

Law Related Education

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Miscellaneous Income	\$ 209	\$ 162	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0
Total Revenues	209	162	0	0	0	0	0
Personnel Services							
Salaries	195,600	201,770	161,418	113,617	201,317	191,795	211,839
Overtime	10	26	0	0	500	500	500
Taxes and Benefits	90,223	100,103	67,406	42,412	110,016	102,872	118,507
Pension	13,398	13,857	11,452	7,581	13,917	11,372	12,002
Total Personnel Services	299,231	315,756	240,276	163,610	325,750	306,539	342,848
Operating Expenses							
Shared Office Allocation	50,517	47,948	46,561	33,960	46,561	50,940	58,153
Postage and Freight	18	9	14	0	150	100	100
Printing	998	135	0	0	1,000	1,000	500
Supplies	1,385	538	62	735	1,800	1,500	1,200
Subscriptions and Books	33	5	1,126	5	50	390	450
Seminars and Training	522	0	254	0	1,000	1,000	600
Miscellaneous	1,270	502	0	0	1,400	1,000	800
Attorney and Staff Travel	6,732	4,135	0	617	7,600	3,088	5,866
Luncheons	485	0	0	53	150	60	120
Computer Hardware	2,677	928	0	5,354	0	6,800	0
Total Operating Expenses	64,637	54,200	48,017	40,724	59,711	65,878	67,789
Total Expenses	363,868	369,956	288,293	204,334	385,461	372,417	410,637
Net Income	\$ (363,659)	\$ (369,794)	\$ (288,293)	\$ (204,334)	\$ (385,461)	\$ (372,417)	\$ (410,637)

High School Mock Trial

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Miscellaneous Income	\$ 15,753	\$ 565	\$ 198	\$ 40	\$ 600	\$ 600	\$ 400
Total Revenues	15,753	565	198	40	600	600	400
Personnel Services							
Salaries	62,791	65,135	64,887	43,009	64,638	64,638	67,870
Taxes and Benefits	24,659	32,066	34,669	23,060	36,442	36,918	39,248
Pension	3,781	3,848	3,885	2,590	3,885	3,885	4,079
Total Personnel Services	91,231	101,049	103,441	68,659	104,965	105,441	111,197
Operating Expenses							
Shared Office Allocation	16,839	15,983	15,520	11,320	15,520	16,980	19,384
Postage and Freight	861	1,010	1,202	112	900	900	900
Supplies	482	2,753	645	196	850	500	500
Telephone	0	0	0	0	20	0	0
Subscriptions and Books	0	0	604	90	0	400	916
Dues and Memberships	250	200	200	200	200	200	200
Miscellaneous	6	37	3	0	400	400	400
Attorney and Staff Travel	644	586	3,168	770	500	500	1,000
Lunches	396	363	0	145	400	450	400
Computer Hardware	1,062	0	0	1,359	0	1,725	0
Computer Software	0	513	364	472	325	363	0
Total Operating Expenses	20,540	21,445	21,706	14,664	19,115	22,418	23,700
HSMT Events							
Law Academy	3,204	1,256	508	2,963	1,000	2,000	5,335
Regional Competition	10,107	(3,840)	(11,316)	(15,490)	(2,250)	(2,850)	(1,900)
State Competition	13,237	939	65	0	12,500	13,000	15,000
National Competition	12,814	850	2,352	473	16,000	16,000	13,000
District Competition	5,004	6,362	0	0	9,000	9,000	9,000
2019 NHSMT-C-Athens	10,298	423	(76)	0	0	0	0
Total HSMT Events	54,664	5,990	(8,467)	(12,054)	36,250	37,150	40,435
Total Expenses	166,436	128,484	116,680	71,269	160,330	165,009	175,332
Net Income	(150,683)	(127,919)	(116,482)	(71,229)	(159,730)	(164,409)	(174,932)

Institute of Continuing Legal Education

**State Bar of Georgia
Budget Report
For the Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Program Revenue							
Registration Revenue	\$ 6,084,772	\$ 5,803,994	\$ 4,481,405	\$ 2,565,240	\$ 5,500,000	\$ 3,775,000	\$ 4,250,000
Sponsorship	97,718	30,078	0	0	30,000	30,000	0
Program Discounts	0	0	(17,387)	(12,653)	0	(22,142)	(100,000)
Affiliate Contribution	198,391	18,249	0	0	0	0	0
Books	1,226	0	0	0	0	0	0
Other	13,235	2,776	0	0	0	0	0
Exhibitor	750	500	0	0	0	0	0
Total Program Revenue	6,396,092	5,855,597	4,464,018	2,552,588	5,530,000	3,782,858	4,150,000
Total Program Expenditures	3,275,175	1,615,256	503,192	358,727	1,650,000	1,165,456	1,323,650
Net Margin on Programs	3,120,917	4,240,341	3,960,826	2,193,860	3,880,000	2,617,402	2,826,350
Personnel Services							
Salaries Full Time	948,084	1,035,099	982,186	519,287	1,298,606	1,215,652	1,266,287
Salaries Part Time	43,674	33,477	0	0	33,600	30,000	30,000
Temporary Part Time	27,071	0	0	0	30,000	25,000	0
Overtime Pay	21,371	21,167	0	1,932	20,000	15,000	15,000
Taxes and Benefits	302,626	358,029	327,369	136,583	497,833	482,311	548,261
Pension	41,642	63,990	58,136	41,162	78,197	61,743	53,536
Total Personnel Services	1,384,468	1,511,762	1,367,691	698,964	1,958,236	1,829,706	1,913,084
Operating Expenses							
Shared Office Allocation	303,103	303,673	318,166	215,080	318,166	322,620	348,916
Board and Committee Meetings	2,079	873	0	1,042	4,000	3,000	3,000
Dues and Memberships	2,097	1,175	1,260	1,230	4,000	2,500	2,500
Licenses and Certification	731	894	245	501	2,000	1,000	1,000
Seminars and Training	1,346	5,006	3,186	3,574	22,000	15,000	12,000
Attorney and Staff Travel	6,125	10,177	3,729	3,247	15,000	12,500	15,000
Supplies	11,693	11,308	3,100	521	15,000	15,000	15,000
Printing	3,938	567	5	0	2,000	5,000	2,500
Subscriptions and Books	0	943	360	735	1,000	1,500	75,000
Postage and Freight	1,649	714	262	404	1,500	1,000	750
Telephone	9,982	5,164	4,500	2,400	6,500	6,500	7,500
Internet Services	0	2,222	2,183	634	8,000	2,500	2,500
Computer Software	61,537	48,366	34,461	73,163	100,000	95,000	10,000

Institute of Continuing Legal Education

State Bar of Georgia
Budget Report
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	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year To Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Contract Programming	75,345	39,845	16,593	5,644	100,000	95,000	50,000
Computer Hardware	2,963	6,701	18,395	0	60,000	40,000	20,000
Miscellaneous	1,822	2,601	118	0	5,000	3,000	2,500
Professional Fees	0	6,810	0	0	15,000	50,000	12,500
Equipment Maintenance and Rental	5,017	3,773	492	0	8,000	5,000	1,000
Other Business Insurance (Not Group)	28,140	30,050	25,527	0	32,000	0	0
Credit Card Discount and Fees	165,434	157,477	110,817	63,425	152,000	100,000	112,000
Banking Fees	0	14	1,063	8	100	0	1,200
Luncheons	2,445	754	0	111	2,000	2,000	2,000
Recruitment	0	0	0	0	6,500	5,000	2,000
Contract Labor	0	7,931	0	0	3,500	7,500	5,000
Total Operating Expenses	685,446	647,038	544,462	371,719	883,266	790,620	704,366
Furniture and Equipment	0	21,451	0	0	10,000	7,500	5,000
Total Expenses	2,069,914	2,180,251	1,912,153	1,070,683	2,851,502	2,627,826	2,622,450
Net Income Before Other Inc and Exp	1,051,003	2,060,089	2,048,673	1,123,177	1,028,498	(10,424)	203,900
Other Income and Expenses							
Interest Income	114,784	92,060	37,753	9,762	65,000	38,156	30,000
Miscellaneous Revenues	10,305	902	0	0	0	0	0
Bond Premium Amortization	(9,296)	(10,092)	(9,826)	(6,160)	0	0	(7,000)
Investment Service Fees	(8,665)	(9,200)	(9,378)	(6,163)	(10,000)	(9,214)	(10,000)
Total Other Income and Expenses	106,928	73,670	18,549	(2,561)	55,000	28,942	13,000
Net Income	\$ 1,157,930	\$ 2,133,759	\$ 2,067,222	\$ 1,120,616	\$ 1,083,498	\$ 18,518	\$ 216,900

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Other Activities							
SBG President	47,455	14,622	13,871	5,493	48,849	43,964	41,800
SBG President Carryover	16,215	0	0	0	0	0	0
SBG President Elect	29,255	13,419	6,448	750	31,029	27,926	26,500
SBG President Elect Elect	697	0	0	0	2,000	1,800	1,500
SBG Treasurer	2,000	1,958	1,041	1,453	4,000	3,800	3,800
SBG Secretary	2,000	812	2,034	1,843	4,000	3,800	3,800
SBG Immediate Past President	14,360	3,650	6,387	2,860	20,799	18,719	17,800
SBG Immed. Past Pres. Carryover	1,152	0	0	0	0	0	0
SBG Past Past President	3,499	0	0	0	2,000	1,800	1,800
Total Officer's Expenses	116,633	34,461	29,781	12,399	112,677	101,809	97,000
Miscellaneous							
BOG and Member Meetings	487,736	99,990	347,883	48,650	380,000	395,000	471,900
Supreme Court Meetings	42,645	33,553	15,549	14,752	45,000	40,000	30,000
Executive Committee Meetings	39,019	43,333	7,091	28,514	60,000	50,000	40,000
Court of Appeals Meetings	3,636	0	0	0	0	0	0
Southern Conference	374	50,359	0	0	0	0	0
Lawyer's Assistance Program	64,582	63,712	85,000	63,750	85,000	85,000	125,000
Sections	185,181	186,026	187,292	120,831	187,835	188,676	301,403
State Disciplinary Board Lawyers	30,000	30,000	31,887	0	20,000	20,000	30,000
Elections	34,683	34,082	34,898	11,728	39,685	34,000	18,375
Dues Notice	36,947	34,724	27,905	4,604	40,000	34,000	33,000
Letters of Good Standing	3,249	2,526	2,072	1,658	2,900	2,500	2,500
Bar Membership Cards	9,277	9,354	7,895	6,286	11,100	10,500	8,850
50 Year Certificates	1,677	2,076	2,034	1,357	2,000	2,700	2,700
Fastcase	228,521	240,436	253,598	267,738	244,000	265,000	280,000
Membership Database Project	0	12,605	0	0	13,000	0	0
Recruitment Costs	0	74,934	0	0	100,000	0	0
State Bar Committees	25,874	27,113	7,490	2,861	29,000	20,000	29,000
Strategic Plan	40,000	40,000	0	0	0	0	0
Georgia Diversity Program	20,000	20,000	20,000	10,000	20,000	10,000	10,000
Conference Sponsorship	(185)	4,000	0	0	0	0	0
ABA Delegate Breakfast	2,418	2,591	0	0	2,500	2,500	2,500
1st Floor Office Furniture Project	216,568	0	15,137	0	14,100	0	0
1st Floor Painting	49,000	0	0	0	0	0	0
Commitment to Equality Awards	2,500	2,500	2,500	2,500	2,500	3,000	3,000
Organization of Bar Investigators	6,486	0	0	0	0	0	0
Resource Center Contribution	110,332	110,332	110,332	55,166	110,332	55,166	55,166
BASICS Program Contributed	150,000	150,000	37,500	0	37,500	0	0

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019	2019-2020	2020-2021	Year to Date	2020-2021	2021-2022	2022-2023
	Actual	Actual	Actual	February 28, 2022	Annual Budget	Annual Budget	Annual Budget
Bond Premium Amortization	2,959	45,882	70,759	30,753	34,000	75,000	65,000
Investment Service Fees	0	35,836	39,481	33,289	36,000	44,000	36,000
Access to Justice/Pro Bono	0	10,000	0	0	0	0	2,500
Total Miscellaneous	1,793,479	1,278,425	1,393,842	704,437	1,516,452	1,339,542	1,549,394
Pro Bono	212,216	212,216	212,216	141,477	212,216	212,216	212,216
Total Other Activities	2,122,329	1,525,102	1,635,839	858,313	1,841,345	1,653,567	1,858,610
Unallocated Services	(155,077)	(109,558)	(91,746)	(64,089)	(0)	0	0
Grand Total	18,555,680	15,997,912	14,134,578	8,915,268	17,320,842	16,375,506	17,258,364

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Shared Office Overhead							
Telephone	74,787	75,938	62,411	36,833	75,000	48,000	58,000
Computer Software	1,396	4,534	2,951	2,030	4,100	3,000	4,000
Equipment Rental	64,944	46,819	51,442	44,541	65,000	55,000	55,000
Kitchen	21,489	17,036	2,284	8,119	23,000	12,123	23,000
Facilities Maintenance	28,775	16,100	21,951	6,295	34,000	18,000	15,000
Transfer to Bar Center	628,512	0	0	0	0	0	0
Payroll Service	22,897	17,938	14,797	10,287	16,000	15,000	16,000
Audit	25,438	23,722	30,450	19,500	26,000	27,000	28,000
Building and Other Insurance (Not Group)	111,645	110,590	116,931	118,541	113,000	148,000	200,000
Supplies and Printing	44,598	52,895	31,858	28,827	51,000	51,000	55,000
Subtotal	1,024,481	365,572	335,075	274,973	407,100	377,123	454,000
Other Services							
Accounting	403,236	406,840	417,400	337,580	440,410	552,472	524,173
Human Resources	185,997	197,434	192,184	153,270	200,795	248,972	234,543
Mailroom	73,650	77,045	79,090	49,970	78,538	77,179	81,076
Receptionist	136,928	141,792	148,422	95,284	152,817	153,081	156,935
Information Technology	0	587,105	586,374	356,414	570,631	588,543	773,055
Subtotal Other Services	799,811	1,410,216	1,423,470	992,518	1,443,191	1,620,247	1,769,782
Total Shared Office Overhead	1,824,292	1,775,788	1,758,546	1,267,491	1,850,291	1,997,370	2,223,782
Total Allocated Services	(1,979,371)	(1,885,346)	(1,850,291)	(1,331,580)	(1,850,291)	(1,997,370)	(2,223,782)
Unallocated Services	(155,075)	(109,558)	(91,746)	(64,089)	(0)	0	0

**State Bar of Georgia
Budget Template
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Related Organizations Shared							
Office Allocations							
Georgia Bar Foundation	3,500	3,500	3,500	2,333	3,500	3,500	4,000
Continuing Legal Education	96,223	79,914	77,601	56,600	77,602	84,900	67,845
TILPP	38,490	47,948	46,561	22,640	46,560	33,960	29,075
Pro Bono	40,089	36,328	54,577	39,264	54,577	58,896	49,598
Professionalism	3,500	3,500	3,500	2,334	3,500	3,500	4,000
Sections	33,678	31,966	31,041	22,640	31,041	33,960	58,153
Subtotal	215,480	203,156	216,780	145,811	216,780	218,716	212,671
State Bar Departments - Shared							
Office Allocations							
Administration	370,460	0	0	0	0	0	0
Membership	0	79,914	77,601	56,600	77,602	84,900	96,921
Meetings	0	31,966	31,041	22,640	31,040	33,960	38,768
Executives	0	279,699	279,366	215,080	279,366	322,620	368,300
Information Technology	67,356	0	0	0	0	0	0
General Counsel	488,333	463,501	450,088	328,280	450,088	492,420	562,142
Communications	67,356	79,914	62,081	45,280	62,081	67,920	77,537
Fee Arbitration	67,356	63,931	62,081	45,280	62,082	67,920	77,537
Law Practice Management	16,840	15,983	15,520	11,320	15,520	16,980	19,384
Savannah Office	12,629	11,987	11,640	8,490	11,640	12,734	14,538
Tifton Office	33,678	31,966	31,041	22,640	31,041	33,960	38,768
Younger Lawyers	101,034	95,897	93,122	67,920	93,122	101,880	116,305
Unauthorized Practice of Law	50,517	47,948	46,561	33,960	46,561	50,940	58,153
Law Related Education	16,839	15,983	15,520	11,320	15,520	16,980	19,384
High School/Mock Trial	303,103	303,673	318,166	215,079	318,166	322,620	348,916
ICLE	16,839	15,983	0	0	0	0	0
Military Legal Assistance Prog	67,356	63,931	62,081	45,280	62,081	67,920	77,537
Conference Center	16,839	15,983	15,520	11,320	15,520	16,980	19,384
Legislative Program	16,839	15,983	15,520	11,320	15,520	16,980	19,384
Subtotal	1,763,891	1,682,190	1,633,511	1,185,769	1,633,511	1,778,654	2,011,111
Total Allocated Services	\$ 1,979,371	\$ 1,885,346	\$ 1,850,291	\$ 1,331,580	\$ 1,850,291	\$ 1,997,370	\$ 2,223,782

2022-2023 State Bar of Georgia Budget																									
Percentage of Shared Office Overhead Expense																									
	Exec	M/Sup	Memb	OBG	CAP	COM	F.A.	LPM	TF	SAV	YLD	HSMT	UPL	TI/PP	CONF	LRE	LEG	CLE	SEC	KLE	GBF	PB	PROF	Total	BAR
22-23 Emp.	19	2	5	29	0	4	4	4	15	2	2	1	6	15	4	3	1	3.9	3	18	3	3	2	121.5	113.5
%22-23 Emp.	16.64%	1.65%	4.12%	23.87%	0.00%	3.29%	3.29%	3.29%	12.3%	1.65%	1.65%	0.82%	4.94%	12.3%	3.29%	2.47%	0.82%	2.88%	2.47%	14.81%	2.47%	2.47%	1.65%	100.0%	
%22-23 Emp.	16.74%	1.70%	4.41%	25.65%	new data	3.52%	3.52%	3.52%	1.32%	1.70%	1.70%	0.88%	5.23%	1.32%	3.52%	2.64%	0.88%	3.08%	2.64%	15.86%			100.0%		

Conference Center

State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023

	2018-2019		2019-2020		2020-2021		Year to Date February 28, 2022		2020-2021		2021-2022		2022-2023	
	Actual		Actual		Actual				Annual Budget		Annual Budget		Annual Budget	
Revenues														
Room Rentals	500	\$	0	\$	0	\$	0	\$	0	\$	0	\$	0	\$
Set Up Fees	2,765		600		0		0		1,600		0		0	
After Hours Fees	8,225		7,675		0		2,080		8,000		7,000		7,000	
Beverage Service	1,895		2,057		0		0		3,000		2,000		2,000	
Cleaning Fees	1,300		1,052		0		375		2,000		1,500		1,500	
Audio Video Support	1,428		900		0		405		1,200		1,000		1,000	
Total Revenues	16,113		12,284		0		2,860		15,800		11,500		11,500	
Personnel Services														
Salaries	208,261		215,877		215,099		143,964		214,226		214,226		224,938	
Overtime	8,553		8,397		0		1,757		11,500		11,500		11,500	
Taxes and Benefits	72,592		82,217		76,470		51,812		93,055		82,762		87,726	
Pension	12,974		13,420		12,927		9,043		13,614		13,565		14,211	
Total Personnel Services	302,380		319,911		304,496		206,576		332,395		322,053		338,375	
Operating Expenses														
Shared Office Allocation	67,356		63,931		62,081		45,280		62,081		67,920		77,537	
Postage and Freight	0		0		0		1		0		0		0	
Supplies	3,384		2,470		1,039		2,343		3,000		3,000		3,000	
Subscriptions and Books	362		450		8,101		556		300		5,500		6,000	
Seminars and Training	23		0		0		0		0		0		0	
Miscellaneous	726		1,140		95		154		850		850		850	
Conference Center Copier	2,301		0		0		6		1,500		1,800		1,800	
Attorney and Staff Travel	0		0		0		117		0		0		2,000	
Computer Hardware	5,003		929		1,442		3,957		0		5,100		0	
Computer Software	63		0		0		0		100		100		0	
After Hours Security	8,737		6,467		0		95		8,500		7,000		7,000	
Room Turn Around Costs	3,118		1,320		0		0		2,000		1,400		1,400	
Contract Programming	0		125		500		0		0		500		500	
Equipment Maintenance	6,076		3,699		1,850		2,739		6,000		4,000		4,000	
Furniture Repairs and Maintenance	9,837		9,415		469		1,150		9,000		8,000		13,000	
Equipment Rental	0		0		0		443		0		0		0	
Kitchen	8,557		6,570		889		1,363		10,000		8,000		8,000	
Facilities Maintenance	0		0		0		375		0		0		0	
Audio Video	11,050		11,397		0		0		10,000		0		0	
Total Operating Expenses	126,593		107,913		76,466		58,579		114,131		113,170		125,087	

Conference Center

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Total Expenses	428,973	427,825	380,962	265,155	446,526	435,223	463,462
Furniture/Equipment	218	794	2,853	672	2,000	0	0
Net Income	\$ (413,078)	\$ (416,335)	\$ (383,815)	\$ (262,967)	\$ (432,726)	\$ (423,723)	\$ (451,962)

Other Bar Center Operations

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Interest Income	\$ 51,941	\$ 92,295	\$ 97,965	\$ 54,768	\$ 64,000	\$ 94,000	\$ 100,000
Gain/Loss Investment Allocation	23,211	96,938	(51,762)	(65,944)	0	0	0
Bar Center Assessments	206,173	1,150	100	350	1,000	0	200
Transfer from Operations	628,512	0	0	0	0	0	0
CCLC Contributions to Bar Center	1,339,560	1,322,797	1,291,495	500,000	1,325,000	1,275,000	1,325,000
Conference Center Copier	737	506	0	0	850	500	0
Total Revenues	2,250,134	1,513,686	1,337,798	489,174	1,390,850	1,369,500	1,425,200
Operating Expenses							
Bond Premium Amortization	0	16,918	30,561	19,966	12,000	27,000	40,000
Investment Service Fees	0	13,312	16,866	10,456	12,000	16,000	22,000
Parking Deck Construction	0	2,510	0	0	0	0	0
Conference Center Contingency	5,780	37	0	0	0	0	0
Conference Center Renovations	93,304	29,299	36,792	12,911	54,400	18,000	0
Museum and 1st Floor Exhibit	0	0	300	0	0	3,000	5,000
Audio Video, Furniture and Equipment	71,666	0	16,317	650	16,000	0	28,000
Building Rehabilitation	84,504	350,650	70,622	20,294	0	0	0
President's Boardroom	2,848	610	0	0	5,000	0	0
Total Operating Expenses	258,102	413,336	171,458	64,277	99,400	64,000	95,000
Total Expenses	258,102	413,336	171,458	64,277	99,400	64,000	95,000
Net Income	\$ 1,992,032	\$ 1,100,349	\$ 1,166,340	\$ 424,897	\$ 1,291,450	\$ 1,305,500	\$ 1,330,200

Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Income Rental Operations	\$ 1,326,790	\$ 1,422,142	\$ 1,301,083	\$ 647,022	\$ 1,447,488	\$ 959,800	\$ 875,000
Storage Rental Operations	38,260	0	0	0	0	0	0
Total Revenues	1,365,050	1,422,142	1,301,083	647,022	1,447,488	959,800	875,000
Operating Expenses							
Personnel Management Salary	46,518	46,771	46,307	9,346	51,000	51,000	65,000
Administrative Taxes and Benefits	3,431	4,750	5,974	483	7,464	7,464	7,800
Travel	68	61	0	0	630	200	200
Supplies	78	589	94	0	1,500	700	200
Telephone Expense	1,116	1,204	1,156	568	1,200	1,300	1,300
Management Fees	56,480	58,175	59,920	45,604	56,895	56,895	63,000
Tenant Services	0	0	0	0	1,750	0	0
Bank Fees	1,276	1,409	1,416	1,016	1,380	1,400	1,500
R&M Salaries	157,763	165,216	169,689	123,086	167,000	167,000	180,000
R&M Taxes and Benefits	61,008	54,943	63,497	40,007	63,000	63,000	69,000
R&M HVAC	39,610	30,865	74,372	24,687	183,640	63,700	65,000
R&M Plumbing	20,411	17,429	6,841	5,282	11,600	7,600	7,600
R&M Fire/Life Prevention	3,700	2,162	2,052	949	7,000	7,000	5,000
R&M Electrical/Lamps	27,379	24,411	5,491	13,150	29,000	27,000	22,000
R&M Water Treatment	10,273	9,934	9,106	8,211	12,000	11,000	11,000
R&M Life Safety Contract	7,314	5,507	38,015	5,939	9,750	11,550	7,000
R&M Tools/Radios	3,573	3,238	2,660	719	3,000	3,000	3,000
R&M Elevators	27,127	29,450	63,771	15,590	26,000	29,000	30,000
R&M Pest Control	2,336	2,679	2,828	2,376	4,000	3,000	3,000
R&M Rubbish Removal	10,794	10,165	13,695	8,803	14,592	14,500	13,000
R&M Other: Locks and Keys	0	0	43	0	1,000	800	300
R&M Other: General Building	7,120	0	6,695	0	8,000	7,000	7,000
R&M Other: Painting	5,222	12,303	3,027	0	3,340	3,400	3,400
R&M Lobby	0	0	0	0	3,500	3,000	3,000
Uniforms	1,438	54	909	902	2,300	1,550	1,000
Electric	419,986	412,237	310,000	214,070	460,000	420,000	330,000
Water	58,168	52,161	53,960	31,363	60,000	55,000	54,000
Gas	21,460	17,844	29,629	15,403	25,000	23,000	25,000
Security Contract	257,874	254,718	253,815	190,745	328,289	270,000	275,000
Cleaning	188,695	203,947	198,078	94,531	204,000	204,000	186,000
Grounds Supplies and Maintenance	9,193	6,230	3,988	2,987	10,200	9,000	7,000
Insurance	44,374	48,940	54,943	39,732	50,400	56,300	66,000
Total Operating Expenses	1,493,785	1,477,412	1,481,971	895,549	1,805,430	1,579,359	1,512,300

Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Total Expenses	1,493,785	1,477,412	1,481,971	895,549	1,805,430	1,579,359	1,512,300
Net Income	\$ (128,735)	\$ (55,270)	\$ (180,888)	\$ (248,528)	\$ (357,942)	\$ (619,559)	\$ (637,300)

Parking

**State Bar of Georgia
Budget Report
For the Bar Year 2022 - 2023**

	2018-2019 Actual	2019-2020 Actual	2020-2021 Actual	Year to Date February 28, 2022	2020-2021 Annual Budget	2021-2022 Annual Budget	2022-2023 Annual Budget
Revenues							
Monthly Parking Operations	\$ 195,304	\$ 145,608	\$ 7,787	\$ 35,654	\$ 189,000	\$ 94,500	\$ 65,000
Daily Parking Operations	50,866	47,006	848	9,718	53,000	26,500	16,000
Special Events Parking Operations	165,436	100,797	15,728	67,463	135,000	67,500	95,000
Total Revenues	411,606	293,411	24,363	112,835	377,000	188,500	176,000
Operating Expenses							
Salaries	111,925	101,448	55,223	72,973	108,000	84,250	113,000
Payroll Taxes	12,225	10,651	5,798	8,972	11,750	9,050	14,000
Workers' Compensation	10,673	9,638	5,246	8,224	10,100	7,950	12,000
Medical Ins/Benefits	15,985	14,558	7,925	11,834	18,000	13,300	17,500
Signs	492	0	0	0	900	450	450
Uniforms	83	261	0	0	240	120	120
Repairs and Maintenance	30,440	17,956	24,932	18,928	23,000	24,200	30,000
Tickets	0	534	0	0	1,000	500	500
Cell Phone/Beeper	4,742	4,138	3,343	812	8,100	5,300	1,800
Office Expenses	6,833	5,975	7,983	4,598	8,000	6,600	6,900
Invoicing Expenses	3,420	3,420	3,420	2,778	4,400	3,900	4,200
Bank Charges	1,994	2,513	1,472	1,624	2,500	2,500	2,500
Credit Card Fees	3,431	2,074	553	1,879	4,000	2,400	2,700
Garage Insurance	6,170	6,282	6,306	5,603	6,200	6,400	8,400
Business License	650	671	650	176	2,400	1,200	800
Management Fee	4,200	4,200	4,380	2,800	4,200	4,200	4,200
Security	93,626	79,818	(3,240)	38,228	102,000	51,000	57,000
Payroll Processing	2,152	2,560	1,452	1,901	1,900	1,800	2,800
Equipment and Supplies	402	1,159	163	0	1,000	700	700
Miscellaneous	0	0	266	0	0	0	500
Cleaning	4,365	0	0	0	6,400	3,200	3,200
Fire Safety	0	0	0	0	500	250	700
Incentive Management Fees	4,869	2,038	0	712	2,600	1,300	2,000
Total Operating Expenses	318,992	269,894	125,872	182,042	327,190	230,570	285,970
Total Expenses	318,992	269,894	125,872	182,042	327,190	230,570	285,970
Net Income	\$ 92,613	\$ 23,517	\$ (101,509)	\$ (69,207)	\$ 49,810	\$ (42,070)	\$ (109,970)

MOTION

1. That the President be authorized to secure a blanket fidelity bond to cover all officers, employees and other persons handling State Bar funds as is required by Article V, Section 8 of the Bylaws.
2. That the State Bar of Georgia and related entities open appropriate accounts with such banks in Georgia, but excluding any bank that does not participate in the IOLTA Program, and other such depositories as may be recommended by the Finance Committee and/or Investment Committee, and designated by the Executive Committee of the Board of Governors of the State Bar of Georgia, and that the persons whose titles are listed below are authorized to sign an agreement to be provided by such banks and customary signature cards, and that the said banks are hereby authorized to pay or otherwise honor any check drafts, or other orders issued from time to time for debit to said accounts when signed by two of the following: the Treasurer, the President, the President Elect, the Immediate Past President, the Executive Director, the Office Manager and the General Counsel, provided either the President or the Treasurer shall sign all checks or vouchers and that said accounts can be reconciled from time to time by said persons or their designees. The authority herein given is to remain irrevocable so as said banks are concerned until they are notified in writing of such revocation of authority and in writing, acknowledge receipt thereof.
3. That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2021-2022.

**State Bar of Georgia
2023 Election Schedule**

2022

- August Deadline for submission of election schedule for publication in October issue
Georgia Bar Journal
- October Official Election Notice, October Issue *Georgia Bar Journal*
- December 2 Nominating petition package mailed to incumbent Board of Governors
Members and other members who request a package

2023

- January 12-14 Nomination of Officers at Midyear Board Meeting, Westin Buckhead Atlanta,
Atlanta GA
- January 20 Deadline for receipt of nominating petitions for incumbent Board Members
including incumbent nonresident (out of state) members
- Feb 17 Deadline for receipt of nominating petitions for new Board Members
including new nonresident (out of state) members
- March 3 Deadline for write-in candidates for Officer to file a written statement (not less
than 10 days prior to mailing of ballots (Article VII, Section 1 (c))
- March 3 Deadline for write-in candidates for Board of Governors to file a written
statement (not less than 10 days prior to mailing of ballots (Article VII, Section
2 (c))
- March 20 Ballots mailed
- April 21 11:59 p.m. Deadline for ballots to be cast in order to be valid
- April 28 Election service submits results to the Elections Committee
- May 5 Election results reported and made available

State Bar of Georgia

Statement of Investment Policy

~~March 2019~~ November ~~May 2021~~

GENERAL INFORMATION

Entity name: State Bar of Georgia

Description: 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.

Fund's purpose: The Fund consists of reserve assets as well as operating cash, both accumulated primarily from the collection of member dues. Reserve funds are set aside for future needs, while operating cash is expected to be spent within the fiscal year.

SCOPE OF STATEMENT

This Statement of Investment Policy ('Policy') reflects the investment policy, objectives, and constraints of the fund.

To assure continued relevance of the guidelines, objectives, and financial status as established in this statement of investment policy, the State Bar of Georgia plans to review investment policy at least annually.

PURPOSE OF STATEMENT

The State Bar of Georgia sets this statement of investment policy forth in order to:

1. Define and assign the responsibilities of all involved parties.
2. Establish a clear understanding for all involved parties of the investment goals and objectives of Fund assets.
3. Offer guidance and limitations to all Investment Managers regarding the investment of Fund assets.
4. Establish a basis for evaluating investment results.
5. Establish the relevant investment horizon for which the Fund assets will be managed.

The statement is not a binding contract; rather, it is a summary of understanding that provides guidance to all involved parties. It is intended to be sufficiently specific to be meaningful, yet flexible enough to be practical.

DELEGATION OF AUTHORITY

Board of Trustees of State Bar of Georgia

The governing body of the Fund is the Board of Governors ("Board"), who have overall responsibility for Policy. As such, the Board is authorized to delegate certain responsibilities to others. The Board has delegated responsibility for the investment of the Fund's assets to the Investment Committee, which may further delegate certain responsibilities to appropriate experts.

Responsibility of the Board of Trustees

- Approve investment policy.

- Ensure that the costs are appropriate and reasonable in relation to the assets, the purposes of the institution, and the skills available to the institution.
- Make reasonable effort to verify facts relevant to the management and investment of the Fund assets.

Investment Committee

The Board has established the Investment Committee (“Committee”). The Committee is responsible for directing management of Fund assets and monitoring compliance with their policies and guidelines. While the Board bears ultimate responsibility for the Fund, the Committee shall recommend to the Board the general policy for the State Bar of Georgia and shall be responsible for day-to-day guidance, monitoring and oversight.

Responsibility of the Committee

- Develop, review and present a Statement of Investment Policy to the Board.
- Develop, review and recommend the overall asset allocation for the Fund, as well as funding level for each manager or strategy in the Fund.
- Approve the investment allocation of Fund assets, both strategic and potential tactical asset allocation changes.
- Oversee investments made by/through delegated parties to confirm their adherence to the investment guidelines in this IPS.
- Communicate changes, if any, to the investing objectives, to the Investment Management Consultant or other delegated parties servicing the portfolio in whole or in part.
- Review the performance in light of the Fund’s investment objectives.
- Appoint, evaluate and remove investment managers for the assets.
- Appoint, evaluate and remove other service providers, such as Investment Management Consultant and Custodian, that it deems necessary.
- Negotiate compensation arrangements with all service providers; control and account for all investment expenses.
- Receive, review and retain the reports of the investment management consultant, and the custodian and other reports on the financial condition of the Fund.
- Manage and monitor all defined risks in the portfolio with assistance of the Investment Management Consultant.
- Designate an individual staff person with the day-to-day administrative responsibility.
- Report recommendations and conclusions to the Board of Governors.

As such, the Committee is also authorized to delegate certain responsibilities to professional experts in various fields. These include, but are not limited to:

Investment Management Consultant(s)

The Investment Management Consultant’s role is that of a non-discretionary advisor to the Investment Committee of the State Bar of Georgia. Investment advice concerning the investment management of Fund assets will be offered by the Investment Management Consultant, and will be consistent with the investment objectives, policies, guidelines and constraints as established in this statement.

Responsibility of the Investment Management Consultant(s)

- Assist in the development and periodic review of investment policy and objectives.

- Assist in the development and periodic review of asset allocation strategy. Recommend strategic and tactical asset allocation changes within the guidelines of the policy.
- Review the capital markets in light of the Fund's investment objectives.
- Assist in the management and tracking of risks in the portfolio.
- Implement portfolio rebalancing upon direction of the Committee within the guidelines of the policy.
- Assist in compensation negotiations with investment managers, custodians and other service providers. Assist the Investment Committee in the determination, understanding, negotiation and accountability of all Fund investment costs.
- Conduct investment manager searches, make recommendations, provide "due diligence" or research on Investment Managers.
- Provide the performance of the total Fund and Investment Manager(s) to assist the Committee with the ability to determine the progress toward the investment objectives.
- Communicate matters of policy, manager research, and manager performance.
- Communicate matters of policy and investment direction to the investment managers when necessary.
- Review Fund investment history, historical capital markets performance and the contents of this investment policy statement with any newly appointed members of the Committee.
- The Investment Management Consultant must operate without any undisclosed conflict of interest.

Investment Manager(s)

Each Investment Manager will have full discretion to make all investment decisions for the assets placed under its jurisdiction and within guidelines of their stated investment methodology.

Responsibility of the Investment Manager(s)

- Investment managers are required to maintain prudent diversification and manage the risk of their portfolios.
- Discretionary investment management including decisions to buy, sell, or hold individual securities, and to alter asset allocation within the guidelines of their stated methodology.
- Report, on a timely basis, quarterly investment performance results.
- Communicate any major changes to economic outlook, investment strategy, or any other factors that affect implementation of investment process, or the investment objective progress of the Fund's investment management.
- Inform the Investment Management Consultant regarding any qualitative change to investment management organization: Examples include changes in portfolio management personnel, ownership structure, investment philosophy, etc.
- Meet with the Investment Management Consultant and/or Investment Committee as needed.
- The Investment Manager must operate without any undisclosed conflicts of interest.

Custodian(s)

The custodian(s) will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Fund, collect dividend and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The

custodian(s) may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Fund accounts.

Other Professional Experts

Additional specialists such as attorneys, auditors and others may be employed by the Committee to assist in meeting its responsibilities and obligations to administer Fund assets prudently.

GENERAL INVESTMENT PRINCIPLES

1. The Fund shall be invested with the care, skill, prudence, and diligence under the circumstances then prevailing that a prudent man acting in like capacity and familiar with such matters would use in the investment of a fund of like character and with like aims.
2. The Board and Committee understand that risk is present in all types of securities and investment styles and recognize that some risk is necessary to produce long-term investment results that are sufficient to meet the Fund's objectives. However, the investment managers are to make reasonable efforts to control risk, and will be evaluated regularly to ensure that the risk assumed is commensurate with the given investment style and objectives.
3. Investment managers are expected to adhere to the investment management styles for which they were hired. Managers will be evaluated regularly for adherence to investment discipline.

INVESTMENT OBJECTIVES

Fund assets represent reserves, ~~all of which may be spent within the next five years with a time horizon of greater than 10 years,~~ and operating cash, which is planned to be spent within the next twelve months. Therefore, the ~~Fund has a short term investment horizon, and the~~ primary objectives of the Fund shall be:

- **Liquidity** - To ensure the ability to meet all expected or unexpected cash flow needs by investing in securities which can be sold readily and efficiently.
- **Preservation of Capital** - To minimize the probability of loss of ~~principal-purchasing power (inflation-adjusted principal)~~ over the investment horizon. Emphasis is placed on minimizing volatility rather than maximizing return.
- **Income and Growth** - To achieve a balanced return of current income and modest growth of principal.

Asset Allocation:

An estimate of operating cash flows should be provided and updated regularly by the Committee or the CFO to the Investment Management Consultant.

- **Operating Cash** (an amount equal to projected net cash inflows, less projected net cash outflows, over the next twelve months) should be allocated to cash, money market funds, or fixed income securities with maturity or weighted average life (WAL) less than one year.
- **Reserve Assets** (Fund assets in excess of estimated operating cash) may be allocated to equities, and fixed income securities with maturity or WAL up to five years.

Fixed income securities are limited to five year maturity or average expected life.

Fixed income securities at the time of purchase must be rated investment grade (no lower than BBB- / Baa3).

Equity securities are permitted up to 30% of the portfolio, with a target weight of 20%.

~~Currently, equity securities are prohibited.~~

Eligible Investments:

1. Money Market Mutual Funds*
2. Certificates of Deposit
3. Commercial Paper
4. Obligations of the U.S. Treasury, states and their political subdivisions and municipalities
5. Obligations of U.S. Federal Agencies, state agencies and their political subdivisions and municipalities
6. Mortgage-backed securities (MBS) issued by U.S. government agencies or government-sponsored enterprises (GSE).
7. U.S. Corporate Bonds, debentures, or other forms of corporate debt
8. Bonds issued in the U.S. by foreign entities that are traded on U.S. exchanges and in U.S. dollars ("Yankee Bonds")
9. Commercial Mortgage Backed Securities ("CMBS")
10. Asset-Backed Securities ("ABS") and Mortgage-Backed Securities ("MBS") issued by non-governmental entities ("non-agency")
11. Collateralized Mortgage Obligations ("CMO")
12. Common stocks
13. Depository Receipts ("ADRs")
14. Real Estate Investment Trusts ("REITs")
- ~~15.~~ Master Limited Partnerships ("MLPs")
- ~~16.~~ Fixed Income and Equity Mutual Funds and Exchange-Traded Funds (ETFs) registered with the Securities and Exchange Commission of the United States under the Investment Company Act of 1940*

* With respect to the inclusion of mutual funds, exchange-traded funds (ETFs) or commingled vehicles, the Committee understands that the Investment Management Consultant does not have any control over the management or portfolio composition of such funds. While the Investment Management Consultant will use best efforts to recommend funds with investment objectives and policies that, at the aggregate portfolio level, are generally consistent with the IPS restrictions, the Committee understands that individual portfolio holdings may not at all times be consistent with the restrictions.

Prohibited Investments:

- ~~1. Equity investments including mutual funds and exchange traded funds (ETFs)~~
- ~~2.1.~~ Preferred stock and convertible bonds
- ~~3.2.~~ Direct mortgages or privately-held real estate
- ~~4. Real Estate Investment Trusts (REITs)~~

~~5. Master Limited Partnerships (MLPs)~~

~~6.3. Commodities or commodity futures~~

~~7.4. Short sales and margin purchases~~

~~8.5. Oil, gas, mineral or other types of leases~~

~~9.6. Futures, options, and other derivative securities~~

~~10.7. Hedge funds and limited partnerships~~

~~11.8. Auction Rate Bonds~~

SPECIFIC INVESTMENT GOALS

Over a five-year time horizon, it is the return goal of the aggregate Fund assets to exceed U.S. inflation, as measured by the Consumer Price Index (CPI). This investment goal is the objective of the aggregate Fund, and is not meant to be imposed on each investment account (if more than one account is used). The goal of each investment manager, over the investment horizon, shall be to:

1. Meet or exceed the market index, or blended market index, selected and agreed upon by the Committee that most closely corresponds to the style of investment management.
2. Display an overall level of risk in the portfolio that is consistent with the risk associated with the benchmark specified above. Risk will be measured by the standard deviation of returns, as well as other statistical measures such as beta and capture ratios; and portfolio characteristics such as duration, sector positioning, and credit quality.

INVESTMENT POLICIES AND PROCEDURES

Risk

The Committee realizes that there are many ways to define risk. It believes that any person or organization involved in the process of managing the State Bar of Georgia's assets understands how it defines risk so that the assets are managed in a manner consistent with the Fund's objectives and investment strategy as designed in this statement of investment policy. The Committee defines risk as:

- The possibility of downside surprise in investment returns and the permanent loss of capital.

To measure risk for the management of the investment portfolio, a variety of risk characteristics and measures will be considered and evaluated. These risk measurements will be included in the quarterly performance reports. For the basis of comparison, a broad fixed income index is used as the benchmark. The risk benchmark for the total fund is:

- 80% Bloomberg Barclays 1-3 Year Government/Credit Index
- 20% MSCI All Country World Index (net of taxes)

Asset Allocation

The Committee shall invest the Fund using asset allocation that is designed to meet the Fund's liquidity needs and long-term goals. The allocation will be based on the objectives of the Fund set forth in this policy statement.

Due to the need for diversification and the longer funding periods for certain investment strategies, the Committee recognizes that an extended period of time may be required to fully

implement the asset allocation plan. It is expected that market value fluctuations will cause deviations from the target allocations to occur.

The strategic asset allocation outlined in the Asset Allocation Addendum reflects an expected portfolio at the beginning of the fiscal year, as cash receipts build and assets are at their highest level. As a fiscal year progresses, operating cash will be drawn down; towards the end of the fiscal year, operating cash may represent a minimal portion of the portfolio.

The Asset Allocation Addendum utilizes Modern Portfolio Theory with inputs provided and the methodology outlined in the addendum. The purpose and objective of this analysis is to illustrate and compare the risk and return characteristics of the portfolio's strategic asset allocation in line with investment objectives. There are inherent limitations for any analysis predicated on probabilistic forecast of the behavior of the forward capital markets. That being said, the statistical analysis outlined in the appendix does provide valuable insight to the risk and return characteristics of the portfolio.

The strategic asset allocation targets are subject to modification and change based on recommendations from the Investment Management Consultant and approval of the investment committee.

Rebalancing

From time to time, market conditions may cause the Fund's investment in various asset classes to vary from the approved allocation. The investment portfolio will be reviewed quarterly and rebalanced, within guidelines, when any asset class is outside the minimum or maximum policy allocation.

Liquidity

Liquidity is the time to convert a security to cash at little or no loss; maximums are put on each liquidity category based on the overall cash needs of the client. Certain investment strategies have different liquidity characteristics. To better define the liquidity of various investment strategies, the follow definitions will apply:

- Liquid: Marketable securities with daily liquidity or up to one-week, depending on capital market conditions.

SELECTION OF INVESTMENT MANAGERS

The Committee's selection of Investment Manager(s) must be based on prudent due diligence procedures. The Manager selection process should include both quantitative and qualitative characteristics. A qualifying investment manager must be a registered investment advisor under the Investment Advisors Act of 1940 ("Act"), or an entity that qualifies for an exemption under the Act. The Investment Committee will use the services of a qualified Investment Management Consultant to assist in the Manager Selection and evaluation process.

Investment Manager Risk:

Investment managers are required to maintain prudent diversification and manage the risk of their portfolios. The Investment Management Consultant will maintain responsibility for the evaluation of the diversification and risk management of the investment managers and their

continued due-diligence to assure the investment managers are operating according to the stated investment methodology approved by the Investment Management Consultant and Investment Committee. In the evaluation of investment managers, the following risk factors and exposures will be considered but not be limited to the following:

Equity Managers

- Evaluating methodology of security selection and portfolio construction
- Benchmark used for performance evaluation
- Role of manager in the portfolio
- Diversification in economic & geographic sectors
- Diversification in market capitalization

Fixed Income Managers

- Evaluating methodology of security selection and portfolio construction
- Benchmark used for performance evaluation
- Role of manager in the portfolio
- The overall duration and yield of the portfolio in relation to various specific benchmarks
- Diversification in economic sectors
- Diversification in the type of fixed-income securities
- The quality of the Securities
- Allocation to foreign securities

PERFORMANCE MEASUREMENT

Performance reports generated by the Investment Management Consultant shall be compiled quarterly and communicated to the Committee for review. Performance measurement will focus on the evaluation of meeting the specific investment goals identified above.

Investment managers shall be reviewed regularly regarding performance, personnel, strategy, research capabilities, organizational and business matters, and other qualitative factors that may impact their ability to achieve desired investment results.

INVESTMENT POLICY REVIEW

To assure continued relevance of the guidelines, objectives, financial status and capital markets expectations as established in this statement of investment policy, the Committee plans to review investment policy at least annually.

This statement of investment policy is adopted on _____, 2019-2021 by the State Bar of Georgia.

_____	_____
_____	_____
_____	_____
_____	_____

DRAFT

TO: Elizabeth Fite

FROM: Rick Rufolo

CC: Tennell Lockett

RE: Georgia Legal Services Program Board Appointments by the State Bar of Georgia

DATE: May 6, 2022

On May 6, 2022, Georgia Legal Services Program held its annual Board of Directors meeting. Pursuant to the GLSP Bylaws, we are requesting the State Bar of Georgia designate the following representatives to serve as members of the GLSP Board for two-year terms from June 2022-June 2024:

- Seth Bruckner, Atlanta
- Marquetta, Bryan, Atlanta
- Keishan Davis, Tucker
- Laverne Lewis Gaskins, Augusta
- Matthew Howell, Atlanta

Additionally, the GLSP Board elected the following State Bar of Georgia representatives as officers:

- Tennell Lockett, President
- Seth Bruckner, President-Elect
- Laverne Lewis Gaskins, Treasurer
- Matthew Howell, Member-At-Large

Respectfully submitted,

Rick Rufolo

GLSP Executive Director

State Bar of Georgia Officer and Non-Officer Executive Committee Expense and Reimbursement Policy

(As ~~amended~~ amended April 14, 2022, July 17, 2020, by the Executive Committee. Effective upon ratification July 1, 2020.)

OFFICER REIMBURSEMENT POLICY

The President, President-Elect, Treasurer, Secretary and Immediate Past-President of the State Bar of Georgia, as well as the President, President-Elect, Treasurer, Secretary, and Immediate Past-President of the Young Lawyers Division (YLD) of the State Bar of Georgia may be reimbursed for the necessary and reasonable expenses incurred while carrying out official duties, subject to the limitations set forth in this Policy. This policy seeks to strike a balance between the need to provide reimbursement to volunteer bar leaders for some of the out-of-pocket expenses incurred incidental to their service, while recognizing that the source of reimbursement is mandatory fees paid by members to support the scope and purposes of the State Bar of Georgia.

The maximum annual amount for officer reimbursement shall be approved by the Board of Governors as part of the budgeting process. At the end of each Bar year the unspent portion from any officer expense accounts shall revert to the general fund and shall not be available to the officer in subsequent years.

Necessary and reasonable expenses subject to reimbursement pursuant to this Policy specifically include those associated with the following:

Commercial Airfare

- Commercial airfare may be reimbursed at the coach class lowest available rate fare for a reserved seat, including associated baggage fees.
- If the flight time is equal to or greater than two hours, then reimbursement at the economy comfort (or equivalent) rate, including associated baggage fees, is permitted.
- Commercial airfare should be booked as early as practical to ensure fiscal responsibility.

Lodging

- Lodging cost may be reimbursed at an amount not to exceed the highest rate negotiated by the hosting entity for one accommodation at the single or double rate, including resort fees.
- If there is no negotiated rate, then the expense may be reimbursed at a rate not to exceed \$250 \$200 plus applicable taxes and resort fees per night.

Meeting Registration

- Meeting registration, including the cost of additional ticketed events the officer and guest is/are expected to attend, may be reimbursed in full. Children's registration (if a separate registration fee is charged) may be reimbursed for the Annual Meeting opening night event only.
- The cost of entertainment or recreational activities will not be reimbursed (unless part of a preplanned meeting activity), nor will the cost of any continuing legal education course.

Meals

- The cost of meals including related incidentals (~~e-g-e.g.~~ tips for food servers) will be reimbursed via the payment of a per diem. This per diem shall be paid at two times the federal per diem rate for the relevant locale. Per diem payments for meals shall be made in compliance with the federal per diem rate for the location where the officer spends the night. If the officer does not spend the night while traveling on State Bar business, the per diem payment will be based upon the federal per diem rate for the location where the business was conducted. Federal per diem rates provide a total daily meal rate and also a breakdown for the portion of the total daily rate applicable individually to breakfast, lunch and dinner.
- Any officer covered by this policy who is provided a meal(s) as part of an event covered by an event fee otherwise reimbursable under this ~~policy~~-Policy may not be reimbursed for the corresponding meal.

Transportation

- When a ~~private-personal~~ automobile is used, mileage may be reimbursed according to the IRS standard rate in effect at the time of travel, plus tolls and parking.
- Other ground transportation expenses (for example, taxis, public transportation, ride-share services, and rental cars) may be reimbursed in full upon the officer providing documentation showing the expense incurred.

Other

- Base membership dues to the American Bar Association will be reimbursed (not including optional section membership).

Expenses subject to reimbursement pursuant to this Policy are necessary and reasonable expenses incurred while an officer covered by this Policy is attending meetings of the State Bar of Georgia (Annual, Midyear, Board of Governors, Executive Committee and other committees); the American Bar Association; the National Conference of Bar Presidents; the Southern Conference of Bar Presidents; or any other meeting or event where the officer is representing the State Bar of Georgia in an official capacity and is expected to be in attendance. This includes expenses incurred while the officer is conducting a visit to plan any such meeting. Reimbursement will ~~not be made for expenses incurred after an initial~~ only be made for one site visit in advance of a meeting to a particular site or after the execution of a contract for a meeting at a particular site, unless ~~that an additional~~ visit is necessary and approved in advance by both the State Bar of Georgia Executive Director and Treasurer.

Expenses associated with the following are specifically excluded from reimbursement pursuant to this Policy:

- Entertainment expenses;
- Alcoholic beverages;
- Hotel mini-bar or laundry expenses;
- Movie rentals during overnight lodging or flights;
- Private aircraft is capped at the amount otherwise available for commercial airfare or mileage between the destinations traveled as set forth above, to the extent the expense exceeds the greater of the coach class commercial airfare rate of a flight between the destinations traveled or mileage between the destinations traveled, according to the IRS standard rate in effect at the time of travel;

- Lodging at personally owned residences, vacation homes or timeshares (for example, Airbnb), unless such lodging expense is equal to or less than the highest negotiated rate for an accommodation at the host hotel for the meeting or event at which it is incurred;
- Pet-care services;
- Childcare services or children’s programs;
- Spa services;
- Sporting or other recreational activities;
- Charitable or political contributions;
- Expenses related to attendance at any political event;
- Gifts;
- Additional food or groceries purchased outside of the meal reimbursement Policy included herein;
- Except as shown in “Other” above, membership fees or dues of business associated with industry associations or clubs; and
- Continuing legal education fees.

Any reimbursable expense incurred by the spouse or designated guest of an officer may also be reimbursed pursuant to this Policy; provided the expense is incurred at or in conjunction with a meeting, event, or site visit at which the spouse or designated guest’s attendance is customary or otherwise necessary or expected.

EXECUTIVE COMMITTEE MEMBERS (NON-OFFICERS) REIMBURSEMENT POLICY

The Officer Reimbursement Policy as shown above will apply to members of the Executive Committee who are not officers. However, the authorized amount for each non-officer is a maximum amount of \$3,000 per fiscal year. This section will be effective July 1, 2023.

REIMBURSEMENT PROCEDURES (OFFICERS AND NON-OFFICER EXECUTIVE COMMITTEE MEMBERS)

The following procedures shall be used to obtain reimbursement of an expense pursuant to this Policy:

- The reimbursable expense shall be submitted to the Finance Department of the State Bar of Georgia no later than 3045 days after the expense is incurred.
- In no event shall an expense incurred during a particular State Bar of Georgia fiscal year (ending June 30) be reimbursed if it is submitted for reimbursement later than August 15-July 31 of the following State Bar of Georgia fiscal year.
- Reimbursement requests must be submitted on the official State Bar of Georgia reimbursement form, signed by the officer-person requesting reimbursement.
- Unless provided by this Policy, supporting documentation of each expense submitted (for example, receipt, ticket or contract) must accompany the reimbursement form. Credit card statements are not sufficient documentation supporting an expense.
- In no event shall an expense be reimbursed prior to approval by the State Bar of Georgia Executive Director, Chief Financial Officer, and Treasurer.
- In the event of a dispute about whether an expense is subject to reimbursement pursuant to this Policy, an officer/the person may submit a written request to the Executive Committee of

the State Bar of Georgia to determine whether the expense at issue is reimbursable pursuant to this Policy. That determination shall be made by a majority of the non-officer members of the Executive Committee participating and voting. In the event of a tie vote, the reimbursement will be disallowed. A quorum for any such vote shall be at least three non-officer members.

Exceptions to this Policy are permitted, but only upon the unanimous determination by the Executive Director, Treasurer and Chief Financial Officer of the State Bar of Georgia that extenuating circumstances have occurred necessitating the exception.

This Policy is subject to change at any time by action of the Board of Governors of the State Bar of Georgia.

**State Bar of Georgia Officer and Non-Officer
Executive Committee Expense and Reimbursement Policy**

(As amended April 14, 2022, by the Executive Committee. Effective upon ratification.)

OFFICER REIMBURSEMENT POLICY

The President, President-Elect, Treasurer, Secretary and Immediate Past President of the State Bar of Georgia, as well as the President, President-Elect, Treasurer, Secretary, and Immediate Past President of the Young Lawyers Division (YLD) of the State Bar of Georgia may be reimbursed for the necessary and reasonable expenses incurred while carrying out official duties, subject to the limitations set forth in this Policy. This policy seeks to strike a balance between the need to provide reimbursement to volunteer bar leaders for some of the out-of-pocket expenses incurred incidental to their service, while recognizing that the source of reimbursement is mandatory fees paid by members to support the scope and purposes of the State Bar of Georgia.

The maximum annual amount for officer reimbursement shall be approved by the Board of Governors as part of the budgeting process. At the end of each Bar year the unspent portion from any officer expense accounts shall revert to the general fund and shall not be available to the officer in subsequent years.

Necessary and reasonable expenses subject to reimbursement pursuant to this Policy specifically include those associated with the following:

Commercial Airfare

- Commercial airfare may be reimbursed at the lowest available fare for a reserved seat, including associated baggage fees.
- If the flight time is equal to or greater than two hours, then reimbursement at the economy comfort (or equivalent) rate, including associated baggage fees, is permitted.
- Commercial airfare should be booked as early as practical to ensure fiscal responsibility.

Lodging

- Lodging cost may be reimbursed at an amount not to exceed the highest rate negotiated by the hosting entity for one accommodation at the single or double rate, including resort fees.
- If there is no negotiated rate, then the expense may be reimbursed at a rate not to exceed \$250 plus applicable taxes and resort fees per night.

Meeting Registration

- Meeting registration, including the cost of additional ticketed events the officer and guest are expected to attend, may be reimbursed in full. Children's registration (if a separate registration fee is charged) may be reimbursed for the Annual Meeting opening night event only.
- The cost of entertainment or recreational activities will not be reimbursed (unless part of a preplanned meeting activity), nor will the cost of any continuing legal education course.

Meals

- The cost of meals including related incidentals (e.g., tips for food servers) will be reimbursed via the payment of a per diem. This per diem shall be paid at two times the federal per diem rate for the relevant locale. Per diem payments for meals shall be made in compliance with the

federal per diem rate for the location where the officer spends the night. If the officer does not spend the night while traveling on State Bar business, the per diem payment will be based upon the federal per diem rate for the location where the business was conducted. Federal per diem rates provide a total daily meal rate and also a breakdown for the portion of the total daily rate applicable individually to breakfast, lunch and dinner.

- Any officer covered by this policy who is provided a meal(s) as part of an event covered by an event fee otherwise reimbursable under this Policy may not be reimbursed for the corresponding meal.

Transportation

- When a personal automobile is used, mileage may be reimbursed according to the IRS standard rate in effect at the time of travel, plus tolls and parking.
- Other ground transportation expenses (for example, taxis, public transportation, ride-share services, and rental cars) may be reimbursed in full upon the officer providing documentation showing the expense incurred.

Other

- Base membership dues to the American Bar Association will be reimbursed (not including optional section membership).

Expenses subject to reimbursement pursuant to this Policy are necessary and reasonable expenses incurred while an officer covered by this Policy is attending meetings of the State Bar of Georgia (Annual, Midyear, Board of Governors, Executive Committee and other committees); the American Bar Association; the National Conference of Bar Presidents; the Southern Conference of Bar Presidents; or any other meeting or event where the officer is representing the State Bar of Georgia in an official capacity and is expected to be in attendance. This includes expenses incurred while the officer is conducting a visit to plan any such meeting. Reimbursement will only be made for one site visit in advance of a meeting, unless an additional visit is necessary and approved in advance by both the State Bar of Georgia Executive Director and Treasurer.

Expenses associated with the following are specifically excluded from reimbursement pursuant to this Policy:

- Entertainment expenses;
- Alcoholic beverages;
- Hotel mini-bar or laundry expenses;
- Movie rentals during overnight lodging or flights;
- Private aircraft is capped at the amount otherwise available for commercial airfare or mileage between the destinations traveled as set forth above, , according to the IRS standard rate in effect at the time of travel;
- Lodging at personally owned residences, vacation homes or timeshares (for example, Airbnb), unless such lodging expense is equal to or less than the highest negotiated rate for an accommodation at the host hotel for the meeting or event at which it is incurred;
- Pet-care services;
- Childcare services or children's programs;
- Spa services;
- Sporting or other recreational activities;

- Charitable or political contributions;
- Expenses related to attendance at any political event;
- Gifts;
- Additional food or groceries purchased outside of the meal reimbursement Policy included herein;
- Except as shown in “Other” above, membership fees or dues of business associated with industry associations or clubs; and
- Continuing legal education fees.

Any reimbursable expense incurred by the spouse or designated guest of an officer may also be reimbursed pursuant to this Policy; provided the expense is incurred at or in conjunction with a meeting, event, or site visit at which the spouse or designated guest’s attendance is customary or otherwise necessary or expected.

EXECUTIVE COMMITTEE MEMBERS (NON-OFFICERS) REIMBURSEMENT POLICY

The Officer Reimbursement Policy as shown above will apply to members of the Executive Committee who are not officers. However, the authorized amount for each non-officer is a maximum amount of \$3,000 per fiscal year. This section will be effective July 1, 2023.

REIMBURSEMENT PROCEDURES (OFFICERS AND NON-OFFICER EXECUTIVE COMMITTEE MEMBERS)

The following procedures shall be used to obtain reimbursement of an expense pursuant to this Policy:

- The reimbursable expense shall be submitted to the Finance Department of the State Bar of Georgia no later than 30 days after the expense is incurred.
- In no event shall an expense incurred during a particular State Bar of Georgia fiscal year (ending June 30) be reimbursed if it is submitted for reimbursement later than July 31 of the following State Bar of Georgia fiscal year.
- Reimbursement requests must be submitted on the official State Bar of Georgia reimbursement form, signed by the person requesting reimbursement.
- Unless provided by this Policy, supporting documentation of each expense submitted (for example, receipt, ticket or contract) must accompany the reimbursement form. Credit card statements are not sufficient documentation supporting an expense.
- In no event shall an expense be reimbursed prior to approval by the State Bar of Georgia Executive Director, Chief Financial Officer, and Treasurer.
- In the event of a dispute about whether an expense is subject to reimbursement pursuant to this Policy, the person may submit a written request to the Executive Committee of the State Bar of Georgia to determine whether the expense at issue is reimbursable pursuant to this Policy. That determination shall be made by a majority of the non-officer members of the Executive Committee participating and voting. In the event of a tie vote, the reimbursement will be disallowed. A quorum for any such vote shall be at least three non-officer members.

Exceptions to this Policy are permitted, but only upon the unanimous determination by the Executive Director, Treasurer and Chief Financial Officer of the State Bar of Georgia that extenuating circumstances have occurred necessitating the exception.

This Policy is subject to change at any time by action of the Board of Governors of the State Bar of Georgia.



CHIEF JUSTICE’S COMMISSION ON PROFESSIONALISM

Members

The Honorable David E. Nahmias (Chair)
Chief Justice, Supreme Court of Georgia
Atlanta, Georgia

Mr. Michael Scott Boone
Atlanta’s John Marshall Law School
Atlanta, Georgia

Mr. Christopher J. Chan
Eversheds Sutherland (US) LLP
Atlanta, Georgia

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

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

Ms. Elizabeth L. Fite
Rogers & Fite, LLC
Atlanta, Georgia

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

Ms. Rebecca Holmes Liles Grist
Bibb County Solicitor General’s Office
Macon, Georgia

Ms. Elissa Haynes
Freeman Mathis & Gary
Atlanta, Georgia

Mr. Francys Johnson
Davis Bozeman Johnson Law
Statesboro, GA

Mrs. Nekia Hackworth Jones
U.S. Securities & Exchange Commission
Atlanta, GA

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

Mrs. Maria F. Mackay
Watkinsville, Georgia

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

The Honorable Shondeana Crews Morris
Superior Court of DeKalb County
Decatur, Georgia

The Honorable William M. Ray, II
U.S. District Court, Northern District of
Georgia
Atlanta, Georgia

The Honorable Clyde L. Reese III
Court of Appeals of Georgia
Atlanta, Georgia

Mrs. Adwoa Gharthey-Tague Seymour
Cox Enterprises, Inc.
Atlanta, Georgia

Assistant Dean Rita A. Sheffey
Emory University School of Law
Atlanta, Georgia

Mrs. Nicki Noel Vaughan
Northeastern Judicial Circuit Public
Defender’s Office
Gainesville, Georgia

Mrs. LaToya Simone Williams
Houston Circuit Public Defenders Office
Warner Robins, GA

Dr. Monica Willis-Parker
Emory University School of Medicine
Atlanta, Georgia

Supreme Court of Georgia Advisor
The Honorable Justice Shawn Ellen LaGrua
Supreme Court of Georgia
Atlanta, Georgia

Staff
Karlise Y. Grier
Executive Director

TO: Board of Governors of the State Bar of Georgia
FROM: Karlise Yvette Grier
Executive Director, Chief Justice’s Commission on Professionalism
DATE: June 4, 2022
RE: Chief Justice’s Commission on Professionalism

The Chief Justice’s Commission on Professionalism (Commission), the first body of its kind in the nation, was created in 1989 by the Supreme Court of Georgia. The Commission’s primary charge is to enhance professionalism among Georgia’s lawyers and judges. **Chief Justice David E. Nahmias** serves as the current Chair of the Commission. **Justice Shawn Ellen LaGrua** serves as the Supreme Court Advisor to the Commission. A brief update regarding the Commission’s work as of May 2, 2022, is as follows.

COMMISSION MEMBER RETIREMENTS AND APPOINTMENTS

The Commission thanks the Commission members who are retiring from the Commission on June 30, 2022, after the completion of their terms of service as follows: **Judge William M. Ray, II**; **Dr. Monica Willis-Parker**; **Ms. Elizabeth L. Fite** and **Ms. Elissa Haynes**. The State Bar of Georgia’s 2022-2023 President, Sarah (Sally) Brown Akins, has nominated **Ms. Cathy Clark Tyler** to serve an initial three-year term on the Commission, beginning on July 1, 2022, as a layperson representative for the Board of Governors, subject to Board of Governors approval at the Annual Meeting. In addition, the Supreme Court of Georgia has appointed **Judge Steven Daniel Grimberg** to serve on the Commission as a representative of the federal judiciary. **Ms. Sarah B. “Sally” Akins** and **Mr. Ron Daniels** will serve on the Commission ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively. The Commission will also welcome back several Commission member for an additional term. Those members are as follows: **Professor Nathan S. Chapman**, University of Georgia School of Law; **Ms. Molly Barrett Gillis**, The Gillis Law Firm, LLC; and **Judge Shondeana Crews-Morris**, Superior Court of DeKalb County.

Chief Justice David E. Nahmias will complete his service as Chair of the Commission upon his retirement from the Supreme Court of Georgia on July 17, 2022. **Chief Justice-Elect Michael P. Boggs** will become Chair of the Chief Justice’s Commission on Professionalism once he is sworn in as Chief Justice of the Supreme Court of Georgia. The Commission thanks Chief Justice Nahmias for his service to the Commission and looks forward to welcoming Presiding Justice Boggs as our new Chair!

GRANT APPLICATIONS FOR PROGRAMS OR PROJECTS THAT PROMOTE LEGAL PROFESSIONALISM

The Commission anticipates accepting applications electronically for grants to promote legal professionalism from mid-June 2022, until July 15, 2022. Information regarding the Grant Criteria is currently available on the Commission's website at <http://cjcpga.org/grants/>. The Commission will accept grant applications only electronically via its website once the application period opens. Grant funds will be disbursed in January 2023. The Commission awarded four grants in January/February 2022 for programs or projects that promote legal professionalism as set forth in the Commission's Grant Criteria as follows: 1) Judicial Council/Administrative Office of the Courts GA Record Restriction/Expungement Clinics; 2) UGA Foundation/Fanning Institute Horace Johnson Peer Court Initiative; 3) Truancy Intervention Project Georgia, Inc. Cultural Competency for Volunteers; and 4) The Mediation Center of the Coastal Empire Mindful Conflict Management CLE.

GROUP LEADER REGISTRATION FOR LAW SCHOOL ORIENTATIONS

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), and in that role provides administrative support and funding for the Committee's work on the Law School Orientations on Professionalism. The orientations are designed to provide incoming 1Ls with their first introduction to professionalism. Georgia judges and lawyers are invited to serve as "Group Leaders" during the orientations to help students learn the meaning of professionalism and why it is important for them as law students. The sub-committee that is planning the 2022 law school orientation programs is chaired by Mr. Michael Herskowitz, U.S. Attorney's Office, Northern District of Georgia. Four law students assisted in revising the hypothetical problems that will be used in 2022. The law students are as follows: **Mats D. Rosen**, J.D. Candidate, 2022, Atlanta's John Marshall Law School; **Kacey Baine**, J.D. Candidate, 2022, Georgia State University College of Law; **Sara Snowden**, J.D. Candidate, 2022, Mercer University School of Law; **Christopher O. Brock**, J.D. Candidate, 2022, University of Georgia School of Law. Assuming that the law schools are able to hold in-person orientations this year, the TENTATIVE dates for the professionalism orientation sessions are as follows.

- | | |
|--|--------------------------|
| • Atlanta's John Marshall Law School | Saturday, August 6, 2022 |
| • Georgia State University School of Law | To Be Determined |
| • Emory University School of Law | To Be Determined |
| • Mercer University School of Law | Friday, August 12, 2022 |
| • University of Georgia School of Law | Friday, August 12, 2022 |

The Commission will provide Group Leader registration information and other updates about the law school orientations on its website and on its social media platforms and in the State Bar of Georgia's E-News as it becomes available. Please visit <http://cjcpga.org/law-school-orientations-on-professionalism-2022/> to apply to serve as a **Group Leader for the 2022 Law School Orientations on Professionalism**. Group Leaders will be notified if they are selected to serve in mid-July 2022.

FINAL REPORT ON THE MARCH 24, 2022, CLE REGARDING THE SIGNIFICANT LAWYER: THE PURSUIT OF PURPOSE AND PROFESSIONALISM

The Commission held its second **FREE** online CLE for 2022 entitled “*The Significant Lawyer: The Pursuit of Purpose and Professionalism*” on March 24, 2022, from 12:15 p.m. – 1:30 p.m. The special guest presenter was Judge William S. Duffey, Jr. (Retired). In 2018, Judge Duffey retired from the United States District Court for the Northern District of Georgia after serving for 14 years as a federal judge. Prior to becoming a federal judge, he served as the United States Attorney for the Northern District of Georgia and worked as a partner at a large Atlanta law firm. During the CLE, Judge Duffey shared some of the insights he learned during his 45-year career. The Commission hosted the CLE on the Zoom Webinar platform. According to the Zoom report generated for the CLE, the CLE was attended by 1,081 “Unique Viewers.” The Commission reported attendance for 1,075 attorneys to the State Bar of Georgia’s Commission on Continuing Legal Education Department. To view materials from the CLE, please visit: <http://cjcpga.org/032422-cjcp-cle/>.

PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published six times per year. The April 2022 Georgia Bar Journal Professionalism Page, entitled *You Can’t Make This Stuff Up*, is attached hereto as “Exhibit A.”

COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS

The Commission’s Executive Director is available to assist State Bar of Georgia sections, local and voluntary Bar associations, and other law-related organizations with their professionalism CLE programming. Please contact the Commission’s Executive Director if you would like assistance in planning a professionalism CLE program or if you would like to have the Commission’s Executive Director to make a professionalism presentation to your organization. Please contact the Commission’s Executive Director, Karlise Y. Grier, via e-mail at kygrier@cjcpga.org for information or assistance.

COMMISSION WEBSITE AND SOCIAL MEDIA

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

Professionalism 2U: <http://cjcpga.org/2u/>
Twitter: <https://twitter.com/CJCPGA>
LinkedIn: <https://www.linkedin.com/company/cjcpga/>
YouTube: <https://www.youtube.com/user/cjcpga/videos>



You Can't Make This Stuff Up

The next time you hear a presumably far-fetched fact pattern in a professionalism CLE or you wonder why a professionalism presenter is talking about something that is apparently obvious, remember there is a reason why.

BY KARLISE Y. GRIER

Often when I present for professionalism CLE trainings, I use hypothetical problems. There are times when attendees seem to feel that the hypothetical problems are “unrealistic” despite the fact that they are usually taken from real life fact patterns where the names have been changed.

Many times, the hypotheticals I use come from disciplinary cases or from reading the pages of the *Daily Report* or

other legal news. Let's look at a few examples, but before I begin, I want to reiterate the late Justice Harold Clarke's now iconic words regarding the difference between ethics and professionalism. Justice Clarke wrote: “[E]thics is a minimum standard *require* of all lawyers while professionalism is a higher standard *expecte* of all lawyers.”¹ I try to use hypothetical that either ask lawyers to consider the

difference between ethics or professionalism or that ask lawyers to consider the choices they make when aspiring to act with professionalism. So, let's consider a few examples.

In December 2021 and January 2022, I had conversations with two individuals in very distinct areas of practice that informed me they were seeing increased incivility in emails. As a result, I did a search for law-



WWW.GETTYIMAGES.COM/AARONAMAT

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yer email incivility. I was shocked by what I discovered. For example, in a Dec. 11, 2019, *ABA Journal* article, an attorney in California faced sanctions for language he used in emails that made me blush.² Since I train on professionalism, not ethics, I created a hypothetical problem based on this article by cutting and pasting toned-down, non-profane words for some of the actual language the attorney used in his emails. One part of the hypothetical problem I created, however, quoted directly from the article because the attorney facing sanctions told one lawyer in a written email “I know where you live[.]” You can’t make this stuff up. Note that the lawyer who was the subject of the article sent the emails before the COVID-19 pandemic began. Since the pandemic began more than two years ago, I believe we are all a bit more tired and a bit more stressed. My nerves are frayed and I suspect yours are as well. For these reasons, and others, my professionalism trainings, and I hope others, need to discuss more than ever “the basics” of professionalism, which includes civility. Every attorney I speak with during a professionalism training tells me that he or she knows not to put anything in writing that you would not want on the front page of a legal journal. But it happens and we know it happens, otherwise lawyers and judges would not call me to say they are seeing increased incidences of nasty emails. So even though everyone reading this article “knows,” take a moment to absorb the lesson again and think about the things you can do to ensure that your emails remain courteous. Respectfully write what you need to say to articulate your client’s legal position. Then re-read your email to ensure that anything written while you are tired, angry or frustrated is removed. It helps you and it helps your client. (I am making a note to myself to ensure I follow my own advice.)

Lawyers are also sometimes somewhat surprised when I speak to them about the

use of “templates.” So, let’s look at another headline because you can’t make this stuff up. In an article entitled “OK, You Broke Me. I Give Up on Motions in Limine,” Hon. Jane P. Manning, State Court of Cobb County, wrote: “I am routinely cited 19th century caselaw in support of a motion in limine. ... One of the frustrating things about motions in limine before me is that it is readily apparent that the attorneys have not read their own motions.”³

Ouch! Our professionalism aspirations state as a lawyer, I will aspire: “to expeditious and economical achievement of all client objectives.”⁴ This does not extend, however, to saving client’s money by using boilerplate templates that lawyers do not read. Therefore, I encourage lawyers that the next time you use a template as a starting point for whatever legal work you are doing, the overarching goal for all lawyers should be: “I will strive to represent you as I would want to be represented and to be worthy of your trust.”⁵

In conclusion, the next time you hear a presumably far-fetched fact pattern in a professionalism CLE or you wonder why a professionalism presenter is talking about something that is apparently obvious, remember there is a reason why. One reason is because attorneys should—at least once per year—use “A Lawyer’s Creed” and the “Aspirational Statement on Professionalism” to reexamine the justifications of the practice of law in our society and to consider the implications of those justifications for their conduct.⁶ The second reason is because attorneys actually do stuff you would never imagine they would do. You can’t make this stuff up. ●



Karlise Y. Grier
Executive Director
Chief Justice’s Commission
on Professionalism
kygrier@cjcpga.org

Endnotes

1. *Professionalism: Repaying the Debt*, Presiding Justice Harold G. Clarke, *Georgia State Bar Journal*, Vol. 25 No. 4, p. 170-173 (May 1989)(Emphasis in original).
2. See Debra Weiss, *Lawyer who told BigLaw attorneys to... faces possible sanctions*, *ABA Journal, Trials & Litigation* (December 11, 2019), <https://www.abajournal.com/news/article/lawyer-who-told-biglaw-lawyers-to-eat-a-bowl-of-dicks-faces-possible-sanctions> (Last visited Feb. 25, 2022). See also Debra Weiss, *Judge tells lawyer who sent... emails the profession doesn't need him*, *ABA Journal, Trials & Litigation* (December 17, 2019), <https://www.abajournal.com/news/article/this-profession-doesnt-need-you-judge-tells-lawyer-who-sent-bowl-of-dicks-emails> (Last visited February 25, 2022).
3. Jane P. Manning, *OK, You Broke Me. I Give Up on Motions in Limine*, *The Daily Report* (September 10, 2021), <https://www.law.com/dailyreportonline/2021/09/10/ok-you-broke-me-i-give-up-on-motions-in-limine/> (Last visited Feb. 25, 2022).
4. Chief Justice’s Commission on Professionalism, *A Lawyer’s Creed and Aspirational Statement on Professionalism* at Lines 73-74, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> (Last visited Feb. 25, 2022).
5. Chief Justice’s Commission on Professionalism, *A Lawyer’s Creed and Aspirational Statement on Professionalism* at Lines 3-5, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> (Last visited Feb. 25, 2022).
6. Chief Justice’s Commission on Professionalism, *A Lawyer’s Creed and Aspirational Statement on Professionalism* at Lines 42-44, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> (Last visited Feb. 25, 2022).

**APPLICATION TO CREATE AN ATTORNEY WELL-BEING SECTION OF THE
STATE BAR OF GEORGIA**

APPLICATION

Pursuant to Article IX, Section 4 of the State Bar Handbook of the State Bar of Georgia, the 48 undersigned members in good standing of the State Bar of Georgia respectfully request the Board of Governors of the State Bar of Georgia to approve the creation of a new Section of the State Bar of Georgia to be known as the *Attorney Well-Being Section*.

**THE AREA OF LAW OR PRACTICE TO WHICH THE SECTION IS TO BE
DEDICATED**

The Attorney Well-Being Section shall connect attorney well-being to competency and performance by creating programming and resources that place attorney well-being as a critical component to improve the administration of justice from both the bar and bench.

NEED FOR THE PROPOSED ATTORNEY WELL-BEING SECTION

On August 14, 2017, the National Task Force on Lawyer Well-Being, issued a report entitled *The Path to Lawyer Well-Being: Practical Recommendations for Positive Change*. See <https://lawyerwellbeing.net/wp-content/uploads/2017/11/Lawyer-Wellbeing-Report.pdf>. The Lawyer Well-Being Report contained several recommendations that focused on five central themes:

- (1) identifying stakeholders and the role each of us can play in reducing the level of toxicity in our profession,
- (2) eliminating the stigma associated with help-seeking behaviors,
- (3) emphasizing that well-being is an indispensable part of a lawyer's duty of competence,
- (4) educating lawyers, judges, and law students on lawyer well-being issues, and
- (5) taking small, incremental steps to change how law is practiced and how lawyers are regulated to instill greater well-being in the profession.

The Attorney Well-being Section will help to ensure that the bar and the bench have the resources needed from voluntary section membership to provide high-quality and up-to-date programming on attorney well-being issues. In addition, the Attorney Well-being Section is needed to have a dedicated group that will focus the attention of the legal profession on well-being as a critical component to improve the administration of justice from both the bar and bench.

PROPOSED BYLAWS

The proposed Bylaws for the Attorney Well-being Section are attached hereto as **Exhibit A**.

APPLICANTS

The names and addresses of 23 State Bar of Georgia members applying for creation of an Attorney Well-Being Section are set forth below. The names and bar numbers of 25 additional State Bar of Georgia members who support creation of an Attorney Well-Being Section are also set forth.

REQUESTED BOARD ACTION

It is respectfully requested that the Board approve the creation of a new State Bar of Georgia Section to be known as the "Attorney Well-Being Section."

Respectfully submitted,

	Name	Bar #	Address
1	R. Javoyné Hicks	#354420	1180 W. Peachtree St., NE, Suite 1650, Atlanta, GA 30309
2	Shiriki Jones	#140976	255 Ohry Dr. Atlanta GA 30324
3	David Lipscomb	#453650	175 Langley Drive C-1 Lawrenceville GA, 30046
4	Chuck Ross	#615217	P.O Box 1390, Lawrenceville GA, 30040
5	Joyce G. Lewis	#296261	1201 W. Peachtree St., Suite 3250, Atlanta, GA30309
6	Sada Jacobson Baby	#307214	1201 W. Peachtree St., Suite 3250, Atlanta, GA30309
7	Barday Vallotton	#917852	1201 W. Peachtree St., Suite 3250, Atlanta, GA30309
8	Halsey Knapp	#425320	1201 W. Peachtree St., Suite 3250, Atlanta, GA30309
9	Kana Caplan	#621805	1201 W. Peachtree St., Suite 3250, Atlanta, GA30309
10	Justin Chin	#886274	1201 Peachtree St., N.E. 400 Colony Square, Atlanta, GA 30361
11	Elizabeth M. Phrampus	#404661	1075 Peachtree Street NE, Suite 1500, Atlanta, GA 30309
12	Michelle Barclay	#037142	244 Washington St. S.W., Suite 300, Atlanta, GA 30334
13	Candice Devonne McKinley	#253892	2701 N. Decatur Road, Suite 337, Decatur, GA 30033
14	Plamen I. Russev	#621148	1201 W. Peachtree St., N.W. Atlanta, GA 30309
15	Laura Myler	#141309	70 Hayes St., Marietta, GA 30062
16	Megan Murren Rittle	#384595	2200 Keys Ferry Court, McDonough, GA 30253
17	Lynn S Garson	#286825	1170 Peachtree St. NE, Atlanta, GA 30309
18	William J. Monahan	#801028	1800 F St. NW, Washington D.C. 20405
19	Eric Alvin Ballinger	#35829	391 East Main St., Canton, GA, 30114
20	Nicki N. Vaughan	#726051	111 Spring St., Gainesville, GA,30503
21	Jessica Reece Fagan	#596163	3330 Cumberland Blvd., Suite 450, Atlanta, GA, 30339
22	James R Gray Sr.	#306014	340 Richard Way, Athens, GA, 30605
23	Robin Frazer Clark	#274620	101 Marietta St. Suite 101, Atlanta GA 30303

In addition to the foregoing 23 members of the State Bar of Georgia, the following additional 25 members of the State Bar of Georgia also support the creation of a State Bar of Georgia Attorney Well-Being Section:

	Name	Bar #
1	Frank Strickland	#687600
2	Andrew Pinson	#584719
3	Darrell Sutton	#693484
4	Thomas Burnside	#097205
5	Kim Higginbotham	#759310
6	Thomas B. Hammond	#321690
7	Letitia McDonald	#489430
8	Edward Krugman	#429927
9	Tomieka Daniel	#603823
10	Jeff Kuester	#429960
11	Joshua Bosin	#143054
12	Amanda Heath	#829687
13	John Webb	#744349
14	Mark Alexander	#008930
15	Philip C. Smith	#662187
16	Render Heard	#342198
17	Paige Whitaker	#598190
18	Richard Campbell	#106210
19	Craig Stafford	#673885
20	Amanda Flora	#141330
21	V. Sharon Edenfield	#141646
22	Jason W. Swindle Sr.	#695459
23	Michelle West	#748777
24	Karlise Grier	#310500
25	Tomieka Daniel	#603823

EXHIBIT A

Attorney Well-Being Section **BYLAWS**

STATE BAR OF GEORGIA

ARTICLE I

Section 1: The name of this Section shall be the "Attorney Well-Being Section."

Section 2: The purpose of this Section shall be to connect attorney well-being to competency and performance by creating programming and resources that place attorney well-being as a critical component to improve the administration of justice from both the bar and bench. The goal of the section is to improve professionalism while minimizing complaints and disciplinary actions of our members. The Section will normalize well-being in our profession and promote attorney well-being best practices in order to provide the highest level of service to the public across all practice areas while adhering to applicable rules, regulations, and ethical standards.

ARTICLE II

Membership and Dues

Section 1: Each member of this Section shall be a member in good standing of the State Bar. Any member of the State Bar, upon request and payment of annual Section dues of (\$35.00) for the current year, shall be enrolled as a member of this Section. Thereafter, such dues shall be paid in advance each year at the time of the payment of dues to the State Bar. Members so enrolled and whose dues are so paid shall constitute the membership of this Section. Any member whose annual dues shall be more than six (6) months past due thereupon shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues on the current year.

Section 2: The annual Section dues payable by each member of this Section shall be established from time to time by the Executive Committee and approved by the Board of Governors of the State Bar of Georgia.

ARTICLE III

Officers

Section 1: The Officers of the Section shall be a Chairperson, a Vice Chairperson, a Secretary, and a Treasurer, all of whom shall be members in good standing of the Section.

Section 2: Each Officer shall hold office for a one (1) year term beginning at the close of the Annual Meeting of the Section at which the Officer is elected and ending at the close of the next

succeeding Annual Meeting of the Section and until his or her successor shall have been elected and qualified. If a vacancy shall arise in the office of Vice Chairperson, Secretary, or Treasurer, the Chairperson shall appoint a successor for the unexpired term(s). If a vacancy shall arise in the office of Chairperson, the Vice Chairperson shall become Chairperson for the unexpired term. If a vacancy shall arise in the office of the Chairperson and there shall, at the same time, exist a vacancy in the office of Vice Chairperson, the Executive Committee of the Section shall appoint a successor Chairperson and Vice Chairperson for the unexpired terms.

Section 3: The Chairperson shall preside at all meetings of the Section and all meetings of the Executive Committee, appoint appropriate committees of the Section to serve during the Chairperson's term, plan and supervise the program of the Section at its annual meeting, and perform all other executive and administrative duties necessary or proper to the organization and functioning of the Section, including any duty as from time to time may be prescribed by the Section or by the State Bar of Georgia.

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

Section 5: The Secretary shall keep minutes of all meetings of the Section, maintain the permanent records, give notices of meetings and perform such other duties as may be prescribed by the Chairperson.

Section 6: The Treasurer shall maintain the budget of the Section, update the income and expenses of the Section, ensure that the bills of the Section are paid, maintain contact with the Section Liaison of the State Bar of Georgia for purposes of maintaining the budget, and report on the budget at the annual meeting or when otherwise requested by the Chairperson.

Section 7: Upon the organization of the Section, the President of the State Bar of Georgia shall appoint, from among the attorneys filing the application for the creation of the Section, a Chairperson, a Vice Chairperson, a Secretary, and a Treasurer to serve until the close of the next annual meeting of the State Bar of Georgia.

ARTICLE IV

Actions and Meetings of the Section

Section 1: An Annual Meeting of the Section shall be held each year at or about the time and place of the Annual Meeting of the State Bar of Georgia, the date, time, and location to be fixed by the Chairperson.

Section 2: Special Meetings, if any, of the Section may be called by the Chairperson, to be convened at such time and place and with such agenda and order of business as may be fixed by the Chairperson.

Section 3: Ten (10) members of the Section present at any Annual or Special meeting of the Section shall constitute a quorum for the transaction of business. Only members physically or virtually present at an Annual or Special meeting of the Section count towards a quorum.

Section 4: All actions of the Section shall be by a majority vote of the Executive Committee, except for actions of the Section submitted to members of the Section present at any properly called Annual or Special Meeting of the Section which actions shall be by majority vote of the members present and voting. Only members physically or virtually present may vote on Section business at any Annual or Special meeting of the Section.

Section 5: Notice of the date, time, and place of each Annual or Special meeting of the Section shall be given to each member of the Section on the rolls of the Section in the office of the State Bar of Georgia. In the absence of actual notice sent at least ten (10) days in advance of any meeting, written or printed notice sent by United States Mail or by e-mail no less than ten (10) days in advance of such scheduled meeting sent to the member's address or e-mail address on record in the office of the State Bar of Georgia, shall constitute due, adequate, and sufficient notice of such meeting of this Section. Further, any such notice may be included with other written or printed material mailed or e-mailed to all of the members of the State Bar of Georgia or any part thereof which includes all members of the Section and such notice shall also be due, adequate, and sufficient notice of such meeting of this Section.

Section 6: There shall be no voting by proxy at any Annual or Special Meeting of the Section.

ARTICLE VI

Elections

Section 1: Elections for Officers of the Section shall be held once per calendar year at the Annual Meeting of the Section. The members, including Officers, shall nominate one or more members of the Section qualified to hold each of the Offices of the Section for the ensuing terms of Office.

Section 2: The names of all members of the Section nominated for each Office shall be submitted to the Section at large, by United States mail or email. In the event that more than one candidate is nominated for an Office, ballots shall be cast until there shall be a majority of the members of the Section present and voting at the Annual Meeting favoring the election of a designated member to that Office. In the event there is only one candidate for an Office, voting for that Office at the Annual Meeting may be by voice vote.

ARTICLE VII

Finances

Section 1: Funds of the Section shall be deposited in the treasury of the State Bar of Georgia and shall be disbursed by the Treasurer of the State Bar of Georgia to pay bills of the Section which have been approved for payment by any Officer of the Section.

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

Section 3: Officers and members of the Section shall not be compensated for services thereto.

Section 4: A financial report of the funds of the Section shall be rendered at each annual meeting thereof. This Section shall have the same fiscal year as the State Bar of Georgia.

ARTICLE VIII

Miscellaneous

Section 1: The Section shall from time to time conduct programs for the continuing education in the area of attorney well-being, but may coordinate its efforts in this regard with other Sections of the State Bar of Georgia.

Section 2: The Section may from time to time, subject to the Rules, Bylaws and Standing Board policies of the State Bar of Georgia, sponsor, promote, study or review proposed legislation. The Section may from time to time report on its legislative activities to the State Bar of Georgia.

ARTICLE IX

Effective Date and Amendment

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

Section 2: These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, and subsequent approval thereof by the Board of Governors of the State Bar of Georgia.

Signed, sealed and subscribed before the undersigned this the ____ day of _____, 2022.

_____ Witness

CHAIRPERSON

PRESIDENT

SECRETARY

STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2021

STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2021

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INDEPENDENT AUDITOR'S REPORT

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

We have audited the accompanying combined financial statements of the **State Bar of Georgia and related entity** (collectively the "State Bar") (a nonprofit organization), which comprise the combined statements of financial position as of June 30, 2021 and 2020, and the related combined statements of activities, functional expense, and cash flows for the years then ended, and the related notes to the combined financial statements.

Management's Responsibility for the Combined Financial Statements

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

Auditor's Responsibility

Our responsibility is to express an opinion on these combined financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the combined financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the combined financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the combined financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the combined financial statements in order to design audit procedures that are appropriate in the circumstances but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements.

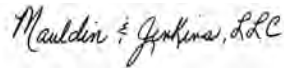
We believe the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of the State Bar as of June 30, 2021 and 2020, and the changes in its net assets and cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Other Matter

Our audit was conducted for the purpose of forming an opinion on the combined financial statements as a whole. The supplemental information on pages 19 through 22 is presented for purposes of additional analysis and is not a required part of the combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined financial statements or to the combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the combined financial statements as a whole.



Atlanta, Georgia
November 18, 2021

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2021 AND 2020

	2021	2020
ASSETS		
Cash and cash equivalents	\$ 17,426,721	\$ 13,905,692
Accounts receivable, net	113,208	126,032
Receivable from related parties	762,130	1,222,128
Receivable from employees	19,258	23,814
Accrued interest receivable	110,960	127,757
Prepaid and other assets	413,039	476,407
Investments, at fair value	17,777,273	17,683,241
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	8,608,423	9,759,299
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,154,364	1,286,993
	\$ 46,385,376	\$ 44,611,363
Total assets		
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 1,316,814	\$ 1,068,050
Accrued salary and retirement plan expense	1,066,483	1,105,781
Payable to Client Security Fund	1,798,187	1,012,046
Payable to related parties	210,661	228,922
Accrued vacation	691,188	663,110
Deferred income - dues and sections	7,572,702	7,819,035
Other deferred income	-	88,198
	12,656,035	11,985,142
Total liabilities		
Net assets		
Without donor restrictions		
Undesignated	2,727,803	5,857,757
Board-designated	28,992,367	25,063,508
Total without donor restrictions	31,720,170	30,921,265
With donor restrictions		
	2,009,171	1,704,956
Total net assets	33,729,341	32,626,221
Total liabilities and net assets	\$ 46,385,376	\$ 44,611,363

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2021

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,464,425	\$ -	\$ -	\$ 11,464,425
Advertising	47,225	-	-	47,225
Membership	217,833	-	-	217,833
Total fees	<u>11,729,483</u>	<u>-</u>	<u>-</u>	<u>11,729,483</u>
ICLE				
Program revenues	4,464,035	-	-	4,464,035
Total ICLE	<u>4,464,035</u>	<u>-</u>	<u>-</u>	<u>4,464,035</u>
Other revenues				
Contributions	-	1,326,525	892,177	2,218,702
Section dues	-	799,554	-	799,554
Convention and meeting fees	-	69,818	-	69,818
Law Practice Management fees	15,498	-	-	15,498
High School Mock Trial fees	17,789	-	-	17,789
Assessment income	-	100	-	100
Investment income	87,057	2,357	13,306	102,720
Rental income	-	1,301,083	-	1,301,083
Other	173,491	86,295	-	259,786
Total other revenues	<u>293,835</u>	<u>3,585,732</u>	<u>905,483</u>	<u>4,785,050</u>
Net assets released from restrictions	<u>-</u>	<u>601,268</u>	<u>(601,268)</u>	<u>-</u>
Total revenues and other support	<u>16,487,353</u>	<u>4,187,000</u>	<u>304,215</u>	<u>20,978,568</u>
EXPENSES				
Program services				
Counsel	4,174,005	-	-	4,174,005
Communications	752,167	-	-	752,167
Membership	877,466	-	-	877,466
Unauthorized practice of law	856,936	-	-	856,936
Law practice management	438,426	-	-	438,426
ICLE	2,446,374	-	-	2,446,374
Other	3,388,271	1,464,118	-	4,852,389
Total program services	<u>12,933,645</u>	<u>1,464,118</u>	<u>-</u>	<u>14,397,763</u>
Supporting services				
Management and general	2,221,531	3,256,154	-	5,477,685
Total expenses	<u>15,155,176</u>	<u>4,720,272</u>	<u>-</u>	<u>19,875,448</u>
CHANGE IN NET ASSETS	1,332,177	(533,272)	304,215	1,103,120
NET ASSETS, BEGINNING	<u>5,857,757</u>	<u>25,063,508</u>	<u>1,704,956</u>	<u>32,626,221</u>
TRANSFERS	<u>(4,462,131)</u>	<u>4,462,131</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 2,727,803</u>	<u>\$ 28,992,367</u>	<u>\$ 2,009,171</u>	<u>\$ 33,729,341</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2020

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,485,394	\$ -	\$ -	\$ 11,485,394
Advertising	49,895	-	-	49,895
Membership	129,012	-	-	129,012
Total fees	<u>11,664,301</u>	<u>-</u>	<u>-</u>	<u>11,664,301</u>
ICLE				
Program Revenues	5,855,600	-	-	5,855,600
Total ICLE	<u>5,855,600</u>	<u>-</u>	<u>-</u>	<u>5,855,600</u>
Other revenues				
Contributions	-	1,321,545	463,068	1,784,613
Section dues	-	821,103	-	821,103
Convention and meeting fees	-	67,800	-	67,800
Law Practice Management fees	54,535	-	-	54,535
Young Lawyers Division fees	9,063	-	-	9,063
High School Mock Trial fees	32,695	-	-	32,695
Assessment income	-	1,150	-	1,150
Investment income	475,241	242,060	53,184	770,485
Rental income	-	1,432,368	-	1,432,368
Other	88,762	446,816	-	535,578
Total other revenues	<u>660,296</u>	<u>4,332,842</u>	<u>516,252</u>	<u>5,509,390</u>
Net assets released from restrictions	<u>-</u>	<u>731,108</u>	<u>(731,108)</u>	<u>-</u>
Total revenues and other support	<u>18,180,197</u>	<u>5,063,950</u>	<u>(214,856)</u>	<u>23,029,291</u>
EXPENSES				
Program services				
Counsel	3,732,187	-	-	3,732,187
Communications	932,071	-	-	932,071
Membership	850,309	-	-	850,309
Consumer assistance program	584,701	-	-	584,701
Unauthorized practice of law	868,369	-	-	868,369
Law practice management	489,718	-	-	489,718
ICLE	2,610,743	6,810	-	2,617,553
Other	2,119,772	1,713,479	-	3,833,251
Total program services	<u>12,187,870</u>	<u>1,720,289</u>	<u>-</u>	<u>13,908,159</u>
Supporting services				
Management and general	3,515,503	3,434,186	-	6,949,689
Total expenses	<u>15,703,373</u>	<u>5,154,475</u>	<u>-</u>	<u>20,857,848</u>
CHANGE IN NET ASSETS	2,476,824	(90,525)	(214,856)	2,171,443
NET ASSETS, BEGINNING	<u>3,603,756</u>	<u>24,931,210</u>	<u>1,919,812</u>	<u>30,454,778</u>
TRANSFERS	<u>(222,823)</u>	<u>222,823</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 5,857,757</u>	<u>\$ 25,063,508</u>	<u>\$ 1,704,956</u>	<u>\$ 32,626,221</u>

See Notes to Combined Financial Statements.

**STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2021**

	Program services										Supporting services	
	Counsel	Communi- cations	Memberships	Unauthorized practice of law	Law practice management	ICLE	Other	Total program services	Management and general	Total		
Personnel costs	\$ 2,556,476	\$ 238,345	\$ 298,467	\$ 514,975	\$ 237,525	\$ 982,185	\$ 868,488	\$ 5,696,461	\$ 1,653,772	\$ 7,350,233		
Payroll taxes	181,459	18,379	23,254	39,531	18,510	72,663	64,183	417,979	104,229	522,208		
Employee benefits	708,648	65,455	107,615	176,348	86,733	312,842	309,370	1,767,011	384,682	2,151,693		
Officers' expenses	-	-	-	-	-	-	17,386	17,386	29,781	47,167		
Shared administrative office expenses	450,089	62,081	77,601	93,122	62,081	318,166	201,764	1,264,904	80,781	1,345,685		
Rent and utilities	-	-	-	-	-	-	-	-	495,795	495,795		
Office expenses	19,966	253,895	3,880	2,749	26	7,868	11,923	300,307	123,910	424,217		
Subscriptions and books	15,121	3,498	354	189	6,946	360	7,121	33,589	10,458	44,047		
Dues and memberships	8,098	405	-	350	485	1,260	54,375	64,973	2,024	66,997		
Seminars and training	4,972	390	215	1,176	3,186	279	1,464	10,307	1,464	11,771		
Travel	14,037	6,092	-	1,348	3,811	3,729	11,942	40,959	23,274	64,233		
Meetings and luncheons	-	-	-	-	-	-	449,121	449,121	45,535	494,656		
Professional services and contract labor	39,052	46,336	781	-	-	16,594	431,563	534,326	320,705	855,031		
Program expenses	-	-	-	-	-	-	669,479	669,479	-	669,479		
Contributions	-	-	-	-	-	-	357,276	357,276	-	357,276		
Insurance	-	-	-	-	-	25,528	-	25,528	183,285	208,813		
Grants	-	-	-	-	-	-	1,000,000	1,000,000	-	1,000,000		
Other	95,103	51,706	351,336	11,480	9,963	-	907,919	1,427,507	809,129	2,236,636		
Depreciation	80,984	5,585	13,963	16,755	11,170	32,514	159,679	320,650	1,208,861	1,529,511		
	\$ 4,174,005	\$ 752,167	\$ 877,466	\$ 856,936	\$ 438,426	\$ 2,446,374	\$ 4,852,389	\$ 14,397,763	\$ 5,477,685	\$ 19,875,448		

See Notes to Combined Financial Statements.

**STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2020**

	Program services										Supporting services	
	Counsel	Communi- cations	Membership	Consumer assistance program	Unauthorized practice of law	Law practice management	ICLE	Other	Total program services	Management and general	Total	
Personnel costs	\$ 2,285,635	\$ 320,356	\$ 292,472	\$ 348,016	\$ 517,034	\$ 261,177	\$ -	\$ 972,211	\$ 4,896,901	\$ 2,774,063	\$ 7,770,964	
Payroll taxes	164,337	24,246	23,155	29,061	40,086	19,932	-	74,064	374,891	210,333	585,214	
Travel expenses	621,350	120,064	97,276	101,367	177,476	99,737	-	30,461	1,376,457	74,842	1,451,299	
Office expenses	383,567	79,914	79,914	79,914	95,897	63,931	-	37,199	37,199	34,482	71,681	
Shared administrative office expenses	-	-	-	-	-	63,931	-	223,760	1,006,917	376,257	1,383,174	
Rent and utilities	-	-	9,202	2,722	1,354	4,176	-	26,274	334,512	572,806	972,806	
Office expenses	23,482	267,302	9,202	2,722	1,354	4,176	-	26,274	334,512	85,327	419,839	
Subscriptions and books	14,790	2,509	175	750	2,270	8,451	-	2,270	28,945	2,069	31,014	
Dues and memberships	8,040	405	-	675	338	125	-	54,027	63,272	14,662	65,922	
Seminars and training	6,582	2,465	-	1,877	300	338	-	1,877	11,562	14,662	26,204	
Travel and lodging	2,719	7,949	-	3,850	3,303	3,303	-	13,965	11,738	109,738	130,476	
Meals and entertainment	2,239	-	169	-	-	-	-	214,985	230,762	109,738	330,500	
Professional services and contract labor	24,608	39,263	1,375	719	-	-	-	594,898	660,863	387,928	1,018,791	
Program expenses	-	-	-	-	-	-	2,617,553	-	2,617,553	-	2,617,553	
Contributions	-	-	-	-	-	-	-	321,582	321,582	-	321,582	
Insurance	85,035	51,000	329,973	6,284	11,029	15,269	-	910,562	1,408,142	200,716	2,007,161	
Other	79,672	16,598	16,598	19,918	13,279	13,279	-	43,156	205,819	1,357,429	1,423,566	
Depreciation	-	-	-	-	-	-	-	-	-	-	-	
	\$ 3,782,187	\$ 932,071	\$ 850,309	\$ 584,701	\$ 868,269	\$ 489,718	\$ 2,617,553	\$ 3,833,251	\$ 13,908,159	\$ 6,949,689	\$ 20,857,848	

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2021 AND 2020

	<u>2021</u>	<u>2020</u>
OPERATING ACTIVITIES		
Change in net assets	\$ 1,103,120	\$ 2,171,443
Adjustments to reconcile change in net assets to net cash and cash equivalents provided by operating activities		
Depreciation	1,529,511	1,563,248
Net realized and unrealized losses (gains) on investments	322,872	(319,127)
Loss on disposal of fixed assets	21,721	-
Decrease in accounts receivable	12,824	5,805
Decrease (increase) in receivables from related parties	459,998	(454,057)
Decrease in receivables from employees	4,556	1,092
Decrease (increase) in accrued interest receivable	16,797	(51,951)
Decrease in prepaid and other assets	63,368	177,398
Increase (decrease) in accounts payable	248,764	(1,141,698)
(Decrease) increase in employee benefits payable	(39,298)	92,738
(Decrease) in payables to related parties	(18,261)	(77,425)
Increase in accrued vacation	28,078	132,766
(Decrease) increase in deferred income - dues and sections	(246,333)	47,481
(Decrease) in other deferred income	(88,198)	(128,000)
Increase (decrease) in payable to Client Security Fund	786,141	(18,966)
Total adjustments	<u>3,102,540</u>	<u>(170,696)</u>
Net cash and cash equivalents provided by operating activities	<u>4,205,660</u>	<u>2,000,747</u>
INVESTING ACTIVITIES		
Purchases of building improvements, furniture, fixtures, and equipment	(267,727)	(636,380)
Purchases of investments	(4,730,721)	(8,442,540)
Proceeds from sale and maturity of investments	<u>4,313,817</u>	<u>3,241,425</u>
Net cash and cash equivalents (used in) investing activities	<u>(684,631)</u>	<u>(5,837,495)</u>
Net increase (decrease) in cash and cash equivalents	3,521,029	(3,836,748)
Cash and cash equivalents, beginning	<u>13,905,692</u>	<u>17,742,440</u>
Cash and cash equivalents, ending	<u>\$ 17,426,721</u>	<u>\$ 13,905,692</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 1 – Summary of significant accounting policies

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 1 – Summary of significant accounting policies (Continued)

Cash and Cash Equivalents – For purposes of the combined statements of cash flows, the State Bar considers all highly liquid debt instruments with original maturities of three months or less to be cash equivalents. Cash equivalents were \$9,975,998 and \$8,155,089 at June 30, 2021 and 2020, respectively, consisting of money market funds. These funds are not insured.

At June 30, 2021 and 2020, in addition to the money market deposits above, the State Bar maintained bank deposits in excess of federally insured limits of \$6,763,329 and \$5,480,509, respectively.

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

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

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 1 – Summary of significant accounting policies (Continued)

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

Accounts Receivable – Accounts receivable are reported net of an allowance for doubtful accounts. As of both June 30, 2021 and 2020, the allowance for doubtful accounts was zero, respectively.

Revenue Recognition – The State Bar follows Financial Accounting Standards Board ("FASB") Topic 606, *Revenue from Contracts with Customers*. Membership dues, annual license fees, ICLE seminar fees and Bar Center assessments are recorded as revenue in the applicable year when received. Any amounts collected prior to and including June 30 applicable to the subsequent year's membership dues, assessments, or seminars are recorded as deferred income in the statements of financial position. Annual license fee and Bar Center assessment notices for the fiscal years ending June 30, 2021 and 2020 were sent out in April 2021 and April 2020, respectively.

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

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

Income Taxes – The State Bar was established as an instrumentality of the state of Georgia, and its income is therefore exempt from income tax under Internal Revenue Code Section 115, per the Internal Revenue Service determination letter dated May 11, 1965. Under Section 115, net income from an activity other than an essential governmental function can be subject to taxation. In management's opinion, the State Bar did not have any such net income during the years ended June 30, 2021 and 2020.

The State Bar has evaluated the effect of generally accepted accounting principles guidance for Accounting for Uncertainty in Income Taxes. Management believes that the State Bar continues to satisfy the requirements of a tax-exempt organization and therefore had no uncertain income tax positions at June 30, 2021 and 2020.

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 1 – Summary of significant accounting policies (Continued)

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

The CSF is funded by a \$100 mandatory assessment of all new members of the State Bar. The CSF can also be funded by an ad hoc assessment of up to \$25 per member per year upon the event its balance falls below \$1,000,000. In its history there has never been an ad hoc CSF assessment.

Aggregate payout from the CSF is limited to \$500,000 per year and \$25,000 per claimant.

Note 2 – Liquidity and availability of financial assets

The following reflects the State Bar’s financial assets as of the statements of financial position date as of June 30, 2021 and 2020, reduced by amounts not available for general use within one year of the statements of financial position date of June 30, 2021 and 2020 because of contractual or donor-imposed restrictions or internal designations.

	2021	2020
Cash and cash equivalents	\$ 17,426,721	\$ 13,905,692
Accounts receivable	894,596	1,371,974
Accrued interest receivable	110,960	127,757
Investments	17,777,273	17,683,241
	36,209,550	33,088,664
Less: Donor-imposed restricted cash and cash equivalents	(2,009,171)	(1,704,956)
Less: Board-designated cash and cash equivalents, accounts receivable, accrued interest receivable, and investments	(20,014,509)	(14,934,774)
Total financial assets without donor restriction or other restrictions available for general use within one year	\$ 14,185,870	\$ 16,449,035

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

Note 3 – Membership

Membership in the State Bar totaled 52,898 and 52,132 at June 30, 2021 and 2020, respectively.

Note 4 – Investments

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 4 – Investments (Continued)

As of June 30, 2021 and 2020, investments at fair value are summarized as follows:

	<u>2021</u>	<u>2020</u>
Cash equivalent	\$ 254,515	\$ 302,704
Fixed income	12,245,573	14,169,759
Government securities	<u>5,277,185</u>	<u>3,210,778</u>
Total investments	<u>\$ 17,777,273</u>	<u>\$ 17,683,241</u>

For the years ending June 30, 2021 and 2020, total investment income are summarized as follows:

	<u>2021</u>	<u>2020</u>
Interest and dividends	\$ 372,347	\$ 451,358
Net realized and unrealized (losses) gains	<u>(269,627)</u>	<u>319,127</u>
Total investment income	<u>\$ 102,720</u>	<u>\$ 770,485</u>

Note 5 – Fair value measurements

As required by FASB's fair value measurements and disclosure guidance, assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2021:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Investments:				
Cash equivalent	\$ 254,515	\$ -	\$ -	\$ 254,515
Fixed income	12,244,706	-	-	12,244,706
Government securities	<u>5,278,052</u>	<u>-</u>	<u>-</u>	<u>5,278,052</u>
Total	<u>\$ 17,777,273</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 17,777,273</u>

The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2020:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Investments:				
Cash equivalent	\$ 302,704	\$ -	\$ -	\$ 302,704
Fixed income	14,169,759	-	-	14,169,759
Government securities	<u>3,210,778</u>	<u>-</u>	<u>-</u>	<u>3,210,778</u>
Total	<u>\$ 17,683,241</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 17,683,241</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 6 – Building, furniture, fixtures, and equipment

The Bar Center building, furniture, fixtures, and equipment as of June 30, 2021 and 2020 are summarized as follows:

	2021	2020
Building and improvements	\$ 27,034,441	\$ 27,031,686
Furniture and office equipment	3,224,570	3,226,660
Computer and electronic equipment	1,109,116	1,045,801
	31,368,127	31,304,147
Less accumulated depreciation	(22,759,704)	(21,544,848)
	\$ 8,608,423	\$ 9,759,299

Land, furniture, fixtures, and equipment other than the Bar Center as of June 30, 2021 and 2020 are summarized as follows:

	2021	2020
Furniture and office equipment	\$ 1,050,114	\$ 1,131,030
Computer and electronic equipment	557,568	655,761
Leasehold and building improvements	375,259	369,928
Computer software	1,675,156	1,718,728
	3,658,097	3,875,447
Less accumulated depreciation	(2,503,733)	(2,588,454)
	\$ 1,154,364	\$ 1,286,993

Note 7 – Retirement plan

The State Bar has a money purchase pension plan that covers substantially all employees. State Bar contributions to this plan for the years ended June 30, 2021 and 2020 were \$454,772 and \$480,020, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 8 – Leases

Lessor – The State Bar leases office space to both related and non-related parties. Rental income totaled \$1,301,083 and \$1,432,368 in 2021 and 2020, respectively. These amounts included receipts of \$60,113 and \$59,510 in 2021 and 2020, respectively, from related parties. Certain of the leases have expiration dates through June 2025 and certain of the leases are renewable annually or cancelable at the request of the lessee.

As of June 30, 2021, approximate future minimum annual lease payments for the leases that are not renewable annually or cancelable are as follows:

For the year ending June 30, 2022	\$	141,480
2023		144,320
2024		120,743
2025		<u>88,022</u>
Total	\$	<u>494,565</u>

Lessee – The State Bar has entered into various non-cancelable operating lease agreements for the rental of photocopiers and mailing equipment. These lease agreements expire on various dates through June 2024.

In addition, the State Bar entered into a lease on November 1, 2008 for its Coastal Georgia office space in Savannah. The lease expired on October 31, 2013 with two five-year options available to renew through 2023. The State Bar renewed the lease under its second option during 2018, with expiration on October 31, 2022.

The State Bar also renewed its lease at a satellite office in Tifton, Georgia and executed a lease agreement for expanded conference room space which expired on September 30, 2021. The lease is currently month-to-month and in renegotiation to be extended to September 30, 2022.

As of June 30, 2021, approximate future minimum annual lease payments for these leases are as follows:

For the year ending June 30, 2022	\$	122,328
2023		71,387
2024		<u>39,732</u>
Total	\$	<u>233,447</u>

Rental expense charged to operations amounted to \$159,403 and \$149,301 for the years ended June 30, 2021 and 2020, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 9 – Related-party transactions

The Commission on Continuing Lawyer Competency contributed \$1,291,495 and \$1,322,797 to the State Bar in 2021 and 2020, respectively. These amounts represent approximately 6% of the total amount of State Bar’s revenue and other support for 2021 and 2020.

The State Bar was also reimbursed by related organizations for their share of salary and operating expenses for the years ending June 30, 2021 and 2020 as follows:

	2021	2020
Commission on Continuing Lawyer Competency	\$ 851,090	\$ 762,764
Chief Justice’s Commission on Professionalism	149,189	178,085
Georgia Bar Foundation, Inc.	<u>93,432</u>	<u>97,477</u>
	<u>\$ 1,093,711</u>	<u>\$ 1,038,326</u>

The following represents a summary of amounts due from related parties as of June 30, 2021 and 2020:

	2021	2020
Commission on Continuing Lawyer Competency	\$ 744,867	\$ 1,200,521
Georgia Bar Foundation, Inc.	<u>17,263</u>	<u>21,607</u>
	<u>\$ 762,130</u>	<u>\$ 1,222,128</u>

The following represents a summary of amounts due to related parties as of June 30, 2021 and 2020:

	2021	2020
Chief Justice’s Commission on Professionalism	\$ 210,661	\$ 219,010
Commission on Continuing Lawyer Competency	-	<u>9,912</u>
	<u>\$ 210,661</u>	<u>\$ 228,922</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 10 – Board-designated net assets

The State Bar had Board-designated net assets available for the following purposes at June 30, 2021 and 2020:

	<u>2021</u>	<u>2020</u>
Bar Center	\$ 15,808,470	\$ 16,459,220
General Operations	4,750,000	4,750,000
Litigation	300,000	300,000
Sections	3,431,440	3,097,035
Conventions	116,852	87,818
Operating contingencies – ICLE	144,435	144,435
Replacement of equipment – ICLE	225,000	225,000
ICLE operations	4,216,170	-
	<u>\$ 28,992,367</u>	<u>\$ 25,063,508</u>

Bar Center net assets primarily consist of the net depreciated cost of the Bar Center building, building improvements, and related Conference Center furniture and equipment.

Note 11 – Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2021 and 2020 were available for the following purposes and are included in cash:

	<u>2021</u>	<u>2020</u>
Legislative Program	\$ 1,350,873	\$ 1,094,092
Law-Related Education/Marshall Fund	231,160	233,708
High School Mock Trial	15,482	15,486
BASICS Program	119,460	69,517
Young Lawyers Division	115,019	170,214
Lawyer Assistance Program	34,650	34,698
Georgia Diversity Program	55,807	13,596
Bar Media Conference	21,834	20,839
Law Day	6,516	6,517
iCivics Program	-	623
Promote Inclusion	13,285	14,212
Access to Justice	1,492	1,492
Military Vet Pro Bono	14,807	14,710
Justice Hunstein's Portrait	15,152	15,152
State Bar of Georgia Foundation	13,634	100
	<u>\$ 2,009,171</u>	<u>\$ 1,704,956</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS

YEARS ENDED JUNE 30, 2021 AND 2020

Note 12 – Net assets released from restrictions

Net assets were released from donor restrictions in 2021 and 2020 by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors as follows:

	2021	2020
Legislative Program	\$ 521,590	\$ 550,572
Young Lawyers Division	60,752	24,374
Law-Related Education/Marshall Fund	4,005	90,687
Georgia Diversity Program	9,032	60,545
Promote Inclusion	3,518	808
Bar Media Conference	138	2,461
iCivics Program	871	4
Lawyer Assistance Program	265	1,372
High School Mock Trial	100	127
Other programs	997	158
	\$ 601,268	\$ 731,108

Note 13 – Contingencies

The State Bar is subject to various suits and proceedings arising in the ordinary conduct of its affairs and has been named as a defendant in several lawsuits. In the opinion of the Office of the General Counsel, all suits and actions now pending or likely to be filed will be resolved without material adverse effect on the financial position of the State Bar.

Note 14 – Effects of COVID-19 Coronavirus

As a result of the spread of the COVID-19 coronavirus, economic uncertainties have arisen which likely negatively impact the change in net assets. Other financial impacts could occur though the extent of potential impact is unknown at this time.

Note 15 – Subsequent events

The State Bar has evaluated subsequent events occurring through November 18, 2021, the date on which the combined financial statements were available to be issued.

SUPPLEMENTARY INFORMATION

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2021

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Elimination</u>	<u>Total</u>
ASSETS				
Cash and cash equivalents	\$ 17,178,685	\$ 248,036	\$ -	\$ 17,426,721
Accounts receivable, net	113,208	-	-	113,208
Receivable from related parties	762,130	-	-	762,130
Receivable from employees	19,258	-	-	19,258
Accrued interest receivable	110,960	-	-	110,960
Prepaid and other assets	413,039	-	-	413,039
Investments, at fair value	15,465,509	2,311,764	-	17,777,273
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	8,608,423	-	-	8,608,423
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,154,364	-	-	1,154,364
Total assets	<u>\$ 43,825,576</u>	<u>\$ 2,559,800</u>	<u>\$ -</u>	<u>\$ 46,385,376</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 1,316,814	\$ -	\$ -	\$ 1,316,814
Accrued salary and retirement plan expense	1,066,483	-	-	1,066,483
Payable to Client Security Fund	1,798,187	-	-	1,798,187
Payable to related parties	210,661	-	-	210,661
Accrued vacation	691,188	-	-	691,188
Deferred income - dues and sections	7,572,702	-	-	7,572,702
Total liabilities	<u>12,656,035</u>	<u>-</u>	<u>-</u>	<u>12,656,035</u>
Net assets				
Without donor restrictions				
Undesignated	537,438	2,190,365	-	2,727,803
Board-designated	28,622,932	369,435	-	28,992,367
Total without donor restrictions	29,160,370	2,559,800	-	31,720,170
With donor restrictions	2,009,171	-	-	2,009,171
Total net assets	<u>31,169,541</u>	<u>2,559,800</u>	<u>-</u>	<u>33,729,341</u>
Total liabilities and net assets	<u>\$ 43,825,576</u>	<u>\$ 2,559,800</u>	<u>\$ -</u>	<u>\$ 46,385,376</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2020

	SBG and SBF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 8,680,470	\$ 5,225,222	\$ -	\$ 13,905,692
Accounts receivable, net	125,032	1,000	-	126,032
Receivable from related parties	1,222,128	-	-	1,222,128
Receivable from employees	23,814	-	-	23,814
Accrued interest receivable	127,757	-	-	127,757
Prepaid and other assets	441,656	34,751	-	476,407
Investments, at fair value	15,388,295	2,294,946	-	17,683,241
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	9,759,299	-	-	9,759,299
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,194,916	92,077	-	1,286,993
Inter-company receivable	93,967	-	(93,967)	-
	<u>\$ 37,057,334</u>	<u>\$ 7,647,996</u>	<u>\$ (93,967)</u>	<u>\$ 44,611,363</u>
Total assets				
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 977,660	\$ 90,390	\$ -	\$ 1,068,050
Accrued salary and retirement plan expense	1,035,650	70,131	-	1,105,781
Payable to Client Security Fund	1,012,046	-	-	1,012,046
Payable to related parties	219,010	9,912	-	228,922
Accrued vacation	663,110	-	-	663,110
Deferred income - dues and sections	7,819,035	-	-	7,819,035
Other deferred income	13	88,185	-	88,198
Inter-company payable	-	93,967	(93,967)	-
Total liabilities	<u>11,726,524</u>	<u>352,585</u>	<u>(93,967)</u>	<u>11,985,142</u>
Net assets				
Without donor restrictions				
Undesignated	(1,068,219)	6,925,976	-	5,857,757
Board-designated	24,694,073	369,435	-	25,063,508
Total without donor restrictions	<u>23,625,854</u>	<u>7,295,411</u>	<u>-</u>	<u>30,921,265</u>
With donor restrictions				
	1,704,956	-	-	1,704,956
Total net assets	<u>25,330,810</u>	<u>7,295,411</u>	<u>-</u>	<u>32,626,221</u>
Total liabilities and net assets	<u>\$ 37,057,334</u>	<u>\$ 7,647,996</u>	<u>\$ (93,967)</u>	<u>\$ 44,611,363</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2021

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Eliminations</u>	<u>Total</u>
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,464,425	\$ -	\$ -	\$ 11,464,425
Advertising	47,225	-	-	47,225
Membership	217,833	-	-	217,833
Total fees	<u>11,729,483</u>	<u>-</u>	<u>-</u>	<u>11,729,483</u>
ICLE				
Program revenues	2,875,105	1,588,930	-	4,464,035
Total ICLE	<u>2,875,105</u>	<u>1,588,930</u>	<u>-</u>	<u>4,464,035</u>
Other revenues				
Contributions	2,218,702	-	-	2,218,702
Section dues	799,554	-	-	799,554
Convention and meeting fees	69,818	-	-	69,818
Law Practice Management fees	15,498	-	-	15,498
High School Mock Trial fees	17,789	-	-	17,789
Assessment income	100	-	-	100
Investment income	80,362	22,358	-	102,720
Rental income	1,301,083	-	-	1,301,083
Other	259,786	-	-	259,786
Total other revenues	<u>4,762,692</u>	<u>22,358</u>	<u>-</u>	<u>4,785,050</u>
Total revenues and other support	<u>19,367,280</u>	<u>1,611,288</u>	<u>-</u>	<u>20,978,568</u>
EXPENSES				
Program services				
Counsel	4,174,005	-	-	4,174,005
Communications	752,167	-	-	752,167
Membership	877,466	-	-	877,466
Unauthorized Practice of Law	856,936	-	-	856,936
Law Practice Management	438,426	-	-	438,426
ICLE	1,381,998	1,064,376	-	2,446,374
Other	4,852,389	-	-	4,852,389
Total program services	<u>13,333,387</u>	<u>1,064,376</u>	<u>-</u>	<u>14,397,763</u>
Supporting services				
Management and general	5,411,332	66,353	-	5,477,685
Total expenses	<u>18,744,719</u>	<u>1,130,729</u>	<u>-</u>	<u>19,875,448</u>
CHANGE IN NET ASSETS	622,561	480,559	-	1,103,120
NET ASSETS, BEGINNING	25,330,810	7,295,411	-	32,626,221
TRANSFERS	5,216,170	(5,216,170)	-	-
NET ASSETS, ENDING	<u>\$ 31,169,541</u>	<u>\$ 2,559,800</u>	<u>\$ -</u>	<u>\$ 33,729,341</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2020

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Elimination</u>	<u>Total</u>
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,485,394	\$ -	\$ -	\$ 11,485,394
Advertising	49,895	-	-	49,895
Membership	129,012	-	-	129,012
Total fees	<u>11,664,301</u>	<u>-</u>	<u>-</u>	<u>11,664,301</u>
ICLE				
Program revenues	-	5,855,600	-	5,855,600
Total ICLE	<u>-</u>	<u>5,855,600</u>	<u>-</u>	<u>5,855,600</u>
Other revenues				
Contributions	1,784,613	-	-	1,784,613
Section dues	821,103	-	-	821,103
Convention and meeting fees	67,800	-	-	67,800
Law Practice Management fees	54,535	-	-	54,535
Young Lawyers Division fees	9,063	-	-	9,063
High School Mock Trial fees	32,695	-	-	32,695
Assessment income	1,150	-	-	1,150
Investment income	697,718	72,767	-	770,485
Rental income	1,432,368	-	-	1,432,368
Other	534,652	926	-	535,578
Total other revenues	<u>5,435,697</u>	<u>73,693</u>	<u>-</u>	<u>5,509,390</u>
Total revenue and other support	<u>17,099,998</u>	<u>5,929,293</u>	<u>-</u>	<u>23,029,291</u>
EXPENSES				
Program services				
Counsel	3,732,187	-	-	3,732,187
Communications	932,071	-	-	932,071
Membership	850,309	-	-	850,309
Consumer Assistance Program	584,701	-	-	584,701
Unauthorized Practice of Law	868,369	-	-	868,369
Law Practice Management	489,718	-	-	489,718
ICLE	-	2,617,553	-	2,617,553
Other	3,833,251	-	-	3,833,251
Total program expenses	<u>11,290,606</u>	<u>2,617,553</u>	<u>-</u>	<u>13,908,159</u>
Supporting services				
Management and general	<u>5,770,248</u>	<u>1,179,441</u>	<u>-</u>	<u>6,949,689</u>
Total expenses	<u>17,060,854</u>	<u>3,796,994</u>	<u>-</u>	<u>20,857,848</u>
CHANGE IN NET ASSETS	39,144	2,132,299	-	2,171,443
NET ASSETS, BEGINNING	<u>25,291,666</u>	<u>5,163,112</u>	<u>-</u>	<u>30,454,778</u>
NET ASSETS, ENDING	<u>\$ 25,330,810</u>	<u>\$ 7,295,411</u>	<u>\$ -</u>	<u>\$ 32,626,221</u>



November 18, 2021

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

We have audited the combined financial statements of State Bar of Georgia (the "State Bar") for the year ended June 30, 2021, and we will issue our report thereon dated November 18, 2021. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated November 18, 2021. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the State Bar are described in Note 1 to the combined financial statements. No new accounting policies were adopted and the application of existing policies was not changed during 2021. We noted no transactions entered into by the State Bar during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the combined financial statements in the proper period.

Accounting estimates are an integral part of the combined financial statements prepared by management and are based on management's knowledge and experience about past and current events and assumptions about future events. Certain accounting estimates are particularly sensitive because of their significance to the combined financial statements and because of the possibility that future events affecting them may differ significantly from those expected. The most sensitive estimates affecting the combined financial statements were:

Management's estimate of the fair value of investments is based on various valuation methodologies and is the price that would be received to sell an asset or paid to transfer a liability. We evaluated the key factors and assumptions used to develop the estimated fair value of investments in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of functional allocation of expenses between program and supporting services is based on a reasonable basis, such as square footage or time spent. We evaluated the key factors and assumptions used to develop the functional allocation of expenses in determining that it is reasonable in relation to the combined financial statements taken as a whole.

Management's estimate of depreciation expense is based on the estimated useful lives of the assets. We evaluated the key factors and assumptions used to develop the estimate of depreciation expense in determining that it is reasonable in relation to the combined financial statements as a whole.

Management's estimate of the allowance for doubtful accounts for receivables, including contributions receivables, is based on the estimate of individual collectability. We evaluated the key factors and assumptions used to develop the allowance for doubtful accounts in determining that it is reasonable in relation to the combined financial statements taken as a whole.

The financial statement disclosures are neutral, consistent, and clear.

Difficulties Encountered in Performing the Audit

We encountered no difficulties in dealing with management in performing and completing our audit.

Disagreements with Management

For purposes of this letter, a disagreement with management is a disagreement on a financial accounting, reporting, or auditing matter, whether or not resolved to our satisfaction, that could be significant to the combined financial statements or the auditor's report. We are pleased to report that no such disagreements arose during the course of our audit.

Management Representations

We have requested certain representations from management that are included in the management representation letter dated November 18, 2021.

Management Consultations with Other Independent Accountants

In some cases, management may decide to consult with other accountants about auditing and accounting matters, similar to obtaining a "second opinion" on certain situations. If a consultation involves application of an accounting principle to the State Bar's combined financial statements or a determination of the type of auditor's opinion that may be expressed on those statements, our professional standards require the consulting accountant to check with us to determine that the consultant has all the relevant facts. To our knowledge, there were no such consultations with other accountants.

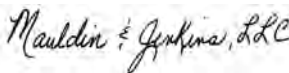
Other Audit Findings or Issues

We generally discuss a variety of matters, including the application of accounting principles and auditing standards, with management each year prior to retention as the State Bar's auditors. However, these discussions occurred in the normal course of our professional relationship and our responses were not a condition to our retention.

Other Matters

With respect to the supplementary information accompanying the combined financial statements, we made certain inquiries of management and evaluated the form, content, and methods of preparing the information to determine that the information complies with U.S. generally accepted accounting principles, the method of preparing it has not changed from the prior period, and the information is appropriate and complete in relation to our audit of the combined financial statements. We compared and reconciled the supplementary information to the underlying accounting records used to prepare the combined financial statements or to the combined financial statements themselves.

This information is intended solely for the use of management and the Board of Governors of the State Bar of Georgia and is not intended to be, and should not be, used by anyone other than these specified parties.

A handwritten signature in black ink that reads "Mauldin & Jenkins, LLC". The signature is written in a cursive, flowing style.

STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Friday, February 18, 2022, at 1 p.m.
Zoom Meeting

Members Participating

Elizabeth L. Fite, President; Sally B. Akins, President-Elect; Tony DelCampo, Treasurer; Ivy N. Cadle, Secretary; Dawn M. Jones, Immediate Past President; Ronald E. Daniels, YLD President-Elect; Elissa B. Haynes, YLD President; Bert D. Hummel, IV, YLD Immediate Past President; William C. Gentry; R. Javoyné Hicks; Shiriki Jones; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

All were present.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Elizabeth L. Fite called the meeting to order at 1:02 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule. She said details for the Tifton Executive Committee meeting on March 11 will be sent in the next few days and if there is anyone in the area they would like to invite to the reception and dinner, to please let her know.

Executive Committee Minutes

Secretary Ivy Cadle presented for approval the minutes of the December 10, 2021, Executive Committee meeting, which were passed by unanimous voice vote as presented.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Jane Stebbins-705405, William P. Davis-213370, Frank O. Brown-087475, Amanda Jensen-391221, Matthew Moffitt-289132, Eugene Terk-591547, Ronald McBay-480840, Dennis Bouxsein-070375, James R Wyche-337700, David Harrison-331950, Kelly Kirkland-573590, Michele Merkel-502519, Clay Karwisch-945372, Grace Hanson-595319, Richard Klopper-425216, Armin Naghashzadeh-113145, Carole Cox-192266, Mary F. O'Toole-555316, Lauren Schreeder Sundberg-629845, Christopher Alan Potts-430927, John Walker Chidsey III-124417, Laura D. Duston-948658, James Henry Wynn-779520, Krista Hardwick-836441.

Disability Status

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

Member Status Appeals

The Executive Committee, by unanimous voice vote, approved the staff recommendation for Eun A. Park to waive the reinstatement fee, but require her to pay the late fee. The Executive Committee, by unanimous voice vote, denied waiving inactive or late fees for William Davis, but approved removing the dues delinquency status from his status on the Bar's website and instead reflect that he has resigned.

Investment Policy Statement Proposed Changes

Chief Financial Officer Ron Turner presented the Investment Policy Statement proposed changes that were discussed at the previous Executive Committee meeting. The Executive Committee, by majority vote, approved the proposed changes to the policy as presented. The proposed changes will now be considered by the Board of Governors at the 2022 Spring Meeting.

2022-2023 Dues Recommendation to the Board of Governors

President Elizabeth L. Fite presented the 2022-2023 dues recommendation. The motion to submit the following recommendation to the Board of Governors for approval passed by majority vote:

1. Dues at \$260 for active members and \$130 for inactive and provisional members;
2. Section dues to be reflected on the dues statement ranging from \$10-\$40;
3. In accordance with Bar Rule 1-506 regarding the Clients' Security Fund, each member is assessed a fee of \$15. This assessment shall be used only to fund the Clients' Security Fund;
4. Professionalism Fee (\$11) mandated by the Supreme Court;
5. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
6. A suggested \$400 opt-in provision for individual contributions (\$100 for younger lawyers) for the Georgia Legal Services Program.

Legislative Proposals

Per Standing Board Policy 100, Legislative Policy and Procedure, the Executive Committee considered a request by the Real Property Law Section to oppose HB 974 so long as it does not allow for mail-in or in-person filing. Rob Brannen presented the Real Law Property Section's request and answered questions from the committee. Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss this request. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session. The Executive Committee, by majority vote, determined that the request is *Keller* compliant and meets the criteria of not being able to go before the Board of Governors due to timing. By majority vote, the Executive Committee voted to not take a formal position on HB 974.

The Georgia Association of Solicitors-General and the District Attorneys Association requested that the State Bar oppose HB 411. Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss this request. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session. The Executive Committee, by majority vote, determined that the request is *Keller* compliant and meets the criteria of not being able to go before the Board of Governors due to timing. A motion and a second to oppose HB 411 failed because it did not receive the required two-thirds vote of approval of the members of the Executive Committee, and no further action was taken.

ACL/Legislative Report

Legislative and Governmental Affairs Director Christine Hayes reported that the Legislature was on Day 16. She said that she and the lobbyist team are continuing to watch the funding proposals for legal services. She also reported there have been a lot of fiduciary and real property bills, and those sections have been very active.

Committee Updates

This item will be held for the March 11 Executive Committee meeting. President Elizabeth L. Fite said to send updates to Chief Operating Officer Sarah Coole if they need to go out prior to the next meeting.

State Bar of Georgia and Related Organizations Flow of Cash Receipts and Disbursements

This item will be held for the March 11 Executive Committee meeting.

Officer and Executive Committee Expense and Reimbursement Policy

This item will be held for the March 11 Executive Committee meeting.

Executive Director's Report

This item will be held for the March 11 Executive Committee meeting.

Treasurer's Report

Treasurer Tony DelCampo reported that everything is in order regarding the finances of the Bar. He noted a variance in the budget regarding updating space on the second floor to accommodate a current tenant.

Office of the General Counsel Report

General Counsel Paula Frederick reported on a request to file a proposed amicus brief and gave background information regarding the case that was involved. While it was a discussion item and not an official vote, the Executive Committee did not feel like it would be approved. General Counsel Frederick will contact the requesting parties and let them know the outcome of the discussion.

ICLE Update

This item will be held for the March 11 Executive Committee meeting.

YLD Report

YLD President Elissa Haynes reported that the YLD Spring Meeting will be held March 17-20 at the Westin Chattanooga, and there will be a joint networking event with Tennessee Young Lawyers Division. They continue to work on planning for the YLD Signature Fundraiser on April 30, with Kate's Club as the beneficiary. YLD President Haynes said that the Legal Food Frenzy sign-up is now open and encouraged Executive Committee members to register their firms.

Lawyer Competency Task Force

President Elizabeth L. Fite reported that the Lawyer Competency Task Force will host a town hall at the Spring Meeting with task force members present to answer questions (rescheduled from the Midyear Meeting).

President's Report

President Elizabeth Fite congratulated Immediate Past President Dawn M. Jones for receiving an honorable mention for the 2022 NCBP President's Page Award for her column, "The Rule of Law: Liberty and Justice for All" appearing in the February 2021 issue of the *Georgia Bar Journal*. President Fite confirmed that Gov. Brian Kemp's appointment of Judge Andrew Pinson to the Supreme Court of Georgia to the seat vacated by Chief Justice David Nahmias ended her judicial race for Judge Pinson's seat on the Court of Appeals of Georgia.

Board of Governors Minutes

The Executive Committee was provided a draft of the 2022 Midyear Meeting Minutes.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

- Executive Committee Member Javoyne Hicks announced she has a new job as senior attorney at Lawrence & Bundy LLC.
- Immediate Past President Dawn M. Jones announced she is receiving Georgia State College of Law's Ben F. Johnson Jr. Public Service Award, the college's highest honor.


Adjournment

There being no further business, the meeting was adjourned at 4:42 p.m.



Ivy Cadle, Secretary

Approved:



Elizabeth E. Fite, President

**STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Friday, March 11, 2022, at 1 p.m.
UGA Tifton Campus Conference Center
Hybrid Meeting**

Members Participating

Elizabeth L. Fite, President; Sally B. Akins, President-Elect; Tony DelCampo, Treasurer; Ivy N. Cadle, Secretary; Dawn M. Jones, Immediate Past President; Ronald E. Daniels, YLD President-Elect; Elissa B. Haynes, YLD President; Bert D. Hummel, IV, YLD Immediate Past President; William C. Gentry; R. Javoyne Hicks; Shiriki Jones; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

All were present either in person or via Zoom.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Elizabeth L. Fite called the meeting to order at 1 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule.

Executive Committee Minutes

Secretary Ivy Cadle presented for approval the minutes of the February 18, 2022, Executive Committee meeting, which were passed by unanimous voice vote as presented.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Anthony Chang Yup Ji-636887, Haifeng Chen-296042, Margaret Anne Boock-066176, Michael P. Senger-921077, Jerome Michael Albanese-007140, Kathryn Karen Wilz-769680, Leon Joe Wolfe-773367.

ACL/Legislative Report

Director of Governmental Affairs Christine Butcher Hayes reported that all items in the State Bar's legislative package have crossed over, and the Psychiatric Advance Directive Act (HB 752) that the Fiduciary Law Section has been working on has been well received and will hopefully pass without any issues. All funding requests that the Bar voted to support have been approved for full funding. The Remote Online Notary bill (HB 334) continues to be worked on, and the legislative team will watch it, along with other bills the State Bar is interested in.

Because of the work of the Programs Committee over the last few years, Executive Committee Member Martin Valbuena asked if the Georgia Resource Center could ask for more money this year. Director of Governmental Affairs Hayes said that while they technically could, it isn't how the Judicial Council's budget works, and she would advise they ask for additional funding during next year's budgeting process.

Committee Updates

The following committee updates were provided:

- Executive Committee Member Javoyné Hicks reported the Wellness Committee will be submitting an application to become a section. She will share the application and proposed bylaws with the Executive Committee before it is presented to the Board of Governors. Joyce Gist Lewis is championing the process. The plan is to present the information at the Annual Meeting and vote at the Fall Meeting. Together with the Suicide Awareness Committee and the Lawyer Assistance Program, they are creating a 911 wellness seminar. With the recent increase in attorney suicides, the chairs of each committee are working together on doing whatever they can do to help. There is a Wellness Connection (formally known as Monthly Touches) next week on meditation.
- Executive Committee Member David Lipscomb reported the Disciplinary Rules and Procedures Committee will meet at the Spring Meeting in Athens.
- Executive Committee Member David Lipscomb reported the Judicial Procedure and Administration/Uniform Rules Committee hasn't met.
- Immediate Past President Dawn M. Jones reported the Committee to Promote Inclusion in the Profession is asking for nominations for the 2022 Commitment to Equality Awards. The deadline is extended to March 31. The Roadmap to Law School Program, headed up by Ira Foster, has had another successful event.
- Immediate Past President Dawn M. Jones reported the Georgia Diversity Program is having a CLE on March 15. It is aimed at younger lawyers to help them with business development and includes one ethics hour. Anyone is welcome to attend.
- Immediate Past President Dawn M. Jones reported the Seeking Equal Justice and Addressing Racism and Racial Bias Committee has been sharing information about International Women's Day celebrations.
- Executive Committee Member Shiriki Jones reported on the Professionalism Committee. She said they recently met and all the subcommittees attended and gave reports. The hypotheticals for the law school orientations for first-year law students have gone through an extensive review. Another subcommittee is working on updating the Speakers' Bureau with attorneys who have expertise in the areas of professionalism and encouraging organizations to use a diverse group of speakers. She reported the Connect with a Colleague Program will begin soon and to look for information on that. And lastly, the Law Day theme is "Toward a More Perfect Union: The Constitution in Times of Change." The Professionalism Committee encourages the local and voluntary bars to participate in Law Day and interact with their communities.
- Executive Committee Member Martin Valbuena reported that the Programs Committee is done for the year.
- Executive Committee Member Martin Valbuena reported the Formal Advisory Opinion Board hasn't met since the last Executive Committee meeting.
- Executive Committee Member Martin Valbuena reported the Law Practice Management Committee is gearing up for a series of lunch and learns in March, April, May and June, and they are meeting next week.
- Executive Committee Member Martin Valbuena reported the Indigent Defense Committee is involved in a lot of legislative activity, and closely monitors all bills that would impact their area of law.
- YLD Immediate Past President Bert Hummel reported that Bridgette Bagley has officially stepped down as outside counsel for the Disciplinary Review Board, and Josh Bell will be the new counsel.
- YLD Immediate Past President Bert Hummel reported that there was some discussion at the CCLC meeting about CCLC's annual contribution to the Bar and to be prepared for questions regarding

that in the future.

- Treasurer Tony DelCampo reported that the Statewide Judicial Evaluation Committee has been fairly active in judicial appointments.
- Treasurer Tony DelCampo reported the International Trade in Legal Services Committee is working on a proposed rule change, and he will have more information on that soon.
- Executive Committee Member Bill Gentry reported the Senior Lawyers Committee continues their work and will meet at the Spring Meeting in April. They are currently planning a seminar.
- Executive Committee Member Bill Gentry reported the Children and the Courts Committee meets regularly.
- Executive Committee Member Bill Gentry reported the Attorney-Client Solicitation Committee has not met.

State Bar of Georgia and Related Organizations Flow of Cash Receipts and Disbursements

Chief Financial Officer Ron Turner presented the State Bar of Georgia and Related Organizations Flow of Cash Receipts and Disbursements. Immediate Past President Dawn M. Jones said it was great background information and suggested giving it to the Board of Governors for a better understanding of the Bar's finances.

Officer and Executive Committee Expense and Reimbursement Policy

Chief Financial Officer Ron Turner presented the proposed changes to the Officer and Executive Committee Expense and Reimbursement Policy following the discussion at the September 2021 Executive Committee Meeting. The policy contains three sections: "Officer Reimbursement Policy," "Executive Committee Members (Non-Officers) Reimbursement Policy," and "Reimbursement Procedures (Officers and Non-Officer Executive Committee Members)." After an extensive review, the Executive Committee approved the proposed changes with minor revisions to the "Officer Reimbursement Policy" and the "Reimbursement Procedures (Officers and Non-Officer Executive Committee Members)" sections by majority vote. At their next meeting, the Executive Committee will further review the "Executive Committee Members (Non-Officers) Reimbursement Policy" portion. President Elizabeth L. Fite asked committee members to send comments regarding the non-officer section to Executive Director Damon Elmore and Chief Financial Officer Ron Turner.

Executive Director's Report

Executive Director Damon Elmore reported the Bar Center currently has 29,000 square feet of rentable space, and with the help of a broker and Cushman & Wakefield, a small focus group is exploring how to rent or utilize that space. He said that it is a top priority, and there are many different ideas including temporary offices or more long-term solutions for individual attorneys. GLSP has signed a 5-year lease with some office renovations. He reported the search for new office space for the Coastal Georgia Office in Savannah is going well, and two spaces are being considered that offer better parking, office space and handicap accessibility. The mask mandate for the Bar Center has been lifted to be in line with the Supreme Court's policy for their building, along with current CDC recommendations. Executive Director Elmore said that activity in the Conference Center continues to increase, with more meetings taking place in person. He reported that nominating petitions for the Board of Governors race are closed, and there is a lot of competition in some circuits. The election will run from March 18 through April 22. He said that there is a continued focus on ICLE programming, with an increase in attendance at the seminars. They are working to find the balance between in-person, virtual and hybrid meetings. There have been two new ICLE staff members added to help manage content and programming.

Treasurer's Report

Treasurer Tony DelCampo reported that there have not been any major changes since the last Executive Committee meeting, and everything is in order regarding the finances of the Bar.

Office of the General Counsel Report

General Counsel Paula Frederick reported that the recent lawyer suicides and wellness issues are having an impact on OGC, mostly due to an increased number of receiverships. She said the real effort will be making sure people understand the responsibilities of a designated attorney. The description on the license fee notice has been updated to better define the duties of a designated attorney. General Counsel Frederick gave an update on in-house counsel registration, reporting that a subcommittee of the Disciplinary Rules Committee will be created to explore the possibility of requiring in-house counsels to register and pay a fee. The subcommittee will be composed of current in-house counsels, members of the Corporate Counsel Section and Disciplinary Rules Committee members.

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

YLD Report

YLD President Elissa Haynes reported that the YLD Spring Meeting will be held March 17-20 at the Westin Chattanooga. The YLD Signature Fundraiser will be held on April 30, with Kate's Club as the beneficiary. YLD President Haynes encouraged Executive Committee members to register for the Legal Food Frenzy. The goal this year is \$1 million.

Lawyer Competency Task Force

President Elizabeth L. Fite reported that the Lawyer Competency Task Force will hold a town hall on April 1 at the Spring Meeting to answer questions regarding the task force and its mission.

President's Report

President Elizabeth L. Fite reported that she received a request from Judge Dorothy Beasley to reinstate the iCivics Committee. After discussion, the Executive Committee decided not to reinstate the committee. President Fite reported that the Senate Judiciary dinner went well, and she made sure that they all knew the Bar is willing to be a resource to them when needed. In light of recent attorney suicides and the general well-being of attorneys, President Fite and Executive Committee members had a heartfelt discussion about attorney wellness and the importance of using their voices to help others and normalize therapy, struggles, etc.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

Immediate Past President Dawn M. Jones reported that the Leadership Institute for Women of Color Attorneys will be having their 17th annual leadership conference from March 23-25. She also reported that Board Member Gary Spencer has been named senior counsel for the NAACP Legal Defense and Educational Fund, Inc.


Adjournment

There being no further business, the meeting was adjourned at 4:30 p.m.



Ivy Cadde, Secretary

Approved:



Elizabeth C. Fite, President

STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
Thursday, April 14, 2022, at 1 p.m.
Zoom Meeting

Members Participating

Elizabeth L. Fite, President; Sally B. Akins, President-Elect; Tony DelCampo, Treasurer; Ivy N. Cadle, Secretary; Dawn M. Jones, Immediate Past President; Ronald E. Daniels, YLD President-Elect; Elissa B. Haynes, YLD President; Bert D. Hummel, IV, YLD Immediate Past President; William C. Gentry; R. Javoyne Hicks; Shiriki Jones; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

All were present.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Christine Butcher Hayes, Director of Governmental Affairs; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Elizabeth L. Fite called the meeting to order at 1 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule.

Executive Committee Minutes

Secretary Ivy Cadle presented for approval the minutes of the March 11, 2022, Executive Committee meeting, which were passed by unanimous voice vote as amended.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Ruchira Ray-906787, John E. Kresge-429614, D. Michael Keen-410485, Cheryl J. Thomas-176750.

Members Requesting Disability Status

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

Standing Executive Committee Policy 1000 (State Bar Elections)

Deputy General Counsel Bill NeSmith presented the Elections Committee's proposed changes to Section (h) *Questions and Appeals*, of Standing Executive Committee Policy 1000 (State Bar Elections). After discussion of changes to be made for clarification, Secretary Ivy Cadle made a motion to table this discussion until the next meeting to allow for Deputy General Counsel NeSmith to make the proposed amendments. The motion was seconded and passed unanimously.

Approval of the 2022-2023 Election Schedule

The Executive Committee approved the 2022-2023 Election Schedule as proposed.

Approval of the 2022-2023 Proposed State Bar Budget

The Executive Committee approved the 2022-2023 State Bar budget as amended.

Committee Updates

The following committee updates were provided:

- Immediate Past President Dawn M. Jones reported that the Committee to Promote Inclusion in the Profession is planning a CLE presentation for the State Bar's 2022 Annual Meeting.
- Immediate Past President Dawn M. Jones reported that the Seeking Equal Justice and Addressing Racism & Racial Bias Committee has a committee meeting on April 22. She said she will give further details by email about their upcoming events.
- Immediate Past President Dawn M. Jones has asked the chairs and leaders of the Georgia Diversity Program, the Committee to Promote Inclusion in the Profession, and the Seeking Equal Justice and Addressing Racism and Bias Committee to meet and see if they can help support each other, share resources, and invite committee members to the others' events to have a more cohesive understanding of the similar committees and knowledge of each other's goals.
- Immediate Past President Dawn M. Jones reported on the ICLE Board. She said they were disappointed in the low attendance at the General Practice and Trial Institute. The ICLE Board is working to gather information and feedback about the sections and other entities that participate in ICLE programming.
- Executive Committee Member David Lipscomb reported that the Disciplinary Rules and Procedures Committee had a meeting at the Spring Meeting. They are considering revisions to Rules 1.5 and 1.8 to clarify whether a lawyer may include a provision in a retainer agreement that requires the client to arbitrate malpractice claims and disputes.
- Executive Committee Member Shiriki Jones reported that the Local and Voluntary Bar Committee has been working on two main items, the Local Bar Awards and Law Day. The committee members are reaching out to the local bars to invite them to submit for the awards and also encourage them to participate in Law Day events in their communities.

OGC Succession Planning Process

Office of the General Counsel Overview Committee Chair Amy Howell reported that President Elizabeth L. Fite charged the committee with evaluating the need for a succession plan for the Office of the General Counsel. She said that the first step was assessing what the challenges are in the next 1-5 years, what positions are critical, and the competency and skills needed. The second step is evaluating high potential candidates, whether internal or external. And the third step is to take action. Ms. Howell said that the committee is narrowing down the first step, identifying what has been done, updating the general counsel's job description, creating a list of core competencies for the role, and having discussions around future issues that may arise. The committee will then make a recommendation if succession planning would be beneficial. If it is recommended, they will continue to work through the process.

Standing Board Policy 600 (Conflicts of Interest)

General Counsel Paula Frederick presented proposed changes to Standing Board Policy 600 (Conflicts of Interest), which requires that volunteer leaders of the Bar (Volunteers) disclose conflicts in certain situations. The proposed policy would allow Volunteers who disclose the conflict to participate in discussion but would project the Volunteer from voting. If the Volunteer is not willing to disclose the nature of the conflict, he or she would not be allowed to participate in discussions or vote on the issue. These changes will also be mirrored in the Bar's Employee Handbook. General Counsel Frederick asked everyone to email her with thoughts, changes or additions to the policy. The Executive Committee will vote on the proposed changes at an upcoming meeting.

Officer and Executive Committee Expense and Reimbursement Policy

The Executive Committee reviewed and discussed the proposed changes to the “Executive Committee Members (Non-Officers) Reimbursement Policy” portion of the Officer and Executive Committee Expense and Reimbursement Policy. As the policy stands, non-officers are only reimbursed for their standard hotel room and organized meals for the Executive Committee Extended Meeting and the Supreme Court of Georgia joint meeting. The proposed changes would continue to include the standard hotel room and organized meals for those two meetings, plus reimbursements for lodging, organized meals and mileage for all Executive Committee meetings. It was suggested that the policy include all Executive Committee meetings with an amount not to exceed a set amount, and be subject to the same policy as officers. After much discussion, President Elizabeth L. Fite said she would take everyone’s feedback and discuss it further with Chief Financial Officer Ron Turner and Executive Director Damon Elmore, and they will present a new version of the proposed policy at the next Executive Committee meeting.

Executive Director’s Report

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session for Executive Director Damon Elmore’s report to discuss a personnel matter. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

Treasurer’s Report

Treasurer Tony DelCampo reported that there have not been any major changes since the last Executive Committee meeting, and everything is in order regarding the finances of the Bar.

Office of the General Counsel Report

General Counsel Paula Frederick reported that Bridget Bagley retired as Review Board Counsel, and the Board has hired Josh Bell as the new Review Board Counsel.

Legislative Report

Director of Governmental Affairs Christine Hayes reported that the legislative session ended Monday, April 4. She said the bill to remit State Bar funds to the treasury did not get a hearing and failed, along with the study committee to look at Bar funds. Legislation to create the Prosecuting Attorneys Oversight Commission (HB 411 and SB 218) also failed. HB 974 passed, which requires all clerks of superior court to offer electronic filing for recordable instruments. The Real Property Law Section was able to get the language they wanted added that allows for mail-in filing. The Legislature did not extend the Georgia COVID-19 Pandemic Business Safety Act, the 2020 legislation which limits liability for potential claims arising from COVID-19 transmission and exposure.

The following is a summary of the Bar’s 2022 legislative package:

1. Support for the Inclusion of Fraud Prevention Provisions from ATLA/MBA Model Act in Georgia’s Remote Online Notary Legislation (HB 334)—Real Property Law Section
Status: Did not pass. A conference committee of legislators from both chambers failed to reach a consensus on the language of the bill.
2. Support for the Adoption of Advance Psychiatric Directive Legislation in Georgia (HB 752)—Fiduciary Law Section
Status: Passed.
3. Support for the Superior and State Court Appellate Practice Act (HB 916)—Appellate Practice Section
Status: Passed.

4. Support for Establishing the Judicial Legal Defense Fund Commission (HB 409)—Bench and Bar Committee
Status: Passed.
5. Support for "Raise the Age" Legislation (HB 272)—Children and the Courts Committee
Status: Did not pass. Failed to receive a final vote in the Senate.
6. Support for Digital Court Reporting Legislation—General Practice & Trial Law Section
Status: This proposal was ultimately not filed during the 2022 session.
7. 7. Support for FY 2023 Judicial Council Budget Request
\$750,000 to Fund Civil Legal Services Grants for Kinship Care Families
Status: Kinship grants are fully funded in the 2023 fiscal year budget.
8. Support for FY 2023 Judicial Council Budget Request
\$3 Million to Fund Civil Legal Services Grants for Victims of Domestic Violence
Status: Domestic violence grants are fully funded 2023 fiscal year budget.
9. Support for FY 2022 Judicial Council Budget Request
\$800,000 to Fund the Georgia Appellate Practice and Educational Resource Center
Status: Georgia Resource Center is fully funded in the 2023 fiscal year budget.

YLD Report

YLD President Elissa Haynes reported she has moved to Freeman Mathis & Gary LLP. She said the YLD Signature Fundraiser is in two weeks on Saturday, April 30, and asked the Executive Committee to consider sponsoring or buying tickets to attend. She said they have raised enough money to cover their expenses, and the remainder of the donations will go to Kate's Club.

Lawyer Competency Task Force

President Elizabeth L. Fite reported that the Lawyer Competency Task Force had a town hall at the 2022 Spring Meeting. The task force subcommittees reported on their purpose and progress to date. Comments and discussion from those in attendance added to the conversation and understanding of the committee's purpose.

President's Report

President Elizabeth L. Fite reported that she has been working with Executive Director Damon Elmore to create an annual review process for the executive director position. This will allow for transparency and gives the Board of Governors additional information for their annual approval of the executive director.

State Bar Employee of the Year Award

General Counsel Paula Frederick announced the Employee of the Year Award recipient.

Distinguished Service Award

President Elizabeth L. Fite announced the Distinguished Service Award recipient.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

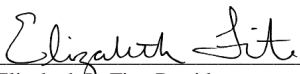
There were no announcements.

Adjournment

There being no further business, the meeting was adjourned at 4:30 p.m.


Ivy Cadle, Secretary

Approved:


Elizabeth E. Fite, President



Date: May 13, 2022
To: State Bar of Georgia Executive Committee
From: Damon Elmore, Executive Director

This serves as an update on our most recent work related to the State Bar of Georgia Strategic Plan (2016-2018). While the proposed period for the initial work contemplated by the document has passed, this also serves as a brief outline of next steps and continued attention with the objectives and priorities.

We do believe the document accomplished much of its intended purpose and have confirmed with the plan's champion that the intention was for the plan to close after 2 years. We have reviewed key elements of the plan, including the positioning statements, objectives, and priorities. When reviewing those elements, we have determined and planned the following:

We continuously review and evaluate the **disciplinary process** and make improvements where desirable and necessary. We have accomplished several of the objectives outlined in the plan, including comprehensive improvements to the procedural rules governing disciplinary cases, e-filing for docketed cases, and use of intervention where appropriate for lawyers with mental impairment. We continue to prioritize updating our rules in response to changes in the legal landscape.

We continue to support **Access to Justice** initiatives that are germane to our work and designed to improve the quality of legal services. We have supported the work of committees specifically charged with paying attention to this work by expanding the honor roll and recognition of pro bono champions. We will be sure to support programs that provide additional opportunity for our Georgia lawyers to support pro bono and other service opportunities.

We recognize the significance of **Lawyer Wellness**, not only as a position statement, but also as a valuable member benefit. Therefore, we will explore ways to support current and ongoing programs, as well as develop programs of intervention for aging and impaired lawyers. We have provided platforms for promoting lawyer wellness, especially with an emphasis on mental health, through our communication platforms. We have made recommendations for additional resources to support our commitment to the initiatives, as those partnerships prove valuable.

We will stay on top of the current legal landscape with respect to integration of **new delivery methods**, as well as trending concepts of self-service, legal professionals, and an analysis of fitness and competency matters. All of our work will be with an eye toward protecting the public, and strategic thinking.

The final positioning statement contemplated in the plan related to the **importance of our role**. There is nothing more important in our daily work. We will remain aware of challenges to the mandatory nature of our Bar, as well as maintain educational opportunities like the #KnowYourBar campaign, and adjust programs and practices as necessary.

Objectives: When evaluating the objectives and measures of progress for the above, we learned that critical baseline or other data was difficult to generate, or overly burdensome in our current processes. Nevertheless, we will execute our work in all of the aforementioned ways, keeping in mind all potential barriers, right and effective strategies, and appropriate measures of success.

As most of this will be a natural part of our day-to-day work, our governing body and members can expect regular updates and reports on our progress as part of our reports to the Board of Governors and Executive Committee or as needed.

HEADQUARTERS

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Date: May 13, 2022

To: State Bar of Georgia Executive Committee

From: Damon Elmore, Executive Director

We wanted to provide a report and update on the unauthorized access that recently affected the State Bar's network and systems. An overview of details related to the incident, weekly activity, next steps and other detailed information is provided. If, after your receipt and review, you have questions or need additional information, do not hesitate to contact me.

Incident Description: As you are aware by now, we noticed unauthorized access on our systems on Thursday, April 28, 2022, at approximately 4:00 pm. Specifically, the head of our Management Information Systems ("MIS") department heard a beeping sound indicating that servers were restarting despite not having received a restart command. Accordingly, he immediately began disconnecting devices from the network. As he was doing this, he observed multiple screens going black. On further inspection, it was determined that 17 servers (including both physical and virtual) and approximately 15 workstations were encrypted with *BitLocker* at the disc level.

All relevant, internal departments were made aware of the event, and we immediately contacted our (cyber security) insurance broker, Greyling, who put us in touch with Atheria Law and other related vendors under the SafeOnline insurance program. We also made our current cyber security partner, Athens Micro, aware of the incident and they dispatched a team to work on identifying the source of the unauthorized access, and then reinforcing our systems. Baker Hostetler was engaged late in the afternoon of April 28, 2022, and a scoping call with Kivu followed on the morning of April 29, 2022. Kivu provides cyber security for incident readiness, response and recovery, and they were engaged for forensic investigation and any communication with a threat actor.

May 1 – May 6 Activity: Most of the activity for the first week related to our response efforts. Kivu assisted the team during the first week of the engagement with respect to containment and monitoring, forensic investigation, and ransom negotiations. Although this has been officially described as a ransomware attack, no monetary demand has been made and no proof of possession of any personally identifiable information ("PII") or other data has been provided.

Baker utilized its extensive network within the law enforcement community to gain extraordinary threat actor intelligence, which has been critical to our incident response efforts. Through the work of our MIS team and all of the connected partner agencies, approximately 50 decryption keys became accessible, and access to back up and other data has taken place. We have been advised that the threat actor behind this attack is APT35, which is on the specially designated nationals and blocked persons ("SDN") list. That means that even if a monetary demand is made, and proof of personal or sensitive data provided, a ransom payment cannot be made.

HEADQUARTERS

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We have been able to access all impacted servers except for the backup domain controllers. We were also able to decrypt three laptop workstations. To monitor the potential for additional access or activity, CrowdStrike Falcon EDR sensors were deployed to approximately 3 servers and 66 workstations accounting for approximately 46% of the environment. As of the date of our meeting, nearly all of the servers and workstations have had the CrowdStrike or other monitoring software loaded.

This has been an essential part of our triage and forensic investigation. Kivu is responsible for supporting a majority of that process, and they provide updates every Monday, Wednesday and Friday with any suspicious activity, alerts or continued threats. So far, we have seen occasional activity at various degrees of severity. That does indicate a *potential* for a continued presence in the current network environment, but our plans and next steps involve building a new environment, which will eliminate or reduce that threat.

Kivu continues to communicate with the threat actor, but those communications are ineffective and are primarily for intelligence (for law enforcement) and/or stalling purposes (to allow us a chance to rebuild our systems) at this point. To date, Kivu’s communications with the threat actor have led Kivu and Baker to conclude that the threat actor cannot identify which of its victims it is dealing with and, therefore, intelligence gathering is limited without providing the threat actor with the identity of the State Bar as the victim. Once sufficient decryption and access are achieved, Kivu will be instructed to terminate communications with the threat actor.

While this process was taking place, all of our teams at the Bar were focused on supporting our members however they could. We have not been inundated with phone calls, and we have taken the limited access to the network as an opportunity to update processes, clean office and file areas, and perform any other available work. We also reconfigured our website and certain social media platforms to provide direct contact and other generic information for the benefit of our members. We were only officially “closed” on April 29, 2022.

Personally Identifiable Information (“PII”): Throughout the process, we have been particularly focused on what PII, if any, may have been accessed or compromised. For the purposes of triggering notification requirements under state law, the following is a list of common data elements that are defined as PII.

Social Security Number	Driver’s License Number	Passport Number
Military Identification Number	Student Identification Number	Financial Account Numbers
Debit or Credit Card Numbers	PIN Code	Biometric Data
Fingerprint	Digital Signature	Other financial information
Taxpayer ID number or IRS PIN	Date of Birth	Username and Password
Medical Information	Health Insurance policy information	DNA Profile

We are aware that other information, categorized as sensitive, confidential or business related, including information used as part of the disciplinary process, is important. Thus far, the investigation has not identified that neither personal data nor the confidential and sensitive business information has been compromised.

We believe this is helped by the way that information is stored on our systems. Even though it has not been determined how the threat actor gained access to the system, the more we work through the forensics process, it becomes apparent that they *may* not have been in the system for as long as we originally feared. Most matters of finance, including payables, expense processing, credit card and account information, or human resources and other important functions, are driven through web platforms or see information uploaded that is encrypted or password protected. As the forensic investigation proceeds, Kivu will attempt to provide a list of accessed files and folders based on the forensic artifacts. Then, we will review those locations and identify which are likely to contain PII or sensitive information. Once we complete that assessment, we will know how to move forward. No matter what, this is of utmost importance to us as we navigate through this process.

May 6 – May 13 Activity: The forensic investigation continued this week. There have been no significant updates with that part of the process.

Internally, our work shifted to rebuilding our domain/network. Late last week we laid out a project plan for the work, and we were able to put into place most of those new steps. Access to email (via an enhanced and more secure license) has been at the top of the list. Email through an Outlook web application, went live Thursday, May 12. With the support and assistance of our database developer, access to the database and connected information began on Monday, May 9 for OGC, as well as our Fee Arb, CLE, Membership and related departments. This has proven particularly important as we move to resume full service.

Programming through our ICLE and YLD departments was not interrupted. While communication, due to a lack of access to email, has made certain elements difficult, prior planning for events that took place this week and those that will take place next week (Family Law and Real Property Law Institutes), mean those have turned out as best as they could have, and we are optimistic about the work connected with the events next week. Our meetings department has also benefitted from the support of our database manager, which means planning for the Annual Meeting continues, with new/additional plans to pivot and adapt where necessary (i.e. onsite registration). We are grateful for the patience and support of our vendor partners.

We are likewise grateful to our team in Communications for the work they have provided in helping us update our members. In addition to an initial update, we have since updated the static page with additional detail for access to various member functions, as well as provided a response to frequently asked (anticipated) questions. We are committed to keeping our members and key stakeholders informed.

Next Steps: We look forward to continuing to support the active forensics analysis and take any action necessary as a result. Internally, other elements of functionality, especially connected to Finance, Membership and OGC, will relaunch the week of May 16.

FORTY SECOND ANNUAL REPORT TO

*THE HONORABLE JUSTICES OF THE SUPREME COURT
AND THE HONORABLE MEMBERS OF THE BOARD OF
GOVERNORS OF THE STATE BAR OF GEORGIA*

*BY THE COMMITTEE ON THE ARBITRATION OF ATTORNEY
FEE DISPUTES*

The Committee on the Arbitration of Attorney Fee Disputes is privileged to submit the following report concerning the Fee Arbitration Program's forty second year of operation.

1. Committee Membership.

Ms. Judy King, a lawyer in Lawrenceville was reappointed for a three-year term and served as Chairperson. Mr. Stanley W. Levitt, a lawyer in Atlanta was reappointed for a three-year term. The lawyer members returning to serve on the Committee were Mr. Mark C. Bips, a lawyer in Decatur, Mr. John M. DeFoor, II, a lawyer in Atlanta, Ms. Rosalind A. Rubens-Newell, a lawyer in Atlanta, and Mr. Darrell Lee Sutton, a lawyer in Marietta. The public members returning to serve were Mr. Alan Granath, from Dunwoody, Ms. Jacquelyn Poole from Marietta, and Ms. Iris Rice, from Smyrna. Mr. David Lipscomb, a lawyer from Lawrenceville served as Executive Committee Liaison.

2. Participation.

Interest by the public and the profession continued during the Program's forty second year. One thousand, one hundred and eighty (1,180) parties requested and were mailed information regarding the Fee Arbitration Program during the year. Referrals by the Client Assistance Program of the Office of the General Counsel accounted for 54% of the inquiries, while 45% of the inquiries were direct calls to the Fee Arbitration staff from the parties involved in the dispute. Referrals from the Office of General Counsel accounted for less than 1% of the inquiries. Many more telephone calls were received, and a number of fee disputes were resolved informally by the Fee Arbitration staff without the filing of a Petition. Copies of the Program's Rules and a Petition form were sent to all persons who requested further information. An informational brochure was also

provided to aid them in understanding this service of the State Bar. In addition, the parties were encouraged to initiate settlement communications prior to returning the completed Petition. The staff furnished consultation time in each case to explain the Fee Arbitration process. Under the Rules, the State Bar administers the Program in a neutral, rather than representative, capacity. Therefore, no advice was rendered on the merits of the matter in issue.

3. Current Activity.

Today 309 cases are in process. Approximately 98 new disputes over attorney fees are reported to the Fee Arbitration Program each month. The Committee, its staff, and the parties are able to resolve a majority of these without the necessity of the full arbitration process. Amounts in controversy vary widely from nominal sums to fees as high as \$4,000,000, with the average case involving \$13,394. Many fields of law are involved, but the areas of family law at 29% and criminal law at 38% produce the most cases.

4. Hearings.

Fee Arbitration hearings continued by Zoom during the year across the State due to Covid-19 restrictions. The cases were heard by our Arbitrators who volunteered to be on a three person panel an entire day to hear as many as four cases for the Fee Arbitration Program. Each arbitrator who served received a lapel pin or a State Bar flash drive in appreciation and recognition of their volunteer service to the Bar through the Fee Arbitration Program. Each arbitrator also received a letter of appreciation from the Supreme Court of Georgia.

5. Rules Changes.

The Committee worked extensively and submitted rules changes to the Supreme Court that will provide a single path for confirmation of the arbitration award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et sq. These rules changes were approved by Supreme Court Order on January 28, 2022.

6. Appreciation.


The Committee wishes to take this opportunity to thank and express its appreciation to Chief Justice David E. Nahmias, as well as all the other members of the Supreme Court, for their overall support and assistance in establishing rosters of volunteer arbitrators throughout Georgia and for their dedication in acknowledging with letters of appreciation to those lawyers and public members who serve voluntarily to the Program.

Appreciation also goes to the arbitrators who volunteered, many of whom have served since the inception of the Program forty-two years ago. The success of the Program has resulted to a great extent from the dedicated efforts and sound judgment of these volunteers.

The Fee Arbitration Program is an effective system and one of the most utilized of all the public service programs operated by the State Bar in furtherance of its goal to improve the administration of justice in Georgia. It continues to serve as a model for other jurisdictions implementing similar programs.

The Committee hopes that all those who read this report will encourage other qualified attorneys and public members to volunteer as arbitrators for future cases. This important service benefits our profession and the public we serve. The Committee is most appreciative of your continued assistance in informing potential arbitrators of this method of illustrating the professionalism of the members of the State Bar of Georgia.

*Respectfully submitted, this
11th day of May, 2022,
Committee on the Arbitration of
Attorney Fee Disputes*

A handwritten signature in black ink that reads "Judy C. King". The signature is written in a cursive, flowing style.

*Judy C. King
Chairperson*

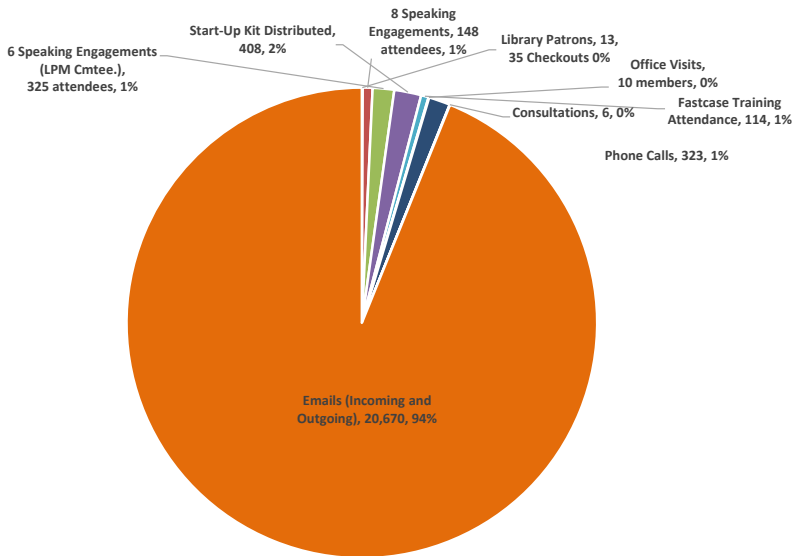
Law Practice Management Program

(Abbreviated report for the 2021-2022 Bar Year)

Members Served by LPMP

Total Number of Members Served 22,017

July 1, 2021 – April 22, 2022



Office Visits/Phone Calls/Emails

A total of **10** members visited LPMP. There were **1** startup discussions, **9** walk-in visits, and **0** visits to the software library conducted by the Program. In addition, LPM distributed **408** *Starting Your Georgia Law Practice* booklets as requested by attorneys, as well as, answered and responded to **323** phone calls and **20,670** emails to and from members.

Consultations

There were **6** general consultation virtual visits during this period. Firms assisted were in solo practice (3 firms); 2-4 attorney firms (3 firms).

Resource Library

Our lending library has a grand total of **1,411** books, CDs, and DVDs for checkout to members and their staff with an option to pick up materials at the Bar Center or to be mailed. Over **250+** titles were removed from the shelf because they were outdated. During this period, there were a total of **35** items checked out by **13** patrons.

Speaking Engagements

There were a total of **8** completed programs during this period. The Program's staff has given **8** continuing legal education and special presentations to Georgia lawyers and other related groups. These presentations have been held in various local and national venues; and have been made directly to at least **148** Georgia Bar members and law students.

LPMP Advisory Committee Webinar CLE Report

There were a total of **6** completed and scheduled programs during this period. The LPMP Advisory Committee has given **6** continuing legal education Zoom webinars that can be viewed on the Bar's YouTube Channel at <https://www.youtube.com/user/StateBarofGeorgia/featured>. Below is a breakout of the sessions:

Date	Webinar Title	Registered	Attended Live Session
11/2/2021 Members attained 1 CLE Credit	<i>Social Media 101, Part 1: Everything You Wanted to Know About Marketing Your Law Practice ... But Were Too Afraid to Ask ... How to Get Started</i> Speakers: Pamela Peynado, Crystal Kesler and Rodolfo Ruiz Sosa	167	94
11/9/2021 Members attained 1 CLE Credit	<i>Social Media 101, Part 2: Everything You Wanted to Know About Marketing Your Law Practice ... But Were Too Afraid to Ask ... I think I'm getting the hang of it. Am I doing this right?</i> Speakers: Pamela Peynado, Crystal Kesler and Rodolfo Ruiz Sosa	121	61
11/16/2021 Members attained 1 CLE Credit	<i>Social Media 101, Part 3: Everything You Wanted to Know About Marketing Your Law Practice ... But Were Too Afraid to Ask ... Becoming a Pro</i> Speakers: Pamela Peynado, Crystal Kesler and Rodolfo Ruiz Sosa	107	58
11/30/2021 Members attained 1 CLE Credit	<i>Social Media 101, Part 4: Everything You Wanted to Know About Marketing Your Law Practice ... But Were Too Afraid to Ask ... Ethical Issues and Social Media</i> Speaker: Pam Peynado and Leigh Burgess	111	42
3/15/2022 No CLE Credit	<i>Immigration 101: What Every Lawyer Must Know</i> Speaker: Pamela Peynado	52	37
4/14/2022 Members attained 1 CLE Credit	<i>To Catch a Title Thief Preventing Real Property Title Theft</i> Speaker: Rick Alembik	77	33
Total		635	325

Fastcase Report

- Since implementation, **30,097** members have logged on at least once with an increase of **535** first time users since July 1, 2021.
- There were **97,605** total logins since July 1, 2021.
- Over 50% of our members have used **Fastcase** (FC) since it was available as a bar member benefit.
- Since implementation, **2,511** attorneys and **114** staff members have attended Fastcase live training. Others have taken advantage of webinar training.

Update from Ed Walter's report on Fastcase Developments at Spring Meeting

- Georgia is one of the most active Fastcase state with over 50% having used it at least occasionally.
- The merge with Casemaker is complete in all states.
- Casemaker's over 700 libraries are now integrated into FC.
- Fastcase acquired the legal technology assets of **Judicata**, a California legal research solution provider widely recognized as an innovator in the legal space. They bring a particular breed of AI that FC will be rolling out this summer that will bring the searching capabilities to a new level.
- A long requested upgrade to the FC Citator is now on the horizon. Named CLERK, it benchmarked well in comparison to Shepherds and Keycite, Demonstrably better than the current citatory, Georgia users will be the first state to have access- slated before the end of 2022.
- Lastly, Docket Alarm is now part of FC with a vast collection of 63 million briefs, pleadings, motions, and orders powered by Docket Alarm within the Fastcase legal research platform. Access to decisions outside of published court cases have expanded to include trial court data in many of Georgia jurisdictions. Ed proposes that Georgia be the second state to add this content as part of our bar membership. Texas contracted to include these documents for their members on March 1, 2022.
- The committee will be exploring this possibility for Georgia member.

**Fastcase Usage Report
July 2021 – March 2022**

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Total
First Time Logins	62	43	57	55	63	57	64	58	76	535
Total Logins	10,266	11,001	10,482	10,641	9,334	12,546	10,639	10,451	12,245	97,605
Total Users Who Logged In	2,763	2,846	2,788	2,805	2,661	2,514	2,687	2,710	2,952	24,726
Searches Conducted	35,772	40,305	36,921	38,894	34,581	28,874	37,251	36,554	43,986	333,138
Documents Viewed	127,776	146,610	138,343	136,924	124,028	107,643	135,447	135,401	153,127	1,205,299
Documents Printed	27,703	30,645	35,286	29,085	25,007	20,291	26,975	35,229	35,232	265,453
Total Transactions	204,342	231,450	223,877	218,404	195,674	171,925	213,063	220,403	247,618	1,926,756

**Fastcase Reported issues / Problems Report
July 2021 – April 2022**

Fastcase Reported Issues/Problems	
Issue Reported	Response
Sheila, SBOG Member Benefits Coordinator- 9/2/2021: Negative citing cases appeared in the timeline view but quickly disappeared from the screen.	Fastcase Response-9/2/2021: Suggested the development team would have to check into this issue. Most likely, the merge with Casemaker data caused a temporary problem.
Sheila, SBOG Member Benefits Coordinator- 11/30/2021: Other calls and emails during this period have to do with user error or forgotten credentials. The Fastcase app is in desperate need of updating. It is very unstable, crashing easily.	Fastcase Response-11/30/2021: The Fastcase App will be getting a major update but no date given.
Sheila, SBOG Member Benefits Coordinator- 12/07/2021: Fastcase reported an outage due to AWS. It was lengthy. Several members contacted me and I kept them informed.	Fastcase Response-12/07/2021: The Fastcase team informed their users through their site.
Sheila, SBOG Member Benefits Coordinator- 2/4/2022: Member reported that Fastcase link from the bar to our Fastcase site isn't working.	Fastcase Response-2/4/2022: Thank you for making us aware of this issue. We also noticed this problem with our Florida site. Problem is now fixed.

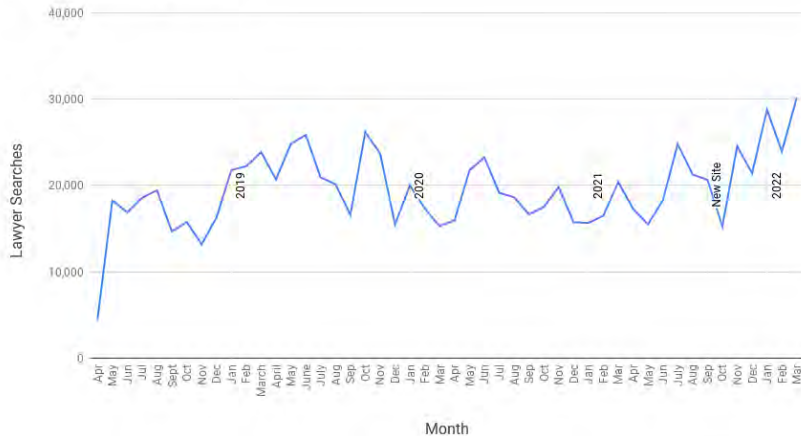
<p>Sheila, SBOG Member Benefits Coordinator-2/10/22 Member reported that they were trying to download a Ga. Code Section, and I could not do it as either a Word document or pdf. Tried in Edge and Chrome.</p>	<p>Fastcase Response-2/10/22: We'll reach out to the member to assist.</p>
<p>Sheila, SBOG Member Benefits Coordinator-4/5/22 Member reported that they were trying to access a Tennessee Code Ann section 67-5-212. As of 9:08 am EDT, the statute is still unavailable.</p>	<p>Fastcase Response-4/5/22: This is a known issue that happens first thing in the morning as we import changes into the system. We are in the process of speeding it up and having statutes and regs come begin syncing in the very early morning hours.</p>

CloudLawyers/ReliaGuide Report

Spring is here and the directory is seeing growth in many areas. Since the start of 2022 the directory has facilitated **103,659** lawyer searches. There have been **91,940** interactions with member profiles (views and clicks) including **2,127** completed contact form requests and **4,782** clicks on lawyer phone numbers and emails.

ReliaGuide and the bar association communication team are continuing to work on marketing campaigns and updating the State Bar of Georgia site information to build awareness about the Find A Lawyer directory and its value to members and the general public. Since the beginning of the year, **1,697** members have signed into their profile and **661** members have edited their profile. Currently there are **265** members signed up for Profile Plus (the enhanced profile). Members with profiles that have a photo, practice areas, biography (Profile Plus) and case examples (Profile Plus) are ten times more likely to get contacted by a potential client than those that do not. Through the site's new analytics, available to each lawyer, the bar continues to learn more about how the directory is utilized to assist lawyers and members of the public.

State Bar of Georgia Searches



**State Bar of Georgia
Private Health Insurance Exchange
April 27, 2022**

WEBSITE ANALYTICS	
Total Users	61,073
Total Sessions	84,079
Total Page Views	227,649
INDIVIDUAL ENROLLMENTS	
Total Enrollments	5,106
• Medical	2,113
• Medicare	27
• Dental	703
• Vision	366
• Telehealth	482
• ID Theft Protection	43
• Life / AD&D	1,071
• Disability	233
• Long-Term Care Enrollments	68
EMPLOYER ENROLLMENTS	
Total Enrollments	1,294
• Medical	736
• Ancillary	319
• Workers' Comp	14
• Professional Liability	223
• Cyber Security	2

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April 26, 2022

Mary Jo Sullivan
Sections Director
State Bar of Georgia
104 Marietta St. NW, Suite 100
Atlanta, GA 30303

RE: Administrative Law Section Annual Report 2021-2022

Dear Ms. Sullivan:

I hope this letter finds you well. This letter shall serve as the Administrative Law Section's annual report for 2021-2022.

On June 28, 2021, the Section hosted a watching party and networking event at Gibney's Pub. The event, which centered around the UEFA 2020 Euro Finals, allowed Section members to gather in person and celebrate after a long year in lockdown.

On September 8, 2021, the Section held a lunch and learn at the Office of State Administrative Hearings featuring Professor Sasha Volokh, who gave an intriguing presentation on the non-delegation doctrine. Attendees received 1.5 hours of CLE credit at no charge.

After a long hiatus caused by the COVID-19 pandemic, the Section hosted its Annual Holiday Party at Fadó on December 3, 2021. As usual, the event was well-attended, and presented an excellent networking opportunity for Section members.

This month, the Section leadership met to discuss plans to host an annual meeting and continuing legal education event this summer. This meeting would include elections for Section officers.

Currently, the Section has 191 members, and its budget is in excellent condition.

Sincerely,

Dominic Capraro

Dominic Capraro
Chair
Administrative Law Section

ANTITRUST LAW SECTION – STATE BAR OF GEORGIA
ANNUAL REPORT AS OF APRIL 25, 2022

Section Officers:

Chair: Lindsay S. Johnson
Vice Chair: Parker Sanders
Secretary: Katie Balthrop

The above-listed officers have held these positions since Summer 2020.

Membership:

Currently, the Section has 88 members. This is a notable increase from the 74 members reported in last year's Annual Report. Section Officers remain committed to growing the Section and increasing engagement of its membership. The Section Officers are still considering a mentorship program to enhance connections among members.

Financials:

The current balance of the Section's operating account is \$14,434.21 as of February 16, 2022. Due to the ongoing impact of the covid-19 pandemic, limited funds were expended in 2021 and into early 2022.

Board Meetings:

In addition to the Section Events listed below, Section Officers formally met on the below dates. Minutes for these meetings are maintained by the Secretary. Additional discussions and email exchanges among Section Officers occurred on an as-needed basis.

September 30, 2021

February 11, 2022

Section Events (since the last Annual Report):

On December 8, 2021, the Section held a Holiday Happy Hour & Networking Event at the Skydeck of Smith Gambrell & Russell LLP. The event was co-sponsored by the Corporate Counsel Section of the Atlanta Bar Association. The event was well-attended.

On April 7, 2022, the Section held a Breakfast Event at Anthem Restaurant at the Marriott Marquis in Washington, DC. This breakfast coincided with the American Bar Association's Spring Meeting at the hotel. Historically, the Section has hosted a breakfast event during the Spring Meeting conference each year, except during 2020-2021 due to covid-19.

The Section is sponsoring a coffee break at the upcoming 2022 Annual Meeting taking place on June 2-5, 2022. The Section previously sponsored a coffee break at the 2021 Annual Meeting as well.

The Section is in the process of planning a CLE and/or networking events for the remainder of 2022.

Respectfully submitted,

/s/ Lindsay S. Johnson

Lindsay S. Johnson
Chair
Antitrust Section
State Bar of Georgia

APPELLATE PRACTICE SECTION

2021 – 2022 Annual Report

Overview

The purpose of the Section, as stated in its bylaws, is “to foster professionalism and excellence in appellate advocacy and to encourage improvements in the appellate process.” The work of the Section involves publishing newsletters, sponsoring programs and seminars, encouraging appellate pro bono representation, providing a forum for dialogue between the appellate bench and bar of this state, and, when appropriate, advocating improvements in appellate practice and procedure through legislation.

At the time of this report, the Section’s membership consists of 511 members.

Section Officers

Chair:	Eric Marlett
Chair-Elect:	Jaletta Smith
Secretary:	Kelly Campanella
Treasurer:	Konrad Ziegler
Immediate Past Chair:	Brandon Bullard

Committees

Programming & Events Committee

This committee is for administering the section’s luncheon programs and other special events.

Communications Committee

This committee is for publishing the section newsletter, The Appellate Review, administering the section’s listserv and coordinating other outlets for information about section activities.

State Practice & Legislation Committee

This committee is for focusing on issues relating to practice before the Supreme Court of Georgia and the Court of Appeals of Georgia, including state appellate court proposals, comments on legislation and rules changes and considering whether to file amicus briefs.

Federal Practice Committee

This committee is for focusing on issues relating to appellate practice in the federal court system, including proposals and comments on legislation and rules changes, comments to the 11th Circuit on Rules Amendments/Proposals, overseeing ECAPI, and considering whether to file amicus briefs.

Seminar Committee

This committee is for coordinating the section's seminars, primarily the state appellate practice seminar.

Pro Bono Committee

This committee is for coordinating the section's pro bono activities.

Activities

December Meeting

The Section held a luncheon meeting on Thursday, December 16, 2021. While Section meetings are normally held at the State Bar Center, this particular meeting was instead held at the Nathan Deal Judicial Center at the invitation of the Hon. Christopher J. McFadden, Presiding Judge, Court of Appeals of Georgia. The current slate of Section officers was formally elected, and Judge McFadden spoke to, and answered questions of, the Section members attending both in person and via Zoom. After the meeting concluded, members were offered a tour of key areas of the new judicial building, including both the Court of Appeals and the Supreme Court courtrooms. Judge McFadden was also kind enough to invite interested members in to view his chambers.

Midyear Meeting

The Section scheduled its annual luncheon at the State Bar Midyear Meeting for Thursday, January 6, 2022. Georgia's new Solicitor General, Stephen Petrany, had agreed to speak to the Section, and the meeting was again set to be both in person and virtual, however, just the week prior, a surge in COVID-19 cases led to the cancellation of all in person meetings for the State Bar Midyear Meeting. While an all virtual option remained possible, after careful consideration and consultation with our speaker, the Section cancelled the luncheon for the Midyear Meeting, with the aim of rescheduling Solicitor General Petrany for a future date.

May Meeting

The Section is in the process of planning a May 2022 luncheon meeting, at which, hopefully, Solicitor General Petrany can be rescheduled.

Annual Meeting

For the 2022 State Bar Annual Meeting being held on Amelia Island, Florida, the Section will be working with the Judicial Section to hold a Joint Luncheon of the Appellate Practice and Judicial Sections on Friday, June 3, 2022. The two Sections had previously endeavored to hold a joint meeting in 2020, but were unable to do so due to the pandemic. Specific plans for the Joint Luncheon are still in progress.

Respectfully submitted,

/s/ Eric J. Marlett

Eric J. Marlett
Chair, Appellate Practice Section
State Bar of Georgia

Memo

To: LANE SOSEBEE
From: ALAN ARMSTRONG, CHAIR, AVIATION SECTION
Date: APRIL 25, 2022
Re: ANNUAL REPORT OF ACTIVITIES OF THE AVIATION
SECTION OF THE STATE BAR OF GEORGIA

OVERVIEW

The Aviation Section of the State Bar of Georgia is devoted to fostering camaraderie and fellowship among its members. Aviation Law is a diverse discipline including a variety of activities and areas of practice such as airport and airspace design, airport operations, flight operations, aircraft acquisitions, the structure and organization of corporate flight departments, access to public use airports, enforcement actions brought by the FAA against airmen accused of violating the regulations and, of course, air disasters and crashes. Many of the members of the section are active pilots and they have an inherent appreciation for the operational considerations that apply to aircraft and airports.

The Section has 177 members. The funds on deposit for the Section are \$15,095.56. Historically, the Section has sponsored aviation law seminars to improve an awareness and appreciation for aviation law both among members and non-members. The members gather together on at least an annual basis for a dinner and to elect officers. The current officers are Alan Armstrong, Chair, Lisa McCrimmon, Vice Chair, and Jason Drouyor, Secretary. Also, Jason Drouyor serves as the editor of the Aviation Section's newsletter. Mr. Drouyor has been admitted to Tulane University to pursue a master's degree in maritime and admiralty law.

April 25, 2022

Mary Jo Sullivan
Sections Director
State Bar of Georgia
104 Marietta St, Suite 100
Atlanta, GA 30303

RE: Child Protection and Advocacy Section
2021-2022 Annual Report

SENT VIA US MAIL AND BY EMAIL

Dear Sections Director Sullivan:

Pursuant to Article X, Section 6 of the bylaws of the State Bar of Georgia, a report of the activities of the Section during the 2021-2022 year is hereby submitted for your consideration.

The Child Protection and Advocacy Section (hereinafter "Section") is concluding its ninth year of operation. The membership of the Section represents a broad spectrum of lawyers and judges who practice in child advocacy and protection. As of April 12, 2022, the Section has grown to 496 members. The Executive Committee replaced the annual full-day CLE program with quarterly professionalism lunch and learn sessions and other opportunities for the Section to gather and become more informed. Due to COVID-19, the efforts to gather in person has been severely hampered however this increased the ability to virtually reach members throughout the State of Georgia.

The Section serves as a forum for dissemination of information on aspects of juvenile law practice related to children. The Section consists of various representatives in juvenile justice: child directed representation, best interest representation, judges, prosecutors, public defenders, many agency representatives including, but not limited to, Department of Juvenile Justice, Division of Family and Children Services, Georgia Department of Education, education representatives, Georgia Legal Services, Georgia Family Connection Partnership, Georgia Appleseed, and other government and non-government organizations.

The Section's Executive Committee during this fiscal year included:

John Paul Berlon	Tonya Boga	Rod Bumett
Hon. Stephanie Burton	Crystal Conway-Johnson	Ira Foster
Leslie Gresham	Chris Hempfling	Afiya Hinkson
Beth Feingold Morris	Julia Neighbors	Anissa Patton
Jill Roth	Stacey Suber-Drake	Laurie Thomas

Elizabeth Bradley Turner	Nicki Vaughn	Michael Waller
Randee Waldman	Cindy Wang	

An Annual Meeting of the Section was held on January 27, 2022. Proper notice was provided through the newsletter and email to current members of the section. A Nominations Committee was selected and said committee presented the following slate of officers for the fiscal year 2022-2023: John Paul Berlon, Chair; Tonya Boga, Vice-Chair; Randee Waldman, Treasurer; and Julia Evon Day, Secretary. This slate of officers was presented along with an opportunity for any nominations from the floor in accordance with the Section's bylaws. The slate of officers was presented and carried by the majority vote of the members of the Section present.

After conducting business of the section, an annual CLE was presented with an hour of professionalism titled "Forever Pandemic through the Looking Glass of Child Welfare" presented by the Honorable Thomas L. Cole, Presiding Judge of Chatham County Juvenile Court, and Honorable Vincent Crawford, Chief Judge of DeKalb County Juvenile Court. This presentation was moderated by Laurie Thomas. A second hour was presented at the annual meeting and this presentation was on "Delinquency and Dependency Litigation in the Forever Pandemic" presented by Randee Waldman, Barton Juvenile Defender Clinic, and Emma Brown-Bernstein, Fulton County Parent Attorney Office. Both these presentations are available on the Section's homepage.

The Section's Executive Committee continues with the objective of diversity in the various fields of law impacting child protection and advocacy. The Section's Executive Committee also continued with the objective to bringing opportunities to all corners of the State. The Executive Committee has a representative in each of the ten Judicial Districts. The following members of the Executive Committee will focus increased outreach efforts in the following judicial circuits:

Judicial District	Name	Email Address
1	John Paul Berlon	jpberlon@gmail.com
2	Michael Waller	mwaller@qaappleseed.org
3	Ira Foster	ifoster@qlsp.org
4	Laurie Thomas	lauriethomaslaw@yahoo.com
5	Afiyah Hinkson	afiya@thehinksonfirm.com
6	Anissa Patton	anissa.patton@fulloncountyga.gov
7	Recently Vacant	

8	Hon. Stephanie Burton	sburton@eighthdistrict.org
9	Nicki Vaughan	nvaughan@hallcounty.org
10	Rod Burnett	rburnett@augusta.gov

During the 2021-2022 fiscal year, a district representative facilitated the following: virtual social hour including Family Feud, back to school drive in rural Georgia, advocating for your child in education and in school tribunal cases; and participating in MD-CANI (www.gacip.org).

The Section contributed support and/or shared information related to the following: Case Law Update (09-24-21).

The Section's annual holiday tradition is to support an entity or project that relates to the participants of the Section. The benefactor for this past year was Genesis House Group Home in Middle Georgia.

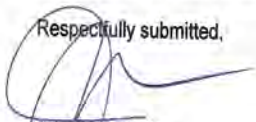
The Section published "Kids Matter", a quarterly publication that provides highlights of the Section's activities and disseminates information such as updates in child welfare law, community initiatives, and other thought-providing issues facing practitioners of child welfare and advocacy. The newsletter is emailed to members and made available on the Section's webpage.

A priority of the Section has been to provide scholarships for members to attend training conferences and take advantage of national educational opportunities. Due to COVID, the Section has planned a lunch and learn webinars. During the 2021-2022 fiscal year, the Section provided the following CLE opportunities:

September 10, 2021	Legal Advocacy for LGBTQ+, Currey Cook and Sruthi Swaminathan
October 8, 2021	Attorney Roundtable - Jerry Bruce and Diana Rugh Johnson
January 27, 2022	Forever Pandemic through the Looking Glass of Child Welfare Delinquency and Dependency Litigation in a Forever Pandemic

If you have any questions, comments, or concerns, please feel free to contact me on my mobile at 912-996-6188.

Respectfully submitted,



John Paul Berton

cc: CPAS EC

SMITH, GAMBRELL & RUSSELL, LLP

M E M O R A N D U M

TO: Mary Jo Sullivan
Lane Sosebee
Section Liaisons, State Bar of Georgia

FROM: Peter Crofton, Chair
Gregory Smith, Vice-Chair

DATE: April 26, 2022

RE: Construction Law Section of The State Bar of Georgia Annual Report 2020-2021

The Construction Law Section (the “Section”) had a great third full year, especially in light of the impact COVID-19 had on our activities. Since its formation on November 2, 2018, we have grown the Section’s membership to 467, and we have \$19,294.97 in our account with the Bar. The pandemic significantly disrupted our programming the first half of the year. Nevertheless, we conducted two in-person events because of our belief that the Construction Bar is significantly enriched by the personal bonds and interactions between our members. Our significant projects this year include:

1. In-Person CLE and Social with Three Other Bar Sections

On October 21, 2022, shortly after the Bar lifted the pause on in-person events, the Section hosted our first post-pandemic in-person event. This event, called the Construction Collaboration Colloquium, was a joint CLE event with the Alternative Dispute Resolution Section, the Judicial Section, and the General Practice and Trial Sections of the Bar. The event consisted of three panel discussions on issues relevant to all of the sections, and featured highly qualified panelists, including former Chief Justice of the Georgia Supreme Court Leah Ward Sears and the current chief (and only) judge of the Georgia Statewide Business Court Walter Davis.

The Colloquium was followed by a networking event which encouraged members of the four Bar sections to network and to experience the comradery of attending an in-person event with other Bar members. Not surprisingly, the event received rave reviews. Several members expressed how much they missed the personal interaction with other attorneys during the pandemic and how glad they were to be able to again attend in-person events.

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2. Women in Construction Roundtable Discussion

On March 30, 2022, we held our second in person event – the Third Annual Women in Construction Roundtable Discussion, an event that celebrates the role of women in the construction industry. The event featured a lively panel discussion about the impact of women and women attorneys in the construction industry. The panel discussed how women are becoming ubiquitous in the construction industry, and the audience interacted with the panel in discussing how to speed up the arrival of that time.

The event was both preceded and followed by a networking event for the attendees. As with the October event, the networking event was intended to help restore the collegiality that comes from personal interaction. Knowing our fellow attorneys as individuals improves the practice of law inside and outside of the courtroom, and improves our ability to work together to improve our profession, our Bar, and our communities.

On a personal note, I was delighted to bring my high-school aged daughter to this event. She wants to be an attorney in the future, and it was a great experience for her to meet women who made the journey she wants to undertake. My daughter even felt comfortable speaking during the panel discussion, which showed me how effective this event can be for inspiring future generations of lawyers. As a result, during the event we discussed with the panel hosting the event next year at one of the area law schools.

3. Section Award of Achievement

The Section was honored, and humbled, to receive a Section Award of Achievement from the Bar at the 2001 Annual Meeting. This Award recognized the Section's positive influence on its members and the Bar community, and the tremendous efforts of the many, many people who have helped bring this Section from non-existence to where it is today. These people include the Section membership, as well as the Sections staff at the Bar. Mary Jo and Lane have been instrumental in helping us with everything from hosting events to navigating the Bar's section requirements, and we owe them a tremendous debt of gratitude.

4. Upcoming Events

The Construction Law section has several new and exciting events on the horizon. We are exploring participating in a Habitat build as a way to fulfill several of our Section goals. We are also considering hosting a large social event, such as a holiday party, to bring our ever growing membership together. Lastly, we are exploring conducting a CLE or other event outside of Metro-Atlanta to better serve our members located in other parts of the state.

5. Conclusion

It has been a productive year, and our membership continues to grow as we strive to reach our goal of supporting the members in their practices. We are glad that we have been able to conduct in-person events so to restore a sense of normalcy to our members' professional lives, and we look forward to continuing to expand the events we offer to our members. We are happy to provide additional information about the Section as may become necessary.

**Annual Report of the Consumer Law Section
State Bar of Georgia**

Lane Sosebee
Sections Coordinator
State Bar of Georgia
104 Marietta St. NW, Suite 100
Atlanta, GA 30303

Dear Mr. Sosebee,

It has been my pleasure to serve as the Chair of the Consumer Law Section during the 2021-2022 Bar Year. I trust the Section will be in capable hands next year under Cliff Carlson and elections will need to be held to select a new Vice Chair and Secretary.

Our Section out on two very important and well attended events. The first was an October 19, 2021 Zoom program with Carlos Vilela, Staff Attorney to the Honorable Jane Manning, Cobb State Court, titled Default Judgment Today, Gone Tomorrow regarding default judgments and various issues with them. This lunch meeting was well attended.

On November 30, 2021 we hosted a Zoom CLE with Shannon L. Mills of Georgia Legal Services Program's Macon Regional Office titled Update from the Field: Evictions Post CDC Eviction Moratorium. This CLE was well attended as well.

This marks a substantial increase in programming put on by our section and I hope begins a trend of increased participation by our membership.

There has been no significant change in our available funds or membership.

Respectfully Submitted,

Ronald Edward Daniels, Chair

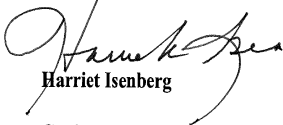
Annual Report 2021-2022
Creditor's Rights Section

Despite the pandemic and so many restrictions, we still were able to have our two annual events. The fall luncheon at Maggiano's was great and gave us a chance to have a face to face meeting we all needed. We purposely did not have a speaker this year so we could just exchange ideas and experiences and network. We had about 40 participants.

We also managed, with the help of Adam Cleveland and Beth Rogers as seminar chairpersons, to have a very successful annual seminar. It was virtual and well attended.

The speakers were informative and the attendees got 6 hours of CLE.

We hope to have an even better year next year.



Harriet Isenberg

Co-Chair

April 26, 2022
Mary Jo Sullivan
Sections Director
State Bar of Georgia
104 Marrietta Street NW #100
Atlanta, GA 30303

Dear Ms. Sullivan:

I hope this letter finds you in good spirits. This letter shall serve as the Dispute Resolution Section's annual report for 2021-2022.

It has been an honor to serve at this role. I am confident that our collective efforts to energize our membership will serve this Section in the long term.

Continuing Legal Education

This year, we are proud to have hosted 14 hours of CLE and we are in planning for 6 additional hours of CLE as detailed below:

- 1 hour CLE August 20, 2021: Uniform Mediation Act
- 1 hour CLE September 17, 2021: Practical Considerations of Uniform Mediation Act
- 3 hours CLE: October 21, 2021: Construction Symposium; Collaboration with Construction Section, the Judicial Section, the Alternative Dispute Resolution Section, and the General Practice and Trial Section
- 6 hours CLE : November 19, 28th Annual ADR Institute and 2021 Neutrals' Conference in collaboration with Georgia Office of Dispute Resolution
- 1.5 hours CLE: January 5, 2022: Arbitrator Roundtable
- 1.5 hours CLE: April 8, 2022: Diversity Symposium.

- With regards to upcoming CLE, our section is in planning for an Arbitration conference (6 hours CLE) in June.

I estimate that the above CLEs attracted over 1,000 individuals in attendance in aggregate.

General Meeting

We also had a general meeting virtually on March 11, 2022.

We are excited to have our first in person gathering since the pandemic, for an in-person breakfast meeting, at the Omni Amelia Island during the State Bar of Georgia's Annual meeting. We will also have a round table discussion on the Georgia Office of Dispute Resolution Rules.

Bylaws

Revisions for our bylaws were approved by the membership at our March meeting, but were declined to be implemented. We will resubmit to the membership for approval and follow the proper process. Those revisions include a Treasurer position that is not in our current bylaws.

Elections & Nominating Committee

a Nominations and Elections Committee comprised of the current officers (Chair Sasan Nematbakhsh & Vice Chair Erika Birg) and executive committee members (Ray Chadwick & Mark Dehler) has been formed.

The election for Vice-Chair, Secretary, and Treasurer will take place at the June 3, 2022, in-person breakfast meeting at the Omni Amelia Island during the State Bar of Georgia's Annual

meeting. The Treasurer will be elected at the June 3 meeting and begin service subject to approval of the bylaws.

At that time we will also vote on new bylaws.

Formation of Several New Committees

In addition, the Section also formed several new committees as following:

- o CLE Committee
- o DEI Committee
- o Events & Networking Committee

Current Officers

Chair: Mr. Sasan Nematbakhsh

Vice Chair: Ms. Erika Birg

Secretary: Vacant

Executive Committee Members

Mr. Ray Chadwick

Mr. Mark Dehler

Finances

The financial balance of the Section as of January 28th, 2022 is \$ 64, 216.48.

Logo

Section has adopted the following logo as the symbol that represents our collective values:



I am confident the future looks very bright for this Section. Again, it has been an honor to serve at this role and lead this prestigious section.

Sincerely,

Sasan Nematbakhsh
Chair, Dispute Resolution Section
State Bar of Georgia

STATE BAR OF GEORGIA – EMPLOYEE BENEFITS SECTION

Annual Report – 2021-2020

Board Members:

Section Chair- Douglas Robinson

Vice Chair/Secretary - Clancy Mendoza

Treasurer - Vacant

Immediate Past Chair - Peter Varney

Current Membership: 225 Members

Current Financials:

Balance: \$34,113.44


Net Revenue: \$2,516.33

Overview/Activity/Goals:

The Employee Benefits Section ("EBS") provides a forum for practitioners, in-house counsel, and government attorneys to discuss topics in the pension and benefits law practice and ERISA-related issues. In the past, the EBS has frequently sponsored an in-person seminar in conjunction with ICLE that is held in March of each year. The seminar includes a variety of speakers on topics relevant to section members, including annual updates from representatives of the U.S. Department of Labor, updates on relevant tax laws and ERISA regulations, and summaries of relevant 11 Circuit decisions. In lieu of a full seminar, the Board sponsored a webinar on "Health Benefits Update: Avoiding Surprises in 2022" in September 2021. The webinar was approved for 1 hour of CLE credit. EBS paid the cost for all section members in attendance.

The EBS recently solicited its members for interest in expanding its Board and received responses from numerous interested members. The Section is in the process of reconstituting the Board for the upcoming year.

Respectfully,



Douglas M. Robinson

Chair/Employee Benefits Section

cc: Mary Jo Sullivan, Sections Coordinator



EQUINE LAW SECTION
STATE BAR OF GEORGIA
ANNUAL REPORT – 2021-2022
Section Chair – Philip Burrus

~Introduction~

I am both privileged and humbled to serve as the Chair of the Equine Law Section for the 2020-2021 calendar year. We are pleased to report that the Equine Law Section of the State Bar of Georgia has delivered an exceptional year so service to the Section’s members. After being named Section of the Year for the 2020-2021 Georgia Bar calendar year, our guiding principle this year has been to continue to revive the Section from its many years of dormancy and ultimately leave the Section in a stronger position than when the year started.

Additionally, my personal goal as Chair was to ensure establishment and institution of necessary Section tools, protocols, procedures, and best practices that will allow future Executive Committees are able to hit the ground running, thrive, succeed, and take the Section to even greater heights. Increasing membership was a predominant focus, followed closely by getting to better know our members needs and interests and delivering first class educational content, outreach, and social activities. Our Executive Committee members put in many hours of volunteer time pursuing each of these goals, and I take pride in being able to report that we have accomplished these goals in many ways, each of which are described in more detail below.

Last year, the Section was bestowed with the distinguished honor of receiving the coveted Section of the Year Award. This was an *incredible* honor, especially for a Section of our size. Having been re-elected Chair (our 2020-2021 year was only nine months due to the fact that the Section was revived from a nine-year plus hiatus in late

August of 2020), I viewed receipt of the award as a personal challenge for our Executive Committee to even *further* increase the Section's momentum moving into the 2021-2022 bar year. I wanted to better market our Section to the State Bar of Georgia, market our Section to the community, increase our membership, better understand what our members want from the Section's leadership, provide more continuing legal education, provide more social and networking opportunities, provide better communication to our members, provide more collaboration between the Section and members of the Judiciary, provide more collaboration between the Section and law students of the various law schools of Georgia, provide more services to our members, and to better promote our Section nationally.

If the 2020-2021 year set a benchmark with our Section of the Year win, I believed the 2021-2022 Executive Committee should use this benchmark not as a mark to match, but rather as a launching pad from which to soar to new heights. This led to many goals, and there was much we wanted to accomplish. We were fortunate enough to have a small, but fantastic, group of Officers and Committee Chairs on the Executive Committee who were eager to get to work. These members include Natalie Henry as Vice Chair and Angela Hinton as Secretary. Lisa Blackstone is our Outreach Chair, while Lindsey Vance serves as our Programs Chair. Each worked diligently this year to achieve results in line with these lofty ambitions, notably including:

- Increasing **Total Membership** from thirty-three members of August 2020 to *fifty-five* members as of the writing of this report;
- Conducting a **Section Survey** requesting input from Section members regarding their areas of practice and backgrounds, Section programming, Section participation, personal preferences for events and meetings in view of the ongoing SARS-CoV-2 pandemic, how to better market the Section, and what the Executive Committee could do to better serve the Section's members;

- Providing enhanced member communication via our **Website**, which can be found at *georgiaequinelaw.org*, and which provides updated news, national events, and community communication links to our members;
- Update and revision of the Section’s **Bylaws** to provide for a Treasurer, honorary Judicial and law student members, and provide for virtual meetings and electronic voting;
- Increased publication of our quarterly **Newsletter** to provide more and better communication of Section activities and national equine issues to both our members and members of the public who request receipt of the newsletter;
- Hosting even more **Continued Legal Education Programs** featuring nationally renowned speakers to educate our members in the substantive areas of equine law;
- Increasing participation in our **Executive Committee** by filling open committee chair positions;
- Publication of an article describing our Section’s activities in the **Georgia Bar Journal**;
- Collaboration nationally with other Equine Sections of Bar Associations of other states, including reciprocal programming with the Equine Committee of the Animal Law Section of the **Florida Bar Association**;
- Hosting two **Social and Networking Events**, one in person and one virtually so that our Section’s members could get to know each other on a more personal level;
- Continue to maintain our **Legal Library** of books on equine law;
- Increase our outreach by our **Outreach Committee** to better promote our Section to the community for the purpose of giving back and better promoting our Section to non-lawyers;
- Helping members of the public obtain legal representation in the field of equine law via the **Find a Lawyer** and **Section Roster** features of the State Bar of Georgia’s website, www.gabar.org; and

- Collaborate with **Other Sections of the State Bar of Georgia** to better provide continuing legal education to members of the State Bar of Georgia and to promote the activities of the Equine Law Section of the State Bar of Georgia.

In short, we wanted to surpass the output of *any* year in the Section’s history. However, it should be noted that we did not want to merely surpass our previous output, but to surpass it in a *meaningful* and *quality* manner. I believe we have delivered remarkable results for the Section. Consider the following comparison to the award-winning 2020-2021 bar year:

<u>Activity</u>	<u>2020-2021</u> <i>Section of the Year</i>	<u>2021-2022</u>	<u>Increase</u>
Number of Members	33 <i>August 2020</i>	55 <i>At time of writing</i>	67%
Lunch and Learn CLE Events	2	4	100%
Social Events	1 <i>Virtual Only</i>	2 <i>One virtual; one in-person</i>	100%
Newsletters to the Section	2	3 <i>With a fourth possible this summer</i>	50%
Volunteers to Lead Section Committees	2	4	100%
Georgia Bar Journal Articles	0	1	--
Membership Surveys	0	1	--
Bylaws	<i>In third revision, soon to be submitted to the Office of General Counsel for consideration</i>	<i>Submitted to the Office of General Counsel; with Conference Call for Approval Scheduled</i>	--

Collaboration with Community Organizations to Promote Section	0	1	--
Collaboration with Other Bar Associations	0	1	--

The remainder of this report provides additional detail on the efforts listed above as well as the Section’s other accomplishments and includes a summary of the Section’s strong financial position.

~Section Survey~

In addition to wanting to understand how the Executive Committee could better serve its members, I wanted to personally ensure that the Executive Committee was sufficiently connected with its membership. As Chair of the Equine Law Section, I have been constantly interested in receiving feedback from our members. I wanted to know whether we are hosting events that are interesting, meaningful, and worth our members’ time. I wanted to know whether we were allocating dues to activities that help our members’ practices. In short, I wanted to know how we could improve. Moreover, with the health risks of the ongoing SARS-CoV-2 pandemic beginning to wane, we wanted to increase the number of social events we could provide for the Section. Accordingly, we needed to know our members’ preferences regarding interpersonal interaction in these challenging times.

Answers to these questions were not always readily available. To this end, in September the Section conducted a survey of its members. The survey was electronically controlled so that each member could only respond once. The questions touched on a range of issues, from how our continuing legal education programs could be improved to how the Executive Committee could better serve its members, to from what backgrounds and legal practice areas our members came, to comfort with in-person social events. The

response was fantastic, as more than half of our members took the time to respond by completing the survey. I was both pleased and grateful for everyone who took the time to respond.

The results were interesting, to be sure. Half of the respondents actually practice in the equine law space, which was a surprise. When I became chair of the Section I personally reviewed the websites of each member of our Section Roster. From that review, it appeared that less than five members were actively practicing in the equine space.

Many members expressed a desire to see more content, with more CLE events leading the list. There were several great suggestions for topics, including best practices for purchase agreements, sales, and leasing, equine insurance and claim disputes, tax related issues related to equine activities, SafeSport, and liability issues associated with owning and boarding horses.

Due to multiple requests for an event focused upon estate planning issues relating to horses, including the establishment of trusts under the Georgia animal trust statute, the Executive Committee promptly scheduled a CLE event on this topic in April. For reasons beyond our control (more on this later), this event was postponed until June. However, in a quintessential “lemons to lemonade” moment, this adversity actually resulted not only in a more nationally recognized speaker agreeing to present on the topic, but also in collaboration between our Equine Section and the Animal Law Section of the Florida State Bar.

One of the primary reasons we conducted the survey was to gauge how comfortable our members would be meeting in-person this fall. A full eighty percent of respondents indicated they would be comfortable meeting at an outdoor event, with twelve respondents willing to meet indoors as well. Twenty percent preferred on-line meetings only.

With that in mind, we tried – and I mean *really* tried – to make an outdoor social event happen in the fall of 2021. We had no Social Committee Chair at the time, and you would be shocked and surprised as to how expensive it is to host twenty people at a restaurant or other venue in Atlanta. We were able to come to a tentative agreement with

a fantastic venue in early November. However, by the time we did there just was not sufficient time to coordinate with the Bar offices, send out invitations, and allow time for RSVPs without the risk of running into either the Thanksgiving holiday or inclement weather. Accordingly, since we were able to tentatively agree on costs, we now have the event scheduled for April 27, 2022, at The Chastain New American Bistro, which just happens to be in a renovated barn in Chastain Park. Assuming all goes as planned, it should be a truly amazing event.

As Chair of the Section, I took it as a personal task to take the results and turn them into tangible benefits for our members. Accordingly, many of the initiatives below were borne from the survey. Others were born from brainstorming sessions and Executive Committee meetings. Still others were simply ideas of my own resulting from my many years of experience with not only the Equine Law Section, but with my previous time serving as Chair of the Intellectual Property Section. I am proud of each and every one. The following list provides a brief summary of a few of these initiatives:

1. *Increasing 1-hour CLE Credits, primarily through Lunch and Learns:* In response to the question, “What would you like to see more of from the Equine Law Section,” the number one response of the members was “more CLE events.” With this in mind, we have doubled our CLE offerings compared to our 2020-2021 Section of the Year award-winning year.
2. *Increasing the number of Social Events:* With the second-place result to the question above being “more social events,” and with more people becoming comfortable meeting – especially when outdoors – with other members, we were able to reserve the South Terrace at The Chastain on Wednesday, April 27, from 5 - 7 p.m. for an Equine Law Section Networking and Cocktail Party Social Event. Delicious crudites, passed hors d’oeuvres and beverages will be provided by the Section. We think the event will be incredible.
3. *Increasing the number of Newsletters:* With the revival of the Section after a nine-year hiatus last year, we commenced the publication of a quarterly newsletter. Apparently, it was a huge success. We had many requests for an increased

number of newsletters. Additionally, we have had several members of the public request our newsletter as well (members of the public can join our publicly facing mailing list at our website, www.georgiaequinelaw.org). Accordingly, we increased the number of newsletters from two (due to our shortened 2020-2021 calendar year) to three. We are also considering a fourth edition this summer.

4. *Better use of Member Dues*: We asked how best to spend our dues. The responses included more social events, more (and better) educational events, and better publicization of the Section. In response, we have recruited more nationally recognized speakers to our educational events, have been more comfortable allocating funds to social events, and have begun a Section outreach and marketing campaign to attract new members.
5. *Better Executive Committee Recruiting*: While the Section's achievements have been great and many, it has not been without challenges. Despite a full **fifty percent** of the survey respondents indicated that they would be willing to serve on the Executive Committee, we spent the year without a Communications Committee Chair and without a Social Committee Chair. However, due to our successful outreach efforts, we now have volunteer/nominees for not only the four Officer positions (pending bylaw approval adding a treasurer), but for the three committee positions as well. We look forward to next year having our first ever **fully staffed** Executive committee! This is great news, and bodes well for the future of the Section.
6. *More Focused CLE Events*: We asked what *type* of CLE events we should have during the year. The responses were informative, and we acted upon them. In addition to offering an Equine Law 101 event in March in response to survey requests, we are also offering an Estate Planning event in June. Our members ask, and we work tirelessly to deliver.
7. *Better Timing of CLE Events*: We asked why members who *had not* attended our events were unable to do so. Many indicated that there were scheduling conflicts. Consequently, we varied the timing of our events this year, trying both lunch events and mid-afternoon events in an effort to draw more attendance.

8. *Better Marketing*: In response to general questions about what the Executive Committee could do better, marketing was one of the more frequent responses. Consequently, the Executive Committee has taken steps to make the Section both more well known, including publishing an article in April edition of the *Georgia Bar Journal*, and more collaborative, working with outside groups such as the Georgia Hunter Jumper Association, the Athens Area Horse Community, and the Animal Law Section of the Florida Bar Association.

~Membership, and in Particular, MORE MEMBERS~

A primary focus of the Executive Committee’s efforts was increasing the number of members of the Section. After a nine-year hiatus, our membership had dropped significantly. When our Executive Committee members mentioned the Equine Law Section to other people interested in equine activities, they even heard responses as disheartening as “I used to be a member of that Section – they never did anything.” We took this feedback and used it as fuel to energize our marketing efforts.

These included publishing an article entitled “The Equine Law Section Rides Again” in the April edition of the *Georgia Bar Journal*. Opening with the question, “Did you know that the State Bar of Georgia has an Equine Law Section,” the article made clear that if not, it would not be surprising as the Section had fallen into a multi-year hiatus. However, the article then articulated all the wonderful efforts made by our Executive Committee to revitalize the Section, concluding with the invitation that even if one does not practice in the equine space, all that is required is an interest in learning about equine law to “join the section and come ride with us!”

Additionally, the Section worked with the Georgia Hunter Jumper Association (“GHJA”), who kindly featured the Equine Law Section in social media, including Instagram posts. While not every GHJA member is an attorney, there are many attorneys who are also GHJA members. Every bit of marketing helps, especially when operating as a small Section with a limited budget. Thus, our outreach campaign continued.

We collaborated with other organizations as well, including the Athens Area Horse Community, who were very interested in connecting and/or partnering with our Section to help “spread the word” to the community regarding our existence, outreach efforts, and educational resources for horse owners and enthusiasts.

These marketing efforts bore fruit, as our membership has risen a full sixty-seven percent since my becoming Chair. This is not a time to rest on our laurels, however. We will continue our marketing efforts, as I believe the Section could easily achieve a membership roster of one hundred members or more.

~Marketing: Website~

Continuing our marketing efforts, we continue to diligently maintain our website, which serves as not only a bulletin board for current events, but also as an informational archive of our activities and communications hub for our members. Our website is an ongoing and thriving webpage that is continually updated with information concerning the Section. The site, www.georgiaequinlaw.org, includes the following pages:

- A home page with welcome messages, places to sign up for our newsletter, and brief introductory information about our leadership, our members, and our mission;
- An “about us” page discussing:
 - what we do, including our educational activities, our service to the State Bar of Georgia, and our Service to the Community;
 - our mission statement;
 - a listing of our officers, including contact information;
 - descriptions of our committees;
 - our membership roster; and
 - links to our bylaws;
- A “news” page featuring Section news, newsletters, past events, and events from other organizations that may be of interest to our members;

- A “programs” page featuring program announcements and a virtual tour of the University of Georgia Large Animal Veterinary Hospital;
- An “events calendar” listing upcoming events with dates, times, and registration information;
- A “media gallery” featuring pictures submitted by Section members; and
- A “contact” page allowing interested parties to communicate with the Officers to become involved in the Section and/or subscribe to the newsletter.

We are quite proud of our website development efforts in creating this informational exchange for our members. We are even more proud of the fact that this site is now *actively being kept up to date*, thereby informing our members of news events and upcoming programming.

~Marketing: More (and more substantive) Newsletters!~

Since access to the website requires (1) knowing that the website exists and (2) affirmatively searching to find the domain, the Executive Committee wanted to also have a “pushed” mechanism of communication with our members as well. Accordingly, we continue to distribute our quarterly newsletter to our members. A surprising result from the survey was that the members want more! A full third of the survey’s respondents requested more newsletters.

Accordingly, this is what we did. Rather than publish two newsletters last year, we will publish three this year, with hope of publishing a fourth summer newsletter during the 2022-2023 calendar year.

In addition to publishing more newsletters, we also wanted to publish more *substantive* newsletters. We wanted not only to provide information about Section activities, but of national equine events as well. The fourth edition, attached as an appendix to this report, includes an effort in that direction. Specifically, Lisa Blackstone wrote an article introducing the “New Amateur Rule Task Force” of the United States

Equestrian Foundation (“USEF”). She discussed the significant changes in rules affecting four focus groups and their participation in USEF events. Our goal is to make more substantive articles like this a staple of our newsletter. It apparently is an effective strategy, as multiple members of the public have requested subscriptions to our newsletter as well, which they can do at our website.

A copy of the aforementioned newsletter – as well as the subsequent newsletters being distributed later this year – are also available on the Equine Law Section’s web site at www.georgiaequinlaw.org under the “News” tab. A third newsletter will be published later this spring. We hope to continually push the newsletter to even more exceptional quality, potentially including scholarly articles and reports on recently held events. Always keeping consideration of the environment in mind, our newsletter will only be distributed electronically. This saves Section funds, reduces labor requirements of those supporting the Section, and also prevents the unnecessary use of paper.

~Marketing: Fill the Executive Committee!~

While the Executive Committee has had great success, it has also experienced challenges that it has worked to overcome. In particular, throughout the 2021-2022 year, we had open positions for both the Social Committee Chair and the Communications Committee Chair. Despite more than *fifty percent* of survey respondents indicating they would gladly serve on the Section’s Executive Committee, multiple calls for volunteers for these positions received no response whatsoever.

Accordingly, the Executive Committee set out on a word-of-mouth campaign to generate enthusiasm for both positions. Working tirelessly on an in-person social event (detailed below) and newsletters (detailed above), the Executive Committee attempted to demonstrate just how important these roles were. Additionally, I tried to personally explain the same in the Letter from the Chair section of the newsletter.

I am pleased to report that these efforts have been successful. In early April, the Section sent out an open call for nominations for both Officer positions and Committee Chair positions. In response, we now have a nominee for all three Officer Positions (four

once the Treasurer position is approved, as we have a Treasurer nominee as well) in addition to four nominations for the four Committees of the Section. This is a **huge** success. It would appear that we will actually start the 2022-2023 with a full contingent of both Officers and Committee Chairs for the first time since restarting the Section. This is great and wonderful news to report.

~Marketing Efforts: Successes~

The combined efforts of publishing in the *Georgia Bar Journal*, working with groups such as the Georgia Hunter Jumper Association, increasing the frequency, quality, and subscribership of the newsletter, maintaining an *always current* website, and good old “pounding the pavement” and spreading the word by mouth marketing efforts of our Executive Committee members have borne immediate fruit. I am happy to report that Section membership has increased a whopping sixty-seven percent since August of 2020. We hope to see this success continue as we continue our marketing efforts.

~Bylaws~

With the Section having been dormant for many years, its bylaws have become badly outdated. Moreover, the operation and functioning of the Section desired by the Executive Committee was inconsistent with the provisions of the bylaws. Illustrating by example, the Officers generally prefer the ability to conduct meetings virtually (a need brought precisely into focus during the pandemic) and voting in elections electronically. The current bylaws are focused around physical mailings of notices through the postal service and voting with physical presence. Through communications with other Section chairs, we discovered that many sections today streamline this process using electronic ballots. Additionally, by allowing new officers to be nominated at the mid-year meeting, rather than the annual meeting, our preferred earlier process will allow newly elected officers time to prepare before assuming office.

Accordingly, we still in the process of taking affirmative steps to amend the bylaws this year to better conform our desired Section operations. We are also working so that these amendments more closely support the Section’s current needs, as well as to more closely resemble the revisions being made to the State Bar of Georgia’s Model Bylaws.

To date we have been through four rounds of revisions with each and every member of the Executive Committee weighing in on the proposed changes. Our bylaws changes have now been reviewed by the Office of General Counsel, who is in the process of rescheduling a meeting to discuss the revisions with us (the first was scheduled for March 23, 2022 but was canceled last minute). We hope to have the revised bylaws ready for a membership vote before the end of the fiscal year.

In addition to adding the position of Treasurer to our Officer corps., the proposed changes to the bylaws seek to improve our relations with both the **Judiciary** and **law students** of the various law schools within the state of Georgia. Specifically, we propose to make “Judges of the Federal Courts of the several Districts of Georgia, and all judges of the United States Court of Appeals for the Eleventh Circuit maintaining an office in Georgia ... Honorary members of [the Equine Law] Section” during their tenure in office. Our goal is to foster outreach with the judiciary by extending a default invitation for any jurist with an interest to automatically be included with our Section.

We additionally propose a provision for “[a]ny associate or student associate of The State Bar of Georgia” to be eligible to “become an associate or student associate of this Section upon application and payment of the required dues.” Such associate members would be entitled to all of the privileges of this Section, except that of voting or holding office. In addition to the desire of our Section to grow from increased membership of current bar association members, we want to plant seeds that will allow the Section to grown *organically* as newly minted law school graduates join the State Bar of Georgia. To do this, we must start our outreach early. Accordingly, if approved our new bylaws will welcome law students to become members of the Section without voting or office holding privileges.

~Section Outreach~

In a continuing effort to foster education, networking, and good will throughout the State Bar of Georgia, I have personally reached out to the chairs of many other Sections, including the Intellectual Property Law Section, the Animal Law Section, the Entertainment and Sports Law Section, and the Insurance Law Section. During my conversations with these colleagues, I have relayed our members' interest potentially partnering with other sections for a joint event. For instance, I have conveyed to the Insurance Law Section that since there is so much money (and liability) involved in equine sporting activities, e.g., hunter/jumper/equitation competitions, western riding, dressage et al., it may be interesting to partner with the Insurance Law Section to coordinate collaboratively with reference to an event focused around insurance and liability in the equine space.

These outreach efforts have borne fruit. We had serious discussions with the Animal Law Section in the fall, and in particular, Megan Boyd while Chair of the Animal Law Section, regarding having a joint social event between our respective Sections. While those efforts did not pan out, we are enthusiastic about working with other Sections. Illustrating by example, we plan to invite all members of the Animal Law Section and the Fiduciary Law Section to join our June CLE event on the intersection of estate planning and equine law featuring nationally renowned author, podcaster, attorney, and activist, Peggy Hoyt Bryan.

~More Social Programming~

As noted above, one of the member desires expressed in the survey was for more social events. Hearing this, we went to work. Without a Social Committee Chair, we worked ever so diligently to arrange an in-person social event for the fall of 2021. We tried – and I mean *really* tried - to make an outdoor social event happen this fall. You would be surprised how expensive it is to host twenty people at a restaurant or other venue in Atlanta. We initially divided up a number of venues among our Executive

Committee members. These included calling, pricing, and negotiating with the following different venues, among others:

- Ticonderoga Club
- Tiny Lou's
- Wrecking Bar
- 5 Church
- Bacchanalia
- Southern Art and Bourbon Bar
- Elevator Lounge
- Old Vinings Inn
- Paces & Vine
- Seven Acres Bar 'n Grill
- Citizen Soul
- Holmes
- Garden & Gun Club
- Barcelona Wine Bar
- Painted Horse Winery and Vineyards
- The Chastain

After a *lot* of hours and a *lot* of meetings, were able to come to a tentative agreement with The Chastain, which happens to be in a renovated horse barn in Chastain Park. However, by the time we did there just was not sufficient time to coordinate with the Bar offices, send out invitations, and allow time for RSVPs without the risk of running into either the Thanksgiving holiday or inclement weather.

Accordingly, in December we hosted a *virtual* Holiday Party via Zoom. Specifically, the Executive Committee held an informal, virtual holiday social gathering via Zoom on Tuesday, December 14 from 5 – 7 p.m. We had several members attend and held a lovely discussion of what is occurring in the Section, holiday plans, and what

brought each of us to the equine space. It was great to get to meet new faces and have some time to just converse as friends.

Since we had agreed to terms at The Chastain, we have now additionally scheduled our first **in-person** social event since restarting the Section. Specifically, we have issued invitations for Equine Section members to attend an amazing Equine Law Section Networking and Cocktail Party Social Event on the South Terrace of The Chastain on Wednesday, April 27, from 5 - 7 p.m. Delicious crudites, passed hors d'oeuvres and beverages will be provided by the Section.

This represents a doubling of our social events from the 2020-2021 Section of the Year award-winning year, which is quite an accomplishment given that we do not have a current Social Committee Chair. It has truly been a team effort to bring this in-person social event to fruition.

~Committee Structure~

In accordance with its bylaws, the Equine Law Section's Executive Committee manages the Section's day-to-day activities. According to the current bylaws, the Executive Committee is comprised of the Section's Officers (Chair, Vice Chair, and Secretary) as well as the chairpersons of its standing and special committees.

Our Executive Committee has established four special committees: a Programs Committee, a Social Committee, a Communications Committee, and an Outreach Committee. The Program Committee helps to coordinate substantive programming for the Section. The Communications Committee provides assistance with our newsletter and website. The Social Committee plans and coordinates social interactions among the members when substantive matters of law are not the principal focus. The Outreach Committee coordinates communication and outreach efforts both within the State Bar of Georgia and with the public. As the mission statement of the Section states that the purpose of the section includes rendering service to the general public, the Outreach Committee became an imperative component in our strategy for fostering relationships with both attorneys practicing in other fields and the public at large.

~Equine Law Library~

Our Equine Law Library includes three volumes, which include *Understanding Equine Law – Your Guide to Horse Health Care and Management* by Milton C. Toby and Karen L. Perch, *More Equine Law and Horse Sense – The Ultimate Legal Guide to Horse Owners and Business* by Julie Fershtman, and *Equine Law, 2nd Edition* by Frank T. Becker. These volumes are available for any Section member to use on a limited, check out and return basis.

~CLE EVENT 1: Equine Welfare and Sport Regulation CLE ~

In August, the Section had its first CLE Event, with the program discussing how the sport horse industry is organized and regulated. The global and national management of equestrian sport is accomplished through a group of inter-related member organizations charged with protecting the welfare of the horse and ensuring fair competition. International and national equestrian rules have some important differences in the actual rules and the hearing process. The jurisdiction of these regulatory bodies is not limited to only drug and medication violations by horses and athletes, but includes adjudication of charges of violations against officials, competition management, national federations, field of play violations by athletes and abuse of both horses and clients. Nationally renowned speaker **Armand Leone** discussed the regulatory framework, what one can expect if deciding to represent a client before one of these adjudicating bodies, and a look at some actual cases. In addition to discussing this regulatory framework, Armand talked about what one can expect if deciding to represent a client before one of these adjudicating bodies. The CLE event was free to Section members and one hour of general CLE credit was given.

~CLE EVENT 2: Equine Law 101: Contracts, Liability Acts, and Agister's Liens ~

In response to popular demand from the survey, we held an equine law basics event in March. Nationally renowned speaker and CLE panelist Lisa Boswell of Wellington, Florida put on a wonderful presentation discussing the basics of equine contracts, including boarding agreements, liability waivers and releases, and purchase, sale, and lease agreements, equine activity liability acts, and agister's liens. Ms. Boswell is an attorney licensed to practice in Florida, Colorado, Montana, and Wyoming, and practices in the areas of equine law, landlord/tenant matters, contracts, and civil litigation. A graduate of Nova Southeastern University's Shepard Broad Law Center, Ms. Boswell is a nationally known speaker. She has authored articles on horse slaughter legislation published by the Florida Bar Association. Married to an equine veterinarian, Ms. Boswell has also co-authored articles on veterinary medicine laws in the state of Florida. We are thrilled – and quite fortunate – to be able to have Ms. Boswell speak to our Section. It was a wonderful and well-attended event. The CLE event was free to Section members and one hour of general CLE credit was given.

~CLE EVENT 3: The Intersection of Estate Planning and Equine Law ~

This event both posed great challenges and bore great fruit. In planning for *over three months*, the event was originally scheduled for April 6, 2022. Local attorney John P. Farrell, an estate planning attorney, former Magistrate Judge, and the author of *Estate Planning for the Modern Family: A Georgian's Guide to Wills, Trusts, and Powers of Attorney*, was scheduled to discussing both the importance and the legal intricacies of incorporating equines into estate planning under Georgia's laws.

Unfortunately, with over fifteen members scheduled to attend, Mr. Farrell canceled on May 31 citing "client conflicts." This led to a furious effort by me to find another speaker. I certainly gave it the old college try. I personally called seven different attorneys with experience in animal trusts, two of which have specific experience with

equine trusts. Given the late date and tight time schedule, I received no offers to present. Sadly, the event was canceled, with the following notice being sent to the members:

Dear CLE Program Registrants,

Thank you for registering for our Intersection of Estate Planning and Equine Ownership CLE event, which was to be held on April 6, 2022 at noon via Zoom. Due to circumstances beyond our control, our speaker has canceled due to client-related conflicts. Despite our best attempts to find a replacement speaker, we were unable to do so given the short timeframe between becoming aware of the issue and the event itself. Accordingly, we must unfortunately cancel the event on April 6. We do hope to be able to offer another CLE event on the topic of estate planning as it relates to equine matters in the near future. We sincerely apologize for any issues this late cancellation may have caused.

While incredibly disheartening, lemonade came from the proverbial lemons when I began corresponding with Peggy Hoyt, who happens to be the Equine Committee Chair of the Animal Law Section of the Florida Bar Association. Ms. Hoyt has an *incredibly impressive* resume. Her credentials include being a Stetson University graduate receiving her B.B.A., cum laude, in 1981, her M.B.A. in 1982, and her J.D., cum laude, in 1993. She has been a college recruiter, financial consultant, account executive, and chief financial officer before. She is a founding partner of Hoyt & Bryan, LLC, and is dual certified by the Florida Bar in Wills, Trusts, and Estates and in Elder Law.

More importantly for this particular CLE program, she is a self-described “attorney, animal advocate, and pet mom.” Her love for animals was developed as a child when her father, John A. Hoyt, was the *President and CEO of The Humane Society* of the United States. She is the author of *All My Children Wear Fur Coats – How to Leave a Legacy for Your Pet*, a book for pet parents on the importance of including their pets as part of their estate plan. She even hosts a weekly “paw-cast” on Buzzsprout called “All My Children Wear Fur Coats.” She is further the Founder and CEO of Animal Care Trust USA, a not for profit organization dedicated to helping pet parents keep loved pets in loving homes. The organization offers several Forever Loved Pet Trust solutions including Forever Home, Forever Family, and Forever Sanctuary. Animal Care Trust

USA can act as a corporate Pet Trustee and is leading the animal estate planning world with the creation of the Forever Loved Pet Trust, a community Pet Trust.

Well, Peggy graciously offered to speak to our Section on this very topic, which was fantastic! Her resume is tailor-made for the topic, and we are incredibly thrilled to have such a nationally renowned speaker present to our Section. Accordingly, this event has been **rescheduled for June 7** between 12 and 1 PM. One hour of general CLE credit will be given and attendance will be free. In an effort to continue our **Section outreach**, we plan to invite all members of the **Animal Law** and **Fiduciary Law** Sections to attend as well.

~EDUCATIONAL EVENT 4: Thoroughbred Racing – It’s not All Roses and Mint

Juleps ~

The collaboration with Peggy has led the Equine Law Section to even further in our mission to collaborate with other Equine Sections of Bar Associations of other states, and in particular to being able to offer reciprocal programming with the Equine Committee of the Animal Law Section of the Florida Bar Association. As noted above, Peggy will be presenting to our Section in June. In an effort to present reciprocal programming, the members of our Section are invited to participate in a Florida Bar Association event entitled “Thoroughbred Racing – It’s not All Roses and Mint Juleps.” This event will be held on April 29. With the Kentucky Derby just around the corner, this webinar hosted by the Equine Committee of the Florida Bar Animal Law Section will explore the Thoroughbred Racing Industry – where it came from, where it is today and what the future may hold. The panel of experts will provide insight into the history of the sport, its statistics in Florida and nationwide, along with an exploration of where the industry is headed. Tracks are closing around the country. The panel will discuss what this means to the sport, to the horses and to the breeders and supporters.

This is a first ever collaborative effort between our Section and another bar association. We are thrilled at the possibilities that may ensue if we can continue this type

of outreach going forward, as it offers us an opportunity to increase programming for our members.

~CLE EVENT 5: Hobby Losses as they Relate to Equine Activities ~

Our other CLE event of the year is scheduled for May and will discuss hobby losses as they relate to equine activities. Another nationally known speaker, Robert Webb, an attorney with Frost Brown Todd has established a reputation as a litigator in civil and criminal tax litigation matters, white-collar criminal defense, and business litigation. Over the past twenty years, he has resolved thousands of civil and criminal tax matters at the federal, state and local level. Robert has worked at the Department of Justice Tax Division in Washington, D.C. while pursuing his Masters of Law (LL.M.) in Taxation from Georgetown University Law Center in Washington, D.C. Robert has taught federal taxation of entities at Bellarmine College, authored the Criminal Tax Practice Monograph for the University of Kentucky College of Law and speaks annually at the American Bar Association Criminal Tax Institute.

In May, he will be speaking to our Section regarding hobby losses. As you may guess, the equestrian sport is incredibly expensive. Most equestrians pursue the sport on a part-time basis. At the same time, purses in weekend events can become significant. Robert will be speaking about how and when hobby losses in the pursuit of such purses can be reported on tax returns. We are really looking forward to his presentation on this topic, which will be on one of May 4th, May 12th, or May 17th. This meeting will also serve as our annual meeting where we hold our elections.

~COMMUNITY OUTREACH: Find a Lawyer ~

As Section Chair, I receive numerous calls requesting from members of the public seeking legal advice in the equine space. In addition to not being an equine law attorney, my believe is that it is **not** within the Section's bylaws, mission statement, or purpose to make referrals to individual attorneys. At the same time, when a member of the public is

in need they should not be left completely in the dark when resources are available to assist in their search for legal services. Accordingly, when such calls arrive they are directed to those resources provided by the State Bar of Georgia at the website www.gabar.org. In particular, I have had the opportunity to direct such calls to either telephone the State Bar of Georgia directly or, more efficiently, to use the “Find a Lawyer” resource offered by the State Bar of Georgia. I have explained that one can search for a lawyer by practice type, city, or zip code. I have also explained that a roster of our Section members is publicly available at the Section’s website found under “our programs” and “Sections.” Generally speaking, callers are unaware that these resources exist.

Given the frequency of these calls, I plan to include an article in our next newsletter requesting members to update their basic profiles, which are complimentary for all State Bar of Georgia Members. I also intend to mention “profile plus,” which may allow members to include additional details about their practice, what makes them unique, and what skills may make them the best suited lawyer to address a particular need. My plan is to suggest lawyers include a biography, photo, and practice area, as this increases their chance of being contacted by a prospective client. Hopefully the ReliaGuide “find a lawyer” directory will be a way that the Section can inform interested parties about the many tools available to the public that are provided by the State Bar of Georgia.

~Outreach Committee~

Chair: Lisa Blackstone

We are quite fortunate to have Lisa Blackstone serving as our Outreach Committee Chair. She is pushing her committee forward with serious momentum and growth, putting together a list of more than twenty-five active equine organizations in Georgia with whom she is initiating contact to discuss outreach possibilities. With experience riding, training, and breeding horses, as well as traveling the country to show

and compete, Lisa brings a broad spectrum of equine knowledge to our Executive Committee.

Lisa is also very active in the governance of equine sport. Illustrating by example, the United States Equestrian Federation (USEF) is the governing body over most breeds and disciplines and is the National Governing Body (NGB) for the United States Olympic equestrian sport. Protests and complaints of rule violations for all affiliates under the umbrella of the USEF are sent to the USEF Hearing Committee. Lisa serves as one of the two co-chairs of the USEF Hearing Committee. In that capacity, she hears cases involving various rule infractions such as drug violations, horse abuse, unsportsmanlike conduct, and amateur rule infractions. She is experienced in the USEF hearing process and personally knows many equine lawyers across the country. Lisa further has knowledge in the Safe Sport Act enacted by Congress in 2017. As noted above, Lisa was largely responsible for securing Julie Fershtman as presenter for our first Continuing Legal Education event.

~Programs Committee~

Chair: Lindsey Vance

We are truly lucky to have Lindsey Vance as our Programs Committee Chair. Lindsey moved to Georgia from New Jersey, having to sit for the Georgia Bar as a result of her move. Prior to even moving, she contacted me regularly with a desire to help our Section. Once she was admitted in Georgia and became a Section member, we welcomed her with open arms. Her enthusiasm and dedication will serve as a springboard from our first two Continuing Legal Education events to propel the Section to even higher heights in 2022.

A graduate of New York University and Fordham Law School, Lindsey grew up in Georgia. While practicing in commercial real estate, Lindsey has been riding since she was five years old and feels more comfortable on a horse than on the ground. Growing up, she competed in the hunters, jumpers, and equitation on the “A” circuit, from Florida

to New York. She also played polo for several years. She plans to bring exciting, educational, and fun events to the calendar as Program Committee Chair.

~Budget~

The Section has revised its budget for the present year and future years. The revision was necessary because last year – after the multi-year hiatus – was seen as an abnormal year due to the fact that the Section has been inactive for so long. Accordingly, the Officers acknowledged that additional efforts may be required during a “reboot” phase that may not be necessary during normal operations. This budget therefore slightly exceeded revenue (considering current balances). By contrast, to ensure the future success of the Section, the current budget is a more “standard” budget that should serve as a template for future Chairs, with one exception. Since we have been able to engage nationally renowned speakers at very reasonable rates, we have allocated more funds to our in-person social event this year. The reason is two-fold: first, with our long hiatus we have excess funds that, via the survey, members have indicated they would like to be used for social events. Second, during the SARS-Cov-2 pandemic we were relegated to virtual meetings only. Since this also resulted in additional reserves, we are trying to start the “in-person” return to normalcy with a very nice social event.

~Diversity~

During the reboot the Section enjoys an excellent record for promoting women and minority members to positions of leadership. This year four of the five Executive Committee members are women. Of the two new volunteers to serve on the Executive Committee, one is a woman as well. We will continue to strive to increase the representation of minority, women, and openly gay members on the Executive Committee and in Officer positions.

~Financial Report~

Financially, the Equine Law Section is in better shape now than it has ever been. This is largely an unintended gift of the Section being inactive for some time. Specifically, the Equine Law Section started the bar year with a balance of \$12,798.93. As of the latest financial report available (April 11, 2012), the Section maintains a balance of \$12,491.81. When the 2022-2023 Section dues are added to the balance at the start of the bar year, the balance will exceed \$13,000.00. Accordingly, despite budgeting in excess of revenue for our reboot year, and for a nice in-person social event this year, the Executive Committee will leave the Section in a solid financial position from which to start future years. The Equine Law Section will enter the 2022-2023 bar year on solid financial footing to continue promoting the interests of its members.

APPENDIX A – SAMPLE NEWSLETTER



QUICK GLANCE:

PAST EVENTS

The Section held a virtual holiday happy hour from 5-7 PM on Tuesday, December 14 via Zoom. It was great to meet new members, discuss the Section, and share horse stories. Thank you to all who attended!

UPCOMING EVENTS

We have two upcoming CLE events confirmed, with invitation announcements coming soon. The first is on **Thursday, March 3**. Lisa Boswell will be presenting on Equine Law Basics.

On **Wednesday, April 6**, John Farrell will be discussing estate planning as it relates to equines under Georgia Law. Please make plans to attend!

VOLUNTEERS NEEDED

The Executive Committee **still needs** volunteers to lead our Communications Committee and Social Committee. Please email Philip Burrus at pburrus@burrusiplaw.com to join the fun!

NEWSWORTHY NOTES

The Executive Committee conducted a survey of the members in September. Thank you to everyone who responded.



Message from the Chair

Welcome to the second newsletter of the new 2021-2022 calendar year. Let me start by saying hello to our new members! Our membership has grown from less than forty members last year to fifty-four members at last count, which is fantastic. As one of the smaller sections with somewhat limited income, each additional member's dues help us deliver more programming, events, and content. If you know a lawyer who is interested in horses and is not a member of our Section, please tell them about us!

Next, I want to thank everyone who responded to our member survey in September. We received twenty-five responses, and the results were interesting to be sure. Eleven of the respondents actively practice equine law, which was a surprise to me as, at least based upon practice areas listed on firm websites of the members. It appeared to be less than five when I became Chair of the Section.

Many members expressed a desire to see more content, with more CLE events leading the list. There were several great suggestions for topics, including best practices for purchase agreements, sales, and leasing, equine insurance and claim disputes, tax related issues related to equine activities, SafeSport, and liability issues associated with owning and boarding horses.



Due to multiple requests for an event focused upon estate planning issues relating to horses, including the establishment of trusts under the Georgia animal trust statute, we have scheduled a CLE event on this topic in April. John Farrell will be discussing the intersection of owning horses and estate planning, which should be a great discussion.

One of the primary reasons we conducted the survey was to gauge how comfortable our members would be meeting in-person this fall. A full eighty percent of respondents indicated they would be comfortable meeting at an outdoor event, with twelve respondents willing to meet indoors as well. Twenty percent preferred on-line meetings only.

With that in mind, we tried – and I mean *really* tried – to make an outdoor social event happen this fall. You would be surprised how expensive it is to host twenty people at a restaurant or other venue in Atlanta. We were able to come to a tentative agreement with a fantastic

MESSAGE FROM THE CHAIR

(continued)

venue in early November. However, by the time we did there just was not sufficient time to coordinate with the Bar offices, send out invitations, and allow time for RSVPs without the risk of running into either the Thanksgiving holiday or inclement weather.

Accordingly, since we were able to tentatively agree on costs, we have decided to instead have our in-person social event in the spring in late April, hopefully the week of April 25th. Assuming all goes as planned, it should be a truly amazing event, and I hope you all will be able to attend.

On the topic of planning social events, we **still need a Social Committee Chair!** We also **need a Communications Committee Chair.** A full fifty percent of the survey respondents indicated that they would be willing to serve on the Executive Committee. Well, now is the time, as we most certainly could use your help! With many goals and finite resources, our Section can only do so many things. To provide the additional CLE events, newsletters, website content, social events, email communication, and joint events with other Sections that the survey respondents desire, we must have more help. If you are interested in serving on the Executive Committee, please contact me at pburrus@burrusiplaw.com.

Thanks to each of you for being a member of the Equine Law Section. Working together we will make this another great year!

Committee News

OUTREACH CHAIR

Lisa Blackstone, Amateur Rule Task Force Member

The USEF Amateur Rule was drafted many years ago and has not received any significant review until now. The USEF President, Tom O'Mara,

established the Amateur Rule Task Force to evaluate how our amateur rule may need to be modified to reflect the many changes in our world. Our scope was to look at each facet of the rule and delve into the merits of possible changes. The task force is comprised of active USEF members representing most of the breeds and disciplines under the umbrella of USEF.

There are four rule changes that the USEF board approved and are now currently in effect. Here is a summary of those changes with some commentary along the way.

The first three proposals deal with what amateurs can do for remuneration. The cost of showing and participating in this sport is prohibitive for some, plus there's a lack of qualified instructors that trainers can afford to hire to help bring in new people. So, the collective thought was that by allowing amateurs to perform certain tasks in exchange for compensation, it would be a win/win for the professional and the amateur and would also be good for the sport.

Throughout our discussions, town halls, and focus groups, we predicated our approach on what activities to allow by asking "Does this activity give this amateur a competitive advantage over other amateurs who are not engaged in this activity?" That's what we want to avoid.

1. Rule Change Proposal - Barn Duties: Amateurs have always been allowed to do chores such as grooming, bathing clipping, braiding, etc. for compensation. In the past they were prohibited from lunging. This rule change permits them to lunge horses in addition to the other chores and that is the only change to the existing rule. The thought is an amateur could help out at shows and maybe defray some of their show expenses while providing much needed assistance for the trainer.

2. Rule Change Proposal - Teaching Beginner Lessons:

This rule change will allow amateurs to teach basic riding lessons to rank beginners for compensation and is a significant departure from our previous rule. These lessons are for people who do not know how to ride at all, hoping to introduce horseback riding to a broader audience and grow our sport. It was more controversial with some Disciplines, but very popular with the Breed Affiliates. Because of that, there will be a "carve out" for those USEF affiliates who want to permit this from those who do not. The biggest complaint was that it would be too hard to enforce.

So, we added some "teeth" to better enforce the new rule as follows: a. The amateurs must register with USEF before they start; b. They can't exceed 20 hours per week teaching; c. They must be under the supervision of a USEF professional; d. They can't teach lessons at competitions; e. The student must be a beginner who has never shown at any level of competition whatsoever (USEF or otherwise); f. The amateur teacher must keep a detailed log of their lessons; g. This log must be reviewed and signed off by the professional; h. Both the amateur and the professional are responsible for compliance; i. USEF may request proof of the lesson log and if either the professional or the amateur fail to comply, that's a violation of the rule and both are subject to penalties.

We shall see how this affects our sport. Hopefully it will help grow interest in riding and be a positive change.

3. Rule Change Proposal - Social Media Conduct:

Amateurs are now permitted to engage in certain social media conduct and receive compensation. Specifically, they may be Brand Ambassadors and Social Influencers, but not Sponsored Athletes. This is also a departure from the rule as previously written because there was no such thing as social media when this rule was first drafted!

Here are the definitions as they will

OUTREACH COMMITTEE

(continued):

appear in the USEF rule book describing each activity:

Social Media Brand Ambassadors are social media users who spread the word about a company/brand or its products by posting about them on social media and promoting them to their unique social audience. This is permitted activity for amateurs.

Social Media Influencers are individuals who have built a reputation for their knowledge, content creation, and expertise on a specific topic. They make regular posts about that topic on their preferred social media channels and generate large followings of enthusiastic, engaged people who pay close attention to their content. This is permitted.

Sponsored Rider is an individual who is paid by companies, sponsors, and/or owner/s to compete and perform, leveraging their exposure and performance in competition. This is NOT permitted for amateurs.

4. Rule Change Proposal - Reapplying For Amateur Status:

The rule change has nothing to do with compensation as did the first three. This allows young adults up to 25 years old who have engaged in professional activities, to reapply for their amateur status and not suffer a huge detriment of waiting one full year. The thought is if, after trying the professional route they realize it was a mistake and want to go back to competing as an amateur, they could have a one-time exclusion from the regular rule and get back to showing as an amateur in three months instead of twelve.

We want to keep our young people in the saddle! However, this is available ONE TIME only. After utilizing the three-month waiting period once, the individual would need to wait one year after ceasing professional activities again to reapply, as is currently the case for everyone. We did not want to see our young adults repeatedly changing their

status and abuse the intent of the rule. That summarizes the rules as they now exist. The task force is continuing to examine the Amateur Rule for additional changes. This year we are reviewing the "family rule", including definitions and how it applies to professionals' spouses and adult children. Also, we are looking at the new Supreme Court decision allowing NCAA athletes to use their name and likeness for compensation to be sure USEF's rules do not conflict. As the year goes on, we will keep you apprised in a follow up newsletter. Until then, if anyone has questions about the new rules, please don't hesitate to contact me.

EVENTS

MARK YOUR CALENDARS FOR OUR MARCH AND APRIL CLES!

EQUINE LAW BASICS CLE: March 3 at noon via Zoom. Lisa M. Boswell will present. While the topic is still being finalized, this should be an excellent discussion of general equine law issues by a nationally known speaker based in Wellington, Florida. Ms. Boswell has authored articles on topics such as legislation concerning horse slaughter published in the *Animal Law Committee Newsletter* of the Florida Bar and veterinary medicine laws published in the *International Equine Veterinarian*. Ms. Boswell is a lifelong equestrian herself and has spoken nationally on equine law basics.

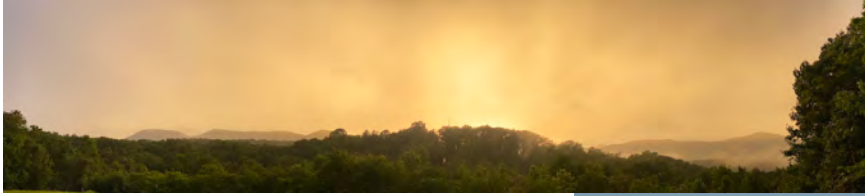
ESTATE PLANNING CLE: April 6 at noon via Zoom. John P. Farrell will present. Did you know that the Georgia law allowing the establishment of trusts specifically allows for trusts for an "animal" rather than just a "pet"? This allows trusts to be created so that owners can provide for horses or other animals

that may not be considered traditional "pets." An estate planning attorney, former Magistrate Judge, and the author of *Estate Planning for the Modern Family: A Georgian's Guide to Wills, Trusts, and Powers of Attorney*, John will be discussing both the importance and the legal intricacies of incorporating equines into estate planning under Georgia's laws.

Invitations and reminders for both events coming soon.

IN-PERSON SOCIAL IN APRIL!

We hope to have an in-person, outdoor, social event in April at one of Atlanta's most noteworthy restaurants. We are tentatively planning on having the event during the last week of April. However, this is contingent upon finalizing the details with both the venue and the State Bar of Georgia. More details to come soon.



RECENT EVENTS:

VIRTUAL HOLIDAY HAPPY HOUR!

The Executive Committee held an informal, virtual holiday social gathering via Zoom on Tuesday, December 14 from 5 – 7 p.m. Thanks to those who attended! We had a lovely discussion of what is occurring in the Section, holiday plans, and what brought each of us to the equine space. It was great to get to meet new faces and have some time to just converse as friends.

Our first CLE event was held via Zoom on August 25, 2021. Armand Leone spoke on *Equine Welfare and Sport Regulation*. He discussed the global and national management of equestrian sport, and how that is accomplished through a group of inter-related member organizations charged with protecting the welfare of the horse and ensuring fair competition. In addition to discussing this regulatory framework, Armand talked about what one can expect if deciding to represent a client before one of these adjudicating bodies. Thanks to all who attended.

ONGOING ACTIVITIES:

ONGOING BY-LAWS REVISION

With the Section being dormant for so long, we updated them last year. Changes included, for example, replacing physical mailings of notices through the postal service and voting with physical presence at the annual meeting of the State Bar of Georgia with the use of electronic ballots and email correspondence.

Upon submitting them to the Bar for review, the Bar revised its model bylaws. Accordingly, we have re-revised the bylaws for resubmission.

In addition to requiring approval of the Section's membership, any proposed amendments would need to be approved by the Board of Governors of the State Bar of Georgia as well.

WEBSITE

Please continue to check out our website at georgiacquinelaw.org!

VOLUNTEERS *STILL* NEEDED!

We need assistance! The Executive Committee has openings for a Communications Chair and a Social Chair. The Communications Chair provides assistance with our newsletter and website. The Social Chair would help to plan social events, including our upcoming event we hope to have in April.

Each position is a great way to help with our efforts to relaunch the Section. No previous experience is required and ample assistance is available. So please help!

LEADERSHIP OFFICERS

Philip H. Burrus, IV - Chair
Burrus Intellectual Property Law Group

Natalie Henry - Vice Chair
Henry Law Group

Angela Hinton - Secretary
Hinton Law

**Betsy Choder - Member at Large
(and hopefully Treasurer once
the Bylaws are updated)**
Vetcounsel LLC

COMMITTEE CHAIRS

Lisa Blackstone - Outreach
Blackstone PC

Lindsey Vance - Programs
Morris, Manning & Martin

Could be You! - Communications
Your firm here

Could be You! - Social
Your firm here



April 2022

**ANNUAL REPORT OF THE FAMILY LAW SECTION OF THE STATE BAR OF
GEORGIA BY THE EXECUTIVE COMMITTEE OF THE FAMILY LAW
SECTION 2021-2022**

The State Bar of Georgia Family Law Section (the “Section”) supports our more than two thousand members in many ways, namely by offering continuing legal education that focuses on issues related to family law, publishing the *Family Law Review*, monitoring legislation that could impact our practices and our clients, providing community service, making charitable contributions that impact families and children, and various other activities, including social events. During the 2021-2022 year our Section has continued to provide these services, albeit while still impacted by the evolving effects of the COVID-19 pandemic. Our accomplishments in the past year are detailed below.

SECTION MEMBERSHIP, FINANCES, AND ORGANIZATION

The Family Law Section is one of the largest sections with more than more than two thousand members and has an account balance of approximately \$540,000. Our Executive Committee consists of fourteen Family Law practitioners from metropolitan Atlanta, Savannah,

and Columbus. Monthly meetings in 2021-2022 were held in person with an option to call in via conference call line if needed.

CONTINUING LEGAL EDUCATION (CLE) PROGRAMS

The Section provided CLE programs to its membership in 2021-2022 via virtual format except for the upcoming Family Law Institute, which will be held in person. The Section offered several Lunch and Learn programs as well as a CLE at the Midyear meeting on January 6, 2022.

Lunch and Learns

Kyla S. Lines, Esq., William Alexander, Esq. and Megan Weis, Esq. organized various well-received and well-attended virtual Lunch and Learn programs throughout the year, including the following:

- June 21, 2021 - "Arbitrating Your Family Law Case," presented by The Honorable Rebecca Crumrine Rieder and Jeff Davis, Esq.;
- November 18, 2021 - "Reading and Understanding Tax Returns," presented by Beth Garrett, JD CPA CVA, Frazier & Deeter, LLC;
- December 17, 2021 - "Dividing Retirement Assets as Equitable Division of Property," presented by Emily W. McBurney, Esq.;
- January 21, 2022 - "EBITDA, Multiples and Other Foreign Language Words (to Attorneys) -- Understanding Business Valuations," presented by Dan Branch with IAG Forensics & Valuation and Megan Wyss, Esq.; and
- February 25, 2022 - "What Family Lawyers Need to Know About Mediating Domestic Violence Cases – Rules and Best Practices," presented by Tracy Johnson, Executive Director of the Georgia Office of Dispute Resolution.

Midyear CLE

The Executive Committee of our section planned for an in-person CLE at the State Bar of Georgia Midyear Meeting on January 6, 2022, but unfortunately, due to mounting COVID-19 numbers, the CLE occurred virtually. Despite the change in format, the Family Law Section's Midyear CLE delivered useful information to our section members via a moderated panel of four Superior Court judges who provided their valuable insights on common fact scenarios family law practitioners confront, emerging areas of family law, and courtroom practice. The Midyear CLE was successfully organized by William Alexander, Esq. and moderated by Kyla S. Lines, Esq. While the cocktail party portion of the Midyear meeting could not occur, the section held its Annual Meeting at which time the slate of officers for 2022-2023 was presented and approved.

Family Law Institute

While our annual Family Law Institutes were cancelled in May 2020 and May 2021 due to COVID-19, the Section membership is looking forward to an in-person Family Law Institute ("FLI") in 2022, which will take place from May 19th-21st at the Westin Hilton Head Resort & Spa. The three-day seminar will provide fourteen hours of CLE for attendees. The agenda, which features speakers from throughout the State of Georgia and from various fields of the law that often overlap with family law, is attached hereto as Attachment "A." For the first time in the history of the Family Law Section, due to the cancellation of the 2020 and 2021 FLIs, this year's FLI will be co-chaired by two members of the Executive Committee, Kyla S. Lines, Esq., the Immediate Past Chair of the Section, and by me, the current Chair of the Section.

The Section recognizes that some of its members would be unable to attend the FLI due to the attendant expenses. Accordingly, the Section offers five scholarships to Section members who show a commitment to family law and public interest, so that they may attend the 2022 Family Law Institute. Each scholarship pays \$1,500 towards the ICLE registration costs for the seminar and accommodations for three nights at the available room rate. In exchange for receiving the scholarship, each recipient will be required to accept one *pro bono* domestic violence and/or divorce case referral from the Georgia Legal Services Program (GLSP).

The expenses associated with providing the Family Law Institute significantly exceed the registration fees paid by attendees. Sponsors from all over the State of Georgia generously provide support Family Law Institute. Executive Committee members, Jamie Perez, Esq. and Ted S. Eittrheim, Esq., served as chairs of the FLI Sponsorship Committee. A list of the sponsors available as of the date of this report is attached hereto as Attachment “B”.

FAMILY LAW REVIEW

The *Family Law Review* (“*FLR*”) is a publication by the Family Law Section that contains articles, interviews, information, a caselaw update and communications relevant to Section members. The *FLR* is typically issued each quarter. Jonathan V. Dunn, Esq. currently serves as Editor of the *FLR*. A copy of the Family Law Reviews published during the past year are attached hereto as Attachment C.

MONITORING AND DRAFTING LEGISLATION

The Family Law Section's Legislative Liaison, Jeremy Abernathy, Esq., and a subcommittee of Section members tracked numerous pieces of legislation that may impact the practice of family law and informed Executive Committee members of the status and progression of relevant proposed legislation.

COMMUNITY SERVICE

Unfortunately, in-person community service projects continued to be impacted by the effects of Covid-19, so the Section focused on meaningful contributions to several charitable groups and projects that did not require in person contact between participants.

The Section made financial gifts to Atlanta Volunteer Lawyer's Foundation, America's Second Harvest of Coastal Georgia, and the Warren Boys & Girls Club. Atlanta Volunteer Lawyers Foundation "stands with, for, and in support of low-income Atlantans as they demand safe and stable housing, insist on fair pay for an honest day's work, and break free from intimate partner abuse." America's Second Harvest of Coastal Georgia is in Savannah and provides food for those struggling with food insecurity and works "to end hunger and improve people's lives." The Warren Boys & Girls Club is in Atlanta and supports children and teens to "reach their full potential and has programs that help children and teens to "succeed in school, live healthy and become leaders."

The Section also made charitable donations to Solomon's Temple, which is a homeless shelter for women and children. Kyla S. Lines, Esq. and Kem A. Eyo, Esq. lead the Section's project to provide items needed by residents of Solomon's Temple by creating and publicizing an

Amazon wish list of needed items. The Section members responded enthusiastically by purchasing these items and sending them directly to Solomon's Temple.

Child Support Worksheet Helpline

The Family Law Section, in conjunction with Georgia Legal Services Program, continued to offer a free Child Support Worksheet Helpline to assist *pro se*, low and moderate-income Georgians who need assistance with child support worksheets. Child support worksheets are required in any action to establish or modify child support and they can be complicated to understand and complete. Volunteer lawyers from the Family Law Section assist callers in preparing child support worksheets. More than 50 volunteers have helped unrepresented many litigants from around Georgia. This year the Child Support Worksheet Helpline was chaired by Samantha Lennon, Esq., who is the Young Lawyer Division representative on the Executive Committee.

SUMMER SOCIAL EVENT

The Section hosted a Summer Social for Section members on June 24, 2021 at Piedmont Park's Magnolia Hall and Lawn. This very enjoyable event offered cocktails, light hors d'oeuvres and actual in-person social interaction and was attended by approximately one hundred guests. In addition to being an opportunity to foster collegiality among family law practitioners, for many family lawyers it was the first time they had seen each other since March of 2020 due to Covid-19.

CONCLUSION

This has been a successful year for the Family Law Section as we continue to emerge from the COVID-19 pandemic and examine how we as lawyers and the practice of law have evolved since COVID-19's onset. We have worked hard to support our Section and maintain as much consistency as possible in these continually changing times. It has been my honor and my pleasure to serve as the Chair of the Family Law Section this year. The Section is poised for continued future success.

Leigh F. Cummings

Chair, Family Law Section

State Bar of Georgia

ATTACHMENT “A”

THURSDAY-SATURDAY, MAY 19-21, 2022

FAMILY LAW INSTITUTE

By registering for in-person attendance you agree to comply with State Bar of Georgia safety measures.

WESTIN HILTON HEAD ISLAND RESORT AND SPA

 **14 CLE Hours**

 **1 ETHICS HOUR**

 **1 PROFESSIONALISM HOUR**

 **3 TRIAL PRACTICE HOURS**



ICLE provides only digital program materials.

THURSDAY, MAY 19, 2022

PRESIDING

Kyla S. Lines, Program Co-Chair; Bloom Lines Alexander LLC, Atlanta, GA
Lelah F. Cummings, Program Co-Chair; Connell Cummings, LLC, Atlanta, GA

- 7:00 REGISTRATION AND BREAKFAST
- 7:15 FIRST-TIMERS' BREAKFAST
- 8:00 OPENING REMARKS
- 8:15 WHEN THE ONLY AMENDMENT YOU KNOW ANYTHING ABOUT IS THE FIFTH – WHAT ELSE DO FAMILY LAWYERS NEED TO KNOW ABOUT CRIMINAL LAW?
 Moderator: *Karline P. Burney*, Burney & Reese, Atlanta, GA
Hon. Jane C. Barwick, Judge, Superior Court of Fulton County, Atlanta, GA
Matthew T. McNally, Law Office of Matthew T. McNally, Atlanta, GA
- 8:45 TURNING THE TABLES: CUSTODY QUESTIONS FOR JUDGES AND TRIAL LAWYERS FROM THE THERAPIST
 Moderator: *Dr. Allison Hill, JG, PhD*, Peachtree Psychological Associates, Atlanta, GA
Hon. Lisa Goldwire Colbert, Judge, Eastern Judicial Circuit of Georgia, Savannah, GA
Kathryn T. Franklin, Franklin Family Law PC, Lawrenceville, GA
Amy L. Kaye, Kaye, Lembeck, Hitt & French, Atlanta, GA
- 9:30 LET'S NOT GO TO THE VIDEOTAPE: INVESTIGATING YOUR CASE LEGALLY AND ETHICALLY IN THE DIGITAL AGE
 Moderator: *Georgia K. Lord*, Radford & Keebaugh, LLC, Decatur, GA
Charles P. "Chuck" Boring, Director, The Judicial Qualifications Commission of Georgia, Atlanta, GA
Brent M. Williams, Hawk PI Professional Investigations, Inc., Duluth, GA
- 10:00 BREAK
- 10:15 CAN WE BUST THAT TRUST? FIVE THINGS FAMILY LAWYERS NEED TO KNOW ABOUT TRUSTS AND ESTATES
 Moderator: *William A. Alexander*, Bloom Lines Alexander LLC, Atlanta, GA
Craig M. Frankel, Gaslowitz Frankel LLC, Atlanta, GA
Leitia A. "Tish" McDonald, King & Spalding, Atlanta, GA
- 10:45 SHE SAID WHAT? HEARSAY EXCEPTIONS AND OTHER COMPLEX EVIDENTIARY ISSUES IN FAMILY LAW
 Moderator: *Paul Milich*, Professor, Georgia State University, College of Law, Atlanta, GA

- 11:45 WHAT IS AN EQUITABLE CAREGIVER, AND WHY IT MATTERS
 Rep. *Charles P. "Chuck" Elstration*, District 104, Georgia General Assembly; McGarity & Elstration, LLC, Buford, GA
Raslyn Holcomb, Judicial Officer, Superior Court of Fulton County; The Grant Group, Atlanta, GA
- 12:15 PROFESSIONALISM THROUGHOUT THE LITIGATION PROCESS – LESSONS FROM FORMER CIVIL LITIGATORS WHO HAVE TAKEN THE BENCH
 Moderator: *Theodore S. "Ted" Eltreim*, Marlin Cutler, LLC, Atlanta, GA
Hon. Kimberly A. Childs, Judge, Cobb County Superior Court, Marietta, GA
Hon. LaTisha Dear Jackson, Judge, Superior Court of DeKalb County, Decatur, GA
Hon. Philip T. Raymond, III, Judge, Bibb County Superior Court, Macon, GA
- 1:15 RECESS
- 2:00 ANDREW R. PACHMAN MEMORIAL CHARITY GOLF TOURNAMENT BENEFITING SOLOMON'S TEMPLE
- 6:30 WELCOME RECEPTION SPONSORED BY STEARNS-MONTGOMERY & PROCTOR
- 7:30 SPEAKERS' AND JUDGES' DINNER
- 8:30 AFTER PARTY HOSTED BY IAG FORENSICS

FRIDAY, MAY 20, 2022

- 6:45 SUNRISE YOGA ON THE BEACH WITH BROOKE COHEN (free of charge – bring your own mat)
- 7:00 BREAKFAST
- 8:00 TRIAL LESSONS LEARNED THE HARD WAY – A PANEL DISCUSSION WITH THE VOICES OF EXPERIENCE
 Moderator: *Hon. Cynthia D. Wright*, Senior Judge, JAMS, Atlanta, GA
Shel G. Edlin, Stern & Edlin Family Law, P.C., Atlanta GA
B. Lane Fitzpatrick, Attorney at Law, Danielville, GA
Kelly A. Miles, Smith, Gilliam, Williams & Miles, Gainesville, GA
Karen Brown Williams, The Williams Firm, P.C., Atlanta, GA
- 9:00 WHAT TO DO WHEN A CHILD REJECTS A PARENT: PRACTICAL, THERAPEUTIC AND LEGAL APPROACHES
 Moderator: *Daniel A. Bloom*, Bloom Lines Alexander LLC, Atlanta, GA
Hon. Christopher S. Brasher, Judge, Superior Court of Fulton County, Atlanta, GA
Dr. Howard Drutman, Ph.D, Atlanta Behavioral Consultants, Roswell, GA

10:00 **PRESENTATION OF AWARDS: TURNER/TUGGLE**

10:10 **BREAK**

10:25 **LEGISLATIVE UPDATE**
Jeremy J. Abernathy, Abernathy Ditzel Hendrick Bryce, Marietta, GA

10:30 **WHEN THE FAMILY BUSINESS IS UP FOR GRABS – THE COLLISION OF CORPORATE AND FAMILY LAW**
Moderator: *James J. McGinnis*, Warner Bates, Atlanta, GA
Dan Branch, CPA/ABV, ASA, MBA, IAG Forensics & Valuation, Atlanta, GA
Jamie Everman, CPA, Callaway & Company, LLC, Atlanta, GA
Jessica J. Wood, Bodker, Ramsey, Andrews, Winograd & Wildstein, P.C., Atlanta, GA

11:00 **WHEN TO ASK FOR A JURY AND STRATEGIES FOR WINNING YOUR CASE**
Moderator: *Adam M. Glickler*, The Glickler Law Firm, Atlanta, GA
Hon. Benjamin A. Land, Chattahoochee Judicial Circuit, Columbus, GA

11:30 **YOU WON YOUR TRIAL BUT THAT BIG LOSER APPEALED – NAVIGATING THE APPELLATE PROCESS AND PRESERVING YOUR VICTORY PENDING APPEAL**
Moderator: *Mereditb C. Kincaid*, The Summerville Firm, Atlanta, GA
Hon. D. Todd Markle, Judge, Court of Appeals of Georgia, Atlanta, GA
Hon. Christopher J. McFadden, Judge, Court of Appeals of Georgia, Atlanta, GA
Hon. Amanda H. Mercier, Judge, Court of Appeals of Georgia, Atlanta, GA
Hon. Brian M. Rickman, Judge, Court of Appeals of Georgia, Atlanta, GA

12:15 **WHO KEEPS THE FARM? FIVE THINGS EVERY FAMILY LAWYER NEEDS TO KNOW ABOUT REAL ESTATE LAW**
Moderator: *Hon. Glen A. Cheney*, Judge, Atlantic Judicial Circuit, Reidsville, GA
Kathleen B. "Katie" Connell, Connell Cummings, Atlanta, GA
R. Kyle Williams, Williams Teusink, Decatur, GA

12:45 **THE IMPORTANCE OF EDUCATION: WHAT FAMILY LAWYERS SHOULD KNOW ABOUT EDUCATION LAW**
Moderator: *Audrey B. Bergeson*, Atlanta Volunteer Lawyers Foundation, Atlanta, GA
Morgan Bridgman, Georgia Applesseed, Atlanta, GA
Suzann M. Wilcox, Nelson Mullins, Atlanta, GA

1:15 **RECESS**

1:30 **INCLUSION COMMITTEE LUNCHEON**

6:00 – 7:30 **SECTION RECEPTION**

SATURDAY, MAY 21, 2022

7:00 **BREAKFAST**

8:00 **GREATEST HITS OF 2021-2022 – CASES YOU NEED TO KNOW**
Kimberly G. Ader, Davis, Matthews & Quigley, P.C., Atlanta, GA
Megan P. Wyss, Boyd Collar Nolen Tuggle & Roddenbery, Atlanta, GA

8:30 **WHAT TO EXPECT FROM "THE DEPARTMENT" – HOW TO HANDLE YOUR CASE WHEN DFCS COMES KNOCKING**
Moderator: *Melissa S. Barber*, Kessler & Solomiany, Atlanta, GA
Lisa Newberry Bradley, Claiborne | Fox | Bradley | Goldman, Atlanta, GA
Hon. Tafia D. Whiteer, Superior Court of Gwinnett County, Lawrenceville, GA

9:00 **DEALING WITH ADDICTION IN CUSTODY CASES: THERAPEUTIC APPROACHES AND TIPS FROM AN INTERVENTIONIST**
Heather R. Hayes, M.Ed., LPC, CIP, CAL, Heather R. Hayes & Associates, Inc., Camming, GA

10:00 **BREAK**

10:15 **THE ETHICS HOUR WITH JIM** ^{62B}
James S. "Jim" Lewis, Assistant General Counsel, State Bar of Georgia, Atlanta, GA

11:15 **DEFERRED COMPENSATION AND OTHER BENEFIT PLANS – WHAT TO DO WHEN YOU ARE IN OVER YOUR HEAD**
Jonathan V. Dunn, Jonathan V. Dunn, PC, Savannah, GA
Elizabeth J. "Beth" Garrett, JD, CPA, CVA, Frazier & Deeter, Atlanta, GA

11:45 **VICTIMOLOGY, DOMESTIC VIOLENCE, AND CUSTODY ISSUES: A PANEL DISCUSSION**
Moderator: *Joel Correa*, Managing Attorney, Atlanta Volunteer Lawyers Foundation, Atlanta, GA
Tomieka R. Daniel, Managing Attorney, Georgia Legal Services Program, Macon, GA
Hon. J. Stephen Schuster, Senior Judge, Superior Courts Georgia, Marietta, GA

12:30 **NAVIGATING UNCHARTED WATERS: WHAT TO DO WHEN YOUR DOMESTIC CASE LANDS IN JUVENILE COURT**
Hon. M. Anthony "Tony" Baker, Judge, Superior Court of Cherokee County, Canton, GA
Royce L. Blount, The Blunt Law Firm LLC, Atlanta, GA

1:00 **ADJOURN**

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ATTACHMENT “B”

Leigh Cummings

Monday, April 25, 2022 at 13:23:42 Eastern Daylight Time

Subject: Family Law Section | 38th Annual Family Law Institute
Date: Monday, April 18, 2022 at 11:45:16 AM Eastern Daylight Time
From: State Bar of Georgia <maryjos@gabar.org>
To: Leigh Cummings <cummings@connellcummings.com>

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Family Law Section | 38th Annual Family Law Institute



38th Annual Family Law Institute – 2022
The Westin Hilton Head Island Resort & Spa, May 19-21, 2022

FINAL REQUEST FOR SPONSORS – DEADLINE FRIDAY, APRIL 22, 2022

This is our final request for sponsors for the 38th Annual Family Law Institute, which will take place at the Westin Hilton Head Island Resort & Spa, from May 19-21, 2022. We are excited to see everyone back in-person! If you wish to sponsor, we will need your commitment by this Friday, April 22.

We sincerely appreciate and thank those firms and sponsors who have already pledged their support for this event. Your contribution is vital to the continued success of the Institute, enables us to put on a superior program and invite Judges from around the state who may otherwise be unable to attend due to budget constraints. A current list of sponsors as of April 18, 2022 is below.

This year's sponsorship opportunities begin at \$250.00 and increase incrementally up to \$7,500.00. We are also offering sponsorship opportunities for various events, including cocktail receptions and the First-Timers Breakfast. The event sponsorships are offered on a first come, first served basis. Once you have determined the level or event you would like to sponsor, please complete the payment form linked below and return it as directed.

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Co-Chair, 38th Annual Family Law Institute

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Co-Chair, 38th Annual Family Law Institute

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ATTACHMENT “C”

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The Family Law Review

A publication of the Family Law Section of the State Bar of Georgia – Fall Issue 2021



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Editors' Corner

By Jonathan Dunn



Welcome to the Autumn Issue of the Family Law Review!

It is my distinct privilege to serve as your editor. I am especially grateful for the opportunity to engage with our thoughtful contributors. I hope that you will find this edition to include a balanced offering of timely articles, such as Tonia McGinnis' exposition of the intersectionality of racial and health equity and Trish Murphy's contribution on lawyering and life during a pandemic, and staples such as Mark Sullivan's article on dividing military benefits and Trent Doty's piece on divorce financial planning. I am also pleased to commend to you Trevi-Ann Thompson's take on crediting child support for intact households, and I encourage you to stay abreast of the latest developments by acquainting yourself with Vic Valmus' case law updates.

I am honored to share these offerings with you, and I encourage you to share your thoughts on topics or articles for the next edition of the Family Law Review.

Editor Emeritus

By Randy Kessler



We have been given a tremendous opportunity. It will sound grandiose, but we are being given the chance to save the world, or at least to save hundreds of thousands, and maybe millions from dying. There, I said the unspeakable. Mere mortals now have a chance to save our fellow human beings. How often in a lifetime, is a human being given the chance to save thousands and possibly millions of lives? Well here we are. Scientists, doctors, business people and government leaders and their staffs, have done the unthinkable. They have brought the possibility of a lethal and potentially fatal blow to the biggest common enemy the human race has faced in all of our lifetimes. Yes, there is a vaccine. There are multiple vaccines. And they are more effective than the vaccines many people take yearly for other viruses. And this one is to wipeout a plague. The last similar pandemic, the so-called "Spanish Flu" killed 50,000,000 people, AND THAT WAS WHENTHE

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WORLD'S POPULATION WAS ONLY 1.5 BILLION. That is over 3 percent of the population of the entire world. And in today's world of almost 8 billion people, that would be the equivalent of over 250,000,000 people dead. AND WE HAVETHE CHANCE TO STOP IT IN IT'S TRACKS. Yes wearing masks, social distancing, washing frequently are crucial, but if the experts are right, if over 75 percent of us take the vaccine, it will basically go away. And isn't that what we all have been dreaming about? So how can there possibly be people who refuse to take the vaccine? No matter how hard I try to see it from all angles, I keep ending up at the obvious answer: we must all take it. So why do I say that? Here are my reasons:

What are the risks associated with the vaccine (possible slight side effects like nausea?) vs. the risks of NOT taking it (DEATH)? Isn't that a good enough reason?

Or:

2. A bigger tragedy even than dying from Covid-19 would be to be the last person to catch Covid-19 and die just before enough people have taken the vaccine and "herd immunity" takes hold. And the delay in reaching herd immunity would only be because some refuse to take the vaccine. THAT WILL CAUSE MANY OF US TO LOSE LOVED ONES, WHO COULD HAVE LIVED IF WE ALL ACCEPTED THE VACCINE JUST A LITTLE FASTER.

Or:

3. Millions of people have now taken the vaccine, how's that for proof it's safe? Millions. Yes, millions. They live and they are much more likely to remain Covid-free. And even if the vaccine didn't work, very few have had minimal side effects, so what's the harm?

Or:

4. What's an easier discussion to have with family, explaining why you made them get a shot, or explaining why you did not let them get a shot, as they lie in an ICU on a ventilator?

To me this is a very simple calculation. And it is a moment we should embrace and not let slip through our hands. How can we let the genius and innovative spirit and effort of our species be ruined by rejecting such hard work? So many have worked so hard to truly save the world. All we should do is to say thank you, we appreciate you saving us and the ones we love.

As soon as I am able, I plan to take it and to be part of the solution. And as I conclude this piece, I am reminded of a client I represented during a difficult mediation process. We almost settled his case, and when the deal fell apart, he said to me in his broken English "Mr. Kessler, we caught the fish, we had it in our hands, but we didn't hold it tight enough and it slipped away". Let's hold onto this solution, and not let it slip away. The consequences are too devastating to even contemplate.

The opinions expressed within *The Family Law Review* are those of the authors and do not necessarily reflect the opinions of the State Bar of Georgia, the Family Law Section, the Section's executive committee or Editorial Board of *The Family Law Review*.

A Word from Our Former Chair

By Kyla Lines



As we (finally) begin to return to normal, my year as Chair of the Family Law Section has come to a close. Since the Bar's year begins July 1 and ends June 30, I have truly been the "Covid Chair" of the Family Law Section. My term began when we were at the height of chaos, and ended now that we are catching a glimpse of what life used to be.

It has indeed been the strangest year ever for all of us in many respects, and it will be interesting to see what changes carry over to our regular lives. I know many of us hope that status conferences and calendar calls will continue to be conducted via Zoom; it's certainly more efficient and cost-effective for us and more importantly, for our clients. I, for one, am thrilled to return to live mediations and hearings though.

The Executive Committee has done its best to successfully handle the challenges handed to us by continuing the Section's purpose of providing quality continuing legal education programs. I am happy to report we have had more success than failure in this regard. While we had to cancel two Family Law Institutes (despite our efforts to conduct a virtual seminar for 2021) we shifted to a virtual format thanks to the hard work of Mary Jo Sullivan and Lane Sosebee at the State Bar. Jeremy Abernathy successfully planned our first virtual CLE, *Race in Family Law*, in conjunction with the State Bar's Midyear Meeting. Using the success of Jeremy's one-hour CLE as incentive and encouragement, we planned and executed an excellent virtual Nuts and Bolts of Family Law seminar thanks to Section Secretary/Co-Chair Elect Ted Eittrheim. We have begun a series of monthly Lunch and Learns which will continue through the Fall and Spring, and Secretary-Elect Karine Burney is working hard to bring back our Nuts and Bolts seminars in a live format this Fall, in both Atlanta and Savannah. Finally, we have the 2022 Family Law Institute to look forward to. Leigh Cummings and I will serve as Co-Chairs of that Institute and we are extremely excited to see everyone in person next summer. Finally, Ivory Brown, Chair of the Family Law Section's Inclusion Committee and Immediate Past Chair of the Section, has once again

knocked it out of the park with her creativity and ingenuity. Her monthly virtual *Custody Considerations Seminar Series: Dialogue and a Movie*, provided CLE credit along with informative discussion on custody issues from a different cultural or ethnic perspective, with a movie woven in to assist the conversation.

Since we were unable to conduct all of our regular seminars, we shifted focus to community assistance. We continued our partnership with the Warren Boys and Girls Club by providing the children they serve with holiday gifts and summer camp supplies. We also contributed to the DeKalb Volunteer Lawyers Foundation and to the Solomon's Temple Foundation. Finally, we also made a donation to STE(A)MTruck, a non-profit from Community Guilds designed to help eliminate inequities in local school systems by giving students and teachers in Title I schools access to STEAM-based learning experiences that otherwise would not exist.

Hannibal Heredia, our Legislative Liaison, worked with his committee throughout the legislative session to track family-law related bills and keep us abreast of developments. His efforts on behalf of the Section are greatly appreciated, especially his willingness to make last minute trips to the Capitol during the pandemic.

Finally, I cannot fail to mention Jonathan Dunn, who has served as the Editor of the Family Law Review for this term. While our ability to publish was impacted by pandemic, Jonathan continued to gather thoughtful articles on timely subjects so that we could publish as soon as the Bar was ready. His efforts are greatly appreciated.

Thanks to those that joined our Family Law Section Social on June 24 at 5:30 at Magnolia Hall in Piedmont Park. Hopefully this was the first of many gatherings, for which we all have a renewed appreciation. It has been an honor to serve as the "Covid Chair," and I look forward to the leadership of Leigh Cummings.

Lawyering & Life During a Pandemic

By Trish Murphy

Managing stress and achieving a work-life balance as a lawyer is difficult. Now during this pandemic, we are blurring the lines between work and home. Lawyers are mediating, attending mediations, going to court and holding client meetings via Zoom (or WebX) from home. This is an added stress to an already stressful career.

Zoom Fatigue or Zoom Coma is a real thing!

Zoom is helpful and has many benefits during a pandemic but it is here to stay because of the convenience and the amount of time it saves for clients and lawyers, as such, self-care is required when using this new platform. These tips are for attorneys, clients, mediators, and Judges.

1. Sitting in one place staring at a screen for hours at a time.

○ **Issues:** Sitting at your computer all day already presented problems for most professionals. Your posture suffers and your back & neck hurt, and your mind is drained.

○ **Quick Fixes:**

■ **Take a break. Stretch.**

Breathe. Take a break does not mean look at your phone. Take a break and walk around, even better walk around outside for a few minutes. The fresh air will do you good! Try not to have back-to-back Zoom meetings. Schedule a break in-between meetings.

■ **Home office.** Make sure your home office is comfortable and you have a proper chair and desk set up to allow you to work comfortably in your home. If possible, have your home office in a separate location in your home. If you have your office in your

bedroom, it may be hard to go to sleep because you see all the work you have to do or ruminate about the day you had.

■ **Treadmill.** I recently bought a treadmill for my home office so I can walk and work at the same time. This is amazing for conference calls, phone meetings, and even Zoom (depending on the situation). The treadmill eliminates the excuse about the weather or if you have enough time to squeeze in a walk outside before your next phone call or meeting. My treadmill has a spot on it to hold a tablet so I can review my emails and dictate my responses as I walk. It is right by my sliding door so I can get sunshine and fresh air as I walk. I only wished I would have thought of this sooner!

2. You get Hangry.

○ **Issue:** As a mediator, I am on Zoom for 6-8+ hours for a family law mediation. Pre-pandemic, I had a built-in break as I walked from room to room. This allowed me to walk around, stretch, and get a snack. With Zoom you change rooms with a simple click of the button. If you don't build in a break or lunch you will experience low blood sugar and that means you get Hangry.

○ **Quick Fix:** I now allow myself the same break when changing rooms by simply putting myself in the waiting room while I grab a snack or more water. Plan ahead and pack your lunch even though you may be at home. A quick break between rooms allows you

to re-energize.

- I remind parties and attorneys to also take breaks during mediation. A quick break outside to get fresh air and breath will invigorate your mind and body.

3. Your Attention Span is Shot!

● **Issues:** You are “On” all the time. In Zoom, you are sitting in a fixed spot looking straight ahead most of the time. This never happens in an in-person meeting. In an in-person mediation, you would look around and participate in a more free-flow environment. In Zoom, you feel “on” all the time and that is exhausting. You are gaging how you look almost the entire time. You may also be wary of looking out the window for fear it looks like you are not paying attention.

○ **Quick Fix:** Hide yourself while on Zoom.¹ This feature allows you to still be seen but you don’t have to always look at yourself. Just don’t forget everyone can still see you so be mindful of what you are doing. I have seen people on Zoom brushing their hair, taking off their make-up, etc. I frequently see a lot of eye-rolling or nasty faces and I want to tell them - *We Can Still See You!*

○ **Switch it up.** Not every meeting has to be by Zoom. Plan a conference call like we did in the old days. Some issues can be done via email as well.

● **Backgrounds are distracting.** Admit it - you look at colleagues’ homes & try and check out what is on their bookshelf. It is human nature and we all do it. The problem is this

is distracting and you are not focusing on the topic at hand.

○ **Quick Fix:** Change your background to something simple and perhaps even soothing. Your office may even ask that you all use the same background as this helps you feel like you are all in the same place.²

4. Brain Drain.

● **Issues:** Video chats mean we need to work harder to process non-verbal cues like facial expressions, the tone and pitch of the voice, and body language; paying more attention to these consumes a lot of energy. Our minds can’t relax as we are trying to process facial expression, voice tone, and body language via a platform where we only see people from the neck up. This dissonance causes us to have conflicting feelings and it is exhausting to our mind and body. This is especially an issue in virtual court. In virtual court, you don’t get to walk around the courtroom. Walking in court allows us to open our minds and truly listen to a witness’s response and think on our feet - literally. Whoever heard of thinking on your rear end?!

○ **Quick Fixes:** Before going to virtual court, do 5 minutes of deep belly breathing to clear your mind. Stretch and do light chair yoga. If possible, take a quick walk outside. The fresh air will awaken your mind and allow free thinking. Think of it like getting your best ideas in the shower. A walk can provide the same benefit.

5. Technology Anxiety.

- **Issues:** Technical issues while using Zoom or WebX are commonplace. Learning to ride the wave during these technical snafus is key. Lawyers are ready and focused when it comes to a trial or mediation and throwing a wrench in your cross-examination with a technology issue breaks your flow. When a party freezes or is dropped it causes additional anxiety. Silence is another challenge. It makes people uncomfortable. There is about a 1.2-second delay between your question and someone's answer. This is not the normal flow of a conversation. The brain quickly thinks there is a problem with technology.

- **Quick Fixes:** Breathe your way through it. No one can see that you are practicing deep belly breathing while you wait for the problem to be fixed. If possible, turn your video off and stretch and breathe so you can stay in the zone. Pick a mantra - a word or sound repeated to aid concentration in meditation - that you can use during these stressful times to keep you relaxed and in the flow.

6. The Myth of Multi-Tasking.

- **Issues:** You think you are being efficient, doing two things at once but research shows that multi-tasking cuts into performance.³ Switching between tasks can cost you as much as 40percent of your productivity. The brain doesn't really do two tasks at once. The brain, in fact, switches between the two tasks. This stop/start process is less efficient, we make more mistakes and it zaps our energy.⁴ Stanford researchers found that people who multitask can't remember things as much as their colleagues who focus on

a single task. Plus, multitasking during someone's meeting or seminar is rude. Your host and the other members on Zoom can see you on your phone or if you are looking dead head into the screen, everyone knows you are answering your emails or checking your social media feeds.

- **Quick Fixes:** Simple - Don't multi-task! Stay present! Stay focused and you might just learn something new. Set time aside for each task and focus on one at a time. This helps you get into a state of flow or in the zone and complete more tasks accurately and efficiently.

Endnotes

1. How to Combat Zoom Fatigue by Liz Fosslien and Mollie West Duffy.
2. How to Combat Zoom Fatigue by Liz Fosslien and Mollie West Duffy.
3. How to Combat Zoom Fatigue by Liz Fosslien and Mollie West Duffy.
4. The Myth of Multitasking by Nancy K. Napier, Ph.D.

How Much Credit Should be Given to Child Support Obligor When the Parties Live Together After Child Support is Awarded?

By Trevi-Ann Thompson

Introduction

It has been the long-standing rule that each parent is financially responsible for the care and support for their child/ren even if the parents were not married at the time the child/ren were born. Regardless of marital status, typically the obligor is the non-custodial parent while the obligee is the custodial parent.¹ However, what happens when the parties decide to resume cohabitation after a child support order has been made? As family law attorneys, whether newer or experienced attorneys, we know it is not uncommon for couples- married or unmarried- to get back together, whether in the midst of a divorce or other child-related actions. This article seeks to do a deep dive into how Georgia courts have been handling unique situations like these and by extension, how other jurisdictions have handled the issue in the United States.

Second Time's a Charm?

To illustrate the issue, here is our hypothetical fact pattern: Mary and John have been married for five years and share two children together. John files for divorce and the parties have a settlement agreement in which John, being the non-custodial parent, has to pay \$700.00 in child support per month for the care and support of the minor children. The settlement agreement has been filed, a divorce decree has been entered and John begins his first couple of payments for the next few months. The couple then decide to give their marriage another try. Now, ex-husband John moves back in with ex-wife, Mary, and no modification of child support has been filed. They continue to live together for two (2) years. The couple ultimately decide that they had it right the first time and to call it quits indefinitely and part ways. Mary now holds the view that John currently owes \$16,800 for the 24 months they lived together because John was not formally making his monthly payments of \$700.00 to her. John, of course, argues that there was no need to make such formal payments since they lived together and besides, he has been contributing to the household by paying the mortgage, utilities, paying

insurance for the family's car, groceries and childcare, among other things.

A Quick Glance on the West Coast

While there are only a few cases in Georgia hinting at this subject, support can be found in California's case law for giving credit to an obligor who has cohabitated with the obligee pursuant to principles of equity. However, California is not alone because states such as Arkansas, Alabama and Louisiana have allowed credit against accrued child support arrearages or for specific expenses paid for by the obligor parent in cases where the parents lived or resumed living together in the same household after divorce.²

In *Ramsey v. Ramsey*, the Arkansas Court of Appeals held Father was allowed to receive credit toward child support arrearage when it found that Father was supporting children and household using his disability benefits.³

In *State Dep't. of Human Res. v. Thomas*, the Alabama Court of Appeals held that Father was entitled to credit against child support arrearage for the six-month period the parties resumed living together after there was unrefuted testimony from Father which revealed that the Father supported the mother and children and that Mother had access to Father's bank account and personal papers and also wrote checks on the Father's account.⁴

In *Dunnaway v. Dunnaway*, the Louisiana Court of Appeals affirmed the decision of the trial court which found Father supported the household by providing shelter, food and paying for the utilities for the benefit of the children and Mother when the parents reconciled and that such actions more than offset the amount of child support allegedly owed by Father which was \$200.00 per month.⁵

In the California case, *Jackson v. Jackson*, Mother and Father got divorced and Mother was awarded custody of the parties' 16-year-old daughter.⁶ Father was ordered to pay Mother \$750.00 per month for the support and maintenance of their daughter.⁷ Shortly thereafter, Father filed a modification of the child

support order however, Mother countered these claims with two citations of contempt stating that Father was behind on his child support payments.⁸ The trial court discharged the contempt citations and ordered termination of the support payments at a fixed date opining that the parties' daughter resided with Father and maintained a permanent residence there.⁹ In retaliation, Mother obtained an ex parte issuance of a writ of execution in the principal amount of \$16,500.00, which was supposedly the aggregate of 22 months of alleged unpaid child support (in excess of \$18,000.00 with interest and costs) and levied on Father's bank account.¹⁰ However, the trial court noted that the date that Father allegedly owed child support was well after the parties' daughter started living with Father.¹¹ As such, Father moved for an order recalling and quashing the writ of execution and in the alternative, for an order for reimbursement for money expended for the benefit of their daughter.¹² The trial court denied both motions stating that Father's motions were an attempt to modify child support prior to the date of filing his Order to Show Cause to Modify Child Support, which ran contrary to California's Civil Code.¹³ Father appealed.¹⁴ The Appellate Court noted that even though it was not the law of the land to retroactively modify child support and that accrued arrearages were to be treated like a judgment for money, these said child support orders were still within the equitable power of the Court.¹⁵ The Court further reasoned that child support was an obligation that belonged to the child and not to the [custodial parent].¹⁶

The Appellate Court in *Jackson* ultimately affirmed the trial court's decision reasoning that the trial court was well within its discretion in "recalling and quashing the writ of execution or permitting only partial enforcement on the basis that [Father] had directly discharged his obligation or on the basis of equitable considerations."¹⁷ The Court also took into consideration the unreasonable delay of Mother in filing the writ of execution finding that the [Mother] acquiesced in the arrangement and delayed for over 30 months after the parties' daughter took up residence with Father.¹⁸ The Court also noted that Mother only attempted to enforce her claim and only sought to file the writ of execution *after* Father was successful in obtaining a modification of the order.

The case of *Jackson* propelled what is now popularly known as "*Jackson credits*" that is considered in situations when the non-custodial parent later assumes full custody of a child but did not file

a motion to modify the child support, custody and in some cases, both. However, the case of *Helgestad v. Vargas*, widened *Jackson's* credit eligibility even more by holding that *Jackson credits* are applicable even in situations where there was not a complete change of custody.²⁰ The Court held in *Helgestad*, that "the same equitable considerations that apply to support orders arising out of marital cases should also apply to support orders arising out of paternity cases."²¹ The Court further opined there was no reason for the trial court to differentiate total changes of custody from periods of living together in the same household because "actual support is actual support."²²

It is the stance in many jurisdictions, including Georgia, that a parent is not bound to compensate the other parent for the voluntary support of his child, absent an agreement. See *Wills v. Glunts*, 222 Ga. 647, 649 (1966). However, it appears that in the absence of such an agreement, the court will look to whether the custodial parent consented- whether expressly or impliedly- to substituted forms of payment rather than formal child support payments in some instances, which will be discussed below. See *Daniel v. Daniel*, 239 Ga. 466 (1977).

Georgia Says...

According to O.C.G.A. § 19-7-2, "[i]t is the joint and several duty of each parent to provide for the maintenance, protection, and education of his or her child until the child reaches the age of majority, dies, marries, or becomes emancipated, whichever first occurs . . . except to the extent that the duty of the parents is otherwise or further defined by court order." (Emphasis supplied). However, "a permanent child support judgment is res judicata and enforceable until modified, vacated, or set aside."²³ (Emphasis supplied). While it is evident that Georgia does not provide for retroactive child support but rather, supports the proposition that "[a] child support obligation may be modified on a prospective basis only"²⁴, it appears as if the Georgia Court of Appeals has opened the door for trial courts to consider giving credit towards child support arrearages in exceptional circumstances for the time the parties resumed living together after the entrance of said child support judgment.

In *Davis v. Davis*, appellant Kenneth Davis and appellee Elizabeth Davis were married in 1978 and divorced in 1991.²⁵ The parties continued to live in the same household for the next two and one-half years, during which time they shared household expenses.²⁶

As such, Kenneth stopped paying child support as required by the final judgment and divorce decree during the time in which the parties continued residing together.²⁷ Kenneth moved out of the household in April 1994, and Elizabeth filed a garnishment action in DeKalb County's state court seeking to recover \$15,000 in unpaid child support.²⁸ Kenneth filed a traverse to the garnishment. At the hearing, Kenneth argued that he should be given credit for the monies he contributed during the period the parties continued to reside together.²⁹ Kenneth also argued that he should also be given credit for child-care services he provided for the children while Elizabeth worked and attended school.³⁰ The state court dismissed the traverse stating that it had no authority to modify the terms of the final judgment and divorce decree and that the garnishment was otherwise proper. The Court of Appeal granted Kenneth's application for discretionary appeal.³¹

The Court held that the state court did not err by dismissing the traverse agreeing with the state court's decision that it had no authority to modify the child support provisions of the final judgment and divorce decree.³² The Court further opined that "such a modification must be accomplished by the filing of a petition in superior court pursuant to O.C.G.A. § 19-6-18 or §19-6-19."³³ However, the Appellate Court noted that under unusual and exceptional circumstances, equity considerations may dictate that the child support payor be given credit for expenditures made on the child's behalf, but noted that this reasoning was inapplicable in the case of *Davis*, because the state court lacked equity jurisdiction.³⁴ Unlike the state court in *Davis*, Georgia's superior courts do have jurisdiction over issues of equity which means that the superior courts may consider principles of equity and give credit to the child support payor for expenditures made for the child's benefit.³⁵ See *Baer v. Baer*, 263 Ga. 574, 575 (2) (1993) (holding that equitable considerations can apply to permit set offs when Wife owed Husband money from joint tax return and for expenses incurred post-divorce for maintenance of parties' residence).

Additionally, it appears as though Georgia courts, like California, have also explored the idea that the obligee can consent – expressly or impliedly- to substituted child support payments by the obligor, rather than formal child support payments. This notion was highlighted in the case of *Daniel v. Daniel*.³⁶ In *Daniel*, Husband and Wife got divorced and settled issues related to child custody, child support, alimony and property settlement, all of

which was incorporated into the parties final divorce judgment.³⁷ Mother brought child support modification action against Father and also obtained a writ of fieri facias against Father for unpaid child support.³⁸ Father, in addition to answering the modification action, filed a counterclaim arguing, among other things, that child support arrearages should not be required because the parties' children were in his custody during those months in question for non-payment.³⁹ Father further argued that both parties mutually agreed upon it.⁴⁰

Specifically, the parties' divorce decree provided Wife was to have custody for the months of September through May and was to receive \$117.00 per child per month during those months with Father having alternate weekend visitation rights during said months and visitation rights over the children's Christmas vacation and between school terms.⁴¹ Father was given custody of the children during the months of June, July and August, during which time he was not required to make child support payments.⁴² Mother was given alternate weekend visitation rights during those months.⁴³

The Court held that given the circumstances, it would be *inequitable* to require Father to pay again for maintenance he has already supplied at Mother's request.⁴⁴ Therefore, Father was given credit for the alleged child support arrearage because the parties' divorce decree *contained no support obligations* by Father during the time he had custody of the children.⁴⁵

Back to Mary and John

So what does this mean for Mary and John? Given all the guiding case law and principles highlighted above, it seems that John can make at least three arguments standing on the principles of equity namely: (1) Consent; (2) Unjust Enrichment and (3) For the benefit of the children positions:

1. Consent

As mentioned earlier, there are two ways in which the obligor can seemingly give consent as illustrated under California and Georgia law (1) express and (2) implied. In our scenario above, John has a good argument that Mary gave him implied consent by allowing him to live in the house where he was contributing to the household expenses and therefore Mary acquiesced in the arrangement similar to the Mother in *Jackson*. As such, Mary impliedly agreed to the form of payment used.

Additionally, the court may also note Mary's unreasonable delay in filing the petition for contempt as part of its' equitable consideration.

2. Unjust Enrichment

Generally, the non-custodial parent is not entitled to credit towards support payments for minor children if he makes additional voluntary payments for their support and maintenance.⁴⁶ However, in the name of equity, if it can be proven that John was making substantial contributions to the household such as paying the mortgage, utilities, paying insurance for the family's car, groceries and child care, among other things, it can be argued that if John is to be held in contempt for child support arrearage then this obviously would be an unjust enrichment to Mary. This is so because Mary would have received the benefit of having all those expenses paid for, for 24 months but also receive the benefit of getting \$16,800 in child support. This ultimately goes against the grain of equity and falls within the parameters for equitable consideration by the court.

Of course, Mary may very well make the argument that John should have filed a modification of child support since the parties resumed living together. However, given that the superior court in Georgia is a court that has equity jurisdiction then this argument is definitely worth making given the aforementioned Georgia case law which demonstrates that Georgia has been flirting with the idea of using equitable considerations under these "unusual and exceptional" circumstances. Additionally, there would not be an injustice to Mary if she is not awarded the arrearage of \$16, 800.

3. It was for the benefit of the children

The right of child support belongs to the children.⁴⁷ Notably "[s]everal jurisdictions, including many which support [this] rule [], have held that a [non-custodial parent] may be given credit if equity would so dictate under the particular circumstances involved, provided that such an allowance would not do an injustice to the [custodial parent]. Included among those equitable exceptions are situations where the [custodial parent] has consented to the [non-custodial] parent's] voluntary expenditures as an alternative to his child support obligation . . . or where the [custodial parent] has been in substantial compliance with the spirit and intent of the divorce decree."⁴⁸ See *Farmer v. Farmer*, 147 Ga. App 387, 390 (2) (1978).

As aforementioned, if it can be proven that John

made substantial contributions to the household, namely paying the mortgage, utilities, insurance for the family's car, groceries and child care when he and Mary resumed living together, then John has a good argument that all the contributions that he made were for the benefit of the children. As such, the Court may award John credit for the payments made to offset the arrearage.

Conclusion

Even though Georgia law is not one that is clear-cut on this issue, under the case law and principles aforementioned, Georgia law gives room for attorneys to be creative in their argument and fight for their client, as it is still within the discretion of the Judge to look at the circumstances and do what is just. On the other hand, if you represent the obligee, the law is still in your favor since this is not a settled principle of law in Georgia. Thus, it is still worth making the argument that the obligor should have pursued a modification action.

Endnotes

1. Sometimes the obligee can be the guardian, caregiver, or the state, but for the purposes of this article, the focus will be the custodial parent as the obligee.
2. See Alice M. Wright, J.D., Annotation, *Right to Credit on Child Support Arrearages for Time Parties Resided Together After Separation or Divorce*, 104 A.L.R.5th 605 (2002)
3. 43 Ark. App. 91 (861 S.W.2d 313) (1993)
4. 615 So. 2d 84 (Ala. Civ. App.) (1993)
5. 517 So. 2d 1135 (La. Ct. App. 5th Cir.) (1987)
6. 51 Cal. App.3d 363, 365 (1975)
7. *Id.*
8. *Id.*
9. *Id.*
10. *Id.*
11. *Id.*
12. *Id.*
13. *Id.* at 365-66
14. *Id.*
15. *Id.*
16. *Id.* at 366-67
17. *Id.* at 368
18. *Id.*
19. *Id.*
20. 231 Cal.App. 4th 719 (2014)
21. *Id.* at 721
22. *Id.* at 722
23. *Jarrett v. Jarrett*, 259 Ga. 560, 561 (1) (1989)
24. *Rose v. Thorpe*, 240 Ga. App. 834, 834 (1999)
25. 220 Ga. App. 745 (1996)

- 26. *Id.*
- 27. *Id.*
- 28. *Id.*
- 29. *Id.*
- 30. *Id.*
- 31. *Id.*
- 32. *Id.*
- 33. *Id.*
- 34. *Id.*
- 35. *Overview of the Superior Court of Fulton County, Superior Court of Fulton County*, <https://www.fultoncourt.org/about/about.php> (last visited March 13, 2021).
- 36. 239 Ga. 466 (1977)
- 37. *Id.*
- 38. *Id.*
- 39. *Id.* at 466-67
- 40. *Id.* at 467 (2)
- 41. *Id.*
- 42. *Id.*
- 43. *Id.*
- 44. *Id.* at 468
- 45. *Id.*
- 46. *Wills*, 222 Ga. at 649
- 47. *Livsey v. Livsey*, 229 Ga. 368, 369 (1972)

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Know What You're Dividing!

By Mark E. Sullivan*

We were just about finished with the hour-long Zoom interview when I heard it. It was one of those moments when your ear says to your brain, “What? Hold on – stop everything!”

The military client was telling his local lawyer and me how he expected to retire from the Army in four months. He said he’d know for sure when the PEB report came through.

“PEB... as in *Physical Evaluation Board*?” I asked. He confirmed that’s what he meant.

It was now clear – as it definitely had not been in the previous hour – that “John Doe” was not gracefully exiting the Army after 20 years of service at his own choice. Rather, he was being forced out with a disability retirement. And that made all the difference in the world.

Disability Retirement

We’d been discussing what share his wife would receive in the divorce settlement, how to write up the military pension division order (MPDO), how much of the pension would be allocated to her, when payments would start from the retired pay center, and what language and data points were required. But now, with the new information, it became clear that this was not a longevity retirement; he was being “put out to pasture” because he was mentally or physically unfit to continue to serve.

And that meant that there was a good possibility that none of the pension would be divided. When a service member gets a disability retirement under Chapter 61 of Title 10, U.S. Code, his retired pay is calculated in two ways, and he always receives the higher amount. The first is retired pay based on his *percentage of disability*. The second method is pay calculated according to his *years of service*. In John’s case, if the higher amount were based on percentage of disability, then none of the pension would be divisible. 10 U.S.C. § 1408(a)(4)(A)(iii). If his retired pay were based on years of service, then only the difference between that amount and the percent-of-disability amount would be divisible.

This made a huge difference in the structure and strategy for the case, and the PEB information only came to light in what we thought were the *last five minutes* of the hour’s interview. It led us to continue the conversation for almost another hour, ranging over topics such as the duty to disclose information to the wife’s attorney, what discovery requests (if any) were served by the other side, the possible role of spousal support in the settlement, grounds for a later motion by the wife to set aside the divorce settlement for fraud, and the Rules of Professional Conduct. The main lesson coming out of the interview was the importance of *knowing what you’re dividing* when the interview involves military pension division.

Retirement from Active Duty

In many cases, John Doe’s pension is based on active duty only, and he will receive a “regular retirement” under Chapter 71 of Title 10. When the divorce is after December 23, 2016 and he isn’t receiving retired pay at divorce, then the MPDO must contain his years of service and his High-3 pay, both as of the divorce date. Further discussions often involve how to calculate the marital fraction.

If John’s “regular retirement” is based on active service as well as time in the National Guard or Reserves, then the discussion may involve calculating the marital fraction according to time, and then again according to retirement points acquired during the marriage; each of the parties will want that resulting percent which most benefits him or her. The time calculation will involve not only active-duty service but also “extra Section 1405 service,” that is, additional time attributed to retirement points received for weekend drill.

Non-Regular Retirement and “Pay Status”

If John is to receive a “non-regular retirement” from the National Guard or Reserves under Chapter 1223 of Title 10, then the data points are still required, but the “years of service” is replaced by “retirement points at divorce,” and someone has to do that calculation. The marital fraction can be fixed as of the divorce date, or it can be a “formula clause” with marital pension service divided by total pension

service (and the latter is unknown when John hasn't stopped drilling). The fraction would look like this:

$$\frac{\text{Marital military service}}{\text{Total military service}}$$

When the denominator is not fixed on the date of separation, filing or divorce, it is represented by "X." And in this situation, military rules for Guard/Reserve retirements require that the fraction be expressed in terms of retirement points, not time.

When John is already in pay status and he's getting monthly pension payments deposited into his bank account, the issue often involves "back payments." If the parties have been separated for, say, two years, then he may owe "Jane Doe" a sum of money for the pension-share payments, which he received in the past 24 months and did not share with her. Or he may owe her nothing if he's been making the house payments or paying spousal support from his pension during the interim period.

When it's Disability Retired Pay...

And finally, when John's retired pay is based on disability, the golden key for the pension-division issue is: *Can the pension be divided at all?* If that issue is not spotted during the interview, then the consequences could be serious and substantial for the

spouse or the service member down the road when the pension order is entered and sent to the retired pay center. The reply letter sent to Jane Doe will likely say that John's retired pay "cannot be divided since it is based entirely on disability." Jane's attorney might file a motion under Rule 59 to amend or alter the divorce settlement. The motion could be under Rule 60, asking for the settlement to be set aside or vacated. There may be a motion for contempt, and Jane might even file a grievance against John's attorney.

All of this can be avoided if the attorney for Jane or for John is aware of what's being divided. It means that – to start the interview – the responsible attorney needs to ask about the nature of the retired pay that the court will be allocating in divorce. It means, in short, that you need to *know what you're dividing*.

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Addressing Racial and Health Inequities

By Latonia McGinnis

In the United States, regardless of region, racial inequities exist across every indicator for success—including criminal justice, education, jobs, housing, and even health outcomes. These inequities are largely driven by racism and bias that are embedded in our systems, institutions, policies and practices. This structural racism results in a lack of access and opportunity, increased sickness and premature death among communities of color. Compared to white women, Black women (across socioeconomic status) are three times more likely to die within one year of childbirth. Black women are also more likely to experience more than triple the rate of death in childbirth than U.S. white women. Black men are 70 percent more likely to die from a stroke as compared to non-Hispanic white men. These are just a few examples of the health disparities people of color face. These disparities are rooted in many cultural and historical influences, including bias among healthcare workers that can lead to mis- or under-diagnosis and other social factors that limit access to adequate healthcare.

Public Health experts have often stated that a person's zip code is the largest predictor of their health status. Research has demonstrated that some groups within the United States are less healthy than others and have poorer health outcomes based on factors such as less green space, crime, lack of access to quality health care, and food deserts. Who lives in which neighborhood and whether that neighborhood has decent housing, good schools, and well-paying jobs is determined by multiple, institutional policies and practices. Whether intentionally or not, these policies and practices have often discriminated by race, which is why we see so much difference in life outcomes of people of color. This uneven distribution of social resources results in Health disparities.

According to the CDC, "Health equity is achieved when every person has the opportunity to attain his or her full health potential and no one is disadvantaged from achieving this potential because of social position or other socially determined circumstances". Racial and Health inequities have a myriad of causes and cannot be addressed by one entity alone. As professionals, we all have a role in acknowledging that these inequities exist and ask ourselves what we can do to help reduce

or eliminate them.

As it relates to health equity, Healthy People 2020 outlines five key domains related to people's physical and social environments and how they affect health outcomes. These domains require a joint effort from various community and professional entities and can impact both racial and health equity:

Neighborhood and built environment: Key issues are nutrition, safe housing, interpersonal violence, and physical environmental conditions, such as exposure to pollution or noise.

Social and community context: Key issues are community participation, incarceration of a family member, and discrimination.

Economic stability: Key issues are poverty, employment, food security, and housing stability.

Education: Key issues are high school graduation, higher education, literacy, and access to early childhood education.

Health and health care: Key issues are ease of access to health care (affordability, transportation, etc.) and health literacy.

Partnerships within the community, education, housing, media, planning and economic development, transportation, and business partners is essential. These partnerships can work to improve the underlying community conditions that make healthy living easier, particularly in underserved communities.

Workplaces have a unique opportunity to help advance racial equity in their places of business by:

- Supporting a person bringing their whole self to work; Many people of color practice 'covering' to fit into societal norms (that tend to be racially biased) and this can be emotionally and mentally exhausting leading to unnecessary and undue stress.
- Being mindful of total rewards programs and offerings that have biases built in due to structural racism
- Removing the stigma around getting support for mental health

- Providing the resources to reduce the disparities that people of color face in regards to their health, wellbeing, financial and community resources
- Encouraging organizations to take a deeper dive into the social determinants of health and addressing them in their company mission and values and community partnerships

To advance racial equity, government and other institutions must focus not only on individual programs, but also on policy and institutional strategies that create and maintain inequities.

We must transform our systems and dismantle policies and practices that uphold racism and continue inequities. Apply a racial equity lens to all decisions about policies and programs. Companies can help advance racial equity within their organization as well as the communities that surround them. This, in turn, will help advance health equity and health outcomes of people of color. If racial equity is addressed collectively and properly, this can lead to improved outcomes for all.

What is the takeaway for the family law attorney? Family law practitioners are uniquely positioned to help facilitate institutional change as employers and advocates. Specifically, with regard to recognizing the intersectionality of racial and health inequities, domestic lawyers would do well to consider the application of equitable principles in the courtroom, in their hiring practices, and in their daily interactions. As family law attorneys are already well versed in the language of equity and enjoy positions of influence within the communities they serve, they are particularly equipped with the tools and opportunity to advance systemic reform.

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Divorce Planning: Financial Considerations

By Trent Doty



Divorce can strain your finances as well as emotions. But being prepared with an investment plan before, during, and after divorce can help protect yourself and take charge of your future financial well-being.

Let's take a look at a few of the financial considerations that are important when going through a divorce:

What do you have right now?

One of the first, and most important things to do when starting the divorce process is to make a list of assets and debts you and your spouse have. It is imperative that you have your own copies and access to all-important records. Assets include all properties, possessions, investments, businesses, and other items that have a cash value. There may be other items depending on your unique situation, but your list of assets and debts should include:

- Personal bank accounts, shared accounts, retirement accounts, brokerage accounts, life insurance/long term care/disability insurance
- Real estate properties, vacation homes, land
- Cars, boats, motorcycles, and any other vehicles
- Any other high-value assets such as jewelry, art, antiques, etc.
- Home loans (mortgage), equity loans, personal loans, auto loans, student loans
- Medical bills, credit card bills
- Any other debts

Once you have these assets compiled, it is important to list the assets/debts that you 1. Owned prior to the marriage 2. Inherited during the marriage 3. Received as gifts during the marriage. These can sometimes be protected when it comes to the division of assets.

Equal isn't always fair

It is important to understand that the division of assets/debts may or may not be 'equal'. For example, if one spouse is a stay at home parent while the other spouse has a salary that provides the majority of the

income for the household, the stay at home spouse may need more assets in order to keep the same standard of living since they haven't worked outside of the home for many years. Oftentimes, the stay at home spouse gave up a previous career in order for the working spouse to progress through the ranks and grow their career.

This is sometimes covered by alimony, but not always.

How do you value the assets?

Is \$250,000 in a checking account the same as \$250,000 in a traditional IRA/401(k)? What about a home worth \$500,000? My spouse has a pension, how is that valued?

This is where it can help to work with someone familiar with the divorce process. It is important that the valuation of these assets is correct. For example, a pension that pays \$6,000/month can be challenging to find the present value if you haven't done that before. In addition to valuing a pension, understanding the tax liabilities and valuations of certain assets can also be an extremely vital piece of the division of assets.

Which assets do you need?

While going through the division of assets, how do you know which assets are best for you?

You need to make sure the liquidity of the assets you're receiving match what you need. Let's look at an example: You are a non-working spouse and you want to keep the family home. The home is worth \$500,000, which is 50percent of the total assets. The house is not paid off and costs \$2,500/month to maintain. If you are not planning on returning to work or aren't sure what level of job you qualify for, you may not be able to afford to keep the home. It may be more beneficial for you to request a liquid asset such as the checking account or brokerage account.

For this reason, it can be beneficial to have an investment plan that can show your monthly income/expenses and what you can afford.

The division of assets have been made and the divorce is final. Now what?

One of the often overlooked pieces following a divorce is creating and reviewing a new investment plan. The cumulative income and assets that were previously supporting one household have now been divided to support two households. This can change your goals and objectives and it could be a good time to review your investment plan.

What does your support team look like?

Friends and family are incredibly important during this difficult time – they can provide the support and structure you need. However, it is also important that you have a team of professionals on your side to assist

with the divorce. You should have a divorce lawyer and a Certified Divorce Financial Analyst® (CDFA®) at a minimum. In addition, it can help to have a mediator, accountant, and a business valuator. These professionals can potentially save you from making costly errors regarding your settlement, and can give you piece of mind while you are dealing with the emotions that come with a divorce.

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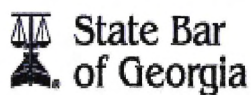
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Ethics dilemma?

Lawyers who would like to discuss an ethics dilemma with a member of the Office of the General Counsel staff should contact the Ethics Helpline at 404-527-6374 or toll free at 800-682-0906, or log on to www.gabar.org and submit your question by email.



Case Law Update

By Vic Valmus



Attorney Work Product

Moody, et al v. Hill, Kertscher & Wharton, LLP et al.
A18A1011 (March 8, 2021)

In this legal malpractice action, former-client appellants moved the Trial Court for a Protective Order claiming that certain documents sought by the appellees from a non-party law firm were protected by attorney-client privilege or attorney work product. The Trial Court denied the Motion concluding the appellants had waived both protections by filing this malpractice action. In a prior appeal, the Supreme Court, on *certiorari*, reversed the Appellate Courts decision concluding the appellants had in fact waived the attorney-client privilege and Trial Court should be affirmed. However, that does not conclude the case as it was still undecided whether the documents at issue were protected by the attorney work product.

Equating the waiver of the attorney work product with the waiver of attorney-client privilege is erroneous. The attorney-client privilege is intended to protect the attorney-client relationship by protecting communications between the clients and the attorneys while the work product doctrine directly protects the adversarial system by allowing attorneys to prepare cases without concern that their work will be used against their clients.

O.C.G.A. § 9-11-26 (d) (3) provides the standard concerning the protection of attorney work product. Discovery of these items is proper only where the parties seeking disclosure shows: 1) There is a substantial need for the materials to prepare its case; and 2) That he is unable without a hardship to attain the substantial equivalent of the materials by other means. Therefore, the discovery is only available under carefully limited circumstances. Even if a party seeking disclosure makes the requisite showing, the Trial Court may order production of the material only after ensuring that there is no disclosure of mental impressions, conclusions, opinions or legal theories of any attorney

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or any other representative. Such a step requires an in-camera review and possible redaction of the document.

Here, the Trial Court made no findings fact concerning the appellees need or hardship and made no inquiry into the substance of the documents at issue. Therefore, the case was remanded.

Contempt/Improper Modification of Decree

Stone v. Stone. A20A1814 (January 29, 2021)

The parties divorced in March of 2015. The Settlement Agreement incorporated into the Final Divorce Decree required the Husband to quitclaim one-half interest in the home to the Wife and the "Wife shall be entitled to the use and possession of the marital residence and shall be responsible for all utilities, expenses, home owners association fees, pest control, lawn maintenance, appliances, fixtures and all other like expenditures on the property... The Husband shall pay the taxes and insurance in 2015 and thereafter the parties shall equally divide the same."

Several years later, the Husband moved for Contempt alleging the Wife had failed to pay her share of the taxes and insurance. The Trial Court found the Wife was in substantial arrears for non-payment of HOA fees and her half of taxes and insurance. The Court further noted that the Wife was unemployed, had no other income except child support and financial obligations regarding the house were a major source of discontent, animosity and conflict between the parties. The Trial Court ordered the marital residence to be sold and the profits divided. The Wife appeals and the Court of Appeals reverses.

The Wife argued that the Trial Court lacked the authority to order the residence sold. The Husband argued that the Trial Court's Order merely clarified the Divorce Decree requirements as to carry out the intent, letter and spirit of the Settlement Agreement. However, there is a firm rule against modifying property division of a Final Divorce Decree. Here, the Divorce Decree awarded the Wife a distinct interest in the marital home and also required her to pay all the expenses, taxes and insurance associated with the home. Neither the Divorce Decree nor the Settlement Agreement specified the remedy if the Wife failed to make those payments and which neither mandated sale of the home for noncompliance. Even though the Trial Court's order to sell the house may appear reasonable given the

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Wife's apparent lack of income and failure to meet her financial obligations under the Decree, the Trial Court can clarify, but cannot modify the terms of the Final Decree.

Domestication

Kerr v. Wilson (2 cases), A20A1668 & A20A2015
(February 22, 2021)

The parties were divorced in 2009 in Tennessee, in which Wilson (Mother) was awarded primary custody of the child and Kerr (Father) was to pay child support. In 2019, the Mother filed a Petition for Registration/Domestication of their Tennessee Order in Superior Court of Glynn County, Georgia. The Father was served with the Petition and Summons on September 19, 2019. The Father filed a *pro se* response to the Petition on September 24, 2019. The Father did not request a hearing on the matter. On October 3, 2019, the Superior Court scheduled a hearing on the Petition, which was held December 3, 2019. On April 7, 2020, the Court entered an Order granting the Petition to Register and Domesticate the Divorce Decree and pursuant to O.C.G.A. §19-9-85, the Father was properly served with notice, but failed to request a hearing within 20 days of service and therefore, registration of Decree was confirmed. The Father appeals and the Court of Appeals affirms in part and reverses in part.

The Father argues that the Court erred by confirming the Decree on the basis that he failed to request a hearing. Here, the Superior Court specifically cited to 19-9-85 and confirmed the Tennessee Divorce Decree because the Father did not request a hearing within 20 days. However, the code section states to contest the validity of a "registered Order" a party must request a hearing within 20 days after the service of the notice. If a timely request is not made, the registration is confirmed as a matter of law. The Tennessee Divorce Decree was not registered pursuant to 19-9-85(a). Therefore, the Father was not required to request a hearing within 20 days of the service of the Petition.

In order to register a Child Custody Order, a litigant must file: 1) A letter or other document requesting registration; 2) Two copies including one certified copy of the determination sought to be registered and a statement under the penalty of perjury that to the best of his or her knowledge and belief, the person seeking registration the Order has not been modified or set aside; and 3) the name and address of the person seeking registration and any parent or person acting as a parent who has been awarded custody or visitation and

the child custody terminations sought to be registered. Here, the Wife's petition did not contain two copies of the Divorce Decree, but only one certified copy and therefore was not a registered Order and the Court erred by automatically confirming the registration based on the Husband's failure to request a hearing.

When the Mother filed a Petition for Domestication, she also filed a Motion for Contempt claiming the Father was behind on his child support payments. The Motion included a request for attorney's fees. After the hearing, the Court entered an Order finding the Husband was in contempt of his child support obligation and ordered him to add \$100.00 per month to his regular payments until the arrearage is paid and awarded the Mother \$1,500.00 in attorney's fees and Court costs. The Father argues that the Court erred by entering an Order finding him in contempt prior to domesticating the Tennessee Divorce Decree and by awarding attorney's fees. Pursuant to 28 USC § 1738 B (a)(1) requires a full faith and credit be given the Child Support Orders of Foreign States citing that each state shall enforce according to its terms a Child Support Order made consistent with this section by a court of another state. Therefore, a Child Support Order is enforceable if made consistent with this section, in a court with proper subject matter and personal jurisdiction and if proper notice and opportunity to be heard are given to the parties. The Father has not challenged the Tennessee's jurisdiction to enter the Order or his notice and opportunity to be heard. Therefore, the Court properly exercises authority to enforce Tennessee Child Support Order. The Father also argues that the Court erred by awarding attorney's fees. Here, the Superior Court did not specify a statutory basis for the fees and contains no factual findings necessary to support the award and therefore, the fees were vacated and remanded.

Grandparent Visitation

Davis et al. v. Cicala, A20A116 (October 5, 2020)

Davis and McKinney (Parents) had two minor children, one born in 2004 and one born in 2009. The parents divorced in 2014 with the Mother as the primary custodian. In 2018, the Mother filed a Petition for Modification and Contempt. Cicala (Grandmother) filed a Motion to Intervene in the modification proceeding and requested reasonable visitation. The Grandmother testified that the children's Father lived with her for two years during which time the children stayed with her in her home every weekend and every other Wednesday. Each child had a bedroom. She

took care of the children, paid financial support, went to Florida each year on vacation and had a continuous and constant relationship with the children since the day they were born. After November 2017, the Grandmother was no longer allowed to visit with the children. The parents testified that the Grandmother had provided financial support and had the children for extended periods of time and had seen the children regularly. In addition, the Mother stated that DM had been harmed by not seeing the Grandmother and was concerned over her health conditions because she has immune deficiency disease. The Trial Court granted the Grandmother's Motion to Intervene and awarded Grandparent visitation under O.C.G.A. §19-7-3(c) (1) and determined by clear and convincing evidence that harm would result if the children were denied independent Grandparent visitation and it was in the children's best interest. The Grandmother was granted independent visitation with the children for one day during the Christmas break from school, one week during the summer breaks to coincide with the Father's portion of the parenting time. The parents appeal and the Court of Appeals affirms.

The parents argue that the award of Grandparent visitation was not supported by evidence, but the record contains sufficient evidence to support the Trial Court's award of visitation to the Grandmother. Under O.C.G.A. §19-7-3 which is known as the Grandparent Visitation statute, the Court utilizes the balancing of interest for the child, the rights of the parents and the wishes of an alienated Grandparent. The Court could consider 1) if the minor child resided with a family member for six months or more; 2) the family member provided financial support for the basic needs of the child for at least one year; 3) there was an established pattern of regular visitation with the child by the family member with the child or 4) any other circumstances that exist indicating that emotional or physical harm would reasonably result if the visitation is not granted. Even though the parents argued that they have not blocked the Grandmother from having a relationship with the children, the parents offer no authority that requires the Trial Court to balance the competing interest and rights of a Grandparent and a child in such a way that O.C.G.A. §19-7-3 would only apply where all visitation has been cut off. Also, the Trial Court found that the health and welfare of the child would be harmed in the absence of visitation of the Grandmother and the visitation would be in the child's best interest. In considering this, the Court found that 1) the child has resided with the Grandmother for two

years during the period of the Father's visitation for the historical pattern of visitation; 2) the Grandmother provided some financial support for the children's basic needs for several years and 3) considered the child's emotional and extended family at the stage of their development. These findings were supported by the evidence. Judge Coomer concurs, however, believes the statute itself appears to be unconstitutional, but the Appellate Court lacks jurisdiction to strike the statute as unconstitutional.

Legitimation/Past Due Child Expenses/Attorney's Fees

Day v. Mason, A20A0964, A20A1520 (October 29, 2020)

Brandon Day (Father) and Ariel Mason (Mother) had a child (KRD) that was born in December 2016. During the first few months of the child's life, the Father paid \$350.00 every other week. In July of 2017, the Mother graduated college and began working full time. Their relation ended in late 2017, but the Father continued to make regular payments to the Mother. In 2018, the Mother enrolled the child in daycare programs. In October 2018, the Father filed a Petition for Legitimation, Custody and Visitation and the Mother filed an Answer and Counterclaim for Paternity, Child Support and Past Child Support, Medical Expenses Not Covered by Insurance and Attorney's Fees. The Legitimation and Parenting Plan was consented to, leaving the other issues to determination by the Court. At trial, the Mother produced evidence showing that she had spent \$15,164.00 on non-child care, non-medical expenses for the child, which included clothes, diapers, formula, groceries, toys and \$2,272.00 for day care expenses. She also had an additional \$915.00 for out-of-pocket childcare expenses that was not covered by the Father. The Father testified that he had already paid voluntarily \$16,304.00 since the child's birth and that she had spent a ridiculous and excessive amount on items that were not necessities. The Trial Court's Final Order awarded future monthly child support payments and also ordered past child support \$2,051.00 towards child care expenses plus \$7,582.00 towards other reasonable and necessary expenses, required the parties to split the cost of the extracurricular activities and ordered the Father to pay all of the Mother's attorney's fees requested of \$4,757.00 under O.C.G.A. §9-11-37 and \$52,000.00 under O.C.G.A. §19-9-3(g). Father appeals and the Court of Appeals affirms in part and reverses in part.

The Father challenges the Court's award of past

child support. Pursuant to O.C.G.A. §19-7-24 it's a joint and several duty of each parent of a child born out of wedlock to provide for the maintenance, protection and education of the child until the child reaches the age of 18 or becomes emancipated. The measure of the Mother's recovery for past expenses is the expenses actually incurred on the child's behalf. Father claims the expenditures sought were not reasonable or necessary, however the Court found that the Mother had actually incurred these expenses and they were reasonable and necessary. The Father objected generally at trial that the Mother's purchases were excessive, but never challenged the reasonableness of or the need for any particular expenditure below and therefore waived the argument and cannot raise it for the first time on appeal. The Father also argues that the mother cannot recover past due support because she accepted what he paid and waited to pursue her claim after he filed his legitimation action. However, this Court has held that a laches defense does not apply in this context.

The Father contends the Trial Court erred by requiring him to pay half of the child's future extracurricular activities. The Trial Court ordered the Father to pay half of the extracurricular activities, but made no findings of fact to support a deviation from the presumptive amount of child support and therefore, this is reversed.

The Father next argues that the Trial Court erred by awarding attorney's fees pursuant to O.C.G.A. §9-11-37 in the amount of \$4,700.00 with his failure to comply with discovery. However, the Mother never filed a Motion to Compel and the Court never entered an Order Compelling Discovery. O.C.G.A. §9-11-37 allows attorney's fees as sanctions for failure to provide discovery, the general scheme is that ordinarily sanctions can be applied only for a failure to comply with an Order of the Court and therefore for sanctions to be valid, there must be a violation of some sort of Discovery Order. In this case, the record contains no indication that the Father violated any discovery related Court order. Therefore, these fees are reversed.

The Father also challenged the Trial Court's award of \$52,000.00 in attorney's fees under O.C.G.A. §19-9-3(g) arguing there was no evidence to support the award and that it was excessive. However, the record shows at the conclusion of the bench trial, the Mother's counsel argued for an award of attorney's fees and listed billing rates and these rates are fair and reasonable for an experienced domestic relation attorney in Atlanta

and also had billing records in the Court as well as charts that summarize the legal bills and settlement offers that were made in the case. After the Mother's attorney finished, the Father's attorney said "I don't have anything" He did not ask to see the invoices or charts and did not seek cross examination of the counsel or challenge the reasonableness of the rates. The record contains no indication that the Father's attorney objected to the submission of these documents or otherwise sought to challenge their content or validity. In addition, the Father filed no Motion for Rehearing or post judgment challenge to the fee award. Here, there was evidence to support the award of fees even though the Father challenges the billing records as inadequate and the fees were unreasonable, but he never sought to question the Mother's counsel about the fees at the Bench Trial and did not request a further hearing. Therefore, the Father has waived these challenges. A party cannot acquiesce in a procedure by the Trial Court and then complain of it later.

The Father also objects to the Trial Court erred by ordering him to pay the past child support in the amount of approximately \$10,000.00 and \$52,000.00 in attorney's fees within 90 days and argues that this deadline is unreasonable plus he does not have the resources to pay. However, the Trial Court is not required to consider the Father's ability to pay in awarding past child support. In addition, O.C.G.A. §19-9-3(g) does not require Trial Court to consider the parties financial circumstances in making an award of attorney's fees. After the case was docketed on appeal, the Mother filed in the Trial Court a Motion for Temporary Attorney's Fees under O.C.G.A. §19-9-3(g) to cover her attorney's fees during the impending appeal until the conclusion of the litigation. The Father argues this code section does not permit the award of attorney's fees, which states in pertinent part that the Court can award other costs of the child custody action and pretrial proceedings to be paid by the parties in proportion and at times determined by the Judge. While the statute specifically refers to pretrial proceedings, it is silent to post trial proceedings. Even though O.C.G.A. §19-9-3 authorized an award of attorney's fees at any time during the pendency of litigation, O.C.G.A. §19-9-3(g) does not authorize award of appellate attorney's fees and must be reversed.

Matters Outside the Record

Rodgers v. Rodgers, A20A1779 (January 29, 2021)

The parties were married in 2005 and had four children. On December 15, 2018, the parties executed a

Settlement Agreement, which included a parenting plan with the Mother as primary physical custodian. The Mother retained the marital home and was responsible for all mortgage payments, taxes and insurance. She would have three years to refinance the mortgage and pay the Husband \$20,000.00 as equity division. The agreement was approved and incorporated into the Final Judgment and Decree of Divorce and filed on December 28, 2018. On December 27, 2019, one day before the Court Order was filed, the Father filed a Motion to Rescind the Settlement Agreement and for Primary Physical Custody based on the Mother telling him she was having a difficult time caring for the children, the heat was broken and the children were freezing. In addition, the Mother's conduct was erratic and unpredictable including infestations of lice in the children's hair and poor academic scores. The hearing was held in January of 2019 and on April 8, 2019, the Court entered a Temporary Child Support Custody Order that vacated the Final Judgment and Decree of Divorce and awarded primary custody to the Father. On August 30, 2019, a Final Hearing granted the parties total divorce, but keeping a civil action open with regards to financial issues, child custody and visitation. On January 13, 2020, the Trial Court held the Final Hearing on the remaining issues. Mother appeared *pro se* and a Final Order was entered on February 13, 2020 awarding the Father sole legal and physical custody with the Mother having supervised visitation because of a safety plan that was issued by DFACS. The Court also found the Mother had abandoned the marital home, was in arrears on the mortgage payments, child support payments and a portion of the medical expenses. The Mother appeals and the Court of Appeals reverses and remands.

The Mother argues the Trial Court erred in the rescission of the parties Settlement Agreement which asserted it can only be rescinded due to fraud, inducement, incapacity or some other defense to contract and the Father's Motion was really an attempt to modify the parties Divorce Decree and should have filed a separate action for modification based on a substantial change in circumstances. Although the Father did not amend his Motion or file a new one after the entry of the judgment, the Trial Court treated his earlier filed Motion to Rescind the Settlement Agreement as a Motion to Rescind the Final Order in light of developments. After the hearing, the Court entered a Temporary Order effectively vacating the Final Judgment and Decree of Divorce. However, the Trial Judge has inherent power during the same

term of Court in which the judgment was rendered to revise, correct, revoke, modify or vacate the judgment even upon his own Motion. His inherent power may be extended beyond the term in which the judgment was entered when a Motion for Reconsideration is filed within the same term of Court. Even though the Father did not file a formal Motion for Reconsideration after the entry of the December 2018 Final Judgment and Decree of Divorce, it appears from the hearing on the matter that the Trial Court treated his Motion to Rescind the Settlement Agreement as a Motion for Reconsideration of the Final Judgment. The Father's counsel presented arguments concerning events that transpired after the Settlement Agreement was signed. Therefore, we interpret the Court's ruling as a grant of the Father's Motion for Reconsideration filed during the same term of Court as a judgment.

The Mother also argued that the Trial Court erred in considering a safety plan by DFACS when there was no evidence the safety plan admitted by the Trial Court. In the February 2020 Final Order, the Trial Court found that unsupervised visitation was presently prohibited by safety plan of DFACS. Accordingly, the Court ordered that to the extent visitation to the children should be allowed in the future by DFACS, Father shall allow the Mother supervised visitation on the first and third Sunday's of each month. The transcript of the January 2020 hearing does not contain any evidence of a DFACS safety plan. There was no testimony presented or exhibits admitted on the matter. Here, the Trial Court is prohibited from considering matters outside the record. Given the Trial Court's ruling with regards to custody and visitation, specifically explaining that unsupervised visitation was prohibited by the safety plan, cannot be based upon matters outside the record.

The Mother also argues the Trial Court's August 2019 Order granting a divorce while reserving custody and financial issues violates Georgia Law. The Mother is correct that a Divorce Decree should resolve all contested issues and no Divorce Decree shall be granted unless all contested issues in the case have been finally resolved. However, the Trial Court arguably rendered any error harmless as it later purported to rule on the remaining contested issues in its February 2020 Final Order.

Medical Expenses/Contempt

Daniel v. Daniel, A20A1938 (March 12, 2021)

The parties were married in 2002 and had 3 minor children. In 2017, the parties filed for divorce.

Following the trial, the Court granted the Husband's divorce: awarded the Mother primary custody; ordered child support; made each party responsible for 50percent of the uncovered medical expenses—but not including over the counter medications or chiropractic, visits unless they were medically necessary and ordered by the children's doctor. The marital home was awarded to the parties as joint tenant in common with the Mother having exclusive rights and possession until the youngest child turned 18. The parties would equally divide the mortgage, pay mortgage taxes and insurance with the Mother paying all utilities and maintenance. They are also to split the expenses on the property located on High Falls Road until the property was sold and equally divide the proceeds and equally divide the monthly proceeds from the sale of the property on Blunt Road until paid in full. Neither party was awarded alimony and the Father was to pay the Mother \$9,037.00 in 90 days on the Mother's Contempt claim. The Court found it could not order the Husband to reimburse the Wife for any expenditures on the marital home or the children prior to the Temporary Order. The Mother appeals and the Court of Appeal affirms in part and reverses and remands in part.

The Mother argues the Trial Court erred by not attaching Child Support Worksheets. O.C.G.A. §19-6-15(m)(1) requires the Court to attach Child Support Worksheets including Schedule E. The Father concedes the Child Support Worksheets were not attached to the Child Support Addendum. However, the Trial Court's failure to attach the Child Support Worksheets is not fatal because the record reflects that the worksheets were proffered and admitted during trial and the Trial Court referenced the Child Support Worksheets in the Child Support Addendum. The relevant information was referenced in the Addendum. The Mother also argues that the Trial Court erred in excluding the reimbursements for the children's over the counter medications and chiropractic visits unless ordered by a doctor. The Trial Court is not required to order a party to pay for uncovered medical expenses not deemed to be medically necessary. The evidence showed that the Mother frequently brought the children to the doctor reflecting the Trial Court's belief that the many uncovered medical expenses were not reasonably necessary. Therefore, the Trial Court did not err by eliminating from the uninsured medical expenses, non-doctor ordered chiropractic visits and over the counter medications.

Next, the Mother argues that the Trial Court improperly divided the marital assets. Equitable

division of marital property does not necessarily mean equal division. In addition, where the Trial Courts divorce decree does not otherwise provide, property remains titled as it was before the divorce decree was entered. Here, the Court awarded the marital residence to both parties making them joint tenants in common where the Mother would be financially responsible for utilities, maintenance and upkeep. The tenancy in common results in a Divorce Decree with each party having a one-half undivided interest in the property. Here, the Mother had exclusive right and possession to the home until the youngest child turned 18 in which time the parties would sell the home and split the proceeds. In this regard, the Trial Court fashioned a remedy by awarding the marital home as tenants in common suitable to both parties in their respective interest in the home.

The Mother also argues that the Trial Court erred in awarding the same trailer to both parties. Here, the evidence showed there were two different trailers at issue, a box trailer and an open ended trailer because the parties concede on appeal that the Trial Court awarded the wrong trailer and because it is unclear from the Divorce Decree which trailer the Trial Court intended for each party to have, part of the Order is vacated and remanded.

Regarding the Mother's contempt provisions in the Divorce Decree, the Mother argued that the Trial Court erred in determining it could not order the Father to reimburse her for expenditures she paid for the minor children and marital residence after filing the divorce, but prior to the parties Consent Temporary Order. The law provides that a party cannot be held in contempt for violation of order that fails to inform him in definite terms as to the duties imposed upon him. However, where divorce actions pending and a spouse subsequently seeks temporary support for a minor child, the Trial Court may award support covering the period from the time the divorce is filed until a Temporary Order Final Hearing is held. At trial, the Mother testified that the Father paid zero financial support from the time the parties separated up to their Consent Temporary Order and that he owed \$4,612.00 in child support for which she wanted to be reimbursed. She also submitted evidence showing expenses she paid for the minor children prior to the Temporary Consent Order. Trial Court found that because there was no court order placed prior to the parties Consent Temporary Order, it could not order the Father to reimburse the Mother for any expenditures on the marital home or the minor children. The Court of

Appeals agreed that the Trial Court lacked authority to hold the Father in contempt for failure to pay amounts that the Trial Court had not previously ordered him to pay. However, the Trial Court was permitted to consider evidence and exercise its discretion to require the Father to reimburse the Mother for such expenses incurred prior to the Consent Temporary Order.

Modification/Relocation

Burnham v. Burnham, A20A1243 (November 2, 2020)

The parties divorced in June of 2016 and had two children. The Divorce Settlement Agreement awarded the Mother primary custody of the children with the Father having visitation on Wednesday after school to Sunday afternoon for the first and third week of each month. (neither party was represented by an attorney). The parties lived in Coweta County and under the heading "Miscellaneous Agreements," the parties agreed to live within 120 miles of the current home address of the marital home until the minor children are of age 18 unless either party and/or spouse relocates due to employment. After the divorce, the Mother allowed the Father much more time with the children than was in the Parenting Plan to almost where the parties were sharing about 50/50 custodial time. Sometime in 2017, the relationship between the parties changed and the Mother began to strictly enforce the terms of the Parenting Plan. In November 2017, the Mother informed the Father that she intended to move from Coweta County to Marietta, Georgia. Based on the intended move, the Father filed a Complaint to Modify Child Custody, Parenting Time and Child Support asserting the move would constitute material change in circumstances. The Mother filed her own Petition for Modification of Visitation.

The Trial Court consolidated both Petitions and the cases proceeded to a hearing. The Mother stated she was engaged and would be living in a new home with her fiancé and his son. Her fiancé's job was the impetus behind the move. Since the filing of the Motion to Modify, the Father contracted to purchase a home located within the children's school district in Coweta County, which will allow the children to remain in the same school. Evidence at trial showed the children had been living in Coweta County their whole life and been regular attendees at their Coweta County church, attended extracurricular activities. In addition, the son was having behavioral changes since the divorce and was seeing a psychologist for more than a year to help him cope. The psychologist testified the son had mixed feelings about the move and stated that he was scared to

move. After the hearing, the Court issues a Final Order granting the Father's petition.

The Mother previously appealed the court's decision citing the Court did not list any material change in condition and the case was remanded back to the Trial Court. Thereafter, the Court issued a second Final Order expressly finding there were four material changes in circumstances justifying in changing custody: (1) There was a significant reduction in visitation and parenting time that the children had with the Father since 2017; (2) The Mother's relocation to Marietta; (3) The Father buying a home within in the children's school district in Coweta County; and (4) The son's enrollment in counselling after he exhibit behavioral changes related to the divorce. The Court then found it to be in the best interest for the primary custody be awarded to the Father. The Mother appeals and the Court of Appeals affirms.

The Mother's claims the Trial Court erred in finding a material change in circumstances. In the record, there is evidence to support the Trial Courts finding of material changes in circumstances. Here, Trial Court correctly considered multiple factors affecting the children including their living arrangement, the time spent with their Father, the participation at church and other extracurricular activities, their individual relationships with their parents, stepparents, stepsiblings and other family and their friendships. Therefore, the Trial Courts findings of material change in circumstances was not based on the Mother's relocation alone, but rather on the Court's assessment of multiple factors in the children's lives.

The Mother also argues that the special terms of the separation agreement amounts to a waiver by the Father to not seek a change in custody unless the Mother relocated more than 120 miles from the marital residence. Parties are generally free to waive both statutory and constitutional rights in their divorce agreements as long as they are not prohibited by a statute or public policy, but any waiver provision must be cast in a clear waiver language. Here, the relocation provision at issue did not include very clear waiver language. For example, it did not include the waive or waiver, nor did it set forth any specific right being waived. In addition, the provision was found in miscellaneous agreement and nothing in the provision connects it to the party's agreement concerning custody of the children in any way. Thus, the relocation provision does not amount to a waiver by either party of his or her right to seek a modification in the custody

based on the relocation of the other party within 120 miles of the marital residence. Also, the Mother challenges the Father's intent or conduct with respect to entering into the relocation provision. The Father did not admit that the parties intended this provision to include a potential change of custody based upon the party's living arrangement. The Father stated at trial that it was part of the Legal Zoom paperwork and believed it was to be commonplace language. His answers do not show any specific intent behind the provision and the Mother points to no other actions by the Father that will allow the Court to infer that he intentionally waived his rights regarding the custodial arrangement of his children. Therefore, the Father's limited testimony did not establish a clear and unequivocal waiver.

Permanent Guardianship/Adoption

In the Interest of KGV, a child. A21A0033 (December 31, 2020)

In January of 2016, the Grandmother of the then 4-year-old child filed a Petition to Terminate the Parental Rights of the Mother and Father or in the Alternative, a Permanent Guardianship. In June, the Court entered an Order denying the Mother's Petition to Terminate, but granted her permanent guardianship. The Court found the Mother and Father had abandoned the child and the child was dependent as a result of the parents chronic un-rehabilitated substance abuse, felony convictions and history of incarceration and that reuniting the parents with the child would be detrimental to the child. The parents also required the parents to pay child support, granted them scheduled phone calls and supervised visitation.

In July 2018, the Grandmother filed a petition in the Superior Court seeking adoption as a relative of the child under O.C.G.A. §19-8-7(a) to terminate the Mother and Father's parental rights on the grounds that the parents had abandoned the child, that the Father had suffered a recent traumatic brain injury and later rendered him incapable of surrendering his parental rights and the child was dependent due to lack of parental care and control. (The Father was represented by a guardian). The Mother then filed a Petition to Dismiss the Petition on the grounds of Res Judicata, which was denied. The Mother filed a second Motion to Dismiss because the Grandmother had already been granted a permanent guardianship and had custody and control of the child which ended the child's abandonment and cured her dependency that the child's care is now the responsibility of the Grandmother

and that all claims of abandonment and dependency with respect to the Mother had been rendered moot. The Mother also argued the Grandmother could not show the child was in a present state of abandonment or dependency because of the Mother. The Court granted the Motion to Dismiss the Adoption based on the Mother's argument regarding the permanent guardianship ended the dependency. The Grandmother appeals and the Court of Appeals reverses.

In her Adoption Petition, the Grandmother sought to adopt the child based on O.C.G.A. §19-8-7(a) and §19-8-10(a). In lieu of obtaining a voluntary surrender of parental rights, the Petitioner pursuing an adoption that is a relative of the child can be obtained by satisfying the requirements that the child had been abandoned by the parents. Nothing in the language of these statutes disqualifies the permanent guardian from seeking to adopt the child rather, O.C.G.A. §19-8-3(a) sets out eligibility requirements. The relative who meets these eligibility requirements is entitled to an adoption under O.C.G.A. §19-8-10, irrespective whether the relative might also be the permanent guardian of the child.

The Mother also argues that the issues of abandonment and dependency in respect to the parents are rendered moot once the permanent guardianship is granted. However, neither the statutory language nor our precedence supports the Mother's argument. Although a permanent guardianship indisputably works a limitation on the parental power of the legal parent by vesting that parental power in a guardian, it does not forever terminate the parental rights of a parent. In addition, a permanent guardianship must establish a reasonable visitation schedule which allows the child to maintain communicable contact with his or her parents and therefore, after a permanent guardianship has been entered, the parent/child relationship is not completely severed. The Grandmother must show, among other things, that the child is dependent due to the lack of proper parental care or control or by his or her parents. The record must contain evidence of present dependency not merely past or potential future dependency. However, the child has been removed from the custody of the parents, but present dependency can be shown through proof that, if the child were returned to the parent at the time of the hearing, the child would be dependent. Thus, the fact that a permanent guardian has custody of the child rather than a parent does not prevent the guardian from establishing present dependency.

Term of Court

Johnson v. Johnson, A20A2061 (March 2, 2021)

The parties were married in 2002, had two children and the Wife filed for divorce in 2017. A trial was held in August 2019 and a Final Decree of Divorce was entered on October 30, 2019. Husband filed a Motion for New Trial on November 25, 2019 for which the Superior Court denied the Motion in February 2020, but entered an Amended Divorce Decree the same day correcting some of the deficiencies alleged by the Husband's Motion. Husband appeals, Court of Appeals affirms in part and reverses and remands in part.

The Husband argues that the Trial Court erred in entering an Amended Divorce Decree after the term of the court had expired. A judge's power to revise, correct, revoke, modify or vacate a judgment does not extend beyond the same term of court, unless a Motion to Modify or Vacate, etc., was filed in the same term of court. In this case, the original judgment was entered in September 2019. However, the Court did not enter the Order amending the Divorce Decree until January, 2020 term. The Husband filed his Motion for the New Trial during the same term of court as the original judgment. Therefore, Trial Court had the inherent power to amend the judgment because the Motion was made in the same term of court in which the original judgment was entered.

Third Party Custody

Ortega v. Temple, et al. A20A1716 (March 15, 2021)

In 2016, Ortega (Mother) gave birth to a child and 7 days afterwards, the Father severely beat the Mother. On January 20, 2017, the maternal Grandmother filed a Petition for Custody, which was granted. In pertinent part, the Order stated that the Grandmother shall consult and discuss any major decisions for the minor child with the Mother before making such decisions. Visitation between the Mother and the minor child shall be as agreed upon by the Mother and the Grandmother. The Father had no visitation with the child and was required to pay child support.

Ortega's godparents (the Temples) filed a Complaint to Modify Custody against the Mother, Grandmother and Father. In the Final Consent Order, the Temples shall have sole legal and physical custody of the minor child and the visitation between the Mother and the minor child will be as agreed upon by the Temples and the Mother and that visitation will not be unreasonably withheld. In 2018, the Mother filed a Petition for

Temporary and Permanent Modification of Custody stating that there had been a substantial change in circumstances and the Mother had made significant strides at recovery from her domestic abuse. In the December 2019 Compliance Hearing, the parties contested the standard to be applied by the Trial Court. The Temples argued that the "Durden" Standard should apply because the Consent Order the Mother entered into voluntarily released all of her parental powers to a third person under O.C.G.A. §19-7-1(b)(1). Therefore, the Temples had a *prima facie* right of custody as against the Mother who lost her right to custody and that the Mother couldn't regain custody only by clear and convincing evidence that she was currently a fit parent and it was in the child's best interest. The Mother argued that "Lopez" Standard applies and that she had not given up her parental rights and maintained visitation and therefore, the Temple's did not have *prima facie* right and she still had a constitutional presumption of custody. However, the Court reasoned that the Consent Order constituted a clear and convincing evidence of the Mother voluntarily releasing her parental rights to third party and "Durden" controlled. The Mother filed an interlocutory Appeal and the Court of Appeals reverses.

The Temples argued that pursuant to O.C.G.A §19-7-1(b)(1) a parent may voluntarily contract with a third party to relinquish parental rights. Therefore, the Temples have a *prima facie* right to custody to the child and the burden of proof shifts to the Mother to regain custody of the child. If parental control has not been lost, the parent has a *prima facie* right to custody. Here, the Mother did not permanently surrender her parental power or custody rights to the child in the Consent Order. The Consent Order reflects only that the Mother, the Grandmother and the Temples agreed to certain custodial terms relating to the child. The Consent Order also provided that the Mother and the Temples would agree upon visitation and it would not be unreasonably withheld. The current Order modified the Order with the Grandmother, which gave the Mother the ability to discuss important issues regarding the child. The Temples cite "Durden" which applies only to permanent awards, which were made properly upon an evidentiary hearing with specific findings establishing parental unfitness by clear and convincing evidence. In absence of a permanent custody award that was entered upon an evidentiary hearing establishing the Mother's unfitness by clear and convincing standards, the Trial Court erred in finding a voluntary contract between the Mother and the Temples had permanently relinquished

the Mothers parental rights. Therefore, the burden of proof does not shift to the Mother. The Trial Court should apply the legal standard that the Mother has *prima facie* right to parental custody and the burden has not shifted to her.

UIFSA/UEFJL

Serluco v. Taggart, A20A1368 (October 21, 2020)

The parties divorced in New York in November 2011. Under the Settlement Agreement, the Husband was ordered to pay the Wife \$3,000.00 in alimony and \$1,500.00 per month in child support for the parties two minor children which stated the alimony would terminate: (1) upon the death of the Wife; (2) death of the Husband; (3) the Wife's cohabitation in accordance with the New Jersey case law; or (4) the Wife's remarriage or entering into a domestic partnership, civil union or same sex marriage. Both parties subsequently relocated to Georgia and in October 2018 the Husband filed in Superior Court of DeKalb County a Petition for Domestication and Registration of the Judgment of Divorce for Modification of Child Support and/ or Alimony pursuant to O.C.G.A. §19-11-160. The Wife answered and filed a Counterclaim for Contempt that the Husband was in arrears in alimony and child support. After a bench trial, the Trial Court issued an Order stated to be in accordance with O.C.G.A. §9-12-130 *et seq.*, (Uniform Enforcement of Foreign Judgment Law, UEFJL). The Court domesticated and amended the judgment from New Jersey. Terminated the Husband's alimony and reduced child support to \$1,099.00 per month until the minor children reach the age of 20. The Trial Court found that the Wife had been in an exclusive romantic relationship with her boyfriend since 2011. The Wife appeals and the Court of Appeals reverses and remands with direction.

The Wife argues that the Trial Court erred by registering/domesticating the New Jersey pursuant to the Uniform Enforcement of Foreign Judgments law (UEFJL). The Husband petition sought relief from his alimony and child support pursuant to UIFSA and not UEFJL and that the New Jersey judgment was registered in Georgia pursuant to UIFSA on October 2, 2018, 14 days before the Husband filed his petition. Because the Husband registered the New Jersey judgment under UIFSA and sought relief under its terms, the Trial Court erred in failing to consider the Husband's petition under UIFSA or to determine whether the provisions of UIFSA applied. O.C.G.A. §19-11-172 allows modification of an issuing state's child support order subject to the limitations of

O.C.G.A. §19-11-170. In addition, the procedures of UIFSA for registration and enforcement of a foreign support orders are in addition to and not exclusive to UEFJL.

Child Support Worksheet Helpline *A Call for Volunteers*

a service provided by the Family Law Section of the State Bar of Georgia and the Georgia Legal Services Program

Flex your child support worksheet prowess to assist income eligible, pro se Georgians with the completion and filing of child support worksheets!

- Convenient and easy way to serve the community
- One-time legal assistance - not an ongoing legal relationship with the pro se litigant
- Contact caller(s) from the comfort of your office or home on your schedule
- Flexible commitment
- You may volunteer for as many cases as you would like to take
- Simple registration e-mail form below to Samantha Lennon at samantha@hfamilylaw.com or Megan Wyss at megan@bcntrlaw.com.

Child Support Worksheet Helpline Volunteers

Alicia Adamson
Lori Anderson
Steven Ashby
Gisely Barksdale
Alice Benton
Audrey Bergeson
Mara Block
Connie Bluffington
Ivory Brown
Teri Brown
Obreziah Bullard
Erik Chambers
Carole Collier

Katie Connell
Leigh Cummings
Courtney Dixon
Ted Eitfrem
Jessica Reece Fagan
Samantha Hassett Carroll
Tamar Faulhaber
Kathryn Franklin
Brooke French
Jennifer Gill
Gary Graham
Michell Graham
John Haldi

Hannibal Heredia
Michelle Jordan
Scot Kraeuter
Sheri Lake
Samantha Lennon
Kyla Lines
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Jorgia Northrup
Sabrina Parker
Jamie Perez
Sabrina Perez

Tera Reese-Beisbier
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Jonathan Rotenberg
Christine Scartz
Laura Selafani
Hayley Settles
Dawn Smith
Savannah Steele
Erin Stone
N. Jason Thompson
Robert Wellon
Megan Wyss

I am interested in being a Volunteer for the Child Support Helpline*

Name: _____

Bar Number: _____

Office Address: _____

Phone: _____

Email: _____

I would like to assist with no more than ____ callers per month.

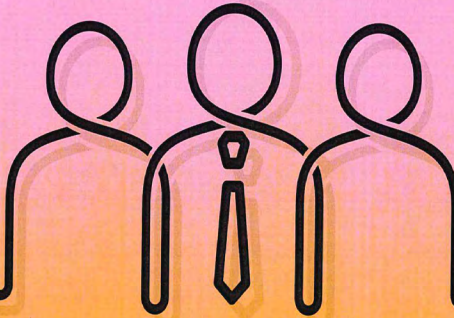
I understand that by signing up for this volunteer position, I am certifying that I have a working knowledge of Child Support Worksheets in the State of Georgia and how to complete them based on information provided to me by a pro se litigant. I also certify that I am a member in good standing with the State Bar of Georgia.

*Please email this form to Samantha Lennon at samantha@hfamilylaw.com or Megan Wyss at megan@bcntrlaw.com.

GEORGIA LAWYERS HELPING LAWYERS

▶ Georgia Lawyers Helping Lawyers (LHL) is a confidential peer-to-peer program that provides colleagues who are suffering from stress, depression, addiction or other personal issues in their lives, with a fellow Bar member to be there, listen and help.

▶ The program is seeking not only peer volunteers who have experienced particular mental health or substance use issues, but also those who have experience helping others or just have an interest in extending a helping hand.



For more information, visit:

www.GeorgiaLHL.org

Family Law Section
State Bar of Georgia
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samantha@hlfamilylaw.com

FIDUCIARY LAW SECTION

ANNUAL REPORT 2021-2022

Despite still dealing with the effects of COVID on in person meetings, the Fiduciary Law Section (“the Section”) has once again had a successful year as highlighted by the information referenced below. We remain appreciative of the assistance provided by the staff of the State Bar, particularly during this difficult year, as well as of the leadership provided by the officers and Board of Governors of the State Bar of Georgia.

Members

The Fiduciary Law Section has 1216 members.

Account Balance

The current balance of our operating account is \$241,531.

Continuing Education

The section typically holds four programs annually, two institutes and two seminars, in conjunction with ICLE. The programs typically are chaired by officers of the Section. While we have not been able to hold these programs entirely in person as we had done pre-pandemic, the section was able to host a mostly on-line version of the Estate Planning Institute in March, with well over 200 members attending. The Section also hosted the Basic Fiduciary Practice 101 seminar in April of this year. The Executive Committee is currently busy planning its largest annual program, the Estate Planning Institute, which is scheduled for July 14-16, 2022 at the Omni Resort at Amelia Island, Florida. This will be the first time the FLI has been held since 2019. The Section is looking forward to once again hosting more than 400 of its members and guests at this event.

In addition to the above, the Section hosted a number of stand-alone CLE seminars via the Bar’s web platform. The State Bar, and in particular, Mary Jo Sullivan and Lane Sosebee, were instrumental making these programs the successes that they were. As they were last year, attendance at each of these events was overwhelming, occasionally exceeding the Bar’s capacity to host. Because of the cancellation of the Section’s popular Institutes, the Section decided to offer these sessions free of charge, opting instead to use Section funds to pay the CLE fee for each program for each registrant.

Leadership

The Section is led by five officers (chair, vice chair, secretary, assistant secretary, and immediate past chair) which are Brian Deutsch, LeAnne Gilbert, Joseph Sillitto and J. W. Haas and Patricia Friedman.

The Section maintained its formal committees—a Forms Committee, co-chaired by Ophelia Chan and Margaret Head, a Code Revision/Legislative Committee, co-chaired by Nick Djuric and Kyle King, a Programs Committee, chaired by Margaret Scott, and an Executive Committee that is comprised of the officers and also includes six at-large members serving staggered three year terms. To provide for continuity, the committee appointments (except for the officers) are for two years, with the current officers serving through June 30, 2021.

Achievements

Primary accomplishments, separate from the continuing education programs held, of the Section this year include:

1. *Code Revision/Legislative Committee.* The Section, through the Code Revision/Legislative Committee, succeeded in having a number of the Section's bills enacted. Most importantly, the Psychiatric Advance Directive Act, which was sponsored by the Section, passed both houses unanimously. In addition to Nick Djuric and Kyle King, the Section specifically thanks section member Dan Munster for spearheading this important bill.
2. *Forms Committee:* Working with the probate judges, the Forms Committee worked to make the latest substantial changes to the Probate Court Standard Forms widely available in Word and PDF to the Section members.
3. *Grant to Georgia Heirs Property Law Center.* The Section once again awarded a grant of \$5,000.00 to the GHPLC to fund the Center's work with the Probate Council of Georgia, as well as other judicial and legislative partners, to understand, streamline, and make more efficient the resolution and prevention of heirs property.
4. *Annual Meeting.* The Section's business meeting was held during ZOOM session on March 15, 2022 and included a planning session for the upcoming year and Committee updates from the Committee Chairs.

Respectfully submitted, this April 24, 2022.

Brian Deutsch

Chair, Fiduciary Law Section

ANNUAL REPORT OF THE FRANCHISING AND DISTRIBUTION LAW SECTION

State Bar of Georgia

April 25, 2022

OVERVIEW

The Franchise and Distribution Law Section was formed to promote the education and best practices of franchise and distribution law among Section members. The primary work of the Section is to hold Continuing Legal Education seminars through a variety of formats, including lunch and learn programs, evening cocktail programs, and an annual half-day, multiple-session CLE program. During these events, there is time allotted for networking in an effort to foster relationships between the members and the ability to learn from outside counsel for franchisors, outside counsel for franchisees, and in-house counsel.

MEMBERSHIP AND FINANCE

At the time of this report, the Section membership is 156 members, which is about the same size membership as last year (152 members). Additionally, at the time of this report, the Section has a balance of \$9,844.08. The Section is in a sound financial position to fund our programming for the next fiscal year.

SECTION OFFICERS

Chair	–	Annie Caiola
Vice Chair	–	Meredith Barnes
Secretary	–	Amy Andrews
Member at Large	–	Bin Minter
Immediate Past Chair	–	Jared Miller

SECTION EVENTS

Annual Half-Day CLE

Typically, the Section hosts an annual half-day CLE in the fall. However, in October of 2021, ABA Forum on Franchising hosted its annual 2-day conference in Atlanta, Georgia – an event which draws a lot of our membership. As a result, the Section determined that a fall CLE was not necessary and would have been redundant. Therefore, we did not host a half-day CLE this year.

Virtual CLE Presentation

On February 2, 2022, the Section hosted a one-hour Virtual CLE entitled “Cryptocurrencies and Franchising”. The event speakers were, Eden Doniger (Bitpay, General Counsel and Chief Compliance Officer), Yuri Eliezer (Founders Legal, head of the intellectual property group) and Stan Sater (Founders Legal, corporate and technology attorney). There were 25 attendees, and the meeting was approved for 1-hour of general CLE credit.

Judicial Forum / CLE

On March 23, 2022, the Section hosted a Judicial Panel with the Honorable JP Boulee (Northern District of Georgia), the Honorable Leigh Martin May (Northern District of Georgia) and the Honorable Craig Schwall (Fulton Superior Court) at The Glenn Hotel. The event included a panel discussion regarding franchise litigation and practice pointers, followed by a reception. There were 28 attendees, and the meeting was approved for 2-hours of general CLE credit.

Annual Meeting and Election

Currently, the Section is planning our last annual event to take place in June 2022. We are tentatively planning a legislative update. At this meeting, the new slate of officers for the Section for the 2022-2023 year will be selected.

TOPICS COMMITTEE

The officers have developed their own topics this year, and have not leaned on a Topics Committee, however it may do so in the future.

CONCLUSION

It has been a privilege to serve as Chair of the Franchise and Distribution Law Section of the State Bar of Georgia. The Section serves as a valuable forum for practitioners in this particular field of law. The level of engagement and participation by Section members remains strong as we move forward into the next Section year.

Respectfully submitted,

/s/ Anne P. Caiola

Anne P. Caiola
Chair
Franchise & Distribution Law Section
State Bar of Georgia



**ANNUAL REPORT
APRIL 23, 2022**

Membership

The Health Law Section currently has over 800 members.

Account Balance

The current balance of the Section's operating account is \$56,229.26

2021-2022 Section Officers

Chair:	<i>Keri Conley</i> , General Counsel & SVP, Health Care Policy
Vice Chair:	<i>Bob Brennan</i> , Partner, Parker Hudson Rainer & Dobbs
Secretary:	<i>Aaron Danzig</i> , Partner, Arnall Golden Gregory
Treasurer:	<i>Wade Miller</i> , Partner, Alston & Bird
Immediate Past Chair:	<i>Rebecca Merrill</i> , Partner, Dentons

2021-2022 Section Executive Committee

<i>Dawn Benson</i> , General Counsel, Phoebe Putney Health System
<i>Scott Grubman</i> , Partner, Chilivis Grubman
<i>Brittany Jones</i> , Associate General Counsel & Privacy Officer, Dispatch Health
<i>Christy Jordan</i> , Vice President, General Counsel & Government Affairs, Southeast Georgia Health System
<i>Elizabeth Kitchens</i> , Partner, Parker Hudson Rainer & Dobbs
<i>Felicia LeRay</i> , Partner, Hall Booth Smith
<i>Lindsey Lonergan</i> , Vice President & Deputy General Counsel, Atrium Health Navicent
<i>Rob Rozier</i> , Partner, Baker Hostetler
<i>Beth Stephens</i> , Partner, Lavender Hoffman Alderman

2021-2022 Law School Liaisons

Stacie Kershner, Associate Director, Center for Health, Law & Society, Georgia State University College of Law

Fazal Khan, Associate Professor, Health Law & Policy, University of Georgia College of Law

Ani Satz, Professor, Health and Disability Law, Policy & Ethics, Emory University College of Law

Section Activities

Law School Activities

The Section continued its tradition of honoring the memory of beloved Section member Alan Rumph, by awarding three fellowships to law students with public interest internships. The 2021 recipients were:

- *Nicole Baptista*, – University of Georgia Law School
- *Mikayla Mobley* – Georgia State University College of Law
- *Shannan Young* – John Marshall Law School

Members of the Section’s Executive Committee participated in career panel discussions at the UGA, Emory, GSU, and Mercer law schools.

Mentorship Program

The Section’s Mentorship Program is now in its third year. It pairs mentees with less than 5 years of experience in health law with mentors who have at least 10 years of experience for a 1-year term. The program includes a series of in-person events, including CLE sessions, lunches and networking events. Due to the pandemic, we converted to remote programming and extended the existing mentorship class for a second year.

Newsletter

The Section published one newsletter in 2021 which included the following articles:

- Clarifying the Confusing Scope of Liability under the AKS - *Amy E. Buice*
- COVID and Health Transaction Diligence: Putting the “Fun” in “Funds” - *Sarah K. Browning*
- No More Surprises: An Overview of Georgia’s Latest Effort to Resolve Balance Billing Disputes - *Douglas J. Witten*
- The Business Associate Agreement: Just A Silly Little Contract? - *Ian P. Hennessey*
- Collins and Captiva: What It Means for Healthcare Organizations and Data Breach Class Actions - *Raj Shah*
- CMS and HHS Signal Course Correction in New Stark, AKS and CMP Final Rules - *T. Mills Fleming*

Educational Programs

Like everything else in 2021, the Section's educational programs remained virtual.

Programs included:

- Spring Lunch & Learn CLE Program: ***Discussion on Stark and AKS Final Rules***
 - Guest Speaker: *Rob Stone*, Partner, Alston Bird
- Summer Lunch & Learn CLE Program: ***The Future of Telehealth - A Post Pandemic Roadmap***
 - Guest Speakers:
 - *Robin L. Everhart*, JD, BSN, Associate General Counsel, Emory University and Emory Healthcare
 - *Fazal Khan*, Professor of Law, University of Georgia School of Law
- Three-Day Annual Advanced Health Law Program
 - ***Fraud & Abuse - Recent Enforcement Activity, Changes, and Compliance Considerations***
 - Guest Speakers:
 - *Aaron Danzig*, Partner, Arnall Golden Gregory LLP (Moderator)
 - *Anthony DeCinque*, Assistant US Attorney, Northern District of Georgia
 - *D;Andrea Morning*, Vice President, Corporate Compliance, Grady Health System
 - *Scott Grubman*, Partner, Chilivis, Grubman, Dalbey & Warner
 - ***Pandemic Relief Compliance and Enforcement Update***
 - Guest Speakers:
 - *Wade Miller*, Partner, Alston Bird (Moderator)
 - *Bowen Shoemaker*, Assistant U.S. Attorney, Middle District of Georgia
 - *Brian Lee*, Senior Associate, Alston Bird
 - *Lindsey Lonergan*, Vice President & Deputy General Counsel, Navicent Health
 - *Brian Rafferty*, Shareholder, Polsinelli
 - ***Hospital-Physician Transactions - Alignment Strategies to Achieve Value-Driven, High-Quality and Patient-Centric Care***
 - Guest Speakers:
 - *Dawn Benson*, Senior Vice President & General Counsel, Phoebe Putney Health System (Moderator)
 - *Brynne Goncher*, Senior Corporate Counsel, Piedmont Healthcare
 - *Kristen Woodrum*, Partner, Baker Hostetler
 - ***Navigating Federal & State Antitrust Scrutiny***
 - Guest Speakers:
 - *Bob Brennan*, Partner, Parker Hudson (Moderator)

- *Ausra Deluard*, Partner, Co-Chair of U.S. Competition and Antitrust Practice, Dentons US LLP
- *Lee Van Vorhees*, Partner, Co-Chair of Antitrust and Competition Practice, Jenner & Block
- **The Physician-Friendly MSO Model and Other Health Management Arrangements**
 - Guest Speakers:
 - *Rebecca Merrill*, Partner, Dentons US LLP (Moderator)
 - *Jim Connors*, Senior Director, Pinnacle Healthcare Consulting
 - *Summer Martin*, Dentons US LLP
- **Surprise Billing and Price Transparency**
 - Guest Speakers:
 - *Keri Conley*, General Counsel & Senior Vice President, Health Care Policy, Georgia Hospital Association (Moderator)
 - *Molly Smith*, Group Vice President, Public Policy, American Hospital Association
 - *Bethany Sherrer*, General Counsel & Director of Government Relations, Medical Association of Georgia
- **Long-Term Care Post-COVID**
 - Guest Speakers:
 - *Brittany Jones*, Senior Counsel, Dispatch Health (Moderator)
 - *Melanie Simon*, General Counsel, Georgia Department of Public Health
 - *Brenda Woodward*, General Counsel, Georgia Department of Behavioral Health
 - *Emily Crosby*, Partner, Baker Hostetler
- **Health Equity - Challenges During a Pandemic**
 - Guest Speakers:
 - *Beth Stephens*, Partner, FisherBroyles, LLP (Moderator)
 - *Ani Satz, J.D., Ph.D.*, Professor of Law, Emory University School of Law
 - *Tracy Sprinkle Dawson, RN, Esq.*, CIPP/US, Founder and Principal Owners of Sprinkle Dawson Law, LLC

April 26, 2022

Mary Jo Sullivan
Sections Director
State Bar of Georgia
104 Marietta St. NW, Suite 100
Atlanta, GA 30303

RE: *Torts and Insurance Practice Annual Report 2021-2022*

Dear Ms. Sullivan:

I hope this letter finds you well. This letter shall serve as the Torts and Insurance Practice Section's annual report and update for 2021-2022. As with most sections, COVID had a negative impact on our ability to host our annual section seminar that has traditionally been held for decades, and is the section's main event. However, over the last year we have been working diligently as a board to get our section's event back on track and prepare for our post-covid ICLE Insurance Seminar. This seminar will provide our section members the opportunity to attend and obtain 12 CLE credit hours at the beaches of St. Simons Island. The Seminar already has tentative dates held with ICLE as well as an outlined agenda of incredible topics and speakers. We hope 2022 will be our best year yet.

Sincerely

HALL BOOTH SMITH, P.C.



Tiffany R. Winks

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111

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**Annual Report of the Intellectual Property Section
State Bar of Georgia
2021-2022**

Overview

The goal of the IP Section of the State Bar is to serve its members, the State Bar and the community at large.

With the pandemic overshadowing much of the bar year (again), it has been a significant challenge to engage with members and the community. Planning events was also difficult as various rules and comfort levels around gathering periodically changed. Our flagship events, the IP Institute, held annually at the Ritz Carlton in Amelia Island, and the IP Gala, held annually at the Georgia Aquarium, had to be put on hold for yet another year.

Still, the members of the IP Section are a close and committed group, and their desire to learn, grow, connect and serve helped make this bar year a great success. We were able to have (so far) five high quality, on-line CLE events that attracted hundreds of members. It is also of note that the majority of the moderators/panelist leading these events were women or persons of color, which highlights the diversity and commitment to diversity of the IP Section. These events are described in more detail below.

We also assisted with various pro bono efforts and community service projects through contributions of money and, more importantly, time. And we are constantly exploring other ways to contribute to the bar and the community.

Leadership Team

Executive Committee meetings were held monthly as a teleconference. Section Chairs and Vice-Chairs participated in monthly planning alongside the Leadership Team. The Leadership Team was comprised of a wonderfully diverse group of volunteer leaders with expertise in a variety of IP-related fields. This year, the members of the Executive Committee were:

- Section Chair: Christopher Curfman, PhD
- Section Chair-Elect: Clark Wilson
- Section Vice-Chair: Chris Lightner
- Section Secretary: Katie Bates
- Section Treasurer: Chittam Thakore
- Sections Coordinator: Lane Sosebee
- Sections Director: Mary Jo Sullivan
- Section Past Chair: Richard Miller

Section Committee Chairs and Vice-Chairs were self-nominated during a membership-wide call for volunteer leadership, and represent extraordinary diversity across several law firms and in-house practitioners. Our two-tiered committee governance structure not only creates transparency and encourages involvement in leadership, but also ensures a smooth transition and continuity for next years' Executive Committee.

We pay particular attention to the needs of our Section's in-house members. We have an In-House Committee tasked with encouraging the involvement of in-house counsel in all of our programming by targeting at least one in-house counsel panel participant for each of our Section-wide CLE events.

Many Section members stepped forward to serve under the focused leadership of our dedicated volunteer Committee Chairs and Vice-Chairs:

Community Outreach, Chair: Matt Warenszak

In-House, Chair: Joe Staley

In-House, Vice-Chair: Justin Ward

Patent, Chair: Andrew Strickland

Patent, Vice Chair: Josh Curry

Copyright, Chair: Liz Wheeler

Copyright, Vice Chair: Rachel Giest

Trademark, Chair: Auma Reggy

Trademark, Vice Chair: Jason Rosenberg

Trade Secrets, Chair: Michael Cicero

Trade Secrets, Vice Chair: Nel Weinrich

Service to Our Members

The IP Section is in outstanding shape. Our membership remains strong, growing again this year to 1,279 members. The IP Section is also fiscally sound with a financial balance of approximately \$193,996.66, the result of accumulated member dues and fiscal responsibility. The IP Section did not collect any sponsorship funding this year because the primary generators of sponsorships, the IP Institute and IP Gala, were canceled again due to the continuing pandemic. But even without these extra funding sources, the IP Section continued to serve its members by offering high-quality CLE events and community-oriented service projects. The IP Section also provided sponsorships to the State Bar of Georgia, the Georgia Lawyers for the Arts and Pro Bono Partnership of Atlanta to support their pro bono efforts in the state, the Georgia Intellectual Property Alliance for the IP Legends Award, and Hands on Atlanta.

The **Patent Committee** hosted the first IP Section event, a CLE, on November 4, 2021, titled "Social Media and Patents - Protecting, Enforcing and Defending Your Innovations." Moderator Bruce Chatman, Counsel at Lee & Hayes, lead a diverse group of panelists: Michael L. Binns, Associate General Counsel of Meta (formerly Facebook), Dorothe Laguerre Smith, Counsel at Eaton Corp., and Kimra Major Morris, Founder of Major-Morris Law. The panel explored the unique issues that arise when protecting innovation and enforcing or defending patent and other IP rights on or in connection with social media platforms and other forms of

new media. The panel offered valuable tips and guidance for practitioners, innovators and accused infringers. This event attracted over 150 attendees.

Next, the **Trade Secret Committee** hosted a CLE event on November 19, 2021, titled “Year 5 of the Defend Trade Secrets Act: The Bench and the Bar Weigh In.” The committee was honored to hear from Judge Steven D. Grimberg of the U.S. District Court for the Northern District of Georgia, James Pooley, a nationally recognized author of the Trade Secrets treatise, and Benjamin Fink, a highly-experienced trade secrets litigator and co-author of a chapter on Restrictive Covenants appearing in the book *Georgia Business Litigation*. Signed into law on May 11, 2016, the Defend Trade Secrets Act (“DTSA”) recently celebrated its fifth anniversary. To commemorate that occasion, the panel discussed the DTSA’s origins, and also reflected upon issues that have emerged over the past five years as among the most prominent when considering whether, and how, to bring a trade secret misappropriation claim under the DTSA. This event attracted over 100 attendees.

The **Copyright Committee** then hosted a CLE event on December 16, 2021, titled “Non-Fungible Works: How Artists Can Leverage Blockchain Technology to Protect Their Copyright.” Panelist included Iris Nevins, an Atlanta-based software engineer and co-founder of Umba Daima Creative Agency, Unseen Gallery and Black NFT Art, which just launched its first utility token—a cryptocurrency fundraising tool that will benefit artists and art collectors in unique ways; Vandana Taxali, a Canadian entertainment attorney and founder of Artcryption, an art, tech and legal startup that protects and helps license and manage art assets and intellectual property using blockchain technology; and Aaron Kelly, an attorney who specializes in helping entrepreneurs and eCommerce businesses navigate IP, blockchain, cryptocurrency and cybersecurity issues. The panelist provided an expert discussion and practical tips for explaining blockchain to clients in plain language, and exploring the ways they can use the technology to their advantage. The event attracted over 100 attendees.

On Martin Luther King Day, January 17, 2022, the IP Section, led by the **Community Outreach Committee**, participated in the MLK Celebration of Service Day on behalf of Hands on Atlanta. Due to a forecast of snow that day, the turnout was not as hoped. Still, some section members braved the elements and helped the West Atlanta Watershed Alliance improve a low-income community’s natural resources by clearing trails and removing invasive plants. A similar event is planned for June 2022.

On January 25, 2022, the **Patent Committee** hosted another CLE event titled “Assignor Estoppel Post *Minerva* and Strategies for Finding Solutions.” The panelists were Kean DeCarlo, Counsel at Womble Bond Dickinson, and Suvashis “V” Bhattacharya, Senior Counsel at HubSpot. The panel discussed strategies and real-world approaches for protecting patent validity and challenging it in light of the Supreme Court’s *Minerva v. Hologic* (2021) decision on the assignor estoppel doctrine. Arcane as it may be, assignor estoppel has long range operational implications for the vast majority of patent owners, most of which own their inventions via patent assignments from employees, mergers and acquisitions, or another transfer of the invention to the company.

Most recently, the **In-House Committee** hosted a CLE event on April 7, 2022, titled “In-House Perspective of 2022 IP Legal Trends and Updates.” The event featured panelist Greg Brown, Managing Counsel of Intellectual Property for Ford Motor Company; Brian Bonner, Senior Intellectual Property Counsel for Idexx, and Michael Sochor, Director of Intellectual Property for Forescout Technologies. The event was well attended with over 150 attendees. In-House Committee Chair, Joe Staley, Counsel at Kids II, and Vice-Chair, Justin Ward, Counsel at Daniel Defense, moderated the event and navigated lively discussions about hiring criteria for outside counsel, Covid’s impact on in-house legal departments and corporate innovation, and prominent recent caselaw that impacts the in-house legal environment.

World IP Day is on April 26, 2022, and the IP Section will join Georgia Intellectual Property Alliance (GIPA) and the IP Section of the Atlanta Bar Association to celebrate this day. This year the theme is “IP and Youth: Innovating for a Better Future.” The IP Section has supported GIPA by providing judges, speakers, and publicity to help their efforts to teach IP to youth in K-12 and all levels of higher education, fostering a collaborative ecosystem that allows youth to learn from personal experiences and best practices of industry leaders. An example of such a collaboration, GIPA and the Georgia Science and Engineering Fair, sponsored a young inventors award where members from the section judged this event.

With two more months to go in the bar year, there are still exciting events planned. The Copyright Committee is planning a CLE event for May 2022 about Music Licensing, and the Trademark Committee is planning their event for May-June 2022. We are also working on a new IP Section website since this tool for connecting with members is in desperate need of an update. It will hopefully be completed this summer.

Conclusion

With all the challenges the pandemic has created, the IP Section has still been able to serve its members well. With a mix of diverse speakers, we have continued to provide exciting educational content to our members. As with the previous two bar years, our flagship events, the IP Institute and the IP Gala, had to be canceled. But since we seem to be in the final days of the pandemic, preparations for the IP Institute and the IP Gala, have begun for 2022-2023.

The IP Section continues to promote the highest standards of excellence in the practice of Intellectual Property. In service to others, we strive to provide excellent programming for our members, and remain a resource for the legal community and the public at large. We look forward to another interesting, informative, and supportive bar year for the IP Section.

Sincerely,



Christopher L. Curfman

IP Section Chair

ANNUAL REPORT OF THE LOCAL GOVERNMENT LAW SECTION

STATE BAR OF GEORGIA

2021

The Local Government Law Section of the State Bar is pleased to submit its Annual Report for 2021. This Section provides a forum for attorneys representing Georgia local government entities (counties, cities and authorities) to exchange ideas, share their experiences, and engage in training opportunities geared toward issues that occur in local government practice. The Section currently has 687 members.

Due to the COVID19 pandemic and restrictions on in-person gatherings, the Section did not conduct an annual Institute for City and County Attorneys, as is usually done in Athens in September each year. The Local Government Law Section is currently planning for and will host the Institute in September 2022. The Institute has been hosted by the Local Government Law Section for many, many years. Members have missed this excellent training and networking opportunity and are looking forward to attending in the Fall.

The current officers of the Local Government Law Section are as follows:

Rebecca L. Tydings, Chair
City Attorney, City of Centerville, GA
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(478) 953-4734
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Jessica Whatley O'Connor, Secretary
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**NONPROFIT LAW SECTION
STATE BAR OF GEORGIA**

**ANNUAL REPORT
April 13, 2022**

Membership

The Nonprofit Law Section had 327 members as of March 24, 2022.

Account Balance

The balance of our operating account is \$26,400.21 as of March 24, 2022.

2021-2022 Officers and Executive Committee Members

Officers

- Chair – Jake Kaplan, Alston & Bird
- Vice Chair – Kathryn Hecker, Arnall Golden Gregory
- Secretary/Treasurer – Ballard Yelton, Morris, Manning & Martin

Additional Executive Committee Members:

- Sabrina Fitze, Immediate Past Chair, Habitat for Humanity
- Joel Arogeti, Kitchens Kelley Gaines P.C.
- Blake Melton, Synovus
- Claire Oates, Boys & Girls Clubs of America
- Kristie Piasta, Children’s Healthcare of Atlanta
- Jonathan Poole, Emory University
- Tanesha Steward, Georgia Tech
- D.A. Wilson, The Wilson Firm

Additional CLE Subcommittee Members:

- Jodie Snow, ABAC Foundation
- Rachel Spears, Pro Bono Partnership of Georgia

Section Activities

Continuing Legal Education (“CLE”)

This fiscal year, with the help of the State Bar, the Section organized eleven (11) hours of free CLEs for Section members.

- August 2021 (1 hour)
 - *Show Me the Money! What Changes to the Name, Image and Likeness Rules mean for Student Athletes, Colleges and Universities and Brand Advertising*
- September 2021 (2 hrs)

- *Legal Issues and Liability Risks of Vaccine Mandates, Proof of Vaccination, and Other Return to Work Issues*
- *Nonprofit Economic Relief Update: PPP, ERC, and More*
- January 2022 (2 hours)
 - *Understanding Risk Management for Attorneys Who Advise and Who Serve on Nonprofit Boards*
 - *Enterprise Risk Management and Cyber Security for Nonprofit Organizations*
- March 2022 (6 hours, including 1 professionalism hour)
 - *Sales Tax Obligations Tied to Fundraising Activities in Georgia*
 - *Professionalism Through Pro Bono*
 - *Best Practices for Board Leaders in Hiring, Supporting and Working with Nonprofit Leaders and Organizations*
 - *Focusing on What Matters Most: Next-Level Nonprofit Board Governance*
 - *Nonprofit Finance and Accounting 101*
 - *Understanding the Basics of Form 990*

Newsletters

This year the Section will again send out a newsletter to its members to keep the membership up to date on the Section's activities. That newsletter should go out in May 2022.

Legislative Committee

In early 2020, the Nonprofit Law Section established a legislative committee made up of attorneys from law firms, nonprofit inhouse counsel and government all who work extensively with nonprofits. The goal of the committee has been to review the Nonprofit Corporation Code including comparing it to the Business Code and the Nonprofit Model Act to update the Code to make it more effective. The committee was stalled due to COVID-19 and began its work in earnest in January 2021. Although the hope initially was for the committee to complete its work by the Fall of 2021 in order to present it to the State Bar Legislative Committees for support of passage this year, that timeline has slipped a year and the Section is now aiming for passage in the 2023 legislative session.

Membership Development Initiative

While COVID-19 impacted the Section's ideas for in-person membership development, we continued targeted outreach to Georgia law schools to invite law students to the Section's CLEs and to garner interest in nonprofit law.

Officers Elected at Annual Meeting for 2021-2022 Fiscal Year

- Chair – Kathryn Hecker, Arnall Golden Gregory
- Vice Chair – Ballard Yelton, Morris Manning & Martin
- Secretary/Treasurer – Tanesha Steward, Georgia Tech

In addition, the Section's bylaws allow for up to eight (8) additional members to join the 2022-2023 Fiscal Year Executive Committee. We are in the process of interviewing Section members from across the nonprofit sector and look forward to diverse representation on next year's Executive Committee.

Respectfully submitted,

Jake Kaplan
Chair – Nonprofit Law Section, State Bar of Georgia

Privacy & Technology Law Section State Bar of Georgia

Annual Report
2021-2022

Introduction:

The Privacy & Technology Law Section for the State Bar of Georgia (“PTLS”) over the past three years has continued to grow, even during a global pandemic. The officers and executive committee leaders have taken great strides to try and find a balance and new normalcy in this post pandemic world. The section’s activities over the past year, which are discussed in detail below, are evidence to show how we have embraced this challenge and surpassed our expectations to keep bringing our members value.

As an officer over the past three years, it has been one of the most challenging and rewarding leadership roles I’ve had the pleasure of holding. As a leader for this section, my goal is to have a lasting impact and continued success of the section and the attorneys.

To ensure the success of the PTLS after my Chair year has concluded, the section and its leaders used our collective strengths to mitigate shortcomings. In this past year, the PTLS established a document repository that compiles past officers (past 3 years) notes, created standard templates for Officer Meetings and Board Meetings, redrafted bylaws, created standard operating procedures for each officer and executive leadership committee member roles, rebranded our section, stored CLE presentations, provided more consistent communication with our section members, delivered relevant and up to date CLEs, and much more.

The entire section has worked incredibly hard this year and I am honored to present our work to the Board of the State Bar of Georgia.

Officers:

[Christina D. McCoy](#) – Chair
[Jason Bernstein](#) – Vice Chair
[Amanda Witt](#) – Secretary

The PTLS elects a new Secretary every June for a three-year term in which that individual will succeed from Secretary to Vice Chair and finally Chair on their third year. Last year our section members voted Amanda Witt as Secretary. These three officers cannot do all the work that is required to continue to bring diverse and impactful programs to our section members. As such, the Officers have created Executive Committees in which we have additional leaders for our section. The Officers & Executive Committee Leaders create the Board. The PTLS Executive Committees and Executive Committee leaders are as follows:

Executive Committee (“EC”) Leaders:

- a. Privacy & Cybersecurity
 - a. [Michael Young](#) – Chair

- b. Technology
 - a. [Elizabeth Eason](#) – Chair
 - b. [Mary Alexander Meyers](#) – Vice Chair
- c. Social
 - a. [Ashley Whitaker](#) – Chair
 - b. [Zain Haq](#) – Vice Chair
- d. Communications
 - a. [Bunny Sandefur Howell](#) – Chair
 - b. [Leeza Snyderman](#) – Vice Chair
- e. Pro Bono & Community Outreach
 - a. [Erinn Robinson](#) – Chair
 - b. [Terrance Pryor](#) – Vice Chair
- f. Inclusion & Diversity
 - a. [Heather Kuhn](#) – Chair
 - b. [Antonette \(“Toni”\) Igbenoba](#) – Vice Chair
- g. Student & New Practitioner
 - a. [Ami Rodrigues](#) – Chair
 - b. [James Boxtton](#) – Vice Chair

Membership:

As of the last update in April, this section has grown to over 850 members. At the beginning of my time as an officer (the prior three years), our section membership has more than doubled during the pandemic, and in the past year, the PTLS continued to grow to more than 100+ members. I believe all the work put into the PTLS by the Officers, EC Leaders, section members, and State Bar of Georgia employees are thanks for our continued success. With the increasing global and domestic laws of privacy and the advancement of technology, the importance of the PTLS is becoming more important than ever.

Financials:

Our section continues to be financially secure and apply the funds to legal activities, community outreach, and CLEs for our members. We require two Officers to approve spend over \$2,500 per event hosted by our EC Leaders. As of April 25th, we have \$40,929 in our account, which will help the PTLS to achieve its goals in years to come.

Board Meetings:

A cadence is established for the Officers to meet from 8-9 every second Wednesday of the month (“Officer Meeting”). The Officers and EC Leaders meet once per month on the second Friday from 12-1 pm (“Board Meeting”). The agenda and past meeting minutes are sent out the Thursday prior to the Board Meeting so all corrections can be made during our meeting. During the Board Meeting, we approve minutes, review financials & membership numbers, discuss any old business, review each committee programs in detail, and have an open table for discussion. All Officer Meetings minutes & Board Meeting minutes are stored on a Google drive and available to anyone who request to review them.

Executive Committee Annual Updates:

a. Privacy & Cybersecurity Committee

Purpose: This committee is focused on bringing relevant and engaging privacy & cybersecurity CLE content to our section members.

- a. Building a Strategic Privacy Program
 - i. A panel presentation on building, maintaining, and growing a strategic privacy program within a company on October 26, 2021. The panelist provided practical tips to over 150 attorneys to ensure legal compliance and operational excellence. 1 general CLE credit for attendees.
- b. Canada's Privacy Law
 - i. This is the first program that two sections worked together to provide more marketing and drive participation since the information was relevant to both the International Law Section & the PTLs. The International Law Section hosted the event while PTLs advertised it to all our members. This is the first, but hopefully not the last, event that two sections of the State Bar worked together to drive more participation. 1 general CLE credit for attendees.
- c. Adtech Advertising Program
 - i. Michael Young will be co-presenting on legal implications on adtech advertising in May 2022. This is part II of a presentation. 1 general CLE is pending approval.

b. Technology Committee

Purpose: This committee is focused on bringing relevant and engaging technology CLE content to our section members.

- a. Jason Waite presented on the Committee of Foreign Investment in the US (CFIUS) and the adoption of the Foreign Investment Risk Review Modernization Act (FIRRMA) on November 8, 2021. He specifically focused on the expanded jurisdiction of CFIUS that resulted in two major regulation packages being created that are now in effect. 1 general CLE credit for attendees.
- b. Mari Myer presented on Restrictive Covenants, including NDAs and Noncompete Agreements on January 26, 2022 where over 130 people attended. 1 general CLE credit for attendees.
- c. Mary Alexander Meyers will be organizing a Lunch & Learn on Healthcare technology in May or June of 2022. 1 general CLE is pending approval.

c. Social Committee

Purpose: This committee is focused on bringing social events, whether virtual or in-person, that offer our section members educational and networking opportunities.

- a. [Bi-Monthly Book Club](#)
 - i. To reach our section members, we came up with creative ways in which to meet virtually. One of those being a bi-monthly virtual book club which is hosted at 8

am by Ashley Whitaker. This year our section members have read and had thoughtful discussions on the following books:

1. Why Privacy Matters by Neil Richards
 2. Privacy's Blueprint: The Battle to Control the Design of New Technologies by Woodrow Hartzog
 3. Weapons of Math Destruction by Cathy O'Neil
 4. This Is How They Tell Me the World Ends: The Cyberweapons Arms Race by Nicole Perlroth
 5. System Error: Where Big Tech Went Wrong and How We Can Reboot by Rob Reich
- ii. Our book club has even had recognition via Twitter by two of the authors with more asking us to read their books next!
- b. Networking Lunches
- i. As the world started opening back up, so did in-person interactions with the PTLs. We hosted small, no more than 5 people per leader, lunch gatherings to start bringing networking back to our members. In November 2021 we started hosting bi-monthly lunches with the last for this Bar year to be on May 13, 2022. Each lunch is hosted by an Officer & EC Leader and at capacity.
- c. Holiday Party
- i. On November 30, 2021, we hosted our first in-person social event since pre-COVID at KR SteakBar. We had over 30+ attendees to the annual holiday party, where we had a fun networking event on decorating name tags. The best name tag won a personalized Yeti mug. Photos of this event and others can be found on our [website](#).
- d. Happy Hour
- i. On March 30, 2022 at 5 Church we hosted a happy hour for all section members. We had over 35+ people in attendance and able to network and enjoy the lovely Atlanta weather and skyline. We had neighboring law school students who also attended. We had a social activity of BINGO, which encouraged individuals to meet and discuss more than work to make lasting connections. We also recognized key individuals who have made our section successful over the years. At this event, the Social Committee partnered with the Pro Bono and Community Service Committee to raise funds for our community service outreach project the Charles Drew High School. We raised \$600 in this fundraising effort. The section will donate an additional \$4400 to purchase laptops and other technology needs for the school.
- e. Annual Meeting Happy Hour (June 2022)
- i. Every June we elect our new Secretary and have a transition of power from the Vice Chair to the Chair for the next Bar year. This Board meeting is opened to all section members. There will be a networking opportunity and additional information on how to get more involved with the section. Details for this event are still being finalized.

d. Communications Committee

Purpose: This committee is focused on discovering and enhancing ways in which to communicate and deliver information to all our section members.

- a. Six years ago, we added a new section (and members) and changed the section name from the Technology Law Section to the Privacy & Technology Law Section. Ever since we joined the two sections, we have continued operations under the Technology Law Section. We kept using the section's logo, website, mission, etc. which all predominantly focused on the technology aspect. These two topics are interrelated and the representation for the section should be too. As to make this a more unified section, we have taken great efforts this year to show the joining of the two sections with our rebranding efforts.
 - i. Website & Maintenance
 1. The Communications Committee has spent countless hours updating our website. This is now a space where we communicate on future events, post jobs in the field, provide photos of past events, and provide presentation materials for all to continue to their education in the technology or privacy legal field. Please review our website [here](#).
 2. Mission Statement
 - a. As part of rebranding the section and our website, we established a formal mission statement which is as follows:

We are Georgia attorneys serving our community by delivering privacy, security, and technology education and pro bono service.
 - ii. Logo
 1. The committee has spent countless hours working with multiple artists around the world to create our new logo. It has been reviewed by the Board and voted on. We will be revealing our new section logo in June 2022 at the section's annual meeting open to all our members. We are excited to finally have a new logo for our section that can be used on all future communication and materials.
- b. Newsletters
 - i. The Board has worked had this year to bring our section's first ever newsletter to our members. A newsletter is a valuable tool in which to communicate past, present, and future events. It also allows a forum in which members can submit articles they wish to educate and bring awareness to all our section members.
 1. November 17, 2021 was the first newsletter. Please click [here](#) to review.
 2. March 16, 2022 was our second newsletter. Please click [here](#) to review.
 - a. As you review, you will notice that there were lessons learned between the two editions. We will continue to edit and adjust with each publication. The third edition, set for publication in June of 2022, will have our first substantive article from a section member and our new logo!
- c. Document Repository
 - i. The committee also established a central location for all documents to start retaining records for the section. Prior to this year, each officer was recreating the process. As such, templates were created to ease the burden, as well as, records

being located from the prior three officers. This central repository also stores prior presentations for CLE credits. Only presentations sent to the committee are saved. This repository also holds the standard operating procedures for each committee so the section can continue to operate should someone resign or be incapacitated to carry on their duties.

e. Pro Bono & Community Outreach Committee

Purpose: This committee is focused on pro bono opportunities, as well as, community outreach opportunities to improve our state.

- a. Day of Outreach
 - i. Partnered with the Inclusion & Diversity community to volunteer at Hope Atlanta. Discussed further in the Inclusion & Diversity committee update.
- b. Charles Drew High School of Clayton County
 - i. This community outreach event was to raise funds to provide technological tools and resources needed for students at Charles Drew High School to complete their course work and further their education. The fundraiser at our happy hour raised \$600 dollars with the PTLs donating \$4400 to the cause. This community outreach endeavor will supply around 20 laptops and additional software tools to the students. We will continue to raise funds for this high school as they still have additional needs for their students around technology.

f. Inclusion & Diversity Committee

Purpose: This committee is focused on ensuring all activities are inclusive and diverse for all section members and reaching out to the broader community. This committee was formed this year.

- a. Day of Service
 - i. The Diversity & Inclusion Committee partnered with the Pro Bono & Community Service Committee on January 22, 2022 for a successful “Day of Service” event. Our group of attorneys and their families volunteered with HOPE Atlanta. HOPE Atlanta seeks to help Georgians avoid homelessness and hunger through a comprehensive approach that equips them with the tools for lifelong stability. In this three-hour act of service, volunteers were able to pack over 21,000 pounds of food feeding over 700 families in Atlanta! This event allowed us to connect section members who share a passion for privacy and helping others.
- b. Intro Into Privacy & Technology Outreach (May & June 2022)
 - i. The committee will be presenting an Introduction into Privacy for other Bar sections and organizations throughout Georgia. This presentation is aimed at educating our legal community and Georgia community on why privacy matters and active steps they can take in their personal lives and businesses. The first presentation is planned for May of 2022.

g. Student & New Practitioner Committee

Purpose: This committee is focused on ensuring new practitioners and students have presentation. This committee was formed this year.

- a. Breaking Into Privacy CLE
 - i. On January 26, 2022 this committee hosted a CLE moderated by the Committee's Chair Ami Rodrigues. The CLE featured a diverse panel of privacy professionals and attorneys in the space of privacy that would give new practitioners and students practical advice for learning the field of privacy, steps they can take to become more involved in this community, and career possibilities with their law degree. 1 general CLE credit for attendees
- b. Established Process for Law Students
 - i. The PTLs is gaining more and more interest from law students at our Atlanta based law schools – John Marshall, Georgia State University, and Emory. The Chair of PTLs was meeting with each student individually to help them join PTLs as a student member. This showed us that we needed to identify a process in which students knew they could join the State Bar of Georgia and the PTLs. As such, we worked with Lane Sosebee at the State Bar to understand the process and clearly documented it for future students to join our section with more ease.
- c. Pilot program on IAPP Study Group
 - i. The committee established a pilot program study group for the IAPP US exam. The pilot was limited to only 8 individuals. The pilot study group started off successful, but after a month of study group sessions the dedication and commitment from the 8 individuals dwindled to 1 active participant. As such, this pilot program was placed on pause to evaluate and determine next steps.

Privacy & Technology Law Forum (“PTLF”):

Every year the PTLs Vice Chair is responsible for our annual conference, which occurred even amidst a pandemic. This year was our 36th annual conference where we had over 30+ speakers from around the world. We expanded our PTLF program to consists of three breakout sessions, instead of two breakout sessions, plus an additional data breach tabletop exercise on both days. The virtual conference was two days and enabled our section members to obtain up to 7.5 general CLEs, 1 ethics CLE, and 1 professionalism CLE. We had over 300 members register and 250 attend, which is our largest participation by our section members to date. Due to our financial security, we were able to offer this year's event **free** to everyone registered. I encourage you to look at the embedded link [here](#) to see our speaker profiles and agenda of topics. This is the largest event the PTLs organizes each year.

Conclusion:

This past year, we faced multiple challenges with one of those operating virtually but realized the power in reaching more members through virtual communications. We offered more CLEs than previous years - a total of 14.5 CLEs, including ethics and professionalism, with 2 more scheduled this Bar year all free of charge to our section members. This allows our members to obtain all their required CLEs from the State Bar of Georgia. We have had higher attendance at all our CLEs than pre-pandemic years. We

have also had more participation from Officers and EC Leaders than prior years and were able to accomplish a majority of all the events discussed herein in a fully virtual environment.

It goes without saying that success is not achieved on your own, and the PTLs success is attributed to the Officers, EC Leaders, our members, and Mary Jo Sullivan & Lane Sosebee. All the information provided herein shows how the Officers, EC Leaders, and our members participated this Bar year. I specifically would like to focus on Mary Jo Sullivan & Lane Sosebee. These two individuals go above and beyond to make sure the Officers can bring value to our section members – main point of contact to assist in planning events, communication pointers more efficiently and effectively to our section members, fielding all our questions as it relates to the State Bar, assisting in all our CLEs since we have gone virtual, and much more. We could not be as impactful or successful without them.

This report summarized all the work the PTLs has done this Bar year. If additional information is needed or wanted, please feel free to contact me. Thank you.

Submitted by: Christina D. McCoy, Privacy & Technology Law Section Chair



REAL PROPERTY
LAW SECTION

ANNUAL REPORT

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YEAR IN REVIEW

From the Chair

"This year, we have focused upon reaching our "highest point" by doing a few things best, with perfection, and the most success" - Kent A. Altom - Section Chair



For the past year, the leadership of the Real Property Law Section has focused on achieving its "acme." In business, the acronym "ACME" stands for "A Company Manufacturing Everything," however, "acme" is a late 16th century Greek word that literally means "highest point." Today, "acme" is more commonly understood to be "the point at which someone or something is best, perfect, or most successful." This year, 2021-2022, the RPLS leaders have not attempted to be and do "everything" as the acronym "ACME" suggests; instead, we have focused upon reaching our "acme"—our "highest point"—by doing a few things best, with perfection, and the most success.

This year, our priority has been to return value to the members of our Real Property Law Section. Change for the sake of change is never a good reason to change. Therefore, our guiding principle has not been to change anything we do, but to enhance everything we do. Acme is more likely to be achieved when we focus on doing less but doing it better. Whether it be our "best in class" continuing legal education seminars, a meaningful and robust legislative agenda or bold pro bono initiatives, we have focused on continuing to do the good things we have always done with a laser focus upon "returning value," realizing when we do that, and others take notice, we will achieve our "acme."

At our annual planning meeting in August 2022, I challenged each Executive Committee member to do one thing: Identify and focus on one way our Section could do better to reach its "acme." Examples include: (1) reconstituting our "Website/Listserv" and "Newsletter" subcommittees as our "Communication" subcommittee, led by co-chairs David Klein and

Tenise Chung, to ensure that our Website/Listserv are being utilized as a greater means by which we communicate with our RPLS members and to enhance (modernize) the ways we communicate with our RPLS members via email blasts and social media rather than a traditional mailed newsletter, and (2) reconstituting our "Awards and Scholarships" and "Membership" subcommittees as our "Recognition" subcommittee, led by Thua G. Barlay, to come up with ways to (i) grow our RPLS membership, (ii) improve the "value" we are providing our RPLS members, and (iii) bring recognition to the Real Property Law Section for all of the "good work" it does for others, not merely to its efforts to recognize others (the annual Pindar Award recipient and Law School Student Scholarship recipients).

It has been a very productive year for the Real Property Law Section, which is the largest Section of the State Bar of Georgia (3,188 members as of April 24, 2022, more than 50% larger than the Bar's second largest Section). Our legislative efforts achieved a win on every front: For example, we preserved the integrity of the State of Georgia's official recordation system of real estate documents by keeping Remote Online Notary from becoming law without the necessary fraud safeguards. While not being a proponent or opponent of the proposed legislation itself because our diverse Section membership represents each side of the debate, we stood on the side of the public and the State's record-keeping. We found new ways to enhance the delivery of our continuing legal education seminars: Our 2021 Real Property Law Institute, in its 43rd year, moved virtual—a six-hour virtual seminar that drew more than 670 attendees, which is twice the number that attended the destination RPLI's in recent years. Additionally, we utilized a low-cost, two-hour virtual format to deliver CLE credits to our Section membership and other Bar members.

Kent E. Altom
Chair

SUB-COMMITTEES

Real Property Law Institute

Sub-committee Chairs: Kent E. Altom (2021) and Hilary H. Fentress (2022)



The Executive Committee of the Real Property Law Section implements many CLE courses for our members throughout the year. The largest of these is our seminar in May of each year - Real Property Law Institute (RPLI). Like all the

other sections we have not had an in-person seminar in two years due to the pandemic and planning a seminar with COVID restrictions still in place was quite a learning experience.

Our 2021 RPLI consisted of 10 hours of CLE credit in three virtual sessions.

For our 2022 RPLI, planning began in October of 2021 including securing 23 speakers over three days with a residential and commercial break out for a total of 12 hours CLE credit including 2 trial practice, 1 professionalism and 1 ethics. We also secured 26 sponsors, planned a 5k run, golf tournament, turtle talk, opening reception, speaker reception, yearly meeting, and an executive committee lunch meeting. As this is being written, registration is open, and an agenda is being approved for distribution. We are very excited to hold this event in person again and look forward to updating you next year on the success of the seminar.

By-Laws

Sub-committee Chair: Hilary H. Fentress

This year our committee received the updated model by-laws from the State Bar. After a review of our last adopted by-laws, we decided to do a full update of our section's by-laws. We updated phrasing to match that of the model by-laws and updated many of the sections to exclude old language or include new language. The revised by-laws will be up for vote at our May meeting to take effect once approved.

Commercial Real Estate

Sub-committee Co-Chairs: Kyle J. Levstek and Paula Rothenberger

On November 11, 2021, the section presented the Annual Commercial Real Estate Seminar at the State Bar of Georgia Bar Center. It was an action-packed day of information, dynamic speakers, and was hosted by the lively Kyle J. Levstek of Calloway Title and Escrow, LLC and witty Paula C. Rothenberger of Balch & Bingham. Mark S. Robinson of ORNTIC opened the day with a fantastic presentation on the history and status of Remote Online Notary in our state and across the country. Matthew W. Johnson with Georgia Business Insurance followed with a detailed presentation on Insurance in Legal Planning. After a break, Jack Young III outlined the current status of Data Security and some cybersecurity horror stories. The always entertaining Mark Chastain with Chastain & Associates thrilled both the viewers in the room and virtually with his take on Commercial Surveys. After a tasty box lunch, the humorous Matt Mashburn with Aldridge Pite LLP exhibited an informative and stimulating presentation on Professionalism in Commercial Real Estate Practice. Commercial Endorsements were then the topic of discussion in a fabulous and timely presentation by Hilary Fentress with CTIC. The day culminated with an all-star underwriting panel featuring J. Michael Dugan of NTINY, Leonard Gray of FATIC, Patrick Hagler of ANTIC, and Brian Pierce of STGC in which they answered questions from the crowd as well as provided topical perspectives on underwriting in our commercial market. Feedback on the seminar was positive and all who attended whether virtually or in person appreciated its value were entertained.

The subcommittee's biggest project for the 2021-2022 year has been the planning and presentation of a 6-hour continuing legal education seminar focused on various commercial real estate topics. The seminar was very well received by the section and provided an opportunity for the commercial practitioners in our section to come together virtually and in person for day of learning as well as discussion of matters specifically affecting the commercial real estate practitioner. Following the seminar, this subcommittee also planned and executed a dinner at the Capital City Club to honor our commercial seminar speakers, our Real Property Law Section past Pindar Aware recipients, and our law Scholle scholarship winners for 2021. Throughout the duration of the year, this subcommittee provides a voice on the Real Property Law Section Committee to share the perspective of the commercial practitioner on pending legislation, new litigation, and other topics which are discussed and addressed by the larger Real Property Section Executive Committee during the year.

We enlisted sponsors for each of the seminar in order to offset the costs to attendees. Each attendee paid only ten dollars per CLE credit.

Communication

Sub-committee Chair: Tenise C. Chung

Our section has tried to move communication with section members into the 21st Century by getting rid of the outdated paper newsletters and replaced with more frequent email blasts containing more timely information dissemination.

Legislative and Governmental Relations

Sub-committee Co-Chairs: Amy Huskins, Rob Brannen, and Mark Robinson

During this past Legislative Session, the Legislative Subcommittee of the Real Property Law Section of the State Bar of Georgia ("RPLS" or "Section") worked with literally hundreds of lawyers, bankers, contractors, realtors, and title company representatives, as well as representatives of many interest groups, including the Mortgage Bankers Association of Georgia, Georgia Bankers Association, American Land Title Association, Southeast Land Title Association, Georgia Association of Realtors, Community Bankers Association, AARP, Georgia Home Builders Association, and several sections of the State Bar of Georgia, including the Fiduciary Law Section, Family Law Section, Business Law Section, and the Construction Law Section. Our discussions and direct involvement with requests to amend several bills from their initial drafts included several pieces of proposed legislation that affect the practice of law as well as the citizens of Georgia, including:

1. House Bill 974-the "Mandatory E-Filing Bill." This bill was sponsored at the request of the GSCCCA but was changed as a direct result of discussions by members of the RPLS with many legislators including those on the House Judiciary Committee and the Senate Judiciary Committee. Due to restrictions placed on the Bar, these discussions were on a personal basis and not officially on behalf of the Bar itself, The RPLS heard from a tremendous number of lawyers and other groups throughout the State regarding this bill. The bill was amended to provide that the Clerks of Superior Court must offer e-filing of

real estate documents but not require e-filing. This was a major relief not only to many lawyers throughout the State, including real estate lawyers construction lawyers, health care lawyers, fiduciary lawyers, and eldercare lawyers, but also to other groups that would have been materially adversely affected by the bill in its original format. In addition to private discussions, our members testified in front of both the House Judiciary Committee and the Senate Judiciary Committee, and we were successful in having the original bill amended to offer e-filing but not require e-filing. One of the major arguments against mandatory e-filing was that no other State requires e-filing because of the potential constitutional issues that would have arisen if the bill had continued to forbid the recordation of paper real estate documents, which constitutional issues include the Fifth Amendment's rights to property, access to courts, restraint against alienation and creation of a separate class. House Bill 974 in its amended format is awaiting signature from Governor Kemp.

2. House Bill 334—the "Remote Online Notary Bill." This bill, initially pre-filed in 2019, was tabled for the Legislative Session 2022, as it did not advance out of Conference Committee. The Board of Governors in 2020 authorized the Real Property Law Section to represent the Bar in connection with confirmation that the bill would include fraud protections previously promulgated by the American Land Title Association and the Mortgage Bankers Association's national legislative conferences. At the end of the 2021 Legislative Session, the bill was placed in Conference Committee, and there were attempts to potentially remove some of the mandated fraud protections from the then current version of the bill. Due to the restrictions on the Bar from the Keller Rule, the Real Property Law Section could not take an official position as to the stance taken by certain residential real estate lawyers of the Bar who have lobbied for the past two years for a real estate document carve out from the bill. The Legislative Subcommittee of the RPLS strongly believes that this bill will resurface for the 2023 session, and thus we will continue to insist upon full fraud protections to remain in the bill, if and when passed. The Legislative Subcommittee and many members of the Section have spent countless volunteer hours from 2019 to the present on this bill.
3. House Bill 554-the "Lis Pendens Bill." This bill, initially filed in the 2021 session and carried over to the 2022 session, did not pass as of April 4, 2022. The Legislative Subcommittee of the RPLS believes that this bill will be re-introduced for the 2023 session. Members of the RPLS spent hundreds of hours in discussions with interested parties, the bill's sponsors, and other legislators regarding amendments to the bill that

would make the bill palatable to both litigators and real estate lawyers throughout the State. Several RPLS members (not officially on behalf of the Bar, but in their individual capacities) testified to the House and Senate Judiciary Committees in the 2021 session and also in the 2022 session.

4. New Proposed Legislation---Constructive Notice Legislation to correct Georgia's recording statutes. The 11th Circuit Court of Appeals on April 7, 2022 issued a landmark decision regarding the requirements for recordation of a real estate document involving real estate located in the State of Georgia. The majority decision issued by Judge Grant openly directs that the General Assembly "fix" some loopholes in the current recording statutes. Members of the RPLS are already in ongoing discussions with potential stake holders about this proposed legislation and will continue to do so throughout the year before the 2023 session.

Litigation

Sub-committee Co-Chairs: Bret Chaness and Larry Evans

The sub-committee continued to inform its members on past and/or pending litigation that involves our area of law. Some of the more important cases include:

- *Pingora Loan Servicing, LLC v. Scarver (In re Lindstrom)*, ___ F.4th ___, No. 20-13615, 2022 WL 1041192 (11th Cir. April 7, 2022) - Holding: The remedial statute, O.C.G.A. § 44-2-18, only allows a deed to be recorded "upon the affidavit of a subscribing witness." The Court concluded that a "subscribing witness" can only be one who already signed the deed by attesting to its execution.
- *Tuggle v. Ameris Bank*, ___ Ga. App. ___, ___ S.E.2d ___, No. A22A0256, 2022 WL 1024687 (Ga. Ct. App. April 6, 2022) - Holding: In an issue of first impression in Georgia, the Court of Appeals held that "Love and Affection" does not constitute "reasonably equivalent value" under Georgia's UFTA.
- *Griggs v. Miller*, ___ Ga. App. ___, ___ S.E.2d ___, No. A21A1366, 2022 WL 679971 (Ga. Ct. App. March 8, 2022) - Holding: The court first concluded that the dragnet clause did not show any intent to create a perpetual security interest, and distinguished it from other cases where the court had found a dragnet clause did so such a thing. It noted that those cases involved HELOC agreements where the borrower can obtain more draws from the same account over time and must take affirmative steps to have the security

deed cancelled even if the debt is paid down to zero. Next, the court held that the reversion statute is not a statute of limitations and therefore not subject to any tolling.

- *Moxie Capital, LLC v. Delmont 21, LLC*, ___ Ga. App. ___, ___ S.E.2d ___, No. A21A1574, 2022 WL 335864 (Ga. Ct. App. Feb. 4, 2022) - Holding: Only cash or a certified check is lawful tender to redeem a property from a tax sale purchaser. The court noted that a personal check is simply a promise to pay, and not a tender of money.

Recognition

Sub-committee Chair: Thua G. Barlay

We revamped this sub-committee this year to also focus on ensure that bar members understand the good works that our section does. The sub-committee worked on compiling this report to the State Bar.

In addition, we continued recognizing individuals for great work focused on real property law:

Pindar Award: The George A. Pindar Award is granted by our section to a member of the section whose lifetime contribution has been significant to the real estate bar. The main objective of the award is to honor a member who unselfishly gives of him or herself for the benefit of the bar. The Executive Committee determined annually if the award shall be granted and will vote to give the award to a person or persons whom the committee thinks represents the ethics and ideals of George A. Pindar. For the 2021, the awardee was Vanessa E. Goggans. Vanessa is a Partner with Goggans, Stutzman, Hudson, Wilson & Mize LLP. She is a former chair of our section and practices in the areas of residential real estate and finance, representing builders, developers, homebuyers, homeowners and lenders in all phases of residential real estate development and sales. She is an active member of the Atlanta real estate community and a frequent speaker on topics regarding CFPB compliance, the Real Estate Settlement Procedures Act (RESPA), ethical issues facing real estate practitioners, new trends in the title insurance industry and practical tips for real estate brokers and closing attorneys.

Scholarships: For the 2021-22 year, the section awarded scholarships to students from several Georgia law schools. At our annual awards dinner, the section recognized these students. The awarded students were Rebecca Arrington (Emory University School of Law), Victoria Bethel (Mercer University School of Law, Meredith Elkin (Georgia State College of Law) and Jeffery Hendricks (not pictured) (University of Georgia School of Law).



Residential Real Estate

Sub-committee Chair: Stuart Gordon

The Residential Sub-Committee typically hosts an annual Residential Seminar to provide CLE hours to members of the State Bar. The last in-person Residential Seminar was in January 2020, with the January 2021 moving to a one-day virtual seminar. Due to the unknown with COVID in the winter of 2021, we planned for another virtual seminar for 2022. This year, though, we successfully held 3 separate 2-hour sessions spread out over 5 weeks: January 13, 2022, February 3, 2022, and February 17, 2022. This allowed a variety of dates and times for members to access CLE content. The number of attendees jumped from 172 on January 13, 2022, to 214 on February 3, 2022, and 241 on February 17, 2022. The topics presented were varied, from a deep-dive into how and where money flows-in for the mortgage industry, to a presentation from an FBI Special Agent with the FBI Computer Intrusion Squad. Here is the schedule of speakers and titles:

- Jack Keeler, Vice President Sales, Flagstar Bank: Tour de Mortgage Finance
- Kenneth Stroud, Esq., Associate State Counsel, CATIC: Bankruptcies on Title: Avoiding Pitfalls and Getting to the Closing Table
- Chad Hunt, Supervisory Special Agent, FBI Computer Intrusion Squad: Cyber - An Enterprise Risk: Best Practices and Lessons Learned
- Jonathan S. R. Anderson, Esq., Vice President and Chief Underwriting Counsel and Tucker Dulong, Esq.: Associate Massachusetts State Counsel, CATIC: 2021 ALTA forms: key changes and additions

- Jane Bond, Esq., Florida Litigation Managing Partner, McCalla Raymer Leibert Pierce, LLC: eNotes and Foreclosure of eNotes
- Allie Jett, Esq., Attorney at Law, Jett Law Group: Process and Substance of a Quiet Title Action

As with our commercial real estate seminar, we also enlisted sponsors for this seminar with each attendee paying only ten dollars per CLE credit.

Title Standards

Sub-committee Chair: Allie Jett

We did a full day CLE in November that was hybrid in person and virtual. I didn't get any email with stats from ICLE, but my recollection was that we had close to 100 attendees. Our other area of concern is the maintenance and update of the published title standards. We anticipate passing an amendment to the survey section at the May annual section meeting.

**STATE BAR OF GEORGIA
TAXATION LAW SECTION**

2021-2022 ANNUAL REPORT

The Taxation Law Section fulfilled its purpose “to promote the objectives of the State Bar of Georgia with the field of tax law” during the 2021-2022 State Bar fiscal year. As provided in its bylaws, the Taxation Law Section actively promoted the continuing education of its members in the field of tax law, provided opportunities for professionals and business groups to interact and engage in activities related to tax law despite the limitations and challenges of COVID-19 restrictions, and worked to achieve improved compliance with the tax laws of Georgia and the U.S. The COVID-19 pandemic continued to limit the Section’s ability to gather and network this year, but the Section, with the assistance of the State Bar staff, maximized its ability with virtual events to provide services to members of the Section as well as the State Bar.

GOVERNANCE

The Taxation Law Section is governed by its Executive Committee. During the current fiscal year the Executive Committee consisted of the following officers:

Chairperson:	Jeffrey L. Cohen
Chair-Elect:	Andrew Vasquez
Vice Chairperson:	Alla Raykin
Treasurer:	David Greenberg
Secretary:	DiAndria Green
Immediate Past Chairperson:	Andy Yates

SEMINARS AND MEETINGS

Virtual CLE Event: On July 28, 2021 the Section hosted a virtual webinar that provided attendees with two hours of CLE paid for by the Section. Cass Brewer, Associate Dean for Academic Affairs and Professor of Tax Law at Georgia State University reported on recent developments in federal income taxation, while George Abney, a partner at Alston & Bird,

reviewed recent and expected developments in tax enforcement at the Internal Revenue Service. Emily Yaun, a supervising attorney at the GSU Low Income Taxpayer Clinic also spoke about the work of the clinic, and how members of the Bar can assist the clinic and refer appropriate tax clients. The webinar was moderated by Andy Yates and Jeff Cohen, and had 277 attendees from throughout the State.

Tax Court virtual settlement program: During the week of July 19, 2021, members of the Taxation Section joined with attorneys in the Internal Revenue Service Office of Chief Counsel to assist taxpayers in settling their pending U.S. Tax Court cases without the need for trial. This program, which has been successfully completed for a few years, was restricted to taxpayers who filed their tax challenges on a *pro se* basis. Although the Internal Revenue Service counsel did not have the exact number of Georgia volunteers, attorneys from several parts of the State participated in settling numerous Tax Court cases.

Annual NASBTS Meeting: On October 21 and 22, 2021, the Section participated again in the annual meeting of the National Association of State Bar Tax Sections, which was held in Nashville. DiAndria Green represented the Section, while members Anson Asbury and Richard Litwin participated as panelists for the presentation on conservation easements.

Georgia Department of Revenue Liaison Meeting: On December 7, 2021 the Section co-sponsored a virtual tax practitioner conference with officials of the DOR. The program was organized and moderated by Richard Litwin, Mace Gunter, and Assistant Commissioner Frank O'Connell. Attendees had their CLE paid for by the Section, and were able to ask questions in real time to the presenters. As with other recent webinars, this program is available for viewing on the Section's webpage on the State Bar of Georgia website.

Annual Professionalism and Ethics Conference: On March 22 the Section, in partnership with the Atlanta Bar Association, sponsored a virtual two hour CLE event. David Golden of Troutman, Pepper, Hamilton, Sanders organized the webinar and gave an excellent ethics refresher. The Honorable Charles Beaudrot, Jr., a Georgia Administrative Law Judge, presented a welcomed presentation on professionalism from the

perspective of the bench. There were over 230 attendees, and they had their CLE paid for by the Taxation Section.

SPECIAL MATTERS

Planned Webinars: The Executive Committee is in the initial planning stages of two more webinars for the upcoming months. One will focus on HB 149, new Georgia legislation for pass-through entities which was enacted to enable increasing the deduction for state and local taxes over the federal \$10,000 limit. The other event would focus on trial CLE hours and center on state and federal tax litigation.

Statewide I.R.S. Survey: Given the fact that most Internal Revenue Service employees had been working from home for almost two years, and many attorneys and members of the public had been experiencing difficulties in dealing with this important federal agency, the Executive Committee constructed and disseminated to the Taxation Section's approximately 800 members a detailed survey on the nature of the members' recent experiences with the Internal Revenue Service and their suggestions for improvement. With the assistance of the State Bar staff, the survey results were organized and compiled, and the Taxation Section sent a letter to I.R.S. Commissioner Charles Rettig in December. The letter (a copy of which is posted on our web page) expressed our collective frustration with the agency and its lack of funding, and included all of the survey results. Neither the State Bar nor the Taxation Section has had a response from the Commissioner. The survey and its results were shared with the National Association of State Bar Tax Sections, which recognized the Georgia Taxation Section in its national newsletter.

Upcoming Newsletter: The 2022 legislative session of the Georgia General Assembly saw several bills pass giving us changes in the procedural, tax credits, sales and income tax areas. Members from the firm Eversheds Sutherland have compiled a report on these and are preparing a summary newsletter to be distributed to members of the Taxation Section.

STUDENT SPONSORSHIPS

The Taxation Law Section continued its annual support of the future practice of tax law in Georgia with a series of \$1500 awards to exceptional law students at Mercer University, Georgia State University, Emory University, and the University of Georgia. The recipients of these annual awards were:

Georgia State University:	Lauren Zenk
University of Georgia:	Brody Klett
Mercer University:	TBA
Emory University:	TBA

Jeffrey L. Cohen, Chairperson

WORKERS' COMPENSATION LAW SECTION ANNUAL REPORT

The Workers' Compensation Section has had a successful year thus far based on the information provided below. We greatly appreciate the assistance provided by the staff of the State Bar and the leadership provided by the Board of Governors of the State Bar of Georgia.

Members

At the current time we have approximately 953 members.

Account Balance

The current balance of our operating account is \$213,072.67.

Continuing Education

The Section holds two programs annually – one institute and one seminar. The programs are chaired, in part, by officers of the Section.

Workers' Compensation Law Institute. This program is held once per year. The 2021 Institute was held in person on October 7-9, at the Jekyll Island Convention Center. It was directed by me and chaired by two claimants' lawyers, Shari Miltiades and Julie Poirier; two defense lawyers, Ryan Klee and Lynn Olmert, and one Administrative Law Judge, the Honorable Andrea Mitchell. The Institute was one of the first, and definitely the largest, in-person seminar post-COVID restrictions on in-person gatherings. The 2021 Distinguished Service Awards were presented at the Institute to Larry Hollington and Luanne Clark. The Workers' Compensation Section also made a donation to Kids' Chance of Georgia at their annual fundraiser held during this seminar.

Workers' Compensation for the General Practitioner. This seminar was held virtually on May 21, 2021, and was planned and chaired by C. Jason Perkins, one of the members of our Executive Committee. The agenda included all aspects of handling a workers' compensation claim before the State Board of Workers' Compensation.

Newsletter

The latest Section Newsletter was released in the Summer of 2021, and the co-editors for this edition were Dan Lovein and Sherrill Britt. Articles included an update on the state of the SBWC by the Honorable Ben Vinson, and articles examining the impact on benefits when refusing a COVID vaccine, alternative medicine options, psychological claims, and scheduled break exceptions versus the ingress and egress rules.

Leadership

The Section is led by an Executive Committee whose current members are as follows:

Chair: Julie Y. John
Vice Chair: C. Jason Perkins
Workers' Compensation for the General Practitioner: Nathan Levy
Secretary & Distinguished Service Award: Mike Boeschen
Treasurer: Dan Lovein
Co-Editor of the Workers' Compensation Newsletter: Sherrill Britt
Co-Editor of the Workers' Compensation Newsletter: Ryan Klee
Immediate Past Chair: Lee Bennett

Respectfully submitted, April 18, 2022.

Julie Y. John
Chair, Workers' Compensation Section

**STATE BAR OF GEORGIA INVESTIGATIONS REGARDING
THE UNLICENSED PRACTICE OF LAW**

Reporting period May 1, 2021, through April 30, 2022

Informal Investigations Initiated in 2021 (CY)	146
Informal Investigations Initiated in 2022 (to date)	36
Informal Investigations Pending (as of April 30, 2022)	76

Statistics

Formal Investigations Initiated	42
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Nature of Formal Investigation:

Disbarred/Suspended/Inactive Lawyer	21
Regular UPL	10
Paralegal/Document Preparation Service	6
Out of State Lawyer	4
Attorney	1

Source of Formal Investigation:

State Bar of Georgia	21
Lawyer	9
Judge	5
Public (Individual)	3
Public (Corporation)	3
State Agency	1

Judicial Districts:

District 1	1
District 2	1

District 3	0
District 4	0
District 5	27
District 6	6
District 7	1
District 8	0
District 9	4
District 10	2
Formal Investigations Pending	109
Formal Investigations Closed	46
Disposition:	
Subject Agreed to Comply	25
Subject Referred to Prosecutor	17
Further Action Unnecessary	2
Subject Warned of Investigation	2

MEMORANDUM

To: Members, Board of Governors

From: Ira L. Foster, General Counsel, Georgia Legal Services Program (GLSP)

Date: April 28, 2022

Re: The Road Map to Law School: A Program to Encourage Black Students to Consider Careers in The Legal Profession

About a year ago, I was asked by the Criminal Justice and Political Science department chairs at Fort Valley State University – my alma mater - to present a workshop on the law school admission process for college students. As I began to prepare my workshop presentation, I reviewed attorney membership data from the American Bar Association (ABA). The ABA Profile of the Legal Profession data revealed that Black attorneys comprised only 4.7% of attorneys in the legal profession; that was a slight decrease since the ABA's 2011 membership profile, when 4.8% of organization's members identified as Black. ¹

As I reviewed the membership data, I was both saddened and alarmed. The slight downward trend may not have seemed significant initially, but the fact that it followed a decade of efforts to make the legal profession more inclusive made it much more consequential. Seeing this data, I felt motivated to do more than a one-time workshop for Fort Valley State University students; I felt the need to do more to help address the declining Black attorney membership numbers.

The first Road Map to Law School workshop was held for Fort Valley State University students on March 25, 2021. Held virtually because of the pandemic, more than 120 students registered and over 70 attended. The workshop format included deans from several law schools greeting the students, law school admissions directors talking with students about the law school admission process, law students talking to the college students about the law school environment, and five lawyers from various practice areas and a judge talking about their careers. The workshop was well received by the students, with a common thread in evaluation responses asking when the next Road Map workshop would be held.

Following the first workshop at Fort Valley State University, hybrid versions of the program were delivered at Savannah State University, a second workshop at Fort Valley State University and, most recently, this February at Albany State University. Among the panelists at the Albany State workshop were several Albany State University graduates who are now lawyers.

At the second Fort Valley State workshop and the Albany State session, book scholarships were offered as door prizes to in-person student attendees. At Albany State, the book scholarship funds were solicited and raised by Alicia Hargrove and Marcee Campbell, both of whom are

Albany State University graduates and active members of the State Bar of Georgia Committee to Promote Inclusion In The Profession. During the workshop, three State Bar of Georgia attorney members also sponsored three Albany State University students with full one-year memberships in Toastmasters International.

To date, almost 300 college students have attended the Road Map workshops. Future plans include offering the presentation at Fort Valley State University, Savannah State University and Albany State University on a yearly basis, as well as expanding the workshop to include students at Morehouse College, Spelman College, Clark Atlanta University and Morris Brown College. In addition to GLSP, organizations that have supported the Road Map workshops to date include the Georgia Association of Black Women Attorneys (GABWA), the State Bar of Georgia's Committee to Promote Inclusion in the Profession, and the State Bar of Georgia's Child and Protection and Advocacy Section. Current State Bar of Georgia Executive Director, Damon Elmore, has also supported and attended all workshop presentations.

Lack of diversity in the legal profession is not solely a function of low minority enrollment in law school. To achieve the benefits of diversity for our colleagues, our profession, and our society, we must address barriers to advancement within our workplaces, as well. We must continue to make efforts to increase the number of Black lawyers in the legal profession, and to remove barriers to their advancement within our profession

Achieving the goal of better inclusivity is going to take a unified effort. The problem of Black underrepresentation in our profession was not created overnight, and it is not the result of a single cause. Being a lawyer means that we have special skills and talents that allows us to face challenges and, in turn, develop solutions to those challenges. Together, we must continue to think creatively and holistically about what those solutions should be.

On Saturday, June 4, 2022, at 2 p.m., an overview of the Road Map workshop will be held during the State Bar of Georgia Annual Conference. If your schedule permits, please try to attend the presentation. A diverse legal profession will ensure that the public has confidence in the legal profession. More broadly, diversity is good in all facets of life; it is the cornerstone of greatness in America. We must work together to ensure that the legal profession is reflective of America.

1. ABA, Profile of The Legal Profession 2021, accessed February 15, 2021<<http://www.americanbar.org/content/dam/aba/administrative/news/2021/0721/polps.pdf>

PROFILE OF THE LEGAL PROFESSION

ABA AMERICAN BAR ASSOCIATION

DEMOGRAPHICS

Lawyers by Race and Ethnicity

The legal profession has been very slow to diversify by race and ethnicity over the past decade, according to the ABA National Lawyer Population Survey. Ten years ago, in 2011, lawyers of color were 11.7% of the profession. A decade later, in 2021, they represented 14.6% of the profession – an increase of almost three percentage points.

White men and women are still overrepresented in the legal profession compared with their presence in the overall U.S. population. In 2021, 85% of all lawyers were non-Hispanic whites, a decline from 88% a decade ago. By comparison, 60% of all U.S. residents were non-Hispanic whites in 2019.

Nearly all people of color are underrepresented in the legal profession compared with their presence in the U.S. population. For example, 4.7% of all lawyers were Black in 2021 – nearly unchanged from 4.8% in 2011. The U.S. population is 13.4% Black.

Similarly, 4.8% of all lawyers were Hispanic in 2021 – up nearly one percentage point from 3.9% a decade earlier. The U.S. population is 18.5% Hispanic.

Just 2.5% of all lawyers were Asian in 2021 – up slightly from 1.7% 10 years earlier. The U.S. population is 5.9% Asian.

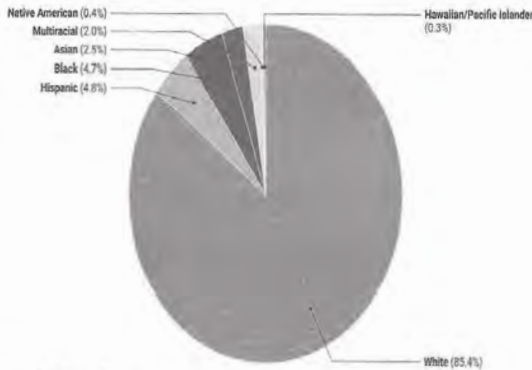
Native Americans are the smallest racial or ethnic group among U.S. lawyers. Roughly one-half of 1% of all lawyers (0.4%) are Native American – down from 1.0% a decade ago. The U.S. population is 1.3% Native American.

The number of mixed-race lawyers is slowly rising. The National Lawyer Population Survey began tracking the number in 2014, when it was close to zero. In 2021, it stood at 2.0% of the profession.

Fast fact:

- Only half of all state bars and state licensing agencies track race and ethnicity in the profession. In 2021, 25 states reported the race and ethnicity of lawyers – up from 17 states in 2011.

Lawyers by Race and Ethnicity: 2021



Source: ABA National Lawyer Population Survey



State Bar
of Georgia

Committee to Promote Inclusion in the Profession



Georgia Legal
Services Program



PRESENTS:

The Road Map to Law School

Thursday, March 25, 2021 – 6:00 pm

Presiding - Atty. Ira L. Foster

I. Welcome

Damon Elmore, Executive Director, State Bar of Georgia, Atlanta, Ga.

Dr. Anthony Holloman, VP University Advancement, Fort Valley State University

II. The Law School Application Process and the LSAT

Joshua Gloster, Second Year Student-University of Florida School of Law, Gainesville, Fla.

III. What Law School Is Like

Victoria Hicks, Third Year Student-University of Georgia School of Law, Athens, Ga.

Shombraya Goodman, Second Year Student- John Marshall School of Law, Atlanta, Ga.

Name to be added, North Carolina Central University School of Law

IV. Career Field After Law School

Kimberly Easterling, United States Attorney, Middle District of Georgia, Macon, Ga.

Shannon Mills, Staff Attorney, Georgia Legal Services Program, Macon, Ga.

Rodney Davis, Attorney at Law, Rodney Davis P.C., Warner Robins, Ga.

Laurie Thomas, Attorney at Law, Managing Partner, Reed Thomas Law Group LLC, Atlanta, Ga.

Honorable Judge Ronald Ramsey, Dekalb State Court, Decatur, Ga.

V. Questions and Answers

VI. Closing Remarks - All program participants (1 minute each)



State Bar
of Georgia

Committee to Promote Inclusion in the Profession



Georgia Legal
Services Program
Celebrating Fifty Years of Service - 1971 - 2021

THE ROAD MAP TO LAW SCHOOL

Thursday, October 7, 2021 | Time: 6:00 pm – 8:00 pm

Savannah State University/King Frazier Student Center

Presiding, Attorney Ira L. Foster
General Counsel, Georgia Legal Services Program

I. Welcome

Damon Elmore, Executive Director, State Bar of Georgia
Shed Dawson, Savannah State University, Student Affairs Office, Greek Life Advisor
LaVonda N. Reed, Dean, Georgia State University, School of Law
Browne C. Lewis, Dean, North Carolina Central University, School of Law
Oren Griffin, Dean, Tulsa University, School of Law (effective January 1, 2022)
Kimberly Ballard-Washington, President, Savannah State University

II. The Law School Application Process and the LSAT

Marc Reece, Director of Recruitment & Outreach, Atlanta's John Marshall Law School
Korey J. Mercer, Director of Admissions, North Carolina Central University,
School of Law

III. What Law School is Like

Victoria Hicks, UGA School of Law Graduate 2021
Shombraja Goodman, 3rd Year Law Student, Atlanta's John Marshall Law School

IV. Career Fields After Law School

Shannon Mills, Supervising Staff Attorney, Georgia Legal Services Program
Laurie Thomas, Attorney at Law, Managing Partner, Reed Thomas Law Group LLC
Maria Waters, Attorney at Law, Worsham Corsi Dobus & Berss
Christopher Middleton, Attorney at Law, Cox Rodman & Middleton LLC
Hon. Judge Lisa G. Colbert, Chatham County Superior Court
Francys Johnson, Attorney at Law, Davis, Bozeman and Johnson

V. Questions & Answers

VI. Closing Remarks – All program participants (please limit to 1 minute)

Our National Judicial Leaders (Video)

REFRESHMENTS WILL BE SERVED



Career Services & Leadership
Development Center



THE ROAD MAP TO LAW SCHOOL

Saturday, February 12, 2022 | Time: 12 noon

Albany State University - C.W. Grant Student Union Ballroom

Presiding, Attorney Ira L. Foster
General Counsel, Georgia Legal Services Program

I. Welcome

Debra S. Williams, Associate Dean, Student Engagement Albany State University
Shiriki Jones, President Georgia Association of Black Women Attorneys
Damon Elmore, Executive Director State Bar of Georgia
Dr. Marion Fedrick, President, Albany State University

II. The Law School Application Process and the LSAT

Monique McCarthy, Senior Director of Admissions Georgia State University Law School
Marc Reece, Director of Recruitment & Outreach, John Marshall Law School
Sharon Gaskin, Associate Dean of Admissions, North Carolina Central University School of Law
Jenna Jackson, Associate Director of Admissions, University of Georgia School of Law

III. What Law School is Like

Joshua Gloster, 3L Law Student University of Florida Levin College of Law
Brianna T. Smith, 3L Law Student John Marshall School of Law

IV. Career Fields After Law School

Dr. Faison Zachary, President, Edward Waters University
Yoshana Jones Hill-Attorney at Law
Tremaine Reese-Attorney at Law
Marcee Campbell-Attorney at Law
Gregory Edwards, District Attorney, Dougherty County
Latoya Bell-Attorney at Law
Terri Benton-Attorney at Law
Elizabeth Givens-Assistant District Attorney, Dougherty County
Andrea Ewing-Attorney at Law
Hon. Judge Willie Louis Sands
Hon. Judge Tabitha Ponder
Hon. Judge Willie Lockett

V. Questions & Answers

VI. Closing Remarks – All program participants (please limit to 1 minute)

VII. CLOSING: SPECIAL GUESTS

Part Two – Breakout Sessions-Presiding Attorney Elicia Hargrove

State Bar of Georgia Coastal Georgia Office Statistics July 2021 to June 2022							
Month	Client/Misc Mtgs	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)
Jan-21							
February							
March							
April							
May							
June							
July	2	3	1	1		7	26
August	5		1	1		7	21
September	4	2	3			9	38
October	3	3	2		1	9	45
November		1	2			3	13
December		2	1			3	14
Year Total:	14	11	10	2	1	38	157
Attorney Locations for 2021: Savannah, Atlanta, Brunswick, Statesboro, Tallahassee(FL), Macon, Metairie(LA), Alpharetta, Marietta, Columbus							
Month	Client/Misc Mtgs	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)
Jan-20	3	6	1		2	12	44
February	1		4			5	16
March	2	6	1	1	2	12	51
April	1	2	2			5	29
May							
June							
July							
August							
September							
October							
November							
December							
Year Total:	7	14	8	1	4	34	140
Attorney Locations for 2022: Savannah, Atlanta, Brunswick, Statesboro, Alpharetta, Rincon, Pooler, Snellville, Lexington KY, Knoxville TN, Gainsville, Richmond Hill, Townsend							

State Bar of Georgia - South Georgia Office Statistics (July 2021 to April 2022)

2021

Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)
January							
February							
March							
April							
May							
June							
July	0	0	1	23	0	24	27
August	0	0	0	4	0	4	4
September	2	2	1	5	0	10	29
October	4	3	0	5	0	12	39
November	1	1	1	12	0	15	29
December	1	2	0	9	0	12	21
Year Total:	8	8	3	58	0	77	149

Attorney Locations 2021: Adel, Albany, Americus, Atlanta, Bainbridge, Buford, Columbus, Cordele, Douglas, Homerville, Jonesboro, Macon, Ocilla, Oglethorpe, Perry, Pooler, Savannah, Sylvester, Tallahassee (FL), Thomasville, Tifton, Valdosta

2022

Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)
January	4	2	1	10	2	19	53
February	3	3	1	16	0	23	57
March	3	1	2	19	2	27	61
April	1	8	0	8	0	17	52
May							
June							
July							
August							
September							
October							
November							
December							
Year Total:	11	14	4	53	4	86	223

Attorney Locations 2022: Albany, Americus, Atlanta, Cordele, Dawson, Douglas, Fitzgerald, Homerville, Kissimmee (FL), Leesburg, Macon, Moultrie, Nashville, Norman Park, Perry, Savannah, Sylvester, Tallahassee (FL), Thomasville, Tifton, Valdosta, Warner Robbins, Waycross

*** Note: Miscellaneous Meetings include video conferences, hearings and focus groups**

PUBLISHED ARTICLES 2021-2022			Headline	Circulation
Date	Newspaper			
5/5/2021	Valdosta Daily Times		Congratulations to new Municipal Court judge	6,215
5/12/2021	Jeff Davis Ledger, Hazlehurst		Congratulations to new solicitor	3,112
5/26/2021	Adel News-Tribune		Congratulations to Chase Studstill on appointment as District Attorney	2,490
5/26/2021	Clinch County News, Homerville		State Bar President congratulates Studstill on appointment as DA	1,350
5/26/2021	Lanier County Advocate, Lakeland		State Bar President congratulates Studstill on appointment as DA	1,250
5/27/2021	Darien News		Sam Oliver appointed to Public Defenders Supervisory Panel for Atlantic Circuit	2,415
6/1/2021	Times Georgiam, Carrollton		Swindle reelected to State Bar board	3,504
6/3/2021	Haralson County Gateway-Beacon, Bremen		Swindle re-elected to Board of Governors	1,000
6/18/2021	Daily Report		State Bar Mourns Loss of Clay C. Long	2,243
6/22/2021	Americus Times-Recorder		Judge Rucker Smith Re-Elected to Board of Governors of State Bar of Georgia	2,065
6/22/2021	Covington News		Covington attorney reelected to State Bar of Georgia Board of Governors	3,132
6/22/2021	Jackson Herald, Jefferson		King re-elected to Board of Governors of State Bar of Georgia	4,376
6/23/2021	Albany Herald		Trey Underwood reelected to State Bar Board of Governors	5,271
6/23/2021	Cordele Dispatch		James Hurt Re-Elected to Board of Governors of State Bar of Georgia	2,268
6/23/2021	Champion, Decatur		Georgia legal community mourns loss of Sissie Rary	494
6/23/2021	Jeff Davis Ledger, Hazlehurst		Tillman elected to State Bar Board	3,112
6/23/2021	Metter Advertiser		Jerry Cadle is elected to State Bar Board of Governors	1,627
6/23/2021	Walton Tribune, Monroe		Geoffroy reelected to State Bar's board	4,249
6/23/2021	Forest-Blade, Swainsboro		Cadle elected to Board of Governors of State Bar of Georgia	3,938
6/23/2021	News-Reporter, Washington		Hammond elected to State Bar of Ga. For Toombs Circuit	1,987
6/24/2021	Toccoa Record		Irvin re-elected	3,444
6/26/2021	Daily Tribune News, Cartersville		Mroczko re-elected to State Bar of Georgia's board of governors	4,986
6/26/2021	Daily Citizen-News, Dalton		Smalley re-elected to State Bar of Georgia Board of Governors	5,320
6/26/2021	Henry Herald, McDonough		Judge Amanda Flora elected to Board of Governors of State Bar of Georgia	1,250
6/28/2021	Gwinnett Daily Post, Lawrenceville		Gwinnett County Bar Association honored by State Bar of Georgia	50,011
6/30/2021	Blackshear Times		Strickland re-elected to Board of Govs of State Bar of GA	2,469
6/30/2021	Elberton Star		Higginbotham elected to board	2,531
7/1/2021	Log Cabin Democrat, Conway (AR)		Hendrix College graduate elected President of Georgia State Bar	3,925
7/1/2021	Pickens County Progress, Jasper		Pickett re-elected to Board of State Bar of Georgia	4,286
7/1/2021	Press-Sentinel, Jesup		Tillman elected to Board of Governors, State Bar of Georgia	4,055
7/1/2021	Gwinnett Daily Post, Lawrenceville		Gwinnett County attorneys re-elected to State Bar of Georgia leadership posts	50,011
7/7/2021	Cairo Messenger		Payne re-elected to board of State Bar	6,083
7/7/2021	Monroe County Reporter, Forsyth		Forsyth's Jenkins re-elected to lead State Bar of Georgia	3,920
7/14/2021	Dahlonega Nugget		Jerry Bruce appointed as Georgia child advocate	3,994
7/15/2021	Clayton Tribune		McNatt remembered for courtroom eloquence	3,480

7/16/2021	Jackson Herald, Jefferson	Congratulations to new Piedmont Circuit Bar Association officers	4,376
7/21/2021	Covington News	State Bar congratulates scholarship winners	3,132
7/21/2021	Moutrie Observer	Legal community mourns Schwall	2,947
7/22/2021	Daily Tribune News, Cartersville	Bar offers its condolences on loss of Ed Clary	4,986
7/24/2021	Walton Tribune, Monroe	Congratulations to New Rock scholar winners	4,249
7/28/2021	Walton Tribune, Monroe	Daily earns Bar Leadership Award	4,249
7/29/2021	Clayton Tribune	Congratulations to Rickman	3,480
8/2/2021	Coastal Courier, Hinesville	Luke Moses Honored by State Bar of Georgia's Young Lawyers Division	3,100
8/5/2021	Gwinnett Daily Post, Lawrenceville	Duluth attorneys honored by State Bar of Georgia's Young Lawyers Division	50,011
8/10/2021	Griffin Daily News	State Bar of Georgia congratulates Kreuziger	3,331
8/11/2021	Daily Report	Ga. Legal Community Mourns Loss of John T. Marshall	2,243
8/11/2021	Walton Tribune, Monroe	Legal Precedents: Walton's first 2 female attorneys set a path	4,249
8/25/2021	Atlanta Daily World	Congrats to Georgia State University Law Dean	1,000
10/12/2021	Union Recorder, Milledgeville	Congratulations to new Georgia College & State University President Cathy Co	4,353
10/13/2021	Savannah Tribune	Congratulations to Judge Colbert on Appointment to State Commission	4,000
11/21/2021	Albany Herald	Attorney Patrick Flynn recognized for state appointment	5,271
11/23/2021	Marietta Daily Journal	Cobb attorneys congratulated	9,515
11/26/2021	Champion, Decatur	Congratulations to Dekalb judge, attorney on appointments to state commission	494
12/3/2021	Brunswick News	State Bar remembers Brunswick lawyer	10,009
1/19/2022	The Northeast Georgian, Cornelia	Elizabeth L. Fite: Mourning the loss of Jim Cox	4,662
1/26/2022	Daily Report	Georgia Legal Community Mourns Loss of Marcus Calloway	2,243
3/22/2022	Calhoun Times	Congratulations to Charlie Williams on recognition of service	4,365
3/22/2022	Gwinnett Daily Post, Lawrenceville	Georgia legal community mourns loss of Lawrenceville's Jones Webb	50,011
3/24/2022	Daily Report	Congratulations to New Members of Ga. Supreme Court, Court of Appeals	2,243
3/26/2022	Daily Report	Commission Presents Benham Awards	2,243
3/26/2022	Daily Report	Georgia Legal Community Mourns Loss of Cliff Barlow	2,243
3/28/2022	Daily Report	Georgia Legal Community Mourns Loss of Mark Kadish	2,243
4/1/2022	Daily Report	Congratulations to New US District Judge Victoria Calvert	2,243
4/2/2022	Douglas County Sentinel, Douglasville	Congratulations to new Superior Court Judge Warren	1,752
4/6/2022	Daily Report	Congratulations to New Appointees to GRACE Commission	2,243
5/10/2022	Daily Report	Georgia Legal Community Mourns Loss of Morton Levine	2,243
		TOTAL CIRCULATION	403,377