



State Bar  
of Georgia

# BOG BOARD BOOK

**2021 Fall Meeting  
Savannah, GA**

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*This book serves as the agenda and materials for the State Bar of Georgia's 2021 Fall Board of Governors Meeting.*



# State Bar of Georgia

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

Saturday, October 23, 2021

9:00 a.m. – 12:00 p.m.

The Westin Savannah Harbor Golf Resort &

Spa and the Savannah Convention Center

Savannah, Georgia

Zoom Webinar:

<https://gabar.zoom.us/j/95037810365?pwd=S3pkU0l3aXl5WmlnbHVadktXWGFpQT09>

Webinar ID: 950 3781 0365

Passcode: 619393

*Dress: Business Casual*

## AGENDA

### Topics

### Presenter

#### 1) ADMINISTRATION

- |                                       |                         |       |
|---------------------------------------|-------------------------|-------|
| a) Welcome and Call to Order .....    | Elizabeth L. Fite ..... | 1-4   |
|                                       | President               |       |
| b) Pledge of Allegiance .....         | Jamie McDowell          |       |
|                                       | Board of Directors, YLD |       |
| c) Invocation .....                   | Joshua I. Bosin         |       |
|                                       | Member-at-Large, Post 3 |       |
| d) Recognition of Special Guests..... | Elizabeth L. Fite       |       |
| e) Roll Call .....                    | Ivy N. Cadle .....      | 5-10  |
|                                       | Secretary               |       |
| f) Future Meetings Schedule.....      | Elizabeth L. Fite.....  | 11-12 |

#### 2) ACTION

- |   |   |       |
|---|---|-------|
| a) Minutes of the 287 <sup>th</sup> & 288 <sup>th</sup> Meeting ..... | Ivy N. Cadle.....                             | 13-25 |
|   | of the Board of Governors on June 11-12, 2021 |       |

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
b) Proposed Rules Changes		
(1) Comment 6, Rule 1.1 of the Georgia Rules of Professional Conduct	Bill Nesmith	26-29
(2) Fee Arbitration Rules	Bill Nesmith/ David Lipscomb	30-105
c) Professional Liability Insurance Committee Report	Chris Twyman, Chair	106-120
d) Clients' Security Fund Board of Trustee's Recommendation	Ivy N. Cadle	121-146
(1) Rules Changes (if Board approves \$15 assessment)		
a. Rule 1-506		
b. Rule 10-103		
e) Appointments to Commission on Continuing Lawyer Competency (CCLC)	Elizabeth L. Fite	
(1) Reappointment of Donna Hix, 2022-2024		
(2) Reappointment of Jeff Ward, 2022-2024		
f) Appointments to Formal Advisory Opinion Board	Elizabeth L. Fite	
(1) Appointment of Martin E. Valbuena Executive Committee Liaison, 2021-2022		

### 3) LEGISLATION

a) Advisory Committee on Legislation New Legislative Proposals ( <b>action</b> )	Kyle Williams, Chair	147-151
(1) Committee To Promote Inclusion in the Profession Support for Judicial Council Budget Request for FY 2023 Funding for Civil Legal Services Grants for Victims of Domestic Violence		
b) Legislative Update	Mark Middleton	

### 4) INFORMATIONAL REPORTS

a) President's Report	Elizabeth L. Fite	
b) Treasurer's Report	Tony DelCampo Treasurer	152-197

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
c) Executive Director Report .....	Damon Elmore	
d) Young Lawyers Division .....	Elissa B. Haynes..... YLD President	198-201
e) Office of the General Counsel Report.....	Paula Frederick.....	202-204
f) Georgia Legal Services Program .....	Tomieka Daniel .....	205-206 Deputy Director
g) Chief Justice’s Committee on .....	Karlise Grier .....	207-219 Professionalism Report

**5) WRITTEN REPORTS**

a) Executive Committee Minutes		
(1) May 14, 2021 .....		220-224
(2) July 9, 2021 .....		225-229
(3) August 20, 2021.....		230-237
b) Law Practice Management .....		238-241
c) Media Report .....		242-243
d) Annual Meeting Evaluation Results .....		244-299

**6) CLOSING**

a) Old Business .....	Elizabeth L. Fite
b) New Business .....	Elizabeth L. Fite
c) Announcements .....	Elizabeth L. Fite
d) Executive Session .....	Elizabeth L. Fite
e) Remarks / Q&A / Comments / Suggestions	
f) Adjournment	

# 2021 FALL MEETING

## STATE BAR OF GEORGIA BOARD OF GOVERNORS & YOUNG LAWYERS DIVISION

THE WESTIN SAVANNAH HARBOR GOLF RESORT & SPA  
AND THE SAVANNAH CONVENTION CENTER  
SAVANNAH, GEORGIA • OCT. 22-24



PHOTO PROVIDED BY THE WESTIN SAVANNAH HARBOR GOLF RESORT AND SPA



State Bar  
of Georgia

**HOTEL CUT-OFF: FRIDAY, OCT. 15**  
**REGISTRATION CUT-OFF: FRIDAY, OCT. 15**



## SCHEDULE OF EVENTS

### FRIDAY, OCT. 22

11:30 a.m. - 12:30 p.m.  
ICLE Board

12 - 2 p.m.  
State Disciplinary Review Board

12:30 - 1 p.m.  
CCLC and ICLE Joint Lunch

1 - 2 p.m.  
Commission on Continuing  
Lawyer Competency

1:30 - 3 p.m.  
YLD Leadership Academy Committee

2 - 4 p.m.  
Disciplinary Rules and Procedures Committee

2:30 - 3:30 p.m.  
YLD Women in the Profession Committee  
(Offsite at Lulu's Chocolate Bar)

3 - 5 p.m.  
Member Benefits Committee  
3:30 - 5 p.m.  
YLD General Session  
6:30 - 9 p.m.  
Joint Board of Governors/YLD Dinner

### SATURDAY, OCT. 23

9 a.m. - 12 p.m.  
Board of Governors Meeting  
3 p.m.  
College Football Viewing Party  
at New Realm Distillery & Brewery

## YLD AND SPECIAL EVENTS

### YLD General Session

Friday, Oct. 22 • 3:30 p.m.

The General Session is open to all members. YLD officers will give reports and members of the YLD Executive Council will provide updates on projects and events.

### Board of Governors/Young Lawyers Division Reception and Dinner

Friday, Oct. 22 • 6:30 p.m.

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

### College Football Viewing Party at New Realm Distillery & Brewery

Saturday, Oct. 23 • 3 p.m.

Cost includes light hors d'oeuvres and drinks. Transportation on your own.

Join your fellow college football fans at New Realm Distillery & Brewery for a football

viewing party in a relaxed historic setting. Come up to the third floor with its rooftop terrace for fine food, craft cocktails and a tap list full of New Realm's Georgia-born craft beers. Limited space available, so be sure to register.

### Directions to New Realm Distillery & Brewery

Take the ferry\* from The Westin and ask to be dropped off at Savannah Riverwalk at City Hall. Take the elevator at the Hyatt Regency Hotel to the main street level and proceed to Whitaker Street directly in front of the hotel. Follow Whitaker all the way to New Realm, located on the left-hand side of the street at the corner of Whitaker and West Broughton Lane.

\*Service Alert: Savannah Belles Ferry Service is operating on a modified schedule until further notice. Operating hours currently run from 7 a.m. to 10 p.m., seven days a week.

## ACTIVITIES TO DO ON YOUR OWN

For information about the resort and area activities, visit [www.marriott.com/hotels/local-things-to-do/savwi-the-westin-savannah-harbor-golf-resort-and-spa/](http://www.marriott.com/hotels/local-things-to-do/savwi-the-westin-savannah-harbor-golf-resort-and-spa/).

## HOTEL ACCOMMODATIONS

Cut-off date • Friday, Oct. 15

Westin Savannah Harbor Golf Resort & Spa  
1 Resort Drive  
Savannah, GA 31421  
912-201-2000

[www.marriott.com/hotels/travel/savwi-the-westin-savannah-harbor-golf-resort-and-spa/](http://www.marriott.com/hotels/travel/savwi-the-westin-savannah-harbor-golf-resort-and-spa/)

The Westin Savannah Harbor Golf Resort & Spa will be our host hotel offering discounted room rates. A block of rooms has been reserved for the meeting. Our room rates are \$229 (standard room) and \$239 (river view), plus applicable taxes and \$5 transportation government fee.

To make reservations and receive our special rates, please call 888-627-8457 and mention you are with the State Bar of Georgia or visit <https://book.passkey.com/e/50205708>.

Reservations must be made by Friday, Oct. 15, as rooms will be on a space and rate availability basis after this date.

Check-in | 4 p.m.

Check-out | 11 a.m.

### ATTIRE

Business casual dress for all meetings.

### HEAVENLY SPA BY WESTIN™

Immerse yourself in the tranquility of Heavenly Spa by Westin™ at The Westin Savannah Harbor Golf Resort & Spa. Located within The Club at Savannah Harbor, just a short stroll from the hotel, the full-service spa offers a wide range of massages, body treatments, facials, nail services and more. For more information, please visit [www.westinsavannahspa.com](http://www.westinsavannahspa.com). The spa is open Monday through Wednesday 10 a.m. – 5 p.m. and Thursday through Sunday 10 a.m. – 6 p.m. State Bar meeting attendees will receive a 10% discount on 50-minute services. Call 912-201-2250 to schedule an appointment or book online.

## SAFETY PROTOCOLS

We will be implementing the following safety protocols for all attendees:

- Requiring the use of properly worn face masks at all indoor events.
- Requiring adherence to recommended social distancing measures.
- Encouraging testing three days prior to the meeting for all in-person attendees.

THANK YOU TO OUR  
5 GAVEL CORPORATE SPONSOR

**MB** | MemberBenefits



## REGISTRATION FORM

Please complete and remit the enclosed registration form by Friday, Oct. 15, 2021. Please use this form to register by checking all events you plan to attend. Registration is required for all events, including "no charge" functions.

### Attendee Information

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

Name \_\_\_\_\_

Nickname \_\_\_\_\_

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

Address \_\_\_\_\_

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

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

Email \_\_\_\_\_

### Special Needs

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

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

### Cancellation/Refund Policy

Cancellation of registration must be received in writing no later than Friday, Oct. 15, 2021. Cancellations will receive a full refund, less a \$25 administrative charge. Absolutely no refunds will be made after Friday, Oct. 15. Requests should be mailed to the State Bar of Georgia, Attn: Michelle Garner, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; faxed to 404-527-8717 or emailed to [michelleg@gabar.org](mailto:michelleg@gabar.org).

*Under Georgia law, there is no liability for an injury or death of an individual entering State Bar of Georgia premises, or premises occupied or leased by the State Bar of Georgia if such injury or death results from the inherent risks of contracting COVID-19. Attendees and guests are assuming this risk by entering such premises. Any person entering the premises waives all civil liability against the State Bar of Georgia for any injuries caused by the inherent risk associated with contracting COVID-19 at public gatherings, except for gross negligence, willful and wanton misconduct, reckless infliction of harm, or intentional infliction of harm, by the State Bar of Georgia.*

### Board of Governors Functions

	Virtual	In-person	
<input type="checkbox"/> Board of Governors/YLD Dinner	___	___	\$75
<input type="checkbox"/> Board of Governors Meeting	___	___	N/C

### Young Lawyers Division Function

<input type="checkbox"/> YLD General Session	___	___	N/C
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### Committee Functions

<input type="checkbox"/> ICLE Board Meeting	___	___	N/C
<input type="checkbox"/> Commission on Continuing Lawyer Competency	___	___	N/C
<input type="checkbox"/> Disciplinary Rules and Procedures	___	___	N/C
<input type="checkbox"/> Member Benefits Committee	___	___	N/C

### Special Event

<input type="checkbox"/> College Football Viewing Party at New Realm Distillery (Sat. afternoon)	___	___	\$40
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Total Enclosed \$ \_\_\_\_\_

### Credit Card Information

Please bill my  Visa  MasterCard  AmEx

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

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

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

Signature \_\_\_\_\_

### Payment Information

Credit card and "no charge" registrations may be faxed to 404-527-8717. Return with payment to: State Bar of Georgia Fall Board of Governors/YLD Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743, or register online at [www.gabar.org](http://www.gabar.org).





## Board of Governors Attendance Record

	1-20	4-20	6-20	10-20	1-21	3-21	6-21	6-21	
	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Friday	6-21
		Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Wild Dunes/Zoom	Saturday
Sarah Brown Akins	•	•	•	•	•	•	•	•	•
Mark W. Alexander	•	•	•	•	•	•	•	•	•
Kent Edward Allom	•	•	•	•	•	•	•	•	•
Anthony B. Askew	•	•	•	•	•	•	•	•	•
JaDawnya Cirtelle Baker	e	•	•	•	•	•	•	•	•
Nina M. Baker	•	•	•	u	•	•	•	u	•
Eric A. Ballinger	•	•	•	•	•	•	•	u	•
Donna G. Barwick	•	•	•	•	•	•	•	•	•
Tracee R. Benzo	•	•	•	•	•	•	•	•	•
James D. Blitch IV	•	•	•	•	•	e	•	•	•
Joshua I. Bosin	n/a	n/a	•	•	•	•	•	•	•
Sherry Boston	•	•	•	•	•	•	•	•	•
Ashley Mackin Brodie	•	•	•	•	•	•	•	•	•
Thomas R. Burnside	u	•	u	•	u	u	•	u	•
Stephanie D. Burton	•	•	•	•	•	•	•	•	•
Ivy Neal Cadle	•	•	•	•	•	•	•	•	•
Richard D. Campbell	•	•	•	•	•	e	•	•	•
David L. Cannon	u	•	•	u	•	u	•	•	•
Carl S. Cansino	•	•	•	e	•	•	•	u	•
Chris M. Carr	•	•	•	•	•	•	•	u	•
Carol V. Clark	•	•	•	•	•	•	•	•	•
Edward R. Collier	•	•	•	u	•	•	•	•	•
Daniel Jackson Connell III	n/a	n/a	n/a	n/a	n/a	n/a	•	•	•
Christopher S. Connelly	e	e	•	•	•	u	•	•	•
Martin L. Cowen III	•	•	•	•	•	•	•	•	•
Susan W. Cox	e	•	•	•	u	•	•	•	•
Kenneth B. Crawford	n/a	n	•	•	•	•	•	•	•
Terrence Lee Croft	•	•	•	•	•	e	•	•	•
Gerald Davidson Jr.	•	•	•	•	•	•	•	•	u
C. Lee Davis	•	•	•	•	•	e	•	•	•

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

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	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Friday
							Wild Dunes/Zoom	Saturday
J. Anderson Davis	•	•	•	e	•	•	•	•
Randall H. Davis	•	•	•	•	•	e	•	•
William T. Davis	•	•	•	•	•	•	u	•
J. Antonio Delcampo	•	•	•	•	•	•	•	•
Scott Dewitt Deltus	•	e	•	•	•	•	e	e
Joseph W. Dent	•	•	•	•	•	u	•	•
Foy R. Devine	•	u	•	u	u	•	u	u
Daniel S. Digby	•	•	•	•	•	•	e	e
Danny L. Durham	n/a	n/a	•	•	•	u	e	e
Susan E. Edlein	•	•	•	•	•	u	•	•
Christopher Edwards	•	•	•	•	•	•	u	•
Archibald A. Farrar	•	•	•	•	•	•	•	•
Elizabeth L. Fite	•	•	•	•	•	•	•	•
Amanda Renee Flora	n/a	n/a	n/a	n/a	n/a	n/a	•	•
Harold Eugene Franklin Jr.	•	•	•	•	•	•	•	•
Keigh E. Gammage	•	•	u	•	•	•	u	•
William C. Gentry	•	•	•	•	•	•	•	•
Michael G. Geoffroy	•	•	•	•	•	•	u	•
Patricia A. Gorham	•	•	•	•	•	•	•	•
Rebecca Holmes Liles Grist	n/a	n/a	n/a	n/a	n/a	n/a	•	•
Thomas B. "Britt" Hammond	n/a	n/a	n/a	n/a	n/a	n/a	•	•
John Haubenreich	•	•	•	•	•	•	•	•
Elissa B. Haynes	n/a	n	•	•	•	•	•	•
Patrick H. Head	•	e	•	•	•	•	•	•
Lawton C. Heard, Jr.	•	•	•	u	•	•	•	•
Render M. Heard Jr.	•	•	e	•	•	u	•	•
Amanda Nichole Heath	n/a	n/a	n/a	n/a	n/a	n/a	u	•
Matthew J. Hennessy	n/a	n	•	•	•	•	•	•
Thomas W. Herman	e	•	•	u	•	•	•	u
R. Jayayne Hicks	•	•	•	•	•	•	•	•

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		Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Wild Dunes/Zoom
Kimberly Wilkerson Higginbotham	n/a	n/a	n/a	n/a	n/a	n/a	.	.
Donna S. Hix	.	.	.	.	.	.	.	.
Michael D. Hobbs	.	.	.	.	.	u	e	e
Amy V. Howell	.	.	.	.	.	.	.	.
Bert Hummel IV	.	.	.	.	.	.	u	.
James W. Hurt	.	u	u	u	u	u	u	.
Christopher Huskins	.	u	u	.	.	u	u	u
Stacey K. Hydrick	e	.	.	.	.	u	.	.
James T. Irvin	.	.	.	.	.	.	.	.
William Dixon James	.	.	.	.	.	.	u	.
Curtis S. Jenkins	u	.	.	u	.	.	.	.
Charles Michael Johnson	.	.	.	.	.	u	u	.
Lester B. Johnson, III	.	.	.	.	.	.	.	.
Shiriki L. Cavitt Jones	.	.	.	.	.	.	.	.
Dawn M. Jones	.	.	.	.	.	.	.	.
Austin O. Jones	n/a	n	.	u	.	.	.	.
Jennifer A. Jordan	.	u	.	u	u	u	.	.
Zahra S. Karinshak	.	.	.	.	.	.	.	.
John F. Kennedy	.	.	u	u	.	.	u	.
Barry E. King	.	.	.	.	.	.	.	.
Judy C. King	.	.	.	.	.	.	.	.
Seth Kirschenbaum	.	.	.	.	.	.	.	.
Catherine Koura	.	u	.	.	.	.	.	.
Edward B. Krugman	e	.	.	.	.	.	e	.
Jeffrey R. Kuester	.	.	.	.	.	.	.	.
Rosten Dara Diya "Chimmy" Law	n/a	n/a	n/a	n/a	n/a	n/a	.	.
Allegra Lawrence-Hardy	.	.	.	.	.	.	.	e
Nicole C. Leet	.	.	.	.	.	.	.	.
Katie K. Leonard	.	.	.	.	.	u	.	.
Dawn Renee Levine	.	.	.	.	.	.	u	u

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	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Wild Dunes/Zoom
Joyce Gist Lewis	•	•	•	•	•	•	•	•
Lisa Katsuko Liang	u	•	•	•	•	•	u	•
David S. Lipscomb	•	•	•	•	•	•	•	•
John R. B. Long	•	•	•	•	•	•	•	•
Dax Eric Lopez	•	•	•	•	•	•	u	•
Ronald A. Lowry	•	u	u	u	•	•	u	u
John Bell Manly	•	e	•	u	•	•	•	•
Hugh J. McCullough	n/a	n	•	•	u	•	•	•
Graham Elliott McDonald	n/a	•	•	•	•	•	•	•
Letitia A. McDonald	•	•	•	•	•	•	•	•
Brad J. McFall	•	•	•	•	•	•	•	•
Scott R. McMillen	n/a	n/a	n/a	n/a	n/a	n/a	u	•
Michael D. McRae	•	•	•	•	•	•	u	•
Terry L. Miller	•	•	•	•	u	•	•	•
William J. Monahan	•	•	u	•	•	•	•	•
Shondeana Crews Morris	n/a	n/a	•	•	•	u	•	•
John T. Mroczko	u	u	u	u	u	u	u	u
Laura J. Murphee	•	•	•	•	•	•	•	•
Paul Wain Painter III	•	•	•	•	•	•	•	•
Amanda Rourk Clark Palmer	•	•	•	•	•	•	•	•
Jonathan B. Pannell	•	•	•	•	•	•	•	•
Joy Renea Parks	•	•	•	•	•	•	u	u
Tabitha Edwina Payne	•	•	•	•	u	•	u	•
Brandon Lee Peak	e	•	•	•	•	•	•	•
Will H. Pickett, Jr.	u	u	u	•	u	u	u	u
Robert Allen Pilumb Jr.	•	•	•	•	•	•	•	•
Kathryn Lauranne Powers	•	•	•	•	•	•	•	•
Jill Pryor	e	•	•	•	•	•	•	•
William M. Ragland	•	•	•	•	•	•	•	u
Tina S. Roddenbery	•	•	•	•	•	•	•	•

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### Board of Governors Attendance Record

	1-20	4-20	6-20	10-20	1-21	3-21	6-21	6-21
	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Wild Dunes/Zoom
Joseph Roseborough	•	•	•	•	u	u	u	u
Wesley Charles Ross	•	•	•	•	•	•	•	•
Claudia S. Saari	•	•	•	•	•	•	•	•
Alex Musole Shalishali	n/a	n/a	•	•	u	•	•	•
H. Burke Sherwood	•	•	•	•	•	•	•	•
Mitchell McKinley Shook	n/a	n/a	•	•	•	•	•	•
Robert H. Smalley, III	•	•	•	•	•	•	•	•
Philip C. Smith	•	•	•	•	•	•	•	•
R. Rucker Smith	•	•	•	•	•	•	•	•
Daniel B. Snipes	•	•	u	•	•	u	•	•
R. Gary Spencer	•	•	•	•	•	•	•	•
H. Craig Stafford	•	•	•	•	•	•	•	•
Lawton E. Stephens	u	•	•	•	•	•	•	•
Donna Coleman Stribling	•	•	•	•	•	•	u	•
C. Deen Strickland	u	•	•	•	•	•	u	•
Frank B. Strickland	•	•	•	•	•	•	•	•
Joseph C. Sumner, Jr.	•	u	•	•	•	•	u	u
Darrell L. Sutton	•	•	•	•	•	•	•	•
Jason W. Swindle	•	•	u	•	•	u	•	•
Michael B. Terry	•	•	•	•	•	•	•	•
Anita W. Thomas	•	u	u	•	•	•	u	•
Stephen Elliot Tillman	n/a	n/a	n/a	n/a	n/a	n/a	u	•
Edward D. Tolley	•	•	u	u	•	•	u	u
Clayton Tomlinson	u	•	e	•	•	•	•	•
Chris P. Twyman	•	•	•	•	•	•	•	•
William Underwood III	•	•	•	•	u	u	•	•
Martin E. Valbuena	•	•	•	•	•	•	•	•
Nicki N. Vaughan	e	•	•	•	•	•	•	•
Carl A. Veline, Jr.	•	•	•	•	•	•	u	•
J. Henry Walker	•	•	•	•	•	•	u	u

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

### Board of Governors Attendance Record

	1-20	4-20	6-20	10-20	1-21	3-21	6-21	6-21	
	ATL	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Zoom Webinar	Wild Dunes/Zoom	Friday Wild Dunes/Zoom	Saturday Wild Dunes/Zoom
Janice M. Wallace	•	•	•	•	•	•	•	•	•
Amy Carol Walters	•	•	•	•	•	•	•	•	•
Harold B. Watts	•	•	•	•	•	•	•	•	•
John P. Webb	•	•	•	•	•	•	•	•	•
Christopher F. West	u	u	u	u	u	u	u	u	u
Nancy J. Whaley	•	•	•	•	•	•	•	•	•
Paige Reese Whitaker	•	•	•	•	•	•	•	•	•
Martha Wilson Williams	•	•	•	•	•	•	•	u	•
Douglas Woodruff	•	•	•	•	u	•	•	•	•
• - attended meeting									

# Future Meetings Schedule

(9/28/2021)



## State Bar of Georgia

### Executive Committee

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Nov. 5, 2021	Bar Center, hybrid – 12 p.m.
Dec. 10, 2021	Bar Center, hybrid – 12 p.m.
Jan. 14, 2022	Zoom, all virtual – 12 p.m.
Feb. 18, 2022	Tifton office, hybrid – 1 p.m.
March 11, 2022	Zoom, all virtual – 1 p.m.
April 15, 2022	Zoom, all virtual – 1 p.m.
May 13, 2022	Columbus, GA – TBD, hybrid – 12 p.m.

### Board of Governors

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Fall 2021	Oct. 22-24, 2021	Westin Savannah & Westin Savannah Trade Center, Savannah, GA (Joint with YLD)
Midyear 2022	Jan. 6-8, 2022	Westin Buckhead Atlanta, GA
Spring 2022	April 1-3, 2022	Hyatt Place Athens/Classic Center Athens, GA (contract pending)
Annual 2022	June 2-5, 2022	Omni Amelia Island Resort Amelia Island, FL

### Young Lawyers Division

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Fall 2021	Oct. 22-24, 2021	Westin Savannah & Westin Savannah Trade Center, Savannah, GA (Joint with BOG)
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Midyear 2022	Jan. 6-8, 2022	Westin Buckhead Atlanta, GA
Spring 2022	March 18-20, 2022	Westin Chattanooga Chattanooga, TN
Annual 2022	June 2-5, 2022	Omni Amelia Island Resort Amelia Island, FL

**American Bar Association Meetings**

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Midyear 2022	Feb. 9-14, 2022	Seattle, WA
Annual 2022	Aug. 3-9, 2022	Chicago, IL

**Southern Conference Meetings**

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2021	Oct. 20-24, 2021	Grand Floridian Resort Orlando, FL
2022	Oct. 27-30, 2022	Omni Resorts, Barton Creek Austin, TX
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**  
**Friday, June 11, 2021, 9:00 a.m.**  
**Wild Dunes Resort/Isle of Palms, South Carolina**  
**Hybrid and available via Zoom**

The 287<sup>th</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. President Dawn M. Jones presided.

Pledge of Allegiance

Board of Governors Member Shiriki Jones led the pledge of allegiance to those in attendance.

Invocation

Board of Governors Member Francys Johnson gave the invocation.

Special Recognition

President Dawn M. Jones recognized the members of the judiciary, the past presidents of the State Bar and other special guests in attendance.

Recognition of Retiring Executive Committee Members and Retiring Board Members

President Dawn M. Jones recognized the following retiring Executive Committee and Board of Governors members: Immediate Past President Darrell Lee Sutton; Immediate YLD Past President William Thomas Davis; Amy Howell, Executive Committee (remaining on the BOG); Larry Michael Johnson, Alapaha Circuit, Post 1; Sam G. Nicholson, Augusta Circuit, Post 1; James L. Roberts IV, Brunswick Circuit, Post 1; Gregory A. Futch, Flint Circuit, Post 1; Ira L. Foster, Member-at-Large, Post 1; Francys Johnson Jr., Member-at-Large, Post 2; Thomas Alexander Peterson IV, Middle Circuit, Post 2; Walter James Gordon Sr., Northern Circuit, Post 1; Philip Augustine, Out-of-State, Post 1; and Dennis C. Sanders, Toombs Circuit.

Roll Call

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

Future Meetings Schedule

President-elect Elizabeth L. Fite reviewed the Future Meetings Schedule.

Minutes of the 286<sup>th</sup> Meeting of the Board of Governors

The minutes of the Board of Governors meeting held March 20, 2021, via Zoom, were approved by unanimous voice and poll vote.

Inactive Sections

President Dawn M. Jones reported on the Individual Rights Law Section and Law and Economics Section. She reported that at this time last year, there were six sections that had not been active in many years. As a result, the Board of Governors reviewed the rules in January and approved a revision to the section rules regarding those sections who become inactive. Sections Director Mary Jo Sullivan contacted each inactive section multiple times. The two who did not respond and show interest in reviving the section were the Individual Rights Law and Law and Economics sections. All necessary steps to abolish

the sections have been met, including notice to the last known section leadership and members by email and notice posted on the Bar's website. Per Article IX Sections, Section 5. Abolition of Sections, the Board of Governors, by majority voice and poll vote, agreed to abolish the Individual Rights Law Section and the Law and Economics Section. If there are members who would like to reinstate either of these sections, per the rules, they will follow the same process as if they were establishing a new section.

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

#### Members' Meeting Minutes

The minutes of the Members' Meeting held during the Midyear Meeting on January 9, 2021, via Zoom, were approved by majority voice and poll vote.

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

#### Awards and Presentations

The following State Bar awards and presentations were made:

##### Military Legal Assistance Program (MLAP)

MLAP Chair Jay Elmore presented the 2019 Marshall-Tuttle Award to Charles Shanor and the 2020 Marshall-Tuttle Award to Douglas G. Andrews.

##### Juvenile Law and Child Advocacy Awards

JP Berlon presented the 2021 Judge Willie Lovett Award for Advancing the Field of Juvenile Law to Hon. LeRoy Burke III, presiding judge of the Chatham County Juvenile Court, retired; and Ira Foster, general counsel/deputy director, Georgia Legal Services Program.

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

Supreme Court Justice David Nahmias presented the award to Charles Williams, Rockdale County Division of Family and Children Services (case manager), and Afiya F. Hinkson, The Hinkson Firm, LLC (lawyer).

##### Chief Justice Thomas O. Marshall Professionalism Awards

Immediate Past President Darrell Sutton presented the 2020 Chief Justice Thomas O. Marshall Professionalism Awards to Hon. Toby Batson Prodggers, retired judge, State Court of Cobb County, Marietta (judge) and A. James Elliott, Dean, Emory University School of Law, Atlanta (lawyer). President Dawn M. Jones presented the 2021 Chief Justice Thomas O. Marshall Professionalism Awards to Hon. John D. Allen, Chattahoochee Circuit Superior Court (retired), Columbus (judge); and George W. "Buddy" Darden III, Pope McGlamry, Atlanta (lawyer).

##### Check Presentation to Georgia Legal Services (GLSP)

President Dawn M. Jones presented an \$827,270 check to Ira Foster, GLSP General Counsel, which represents contributions made by Bar members for the 2020 GLSP "And Justice for All" Campaign.

##### Recognition of Corporate Sponsor

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

President Dawn M. Jones presented the following awards:

Local and Voluntary Bar Awards

2020 Thomas R. Burnside, Jr. Excellence in Bar Leadership Award: Rebecca Dally.

2021 Thomas R. Burnside, Jr. Excellence in Bar Leadership Award: Hon. Joy Lampley-Fortson.

2020 Award of Merit: Walton County Bar Association (Under 50 members), Gwinnett County Bar Association (101 to 250 members), Georgia Association of Black Women Attorneys (251 to 500 members), Atlanta Bar Association (501 members or more).

2021 Award of Merit: Walton County Bar Association (51 to 100 members), Georgia Association of Black Women Attorneys (251 to 500 members), Cobb County Bar Association (501 members or more).

2020 Law Day Award of Achievement: Walton County Bar Association (Under 50 members), Gwinnett County Bar Association (101 to 250 members).

2021 Law Day Award of Achievement: Walton County Bar Association (51 to 100 members), Houston County Bar Association (101 to 250 members).

2020 Best Newsletter Award: Gwinnett County Bar Association (101 to 250 members), Georgia Defense Lawyers Association (501 members or more).

2021 Best Newsletter Award: Gwinnett County Bar Association (101 to 250 members), Georgia Defense Lawyers Association (501 members or more).

2020 Best Website Award: Walton County Bar Association (Under 50 members), Gwinnett County Bar Association (101 to 250 members).

2021 Best Website Award: Walton County Bar Association (51 to 100 members), Gwinnett County Bar Association (101 to 250 members), Cobb County Bar Association (501 members or more).

2020 President's Cup Award: Georgia Association of Black Women Attorneys.

2021 President's Cup Award: Georgia Association of Black Women Attorneys.

President's Report

President Dawn M. Jones delivered the President's Address (Exhibit B).

State of the Supreme Court of Georgia

Hon. Harold Melton, chief justice of the Supreme Court of Georgia, delivered the State of the Supreme Court of Georgia address.

State of the Court of Appeals of Georgia

Hon. Christopher McFadden, chief judge of the Court of Appeals of Georgia, delivered the State of the Court of Appeals of Georgia address.

Office of the Attorney General

Attorney General Chris Carr delivered the State of the Office of the Attorney General.

State of the Office of Governor

Executive Counsel David Dove delivered the State of the Office of Governor on behalf of Gov. Brian Kemp.

State of the Georgia House Judiciary Committee

Rep. Chuck Efration, chair of the House Judiciary Committee, reported on the activities of the House Judiciary Committee.

State of the Georgia Senate Special Judiciary Committee

Sen. Jennifer Jordan, chair of the Senate Judiciary Committee, reported on the activities of the Senate Judiciary Committee.

Memorials

President Dawn M. Jones presented the Memorials report.

Young Lawyers Division

Young Lawyers Division President Bert Hummel reported on the activities of the YLD. Hummel said that this was not the year that anyone envisioned, but he was proud of what the YLD was able to accomplish regardless of the circumstances. He said that the YLD had received the benefit of many leaders this year. The Poll Worker Program in conjunction with the Secretary of State's office was a huge success; they had hundreds of volunteers who served as poll workers and deputy registrars. Each Bar member who volunteered with their county's Board of Elections, completed poll worker training, worked at their local polling place on Election Day and donated their reimbursement check was eligible to receive six hours of CLE credit. The donated reimbursement checks benefited the YLD's Public Interest Internship Program, allowing the program to award four grants this year. Hummel also reported that the YLD's Women in the Profession Committee continued their wills program to provide estate planning for frontline workers in the fight against COVID-19, helping several hundred Georgians. The Georgia Legal Food Frenzy was a resounding success, raising more than \$934,000, setting a new record. The YLD also sponsored the Atlanta Volunteer Lawyers Foundation's Saturday Lawyers Program, providing impactful results for several Georgians in their time of need. Hummel thanked the Board for their support during his year and wished Incoming YLD President Elissa Haynes luck as he turned over the YLD to her.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

There were no announcements.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

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

Adjournment

There being no additional business, the meeting was adjourned at 11:45 a.m.

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Tony DeCampo, Secretary

Approved:

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Dawn M. Jones, President

**- DRAFT -**  
**STATE BAR OF GEORGIA**  
**BOARD OF GOVERNORS**  
**MEETING MINUTES**  
**Saturday, June 12, 2021, 9:00 a.m.**  
**Wild Dunes Resort/Isle of Palms, South Carolina**  
**Hybrid and available via Zoom**

The 288<sup>th</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the date and location shown above. President Elizabeth L. Fite presided.

Pledge of Allegiance

Supreme Court of Georgia Justice Carla Wong McMillian led the pledge of allegiance to those in attendance.

Invocation

Board of Governors Member C. Sutton Connelly 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.

Welcome to New Officers and Board Members

President Elizabeth L. Fite recognized the new officers and Board of Governors members.

Roll Call

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

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule.

Section Awards

Immediate Past President Dawn M. Jones presented the Section Awards. Section awards are presented to outstanding sections for their dedication and service to their areas of practice, and for devoting endless hours of volunteer effort to the profession. The Equine Law Section was awarded Section of the Year. The Construction Law Section, the Fiduciary Law Section and the Nonprofit Law Section were awarded Section Awards of Achievement. Peter Crofton, chair of the Construction Law Section, accepted the award on behalf of the section. The remainder of the sections will receive their awards following the meeting.

Approval of President's Appointments to the State Disciplinary Boards

The Board of Governors approved the following presidential appointments to the State Disciplinary Boards by unanimous voice and poll vote:

State Disciplinary Board

John Herbert Cranford Jr., Newnan (2024)  
Robert Rogers Giannini, Lawrenceville (2022)  
Jeffrey R. Harris, Savannah (2024)  
Margaret Ware Sigman Puccini, Savannah (2024)

State Disciplinary Review Board

At-Large: D. Pearson Beardsley, Atlanta (2024)

Lay Member: Susan Leger-Boike, Cordele (2024)

Formal Advisory Opinion Board

Georgia Trial Lawyers Association: C. Andrew Childers, Atlanta (2023)

Georgia Defense Lawyers Association: Jacob Edward Daly, Atlanta (2023)

Young Lawyers Division: Donavan Keith Eason, Savannah (2023)

Member: David Neal Lefkowitz, Athens (2023)

At-Large: Edward B. Krugman, Atlanta (2023)

John Marshall: Jeffrey Alan Van Detta, Atlanta (2023)

Mercer University: Patrick E. Longan, Macon (2023)

University of Georgia: Lonnie Theodore Brown Jr., Athens (2023)

Approval of the ICLE Board

The Board of Governors approved the proposed 2021-2022 ICLE Board by unanimous voice and poll vote.

Approval of 2021-2022 Standing, Special & Program Committees and Boards

The Board of Governors approved the proposed 2021-2022 Standing, Special & Program Committees and Boards by unanimous voice and poll vote.

President's Address

President Elizabeth L. Fite delivered the President's Address (Exhibit B).

Nominations to the Judicial Qualifications Commission (JQC)

Following a report by President Elizabeth L. Fite, the Board of Governors, by unanimous voice and poll vote, approved the following list of nominees, as revised, to the Judicial Qualifications Commission, which was submitted by the JQC Nominating Committee: Robert O. Bozeman, M. Gino Brogdon Sr., Caren Cloud, J. Anderson "Andy" Davis, Jeffrey Reese Davis, Keith Elliot Gammage, W. Pope Langdale, Tiffany Darcel, Williams Roberts, Toronda "Tori" Michelle Silas and R. Gary Spencer. Pursuant to O.C.G.A. § 15-1-21, the names will be provided to Lt. Gov. Geoff Duncan.

Treasurer's Report

Treasurer Tony DelCampo reported on the Bar's finances and investments. He reported that the financial strength of the Bar is good and referred the Board of Governors to the written financial reports in the Board Book. DelCampo called specific attention to the variance explanations, where any line item that exceeds more than \$100 is explained and how each variance will be handled within each departmental budget. He explained that the Bar was budgeted at a net loss of \$336,081, and the Bar Center Operations were budgeted at a net gain of \$550,592. DelCampo reported that the Georgia Public Defender Council moved out of the Bar Center and is no longer a tenant, reducing the amount of the anticipated rental income. Because of the pandemic, parking deck revenue was also reduced. However, due to the ongoing pandemic, these changes were expected, and everyone continues to be focused on the budget as they work to mitigate the loss of revenue from tenant and parking income.

The Board of Governors received copies of the combined Operations and Bar Center Consolidated Revenues and Expenditures Report as of March 31, 2021; Bar Center Revenues and Expenditures Summary for the Nine Months Ending March 31, 2021; Year to Date Operations Income Statement Ending March 31, 2021; Status and Use of Cash Investments as of March 31, 2021; Board-Designated and Donor Temporarily Restricted Net Assets as of March 31, 2021; Summary of Members and Voluntary Contributions to GLSP Paid through March 31, 2021; Summary of Members and Voluntary Legislative

Contributions Paid through March 31, 2021; Legislative Activity Report from July 1, 2020 through March 31, 2021; Summary of Clients' Security Fund Activity for the Current Period Ending March 31, 2021; and Institute of Continuing Legal Education Income Statement Ending March 31, 2021.

#### 2021-2022 State Bar Budget

Treasurer Tony DelCampo presented the Fiscal Year 2021-2022 Proposed Consolidated Budget and ICLE Budget (Exhibit C), which the Board of Governors approved by majority voice and poll vote. The proposed Consolidated Budget reflects the following:

- 1) License fees at \$254 for active members and \$127 for inactive members, which represents no license fee increase from the 2020-2021 Bar year;
- 2) Section dues to be reflected on the license fee statement ranging from \$10-\$40; and
- 3) Continuation of the assessment required by Bar Rules regarding the Clients' Security Fund (\$100 @ \$25/year, beginning with the second full fiscal year following a member's year of admission); and
- 4) Professionalism Fee (\$11) (mandated by the Supreme Court); and
- 5) Continuation of a \$100 voluntary contribution for the Legislative and Public Education Fund; and
- 6) A suggested \$400 individual contribution (\$100 for young lawyers) for the Georgia Legal Services Program.

#### Financial Resolutions

The Board of Governors approved the following financial resolutions by unanimous voice and poll vote:

- 1) As required by Article V, Section 8 of the Bylaws, 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) Pursuant to Article V, Section 6 of the Bylaws, the Board directed 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 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 2020-2021.

Executive Director Election

The Board of Governors elected Damon Elmore as executive director for the 2021-2022 Bar year by unanimous voice and poll vote.

Election Schedule 2021-2022

The Board of Governors approved the proposed 2021-2022 Elections Schedule (Exhibit D) by unanimous voice and poll vote.

Election Committee Recommendation

The Board of Governors, by unanimous voice and poll vote, approved the Election Committee's recommendation of changing how members choose to receive paper ballots from opt-out to opt-in. In the past three years, 78-81% ballots that were cast in the BOG election were electronic. Changing to an opt-in method will reduce the cost of the election by approximately \$17,000 to \$18,000. The committee is planning a publicity strategy to ensure members are well informed of the changes to the process and encouraged to participate in the election.

Executive Committee Election

The Executive Committee election was held with the following results after the Board of Governors accepted the slate of candidates by majority voice and poll vote:

One-Year Term 2021-2022

Nominations:

Candidate: Bill Gentry  
Nominator: Darrell Sutton  
Seconded: Tina Roddenbery

Results:

Elected by majority ballot vote for a one-year term

Candidate: Nicole Leet  
Nominator: Will Davis  
Seconded: Amy Walters

Two-Year Term 2021-2022

Nominations:

Candidate: R. Javoyne Hicks  
Nominator: Judge Shondeana Morris  
Seconded: Lester Johnson

Elected by majority ballot vote for two-year term

Candidate: Shiriki Jones  
Nominator: Amy Howell  
Seconded: Brandon Peak

Elected by majority ballot vote for two-year term

Candidate: Nicole Leet  
Nominator: Will Davis  
Seconded: Amy Walters

Candidate: David S. Lipscomb  
Nominator: Gary Spencer  
Seconded: John Haubenreich

Elected by majority ballot vote for two-year term

#### Georgia Legal Services Program Appointments

By unanimous voice and poll vote, the Board of Governors approved the appointments of William Gregory II, Tennell Lockett, Darrell Sutton and Suzanne Werner for two-year terms to the Georgia Legal Services Program Board.

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

By unanimous voice and poll vote, the Board of Governors approved the appointment of Christopher J. Chan for a three-year term to the Chief Justice's Commission on Professionalism.

#### Young Lawyers Division President's Report

YLD President Elissa Haynes said that she was grateful to be the 75<sup>th</sup> president of the Young Lawyers Division this year, and she thanked Outgoing YLD President Bert Hummel for his service and dedication to the YLD during a difficult year where almost all meetings and events were held via Zoom. Haynes stated that her goals will be: 1) encouraging and promoting inclusivity and involvement in the YLD, and she encouraged Board members to help support young lawyers in their participation in the YLD; 2) increase legislative involvement from young lawyers because of the extremely low number of lawyers in the Legislature; 3) greater interaction between the YLD and the Board of Governors, holding joint meetings and gatherings; and 4) focusing on technology, including a virtual option for all of her meetings to encourage participation. Haynes also plans to create a YLD-wide listserv for people who may not have the benefit of a law firm or access to a listserv like GDLA or GTLA, so they can ask questions or receive support; focus on attorney wellness; secure new and interesting speakers for YLD CLEs and events; create a Hamilton-themed CLE for Constitution Day; and continue the momentum of the Legal Food Frenzy.

#### Executive Director's Report

Executive Director Damon Elmore reported on current Bar operations. He thanked everyone for their vote of confidence and extension of his term as executive director. Elmore reported that Bar staff will begin working from the Bar Center and satellite offices beginning in July, on a staggered schedule to ensure the safest re-entry into the buildings. The Coastal and South Georgia offices have been hosting small meetings and space for depositions for our members, leading the way in helping us determine the best way to hold larger meetings and gatherings. Elmore took time to highlight the work of several departments over the past several months, illustrating that the work of the Bar has continued despite the pandemic.

He reported that he will be focusing on the following items in the coming months: 1) continuing to work on plans to attract new tenants and optimize the use of 104 Marietta Street; 2) being intentional and connecting with members and key stakeholders to share the story of the work we are doing and gathering feedback, opinions and suggestions as we are always open to improve and enhance our value; and 3) get into a groove of supporting our staff and carrying out the work of the Board of Governors and Bar leadership. Elmore thanked President Dawn Jones and Chief Justice Harold Melton for supporting him in his new role.

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

Hon. Susan Edlein reported on the activities of the Chief Justice's Commission on Professionalism. CJCP has offered many CLEs over the last several months. In March, CJCP held the "Unparalleled Unity" CLE that was attended by 1,600 people. The CLE focused on how the legal profession can lead the way in bridging the gap of division and social unrest we are currently facing in society. In April, CJCP hosted the Suicide Awareness Program, where many spoke honestly and bravely about a very difficult topic. Judge Edlein directed Board members to CJCP's website to volunteer for the upcoming law school orientations and to find more information about grant applications.

### Georgia Bar Foundation Report

There was no report.

### Legislative Report

Governmental Affairs Director Christine Butcher Hayes reported that the Bar successfully lobbied the passing of both the family law bill and guardianship rewrite bill. The online notary bill did not pass and will continue next year in the second year of the session. Hayes reported on HB 166, a bill that would require the Bar to remit its funds to the General Assembly for appropriation on an annual basis, and HR 427, a study committee that would solely be done by the House that would look at the structure and function of the Bar as well as how it budgets its funds. Neither the bill nor the study committee ended up getting a vote in the House, but both will continue into next year because it was the first year of the legislative session. She said they plan to use the leadership of the Bar and lobbying team to educate members of the Legislature and the Bar about the Bar's structure and operations in regards to both disciplinary and administrative duties. She reported on HB 411, a bill to create a prosecuting entity similar to the JQC for district attorneys and solicitors. It did not pass during session but will continue next year. She introduced Kyle Williams as the new chair of the Advisory Committee on Legislation and thanked Javoyne Hicks for her service as last year's chair. She stated that she was grateful for the support of the Bar's contract lobbyists Rusty Sewell, Mark Middleton and Roy Robinson. Lastly, Hayes thanked the Bar's leadership and the Board of Governors for their support of the legislative program.

### Georgia Statewide Business Court Report

Hon. Walt W. Davis reported on the Georgia Statewide Business Court. He said that it had been two years since the governor asked him to take on and create the Business Court, which officially opened on Aug. 1, 2020. He reported that they created the Business Court and got it running by: 1) building, designing, developing rules and a web presence; and 2) marketing the Business Court with many speaking engagements. As a result, the Business Court has had 37 cases filed since August. Judge Davis offered to visit any place to tell people about the new Business Court.

### Clients' Security Fund

Secretary Ivy Cadle gave an informational report on the Clients' Security Fund. He said that the Board continuously looks for ways to be good stewards of the Bar's money, and the Clients' Security Fund is a potential assessment on members. He wanted the Board to be educated on the subject so they could in turn educate their constituents. The CSF is a pool of funds that the State Bar has in order to pay clients when their lawyer steals their money. It does not have anything to do with malpractice insurance, but rather just the theft of money from clients. The Board of Trustees reviews the individual claims, and there is a limit of \$25,000 per claim. Cadle said that in considering the Clients' Security Fund, the Board should remember that the mission statement of the Bar is to protect the public, and this fund directly protects the public from unethical attorneys. Those attorneys are typically subject to disciplinary action, and if they try to be reinstated, they must pay back all the funds that were paid on their behalf as part of their reinstatement.

Cadle said that the question is how we fund this program going forward. The rules on funding this program were initially passed in the 1980s. Cadle pointed out that as we have more lawyers and more claims, and it is time for the rules to be reviewed and updated. Traditionally, it's been funded by Rule 1-506, where each new member of the Bar is charged \$100, payable over four years at \$25 per year. Historically, that is approximately \$200,000 per Bar year. There is a maximum payout of \$500,000 each year, and the trustees and program usually run out of funds about halfway through the year. The funding gap was made up by a CCLC grant of \$388,000 in June 2020, and then a \$1 million transfer from the ICLE account was approved in March 2021. The money from the CCLC was accompanied by an expectation from the Supreme Court of Georgia that a permanent funding solution be found. The money from ICLE was moved into the CSF to avoid an assessment, up to \$25 per Bar member, during the pandemic.

Cadle reported that currently, the fund balance is \$1.9 million, giving the Board time to figure out how to fix this issue permanently. There is a Bar rule that says if the fund goes below \$1 million, all members have to be assessed an amount that will bring the fund back up to \$1 million. Past President Bob Kauffman, as a long-time trustee of the CSF, was asked how to best fund it. Kauffman proposed, and the trustees unanimously approved, that the Bar seek a level of contribution of \$15 per year from every lawyer. This amount would be added to the Bar dues and would then be designated to the CSF, which would give the fund the right amount of money to continue operating. At the same time, there are rules that would need to be updated to reflect this change. Cadle stated that he believes the program is important as it gives the Bar a chance to make people whole again, even if it is not a perfect solution. All states have a Clients' Security Fund, and they all operate differently.

Board members requested that they receive statistics on what the average person is requesting to be reimbursed. They wanted to make sure that \$15 is enough, and if this amount truly makes it sustainable. Another Board member asked if any restitution is sought from the lawyer who stole money from their client. Cadle assured he would get this information to the Board prior to their next meeting.

#### State Bar of Georgia Audit Report

The Board of Governors received a copy of the State Bar of Georgia Audit Report for the year-end 2020 and related auditor's letter regarding governance.

#### Executive Committee Minutes

The Board of Governors received a copy of the minutes of the Executive Committee meeting held on Feb. 26, 2021, March 16, 2021, and April 16, 2021.

#### Office of the General Counsel

The Board of Governors received a written memorandum from the Office of the General Counsel with a link to access online the Annual Report of the Office of the General Counsel.

#### Insurance Committee

The Board of Governors received a written report from the Insurance Committee.

#### Fee Arbitration Program

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

#### Law Practice Management Program

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

#### Sections' Annual Reports

The Board of Governors received written reports from the following sections: Administrative Law Section, Animal Law Section, Antitrust Law Section, Child Protection and Advocacy Section, Construction Law Section, Creditors' Rights Section, Employee Benefits Law Section, Equine Law Section, Family Law Section, Fiduciary Law Section, General Practice & Trial Law Section, Nonprofit Law Section and Professional Liability Section.

#### Unlicensed Practice of Law Program

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

Communications Media Report

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

Wellness Newsletter

The Board of Governors received a copy of Volume 1, Number 2, of the Wellness Newsletter, presented by the Attorney Wellness Committee.

Old Business

Fite reminded the Board of Governors that they would hear a presentation by the Professional Liability Insurance Committee at the 2021 Fall Board of Governors Meeting on Oct. 23, 2021.

New Business

There was no new business.

Remarks/Q&A/Comments/Suggestions

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

Adjournment

There being no further business, the meeting was adjourned at 12 p.m.

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Ivy Cadle, Secretary

Approved:

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Elizabeth L. Fite, President



Memorandum to: Members, Board of Governors  
From: Paula Frederick, General Counsel  
Date: September 28, 2021  
Re: Proposed amendment to Comment 6, Rule 1.1 of the  
Georgia Rules of Professional Conduct

At the 2019 Fall meeting (October 19, 2019) the Board approved an amendment to Georgia Rule of Professional Conduct 1.1, *Competence*. The amendment revises Comment 6, which deals with maintaining competence, to add the following language:

To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, **including the benefits and risks associated with relevant technology**, engage in continuing study and education, and comply with all continuing legal education requirements to which the lawyer is subject.

Bar Counsel filed a Motion requesting the change on February 28, 2020. After reviewing the Motion, the Supreme Court asked the Office of the General Counsel to return this matter to the Board for further discussion.

pjf  
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## RULE 1.1 COMPETENCE

...

Comment

...

Maintaining Competence

[6] ~~To maintain the requisite knowledge and skill, a lawyer should engage in continuing study and education. To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education, and comply with all continuing legal education requirements to which the lawyer is subject.~~

If the proposed amendments to the rule are approved, the amended rule would read as follows:

### RULE 1.1 COMPETENCE

A lawyer shall provide competent representation to a client. Competent representation as used in this rule means that a lawyer shall not handle a matter which the lawyer knows or should know to be beyond the lawyer's level of competence without associating another lawyer who the original lawyer reasonably believes to be competent to handle the matter in question. Competence requires the legal knowledge, skill, thoroughness and preparation reasonably necessary for the representation.

The maximum penalty for a violation of this rule is disbarment.

Comment

Legal Knowledge and Skill

[1A] The purpose of these rules is not to give rise to a cause of action nor to create a presumption that a legal duty has been breached. These rules are designed to provide guidance to lawyers and to provide a structure for regulating conduct through disciplinary agencies. They are not designed to be a basis for civil liability.

[1B] In determining whether a lawyer employs the requisite knowledge and skill in a particular matter, relevant factors include the relative complexity and specialized nature of the matter, the lawyer's general experience, the lawyer's training and experience in the field in question, the preparation and study the lawyer is able to give the matter and whether it is feasible to refer the matter to, or associate or consult with, a lawyer of established competence in the field in question. In many instances, the required proficiency is that of a general practitioner. Expertise in a particular field of law may be required in some circumstances.

[2] A lawyer need not necessarily have special training or prior experience to handle legal problems of a type with which the lawyer is unfamiliar. A newly admitted lawyer can be as competent as a practitioner with long experience. Some important legal skills, such as the analysis of precedent, the evaluation of evidence and legal drafting, are required in all legal problems. Perhaps the most fundamental legal skill consists of determining what kind of legal problems a situation may involve, a skill that necessarily transcends any particular specialized knowledge. A lawyer can provide adequate representation in a wholly novel field through necessary study. Competent representation can also be provided through the association of a lawyer of established competence in the field in question.

[3] In an emergency a lawyer may give advice or assistance in a matter in which the lawyer does not have the skill ordinarily required where referral to or consultation or association with another lawyer would be impractical. Even in an emergency, however, assistance should be limited to that reasonably



necessary in the circumstances, for ill-considered action under emergency conditions can jeopardize the client's interest.

[4] A lawyer may accept representation where the requisite level of competence can be achieved by reasonable preparation. This applies as well to a lawyer who is appointed as counsel for an unrepresented person subject to Rule 6.2: Accepting Appointments.

### Thoroughness and Preparation

[5] Competent handling of a particular matter includes inquiry into and analysis of the factual and legal elements of the problem, and use of methods and procedures meeting the standards of competent practitioners. It also includes adequate preparation. The required attention and preparation are determined in part by what is at stake; major litigation and complex transactions ordinarily require more elaborate treatment than matters of lesser consequence.

### Maintaining Competence

[6] To maintain the requisite knowledge and skill, a lawyer should keep abreast of changes in the law and its practice, including the benefits and risks associated with relevant technology, engage in continuing study and education, and comply with all continuing legal education requirements to which the lawyer is subject.



MEMORANDUM

To: Board of Governors

From: Bill NeSmith

Date: September 28, 2021

Re: Proposed Fee Arbitration Rules changes

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Following the directives from the Supreme Court Georgia at the March 16, 2019, extended meeting between the Court and the Executive Committee, the Fee Arbitration Committee is proposing a change to its rules so that the Program be utilized only by consent of both the Petitioner and Respondent. This is a summary of the Fee Arbitration Program Committee rules changes, which include:

1. The Preamble has been edited, deleting any reference to the participants being allowed to engage in non-binding arbitration.
2. Rule 6-201 has been edited to limit the Petition for arbitration to 50 pages.
3. Rule 6-203 has been edited to limit the Answer to 50 pages.
4. Rule 6-204 has been edited to raise the threshold amount in dispute from \$750 to \$1,000 and deletes any reference to the participants engaging in non-binding arbitration.
5. Rule 6-503 has been edited and deletes any reference to the participants engaging in non-binding arbitration.
6. The Preamble, Rule 6-201, Rule 6-204, Rule 6-417, and Rule 6-503 have

been edited to delete reference to the ability of participants to engage in non-binding arbitration and to provide that the Petitioner and the Respondent must agree to be bound by the arbitration award or the matter will not be accepted for arbitration and that all awards are binding on the petitioner and respondent and enforceable under the Georgia Arbitration Code.

7. The Preamble has been edited to include language informing the lawyer who does not agree to be bound by the arbitration, that after reviewing the client's petition, the Committee may make a referral to the Office of General Counsel for consideration of an inquiry into a possible disciplinary action based on Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule 1.15 (failure to return unearned fees) or such other Rules as may be appropriate.

1 Part VI - Arbitration of Fee Disputes

2 Preamble

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

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

17 ~~A unique feature of this program is that, if~~ a client initiates the arbitration process ~~and~~  
18 ~~agrees to be bound by the result of the arbitration~~ and the respondent lawyer refuses to be  
19 bound by any resulting award, the matter will not be accepted for ~~still be submitted to~~  
20 ~~arbitration if, after investigation by the Committee or its staff, the client's claim appears to~~  
21 ~~warrant a hearing.~~

22 ~~If the client prevails in the arbitration, the State Bar of Georgia, upon the written request~~  
23 ~~of the client, may provide a lawyer to represent the client in post-award proceedings at no cost~~

~~other than court filing fees and litigation expenses. Alternatively, the Office of the General Counsel of the State Bar of Georgia may represent, assist, or advise a client in post-award proceedings. If at any time during the process as set forth in these rules, based upon information received or a lack of information received, the Committee may make a referral to the Office of the General Counsel for consideration of an inquiry into a possible disciplinary action based on Georgia Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule 1.16 (d) (failure to return unearned fees) or other applicable rules.~~

## CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE DISPUTES

### Rule 6-101. Administration of Program.

This program will be administered by the State Bar Committee on the Arbitration of Attorney Fee Disputes ("Committee").

### Rule 6-102. Committee Membership.

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

### Rule 6-103. Terms.

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

47 Rule 6-104. Powers and Duties of Committee.

48 The Committee shall have the following powers and duties:

- 49 (a) To determine whether to accept jurisdiction over a dispute;
- 50 (b) To appoint and remove lawyer and nonlawyer arbitrators and panels of  
51 arbitrators;
- 52 (c) To oversee the operation of the arbitration process;
- 53 (d) To develop and implement fee arbitration procedures;
- 54 (e) To interpret these rules and to decide any disputes regarding the interpretation  
55 and application of these rules;
- 56 (f) To determine challenges to and rule on, the neutrality of an arbitrator where  
57 the arbitrator does not voluntarily withdraw;
- 58 (g) To maintain the records of the State Bar of Georgia's Fee Arbitration Program;  
59 and
- 60 (h) To perform all other acts necessary for the effective operation of the Fee  
61 Arbitration Program.

62 Rule 6-105. Staff's Responsibilities.

63 State Bar of Georgia staff shall be assigned to assist the Committee. The assigned staff  
64 will have such administrative responsibilities as may be delegated by the Committee, which  
65 may include the following:

- 66 (a) Receive and review arbitration requests and discuss them with the parties, if  
67 necessary;
- 68 (b) Conduct inquiries to obtain additional information as needed;

69 (c) Make recommendations to the Committee whether to accept or decline  
70 jurisdiction; and

71 (d) Transmit notices of arbitration hearings, arbitration awards, and other  
72 Committee correspondence.

## 73 CHAPTER 2 JURISDICTIONAL GUIDELINES

### 74 Rule 6-201. Petition.

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

78 (a) A statement of the nature of the dispute and the petitioner's statement of facts,  
79 including relevant exhibits and dates. The statement must be double-spaced, typed in a  
80 12-point font or hand written and is limited to 50 pages including exhibits. The page  
81 limit may be increased by the Fee Arbitration staff for good cause shown;

82 (b) The names and addresses of the client(s) and the ~~attorney~~lawyer(s);

83 (c) A statement as to whether or not~~that~~ the petitioner has made a good faith effort  
84 to resolve the dispute and the details of that effort;

85 (d) A statement that by filing the petition, the petitioner has agreeds to be bound by  
86 the result of the arbitration;

87 (e) The date of the petition; and

88 (f) Each petitioner's signature.

### 89 Rule 6-202. Service of Petition.

90 If a petition has been properly completed and appears to have merit, Committee staff  
91 shall serve a copy of the petition, along with a Fee Arbitration Answer Form and an

92 acknowledgment of service form, upon the respondent by ~~first~~-first-class mail addressed to  
93 such party's last known address. A signed acknowledgment of service form or a written answer  
94 from the respondent or respondent's ~~counsel~~attorney shall constitute conclusive proof of  
95 service and shall eliminate the need to utilize any other form of service.

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

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

102 If service is not accomplished, the Committee shall not accept jurisdiction of the case.  
103 Rule 6-203. Answer.

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

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

109 (a) If the respondent is the client and/or payer, a statement as to whether the  
110 respondent agrees to be bound by the result of the arbitration;

111 (b) The respondent's statement of facts. The statement must be double-spaced,  
112 typed in a 12-point font or hand written, and the submission is limited to 50 pages  
113 including exhibits. The page limit may be increased by the Fee Arbitration staff for  
114 good cause shown;



- 115 (c) Any defenses the respondent intends to assert;
- 116 (d) The date of the answer; and
- 117 (e) Each respondent's signature.

118 Committee staff shall serve a copy of the answer upon each petitioner by first class  
119 mail, addressed to such party's last known address.

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

122 Rule 6-204. Accepting Jurisdiction.

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

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

128 (b) The legal services in question were performed:

129 (1) in the State of Georgia; or

130 (2) from an office located in the State of Georgia; or

131 (3) by a lawyer who is not admitted to the practice of law in any United  
132 States jurisdiction other than Georgia, and the circumstances are such that if the  
133 State Bar of Georgia does not accept jurisdiction, no other United  
134 States jurisdiction will be available to a client who has filed a petition under  
135 this program.

136 (c) The disputed fee exceeds \$1,000,750.

137 (d) The amount of the disputed fee is not governed by statute or other law, nor has  
138 any court fixed or approved the full amount or all terms of the disputed fee.

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

141 (f) The petition seeking arbitration of the fee dispute is filed with the Committee  
142 no more than two years following the date on which the controversy arose. If this date  
143 is disputed, it shall be determined in the same manner as the commencement of a cause  
144 of action on the underlying contract.

145 (g) In the case of disputes between lawyers and clients, a lawyer/client relationship  
146 existed between the petitioner and the respondent at the time the legal services in  
147 question were performed. A relative or other person paying the legal fees of the client  
148 may request arbitration of disputes over those fees, provided both the client and the  
149 other person payor join as co-petitioners or co-respondents and both agree to be bound  
150 by the result of the arbitration.

151 (h) The client, whether petitioner or respondent, agrees to be bound by the result of  
152 the arbitration. If the respondent ~~lawyer~~ ~~attorney~~ does not agree to be bound by the  
153 result of the arbitration, the Committee will not accept the matter for arbitration ~~in its~~  
154 ~~discretion may determine that it is in the best interest of the public and the legal~~  
155 ~~profession to accept jurisdiction. When the Committee accepts jurisdiction under these~~  
156 ~~circumstances, the nonconsenting lawyer shall be considered a “party” for purposes of~~  
157 ~~these rules.~~

158 (i) In disputes between lawyers, the lawyers who are parties to the dispute are all  
159 members of the State Bar of Georgia and have all agreed to arbitrate the dispute under  
160 this program and to be bound by the result of the arbitration.

161 ~~(j) Additionally, w~~Where the parties to a fee dispute have signed a written  
162 agreement to submit fee disputes to binding arbitration with the State Bar of Georgia's  
163 Attorney Fee Arbitration Program, the Committee will consider the agreement  
164 enforceable if it is:

- 165 (1) set out in a separate paragraph;
- 166 (2) written in a font size at least as large as the rest of the contract; and
- 167 (3) separately initialed by the client and the ~~lawyer~~attorney.

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

#### 174 Rule 6-205. Termination or Suspension of Proceedings.

175 The Committee may suspend or terminate arbitration proceedings or may decline or  
176 terminate jurisdiction if the client, in addition to pursuing arbitration of a fee dispute under  
177 these rules, asserts a claim against the lawyer in any court arising out of the same set of  
178 circumstances, including any claim of malpractice. Any claim or evidence of professional  
179 misconduct within the meaning of the ~~Georgia Code~~ Rules of Professional Responsibility

180 Conduct may be reported by the arbitrators or the Committee to the Office of the General  
181 Counsel for consideration under its normal procedures.

182 Rule 6-206. Revocation.

183 After jurisdiction has been accepted by the Committee ~~and the other party has agreed~~  
184 ~~in writing to be bound by the award~~, the submission to arbitration shall be irrevocable except  
185 by consent of all parties or by action of the Committee or the arbitration panel for good cause  
186 shown.

### 187 CHAPTER 3 SELECTION OF ARBITRATORS

188 Rule 6-301. Roster of Arbitrators.

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

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

196 Rule 6-302. Neutrality of Arbitrators.

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

201 If an arbitrator becomes aware of any circumstances that might preclude that arbitrator  
202 from rendering an objective and impartial determination of the proceeding, the arbitrator must

203 disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the  
204 potential conflict prior to the hearing, the disclosure shall be made to the Committee, which  
205 shall forward the disclosure to the parties. If the potential conflict becomes apparent during the  
206 hearing, the disclosure shall be made directly to the parties.

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

211 Rule 6-303. Selection of Arbitrators.

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

215 In cases involving disputed amounts ~~greater than \$750 but~~ not exceeding \$2,500, the  
216 Committee in its sole discretion may appoint an arbitration panel consisting of one lawyer who  
217 has practiced law actively for at least five years.

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

223 Rule 6-304. Qualifications of Lawyer Arbitrators.

224 In addition to being impartial, lawyer arbitrators shall:

225 (a) Have practiced law actively for at least five years; and

226 (b) Be an active member in good standing of the State Bar of Georgia.

227 Rule 6-305. Powers and Duties of Arbitration Panel.

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

229 (a) To compel by subpoena the attendance of witnesses and the production of  
230 documents and things;

231 (b) To decide the extent and method of any discovery;

232 (c) To administer oaths and affirmations;

233 (d) To take and hear evidence pertaining to the proceeding;

234 (e) To rule on the admissibility of evidence;

235 (f) To interpret and apply these rules insofar as they relate to the arbitrators' powers  
236 and duties; and

237 (g) To perform all acts necessary to conduct an effective arbitration hearing.

238 Rule 6-306. Compensation.

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

243 CHAPTER 4 RULES OF PROCEDURE

244 Rule 6-401. Representation by Counsel.

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

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

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

253 Rule 6-403. Attendance and Participation at Hearing.

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

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

261 Rule 6-404. Stenographic Record.

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

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

268           If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration  
269 is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee

270 or its designee shall determine the course of further proceedings and may appoint a substitute  
271 or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

272 Rule 6-406. Discovery, Subpoenas and Witnesses.

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

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

281 Rule 6-407. Adjournments.

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

284 Rule 6-408. Arbitrators' Oath.

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

288 Rule 6-409. Order of Proceedings.

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



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

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

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

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

301 Rule 6-411. Evidence.

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

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

311 (c) The names and addresses of all witnesses who testify at the arbitration shall be  
312 made a part of the record. Upon their own motion or at the request of any party, the  
313 arbitrators shall have the power to require the sequestration of any witness during the  
314 testimony of other witnesses.

315 (d) The arbitrators may receive and consider the evidence of witnesses by affidavit  
316 (copies of which shall be served on the opposing party at least five days prior to the  
317 hearing); but shall give such evidence only such weight as the arbitrators deem proper  
318 after consideration of any objections made to its admissibility.

319 (e) The petition, answer, and other pleadings, including any documents attached  
320 thereto, may be considered as evidence at the discretion of the arbitrators and given  
321 such weight as the arbitrators deem appropriate.

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

325 Rule 6-412. Written Contract.

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

328 Rule 6-413. Closing of Hearings.

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

333 Rule 6-414. Reopening of Hearings.

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

338 Rule 6-415. Waiver of Rules.

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

342 Rule 6-416. Waiver of Oral Hearings.

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

344 Rule 6-417. Award.

345 ~~If both parties have agreed to be bound by the arbitration, the award of the arbitrators~~  
346 ~~is final and binding upon the parties.~~The award of the arbitrators is final and binding upon the  
347 parties.

348 ~~In cases in which a lawyer refuses to be bound by the result of the arbitration, the award~~  
349 ~~rendered will be considered as prima facie evidence of the fairness of the award in any action~~  
350 ~~brought to enforce the award, and the burden of proof shall shift to the lawyer to prove~~  
351 ~~otherwise.~~

352 Rule 6-418. Time of Award.

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

358 Rule 6-419. Form of Award.

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

362 Rule 6-420. Award Upon Settlement.

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

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

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

371 Rule 6-422. Communication with Arbitrators.

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

373 Rule 6-423. Interpretation and Application of Rules.

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

379 CHAPTER 5 POST-AWARD PROCEEDINGS

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

381 In cases where ~~both parties agreed to be bound by the result of the arbitration and an~~  
382 award in favor of a client has not been satisfied within three months after it was served upon  
383 the parties, the client may apply to the appropriate Georgia superior court for confirmation of  
384 the award in accordance with the Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

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

390 Rule 6-502. Confirmation of Award in Favor of LawyerAttorney.

391 In cases where ~~both parties agreed to be bound by the result of the arbitration and an~~  
392 award has been issued in favor of ~~a lawyeran attorney~~, the ~~lawyerattorney~~ may apply to the  
393 appropriate Georgia superior court for confirmation of the award in accordance with the  
394 Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

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

397 Rule 6-503. ~~Procedure Where Lawyer Refuses to be Bound~~Enforcement of Arbitration  
398 Awards.

399 ~~In cases where an attorney refuses to be bound by the result of an arbitration and an~~  
400 ~~award in favor of a client remains unsatisfied three months after service of the award upon the~~  
401 ~~parties, the State Bar of Georgia, upon the written request of the client, may provide a lawyer~~  
402 ~~to represent the client in post-award proceedings at no cost to the client other than court filing~~  
403 ~~fees and litigation expenses. Alternatively, the Office of the General Counsel of the State Bar~~

404 of Georgia may represent, assist, or advise a client in post-award proceedings, provided the  
405 client shall be responsible for all court filing fees and litigation expenses.

406 An award rendered in favor of a client in a case in which the attorney refused to be  
407 bound by the result of the arbitration will be considered as prima facie evidence of the fairness  
408 of the award, and the burden of proof shall shift to the lawyer to prove otherwise.All arbitration  
409 awards under these rules are enforceable under the Georgia Arbitration Code, [OCGA, C.G.A.](#)  
410 [§9-9-1 et seq.](#)

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

## 416 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND IMMUNITY

### 417 Rule 6-601. Confidentiality.

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

422 A person who was not a party to the dispute shall not be allowed access to such  
423 materials unless all parties to the arbitration consent in writing or a court of competent  
424 jurisdiction orders such access. However, the Committee, its staff, or representative may reveal  
425 confidential information in those circumstances in which the Office of the General Counsel is  
426 authorized by Bar Rule 4-221 1(d) to do so.

427 Rule 6-602. Record Retention.

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

430 Rule 6-603. Immunity.

431 ~~Committee members, arbitrators, staff, and appointed voluntary counsel assisting the~~  
432 ~~program shall be immune from suit for any conduct in the course and scope of their official~~  
433 ~~duties under this program. Parties and witnesses shall have such immunity as is applicable in~~  
434 ~~a civil action in Georgia.~~ The Supreme Court of Georgia recognizes the Fee Arbitration Program  
435 of the State Bar of Georgia to be judicial and quasi-judicial in nature and within the Court's  
436 regulatory function, and in connection with such arbitration proceedings, members of the Fee  
437 Arbitration Committee, volunteer arbitrators, appointed voluntary counsel assisting the  
438 program and State Bar of Georgia Fee Arbitration staff are entitled to those immunities  
439 customarily afforded to persons so participating in judicial and quasi-judicial proceedings or  
440 engaged in such arbitration activities.

441 Part VI - Arbitration of Fee Disputes

442 Preamble

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

449 Committee on the Arbitration of Attorney Fee Disputes (“Committee”) to arbitrate the dispute  
450 pursuant to these rules.

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

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

459         If at any time during the process as set forth in these rules, based upon information  
460 received or a lack of information received, the Committee may make a referral to the Office of  
461 the General Counsel for consideration of an inquiry into a possible disciplinary action based  
462 on Georgia Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule  
463 1.16 (d) (failure to return unearned fees) or other applicable rules.

#### 464 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE DISPUTES

##### 465 Rule 6-101. Administration of Program.

466         This program will be administered by the State Bar Committee on the Arbitration of  
467 Attorney Fee Disputes (“Committee”).

##### 468 Rule 6-102. Committee Membership.

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



472 Rule 6-103. Terms.

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

480 Rule 6-104. Powers and Duties of Committee.

481           The Committee shall have the following powers and duties:

- 482           (a) To determine whether to accept jurisdiction over a dispute;
- 483           (b) To appoint and remove lawyer and nonlawyer arbitrators and panels of  
484 arbitrators;
- 485           (c) To oversee the operation of the arbitration process;
- 486           (d) To develop and implement fee arbitration procedures;
- 487           (e) To interpret these rules and to decide any disputes regarding the interpretation  
488 and application of these rules;
- 489           (f) To determine challenges to, and rule on, the neutrality of an arbitrator where  
490 the arbitrator does not voluntarily withdraw;
- 491           (g) To maintain the records of the State Bar of Georgia's Fee Arbitration Program;  
492 and
- 493           (h) To perform all other acts necessary for the effective operation of the Fee  
494 Arbitration Program.

495 Rule 6-105. Staff's Responsibilities.

496 State Bar of Georgia staff shall be assigned to assist the Committee. The assigned staff  
497 will have such administrative responsibilities as may be delegated by the Committee, which  
498 may include the following:

499 (a) Receive and review arbitration requests and discuss them with the parties, if  
500 necessary;

501 (b) Conduct inquiries to obtain additional information as needed;

502 (c) Make recommendations to the Committee whether to accept or decline  
503 jurisdiction; and

504 (d) Transmit notices of arbitration hearings, arbitration awards, and other  
505 Committee correspondence.

## 506 CHAPTER 2 JURISDICTIONAL GUIDELINES

507 Rule 6-201. Petition.

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

511 (a) A statement of the nature of the dispute and the petitioner's statement of facts,  
512 including relevant exhibits and dates. The statement must be double-spaced, typed in a  
513 12-point font or hand written and is limited to 50 pages including exhibits. The page  
514 limit may be increased by the Fee Arbitration staff for good cause shown;

515 (b) The names and addresses of the client(s) and the lawyer(s);

516 (c) A statement as to whether or not the petitioner has made a good faith effort to  
517 resolve the dispute;

- 518 (d) A statement that by filing the petition, the petitioner has agreed to be bound by  
519 the result of the arbitration;
- 520 (e) The date of the petition; and
- 521 (f) Each petitioner's signature.

522 Rule 6-202. Service of Petition.

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

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

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

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

536 Rule 6-203. Answer.

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

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

542 (a) If the respondent is the client and/or payer, a statement as to whether the  
543 respondent agrees to be bound by the result of the arbitration;

544 (b) The respondent's statement of facts. The statement must be double-spaced,  
545 typed in a 12-point font or hand written, and the submission is limited to 50 pages  
546 including exhibits. The page limit may be increased by the Fee Arbitration staff for  
547 good cause shown;

548 (c) Any defenses the respondent intends to assert;

549 (d) The date of the answer; and

550 (e) Each respondent's signature.

551 Committee staff shall serve a copy of the answer upon each petitioner by first class  
552 mail, addressed to such party's last known address.

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

555 Rule 6-204. Accepting Jurisdiction.

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

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

561 (b) The legal services in question were performed:

562 (1) in the State of Georgia; or

- 563 (2) from an office located in the State of Georgia; or
- 564 (3) by a lawyer who is not admitted to the practice of law in any United  
565 States jurisdiction other than Georgia, and the circumstances are such that if the  
566 State Bar of Georgia does not accept jurisdiction, no other United  
567 States jurisdiction will be available to a client who has filed a petition under  
568 this program.
- 569 (c) The disputed fee exceeds \$1,000.
- 570 (d) The amount of the disputed fee is not governed by statute or other law, nor has  
571 any court fixed or approved the full amount or all terms of the disputed fee.
- 572 (e) The fee dispute is not the subject of litigation in court at the time the petition  
573 for arbitration is filed or when the Committee determines jurisdiction.
- 574 (f) The petition seeking arbitration of the fee dispute is filed with the Committee  
575 no more than two years following the date on which the controversy arose. If this date  
576 is disputed, it shall be determined in the same manner as the commencement of a cause  
577 of action on the underlying contract.
- 578 (g) In the case of disputes between lawyers and clients, a lawyer/client relationship  
579 existed between the petitioner and the respondent at the time the legal services in  
580 question were performed. A relative or other person paying the legal fees of the client  
581 may request arbitration of disputes over those fees, provided both the client and the  
582 other person payor join as co-petitioners or co-respondents and both agree to be bound  
583 by the result of the arbitration.

584 (h) The client, whether petitioner or respondent, agrees to be bound by the result of  
585 the arbitration. If the respondent lawyer does not agree to be bound by the result of the  
586 arbitration, the Committee will not accept the matter for arbitration.

587 (i) In disputes between lawyers, the lawyers who are parties to the dispute are all  
588 members of the State Bar of Georgia and have all agreed to arbitrate the dispute under  
589 this program and to be bound by the result of the arbitration.

590 (j) Where the parties to a fee dispute have signed a written agreement to submit  
591 fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee  
592 Arbitration Program, the Committee will consider the agreement enforceable if it is:

- 593 (1) set out in a separate paragraph;
- 594 (2) written in a font size at least as large as the rest of the contract; and
- 595 (3) separately initialed by the client and the lawyer.

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

602 Rule 6-205. Termination or Suspension of Proceedings.

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

607 misconduct within the meaning of the Georgia Code of Professional Responsibility may be  
608 reported by the arbitrators or the Committee to the Office of the General Counsel for  
609 consideration under its normal procedures.

610 Rule 6-206. Revocation.

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

#### 614 CHAPTER 3 SELECTION OF ARBITRATORS

615 Rule 6-301. Roster of Arbitrators.

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

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

623 Rule 6-302. Neutrality of Arbitrators.

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

628 If an arbitrator becomes aware of any circumstances that might preclude that arbitrator  
629 from rendering an objective and impartial determination of the proceeding, the arbitrator must

630 disclose that potential conflict as soon as practicable. If the arbitrator becomes aware of the  
631 potential conflict prior to the hearing, the disclosure shall be made to the Committee, which  
632 shall forward the disclosure to the parties. If the potential conflict becomes apparent during the  
633 hearing, the disclosure shall be made directly to the parties.

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

#### 638 Rule 6-303. Selection of Arbitrators.

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

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

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

#### 650 Rule 6-304. Qualifications of Lawyer Arbitrators.

651 In addition to being impartial, lawyer arbitrators shall:

652 (a) Have practiced law actively for at least five years; and



653 (b) Be an active member in good standing of the State Bar of Georgia.

654 Rule 6-305. Powers and Duties of Arbitration Panel.

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

656 (a) To compel by subpoena the attendance of witnesses and the production of  
657 documents and things;

658 (b) To decide the extent and method of any discovery;

659 (c) To administer oaths and affirmations;

660 (d) To take and hear evidence pertaining to the proceeding;

661 (e) To rule on the admissibility of evidence;

662 (f) To interpret and apply these rules insofar as they relate to the arbitrators' powers  
663 and duties; and

664 (g) To perform all acts necessary to conduct an effective arbitration hearing.

665 Rule 6-306. Compensation.

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

670 CHAPTER 4 RULES OF PROCEDURE

671 Rule 6-401. Representation by Counsel.

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

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

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

680 Rule 6-403. Attendance and Participation at Hearing.

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

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

688 Rule 6-404. Stenographic Record.

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

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

695           If an arbitrator dies, resigns, or becomes unable to continue to act while an arbitration  
696 is pending, the remaining two arbitrators shall not proceed with the arbitration. The Committee

697 or its designee shall determine the course of further proceedings and may appoint a substitute  
698 or replacement arbitrator or, by agreement of the parties, may proceed with one arbitrator.

699 Rule 6-406. Discovery, Subpoenas and Witnesses.

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

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

708 Rule 6-407. Adjournments.

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

711 Rule 6-408. Arbitrators' Oath.

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

715 Rule 6-409. Order of Proceedings.

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

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

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

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

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

728 Rule 6-411. Evidence.

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

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

738           (c) The names and addresses of all witnesses who testify at the arbitration shall be  
739 made a part of the record. Upon their own motion or at the request of any party, the  
740 arbitrators shall have the power to require the sequestration of any witness during the  
741 testimony of other witnesses.

742 (d) The arbitrators may receive and consider the evidence of witnesses by affidavit  
743 (copies of which shall be served on the opposing party at least five days prior to the  
744 hearing); but shall give such evidence only such weight as the arbitrators deem proper  
745 after consideration of any objections made to its admissibility.

746 (e) The petition, answer, and other pleadings, including any documents attached  
747 thereto, may be considered as evidence at the discretion of the arbitrators and given  
748 such weight as the arbitrators deem appropriate.

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

752 Rule 6-412. Written Contract.

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

755 Rule 6-413. Closing of Hearings.

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

760 Rule 6-414. Reopening of Hearings.

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

765 Rule 6-415. Waiver of Rules.

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

769 Rule 6-416. Waiver of Oral Hearings.

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

771 Rule 6-417. Award.

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

773 Rule 6-418. Time of Award.

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

779 Rule 6-419. Form of Award.

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

783 Rule 6-420. Award Upon Settlement.

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

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

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

792 Rule 6-422. Communication with Arbitrators.

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

794 Rule 6-423. Interpretation and Application of Rules.

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

## 800 CHAPTER 5 POST-AWARD PROCEEDINGS

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

802 In cases where an award in favor of a client has not been satisfied within three months  
803 after it was served upon the parties, the client may apply to the appropriate Georgia superior  
804 court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A.  
805 § 9-9-1 et seq.

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

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

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

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

817 Rule 6-503. Enforcement of Arbitration Awards.

818 All arbitration awards under these rules are enforceable under the Georgia Arbitration  
819 Code, [OCGA.C.G.A.-O.C.G.A. §9-9-1](#) et seq.

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

## 825 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND IMMUNITY

826 Rule 6-601. Confidentiality.

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

831 A person who was not a party to the dispute shall not be allowed access to such  
832 materials unless all parties to the arbitration consent in writing or a court of competent  
833 jurisdiction orders such access. However, the Committee, its staff, or representative may reveal



834 confidential information in those circumstances in which the Office of the General Counsel is  
835 authorized by Bar Rule 4-221.1 to do so.

836 Rule 6-602. Record Retention.

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

839 Rule 6-603. Immunity.

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

1 Part VI - Arbitration of Fee Disputes

2 Preamble

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

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

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

19 If at any time during the process as set forth in these rules, based upon information  
20 received or a lack of information received, the Committee may make a referral to the Office of  
21 the General Counsel for consideration of an inquiry into a possible disciplinary action based  
22 on Georgia Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule  
23 1.16 (d) (failure to return unearned fees) or other applicable rules.

24 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE DISPUTES

25 Rule 6-101. Administration of Program.

26 This program will be administered by the State Bar Committee on the Arbitration of  
27 Attorney Fee Disputes ("Committee").

28 Rule 6-102. Committee Membership.

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

32 Rule 6-103. Terms.

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

40 Rule 6-104. Powers and Duties of Committee.

41 The Committee shall have the following powers and duties:

- 42 (a) To determine whether to accept jurisdiction over a dispute;
- 43 (b) To appoint and remove lawyer and nonlawyer arbitrators and panels of  
44 arbitrators;
- 45 (c) To oversee the operation of the arbitration process;
- 46 (d) To develop and implement fee arbitration procedures;

47 (e) To interpret these rules and to decide any disputes regarding the interpretation  
48 and application of these rules;

49 (f) To determine challenges to, and rule on, the neutrality of an arbitrator where  
50 the arbitrator does not voluntarily withdraw;

51 (g) To maintain the records of the State Bar of Georgia's Fee Arbitration Program;  
52 and

53 (h) To perform all other acts necessary for the effective operation of the Fee  
54 Arbitration Program.

55 Rule 6-105. Staff's Responsibilities.

56 State Bar of Georgia staff shall be assigned to assist the Committee. The assigned staff  
57 will have such administrative responsibilities as may be delegated by the Committee, which  
58 may include the following:

59 (a) Receive and review arbitration requests and discuss them with the parties, if  
60 necessary;

61 (b) Conduct inquiries to obtain additional information as needed;

62 (c) Make recommendations to the Committee whether to accept or decline  
63 jurisdiction; and

64 (d) Transmit notices of arbitration hearings, arbitration awards, and other  
65 Committee correspondence.

66 CHAPTER 2 JURISDICTIONAL GUIDELINES

67 Rule 6-201. Petition.

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

- 71 (a) A statement of the nature of the dispute and the petitioner's statement of facts,  
72 including relevant exhibits and dates. The statement must be double-spaced, typed in a  
73 12-point font or hand written and is limited to 50 pages including exhibits. The page  
74 limit may be increased by the Fee Arbitration staff for good cause shown;
- 75 (b) The names and addresses of the client(s) and the lawyer(s);
- 76 (c) A statement as to whether or not the petitioner has made a good faith effort to  
77 resolve the dispute ;
- 78 (d) A statement that by filing the petition, the petitioner has agreed to be bound by  
79 the result of the arbitration;
- 80 (e) The date of the petition; and
- 81 (f) Each petitioner's signature.

82 Rule 6-202. Service of Petition.

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

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

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

95 If service is not accomplished, the Committee shall not accept jurisdiction of the case.  
96 Rule 6-203. Answer.

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

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

- 102 (a) If the respondent is the client and/or payer, a statement as to whether the  
103 respondent agrees to be bound by the result of the arbitration;
- 104 (b) The respondent's statement of facts. The statement must be double-spaced,  
105 typed in a 12-point font or hand written, and the submission is limited to 50 pages  
106 including exhibits. The page limit may be increased by the Fee Arbitration staff for  
107 good cause shown;
- 108 (c) Any defenses the respondent intends to assert;
- 109 (d) The date of the answer; and
- 110 (e) Each respondent's signature.

111 Committee staff shall serve a copy of the answer upon each petitioner by first class  
112 mail, addressed to such party's last known address.

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

115 Rule 6-204. Accepting Jurisdiction.

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

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

121 (b) The legal services in question were performed:

122 (1) in the State of Georgia; or

123 (2) from an office located in the State of Georgia; or

124 (3) by a lawyer who is not admitted to the practice of law in any United  
125 States jurisdiction other than Georgia, and the circumstances are such that if the  
126 State Bar of Georgia does not accept jurisdiction, no other United  
127 States jurisdiction will be available to a client who has filed a petition under  
128 this program.

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

130 (d) The amount of the disputed fee is not governed by statute or other law, nor has  
131 any court fixed or approved the full amount or all terms of the disputed fee.

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

134 (f) The petition seeking arbitration of the fee dispute is filed with the Committee  
135 no more than two years following the date on which the controversy arose. If this date  
136 is disputed, it shall be determined in the same manner as the commencement of a cause  
137 of action on the underlying contract.

138 (g) In the case of disputes between lawyers and clients, a lawyer/client relationship  
139 existed between the petitioner and the respondent at the time the legal services in  
140 question were performed. A relative or other person paying the legal fees of the client  
141 may request arbitration of disputes over those fees, provided both the client and the  
142 other person payor join as co-petitioners or co-respondents and both agree to be bound  
143 by the result of the arbitration.

144 (h) The client, whether petitioner or respondent, agrees to be bound by the result of  
145 the arbitration. If the respondent lawyer does not agree to be bound by the result of the  
146 arbitration, the Committee will not accept the matter for arbitration.

147 (i) In disputes between lawyers, the lawyers who are parties to the dispute are all  
148 members of the State Bar of Georgia and have all agreed to arbitrate the dispute under  
149 this program and to be bound by the result of the arbitration.

150 (j) Where the parties to a fee dispute have signed a written agreement to submit  
151 fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee  
152 Arbitration Program, the Committee will consider the agreement enforceable if it is:

- 153 (1) set out in a separate paragraph;
- 154 (2) written in a font size at least as large as the rest of the contract; and
- 155 (3) separately initialed by the client and the lawyer.



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

162 Rule 6-205. Termination or Suspension of Proceedings.

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

170 Rule 6-206. Revocation.

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

174 CHAPTER 3 SELECTION OF ARBITRATORS

175 Rule 6-301. Roster of Arbitrators.

176 The Committee shall maintain a roster of lawyers available to serve as arbitrators on  
177 an “as needed” basis in appropriate geographical areas throughout the state. To the extent  
178 possible, the arbitration should take place in the same geographical area where the services in

179 question were performed; however, the final decision as to the location of the arbitration  
180 remains with the Committee.

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

183 Rule 6-302. Neutrality of Arbitrators.

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

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

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

198 Rule 6-303. Selection of Arbitrators.

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

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

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

210 Rule 6-304. Qualifications of Lawyer Arbitrators.

211 In addition to being impartial, lawyer arbitrators shall:

- 212 (a) Have practiced law actively for at least five years; and
- 213 (b) Be an active member in good standing of the State Bar of Georgia.

214 Rule 6-305. Powers and Duties of Arbitration Panel.

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

- 216 (a) To compel by subpoena the attendance of witnesses and the production of  
217 documents and things;
- 218 (b) To decide the extent and method of any discovery;
- 219 (c) To administer oaths and affirmations;
- 220 (d) To take and hear evidence pertaining to the proceeding;
- 221 (e) To rule on the admissibility of evidence;
- 222 (f) To interpret and apply these rules insofar as they relate to the arbitrators' powers  
223 and duties; and
- 224 (g) To perform all acts necessary to conduct an effective arbitration hearing.

225 Rule 6-306. Compensation.

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

230 CHAPTER 4 RULES OF PROCEDURE

231 Rule 6-401. Representation by Counsel.

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

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

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

240 Rule 6-403. Attendance and Participation at Hearing.

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

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

248 Rule 6-404. Stenographic Record.

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

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

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

259 Rule 6-406. Discovery, Subpoenas and Witnesses.

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

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

268 Rule 6-407. Adjournments.

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

271 Rule 6-408. Arbitrators' Oath.

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

275 Rule 6-409. Order of Proceedings.

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

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

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

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

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

288 Rule 6-411. Evidence.

289 (a) Parties may offer such relevant and material evidence as they desire and shall  
290 produce such additional evidence as the arbitrators may deem necessary to an  
291 understanding and determination of the dispute. The arbitrators shall be the judge of

293 liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and  
294 given such weight as the arbitrators deem appropriate.

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

298 (c) The names and addresses of all witnesses who testify at the arbitration shall be  
299 made a part of the record. Upon their own motion or at the request of any party, the  
300 arbitrators shall have the power to require the sequestration of any witness during the  
301 testimony of other witnesses.

302 (d) The arbitrators may receive and consider the evidence of witnesses by affidavit  
303 (copies of which shall be served on the opposing party at least five days prior to the  
304 hearing), but shall give such evidence only such weight as the arbitrators deem proper  
305 after consideration of any objections made to its admissibility.

306 (e) The petition, answer, and other pleadings, including any documents attached  
307 thereto, may be considered as evidence at the discretion of the arbitrators and given  
308 such weight as the arbitrators deem appropriate.

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

312 Rule 6-412. Written Contract.

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

315 Rule 6-413. Closing of Hearings.

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

320 Rule 6-414. Reopening of Hearings.

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

325 Rule 6-415. Waiver of Rules.

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

329 Rule 6-416. Waiver of Oral Hearings.

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

331 Rule 6-417. Award.

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

333

334 Rule 6-418. Time of Award.

335 The arbitrators shall make all reasonable efforts to render their award promptly and not  
336 later than 30 days from the date of the closing of the hearing, unless otherwise agreed upon by  
337 the parties with the consent of the arbitrators or an extension is obtained from the Committee



338 or its chair. If oral hearing has been waived, then the time period for rendering the award shall  
339 begin to run from the date of the receipt of final statements and evidence by the arbitrators.

340 Rule 6-419. Form of Award.

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

344 Rule 6-420. Award Upon Settlement.

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

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

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

353 Rule 6-422. Communication with Arbitrators.

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

355 Rule 6-423. Interpretation and Application of Rules.

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

361 CHAPTER 5 POST-AWARD PROCEEDINGS

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

363 In cases where an award in favor of a client has not been satisfied within three months  
364 after it was served upon the parties, the client may apply to the appropriate Georgia superior  
365 court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A.  
366 § 9-9-1 et seq.

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

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

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374 the appropriate Georgia superior court for confirmation of the award in accordance with the  
375 Georgia Arbitration Code, O.C.G.A. § 9-9-1 et seq.

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395 confidential information in those circumstances in which the Office of the General Counsel is  
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### 409 Preamble

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

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

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

426 If at any time during the process as set forth in these rules, based upon information  
427 received or a lack of information received, the Committee may make a referral to the Office of  
428 the General Counsel for consideration of an inquiry into a possible disciplinary action based

429 on Georgia Rules of Professional Conduct including Rule 1.5 (unreasonable fees) and/or Rule  
430 1.16 (d) (failure to return unearned fees) or other applicable rules.

431 CHAPTER 1 COMMITTEE ON ARBITRATION OF ATTORNEY FEE DISPUTES

432 Rule 6-101. Administration of Program.

433 This program will be administered by the State Bar Committee on the Arbitration of  
434 Attorney Fee Disputes ("Committee").

435 Rule 6-102. Committee Membership.

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

439 Rule 6-103. Terms.

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

447 Rule 6-104. Powers and Duties of Committee.

448 The Committee shall have the following powers and duties:

- 449 (a) To determine whether to accept jurisdiction over a dispute;
- 450 (b) To appoint and remove lawyer and nonlawyer arbitrators and panels of  
451 arbitrators;

- 452 (c) To oversee the operation of the arbitration process;
- 453 (d) To develop and implement fee arbitration procedures;
- 454 (e) To interpret these rules and to decide any disputes regarding the interpretation  
455 and application of these rules;
- 456 (f) To determine challenges to, and rule on, the neutrality of an arbitrator where  
457 the arbitrator does not voluntarily withdraw;
- 458 (g) To maintain the records of the State Bar of Georgia's Fee Arbitration Program;  
459 and
- 460 (h) To perform all other acts necessary for the effective operation of the Fee  
461 Arbitration Program.

462 Rule 6-105. Staff's Responsibilities.

463 State Bar of Georgia staff shall be assigned to assist the Committee. The assigned staff  
464 will have such administrative responsibilities as may be delegated by the Committee, which  
465 may include the following:

- 466 (a) Receive and review arbitration requests and discuss them with the parties, if  
467 necessary;
- 468 (b) Conduct inquiries to obtain additional information as needed;
- 469 (c) Make recommendations to the Committee whether to accept or decline  
470 jurisdiction; and
- 471 (d) Transmit notices of arbitration hearings, arbitration awards, and other  
472 Committee correspondence.

473 CHAPTER 2 JURISDICTIONAL GUIDELINES

474 Rule 6-201. Petition.

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

478 (a) A statement of the nature of the dispute and the petitioner's statement of facts,  
479 including relevant exhibits and dates. The statement must be double-spaced, typed in a  
480 12-point font or hand written and is limited to 50 pages including exhibits. The page  
481 limit may be increased by the Fee Arbitration staff for good cause shown;

482 (b) The names and addresses of the client(s) and the lawyer(s);

483 (c) A statement as to whether or not the petitioner has made a good faith effort to  
484 resolve the dispute;

485 (d) A statement that by filing the petition, the petitioner has agreed to be bound by  
486 the result of the arbitration;

487 (e) The date of the petition; and

488 (f) Each petitioner's signature.

489 Rule 6-202. Service of Petition.

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

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

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

502 If service is not accomplished, the Committee shall not accept jurisdiction of the case.  
503 Rule 6-203. Answer.

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

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

509 (a) If the respondent is the client and/or payer, a statement as to whether the  
510 respondent agrees to be bound by the result of the arbitration;

511 (b) The respondent's statement of facts. The statement must be double-spaced,  
512 typed in a 12-point font or hand written, and the submission is limited to 50 pages  
513 including exhibits. The page limit may be increased by the Fee Arbitration staff for  
514 good cause shown;

515 (c) Any defenses the respondent intends to assert;

516 (d) The date of the answer; and

517 (e) Each respondent's signature.



518 Committee staff shall serve a copy of the answer upon each petitioner by first class  
519 mail, addressed to such party's last known address.

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

522 Rule 6-204. Accepting Jurisdiction.

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

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

528 (b) The legal services in question were performed:

529 (1) in the State of Georgia; or

530 (2) from an office located in the State of Georgia; or

531 (3) by a lawyer who is not admitted to the practice of law in any United  
532 States jurisdiction other than Georgia, and the circumstances are such that if the  
533 State Bar of Georgia does not accept jurisdiction, no other United  
534 States jurisdiction will be available to a client who has filed a petition under  
535 this program.

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

537 (d) The amount of the disputed fee is not governed by statute or other law, nor has  
538 any court fixed or approved the full amount or all terms of the disputed fee.

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

541 (f) The petition seeking arbitration of the fee dispute is filed with the Committee  
542 no more than two years following the date on which the controversy arose. If this date  
543 is disputed, it shall be determined in the same manner as the commencement of a cause  
544 of action on the underlying contract.

545 (g) In the case of disputes between lawyers and clients, a lawyer/client relationship  
546 existed between the petitioner and the respondent at the time the legal services in  
547 question were performed. A relative or other person paying the legal fees of the client  
548 may request arbitration of disputes over those fees, provided both the client and the  
549 other person payor join as co-petitioners or co-respondents and both agree to be bound  
550 by the result of the arbitration.

551 (h) The client, whether petitioner or respondent, agrees to be bound by the result of  
552 the arbitration. If the respondent lawyer does not agree to be bound by the result of the  
553 arbitration, the Committee will not accept the matter for arbitration.

554 (i) In disputes between lawyers, the lawyers who are parties to the dispute are all  
555 members of the State Bar of Georgia and have all agreed to arbitrate the dispute under  
556 this program and to be bound by the result of the arbitration.

557 (j) Where the parties to a fee dispute have signed a written agreement to submit  
558 fee disputes to binding arbitration with the State Bar of Georgia's Attorney Fee  
559 Arbitration Program, the Committee will consider the agreement enforceable if it is:

- 560 (1) set out in a separate paragraph;
- 561 (2) written in a font size at least as large as the rest of the contract; and
- 562 (3) separately initialed by the client and the lawyer.

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

569 Rule 6-205. Termination or Suspension of Proceedings.

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

577 Rule 6-206. Revocation.

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

### 581 CHAPTER 3 SELECTION OF ARBITRATORS

582 Rule 6-301. Roster of Arbitrators.

583 The Committee shall maintain a roster of lawyers available to serve as arbitrators on  
584 an "as needed" basis in appropriate geographical areas throughout the state. To the extent  
585 possible, the arbitration should take place in the same geographical area where the services in

586 question were performed; however, the final decision as to the location of the arbitration  
587 remains with the Committee.

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

590 Rule 6-302. Neutrality of Arbitrators.

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

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

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

605 Rule 6-303. Selection of Arbitrators.

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

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

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

617 Rule 6-304. Qualifications of Lawyer Arbitrators.

618 In addition to being impartial, lawyer arbitrators shall:

- 619 (a) Have practiced law actively for at least five years; and
- 620 (b) Be an active member in good standing of the State Bar of Georgia.

621 Rule 6-305. Powers and Duties of Arbitration Panel.

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

- 623 (a) To compel by subpoena the attendance of witnesses and the production of  
624 documents and things;
- 625 (b) To decide the extent and method of any discovery;
- 626 (c) To administer oaths and affirmations;
- 627 (d) To take and hear evidence pertaining to the proceeding;
- 628 (e) To rule on the admissibility of evidence;
- 629 (f) To interpret and apply these rules insofar as they relate to the arbitrators' powers  
630 and duties; and
- 631 (g) To perform all acts necessary to conduct an effective arbitration hearing.

632 Rule 6-306. Compensation.

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

637 CHAPTER 4 RULES OF PROCEDURE

638 Rule 6-401. Representation by Counsel.

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

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

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

647 Rule 6-403. Attendance and Participation at Hearing.

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

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

655 Rule 6-404. Stenographic Record.

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

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

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

666 Rule 6-406. Discovery, Subpoenas and Witnesses.

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

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

675 Rule 6-407. Adjournments.

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

678 Rule 6-408. Arbitrators' Oath.

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

682 Rule 6-409. Order of Proceedings.

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

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

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

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

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

695 Rule 6-411. Evidence.

696 (a) Parties may offer such relevant and material evidence as they desire and shall  
697 produce such additional evidence as the arbitrators may deem necessary to an  
698 understanding and determination of the dispute. The arbitrators shall be the judge of  
699 the relevancy and materiality of the evidence offered. The rules of evidence shall be



700 liberally interpreted, and hearsay may be utilized at the discretion of the arbitrators and  
701 given such weight as the arbitrators deem appropriate.

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

705 (c) The names and addresses of all witnesses who testify at the arbitration shall be  
706 made a part of the record. Upon their own motion or at the request of any party, the  
707 arbitrators shall have the power to require the sequestration of any witness during the  
708 testimony of other witnesses.

709 (d) The arbitrators may receive and consider the evidence of witnesses by affidavit  
710 (copies of which shall be served on the opposing party at least five days prior to the  
711 hearing), but shall give such evidence only such weight as the arbitrators deem proper  
712 after consideration of any objections made to its admissibility.

713 (e) The petition, answer, and other pleadings, including any documents attached  
714 thereto, may be considered as evidence at the discretion of the arbitrators and given  
715 such weight as the arbitrators deem appropriate.

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

719 Rule 6-412. Written Contract.

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

722 Rule 6-413. Closing of Hearings.

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

727 Rule 6-414. Reopening of Hearings.

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

732 Rule 6-415. Waiver of Rules.

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

736 Rule 6-416. Waiver of Oral Hearings.

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

738 Rule 6-417. Award.

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

740 Rule 6-418. Time of Award.

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

746 Rule 6-419. Form of Award.

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

750 Rule 6-420. Award Upon Settlement.

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

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

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

759 Rule 6-422. Communication with Arbitrators.

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

761 Rule 6-423. Interpretation and Application of Rules.

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

767 CHAPTER 5 POST-AWARD PROCEEDINGS

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

769 In cases where an award in favor of a client has not been satisfied within three months  
770 after it was served upon the parties, the client may apply to the appropriate Georgia superior  
771 court for confirmation of the award in accordance with the Georgia Arbitration Code, O.C.G.A.  
772 § 9-9-1 et seq.

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

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

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

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

784 Rule 6-503. Enforcement of Arbitration Awards.

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

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

792 CHAPTER 6 CONFIDENTIALITY, RECORD RETENTION, AND IMMUNITY

793 Rule 6-601. Confidentiality.

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

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

803 Rule 6-602. Record Retention.

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

806 Rule 6-603. Immunity.

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



September 22, 2021

Fellow Members of the Board of Governors:

The Professional Liability Insurance Committee has finished its work and will present a final report at the Fall meeting of the Board of Governors on October 23 in Savannah.

During the first year of its existence, the committee recommended a rule that would require all Georgia lawyers in private practice to be covered by a malpractice insurance policy with coverage limits outlined in the rule. That recommendation was tabled. The Board instructed the committee to get input from Bar members and to gather information about the cost of coverage.

During its second year the committee developed four options which it vetted through a series of town hall meetings and other requests for feedback. The committee tweaked the recommendations based upon the input that it received. When the pandemic hit the committee decided not to present its final report until the Board could meet in person.

At our final meeting, the committee did not reach consensus regarding any of the proposals, but a majority of members favored some level of disclosure.

Option 2 received the highest number of votes. It would require all lawyers in private practice to disclose on the annual dues form whether they are covered by a policy of malpractice insurance. If the lawyer is not covered, he or she would be encouraged (but not required) to complete a self-assessment that the Bar would provide free of charge in an online format. The online program assessment will evaluate the areas where a lawyer has risk, and steer the lawyer towards resources that will help reduce the risk of a malpractice claim. The cost of creating and maintaining the assessment program will be \$25,000 in the first year, about .63 per member. After the first year the estimated cost will be \$10,000/year, about .25 per member.

Under Option 2 the Member Directory on the State Bar of Georgia website will state whether each member is “covered,” “not covered,” or “exempt.” A member whose coverage lapses during the Bar year will be required to report the lapse of coverage to the Bar. The requirements of the rule are covered by the same deadlines as those for paying dues, so that the information is due on July 1 of each year and a member who does not comply will go out of good standing on September 1. To return to good standing the member must make the required disclosure to the Membership Department.

The attachment to this memo includes all of the options that the committee considered. As I present the Committee Report to the Board, I will move that the Board adopt Option 2. If that motion is not approved by majority vote, the president will open the floor for any other motions that Board members wish to offer.

It has been my honor to serve as Chair of the Professional Liability Insurance Committee for the past two Bar years. I would like to thank all of the members of the committee and the bar membership at large for their input on this important issue.

Christopher Paul Twyman

## PLI OPTIONS—EXECUTIVE SUMMARY

OPTION 1A – all active lawyers in private practice must disclose on their annual license fee statement whether they are covered by a malpractice insurance policy. Arbitrators, mediators, government, and in-house/organizational lawyers would be exempt. The information would be publicly available in the member’s listing in the online Member Directory. Lawyers in private practice who fail to disclose would go out of good standing on September 1 of the Bar year, (the same date that members who do not pay their dues cease to be in good standing). To return to good standing the member would need to make the disclosure to the Membership Department of the Bar. Lawyers who do have coverage would not be required to provide information about the insurance company, policy number or policy limits.

OPTION 1B is the same as Option 1A except the information would NOT be published in the Member Directory. The Bar would provide the information upon request by any person.

OPTION 2 would require disclosure on the annual license fee statement, would make the information publicly available on the website, and would have the same deadlines for reporting as Option 1A. Lawyers who are not covered by a PLI policy would be encouraged to take an online self-assessment course provided by the Bar and designed to evaluate the lawyer’s practice for the risk of malpractice. Members could take the assessment course for free and receive CLE credit upon completion. The results of the test would be confidential and members would receive information about resources to help reduce the risk of a malpractice claim. None of the information would be provided to the Office of the General Counsel.

OPTION 3A would include all of the provisions of Option 2, but the information would NOT be published in the Member Directory, and the self-assessment course would be required for all lawyers who are not covered by a PLI policy. If the lawyer failed to make the disclosure or, if not covered, to either complete the assessment or to obtain coverage within one year of the required disclosure date, he or she would go out of good standing.

OPTION 3B is the same as Option 3A except that the information would be published in the Member Directory.

OPTION 4 would require lawyers in private practice who are not exempt to be covered by a PLI policy with minimum limits of \$100,000/\$300,000. If the policy was for the minimum limits it would have to be non-eroding. The information would be reported to the Bar on the dues statement each year. Members who do not comply would go out of standing as of September 1 of the Bar year, and could return to good standing only by providing the Bar’s Executive Director with proof of coverage.





24 (e) Each member shall provide the State Bar of Georgia with confirmation of coverage  
25 upon request.

26 (f) The information required by this Rule is due on July 1 of each year. A member  
27 who does not comply with the requirements of the Rule by September 1 shall cease to be  
28 a member in good standing. A member deemed not to be in good standing under this  
29 Rule shall be returned to good standing upon making the disclosure required in subpart  
30 (a) to the Membership Department of the State Bar of Georgia.

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OPTION 1B

Mandatory Disclosure Requirement (without publication)

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**Rule 1-210. Professional Liability Insurance**

- (a) Each active member of the State Bar of Georgia engaged in the private practice of law in Georgia shall disclose on the annual license fee statement whether the member is covered by a policy of professional liability insurance.
- (b) The following members shall be exempt from the requirements of this rule:
  - (1) Members who are employed by a governmental entity or other organization and whose practice is limited to matters concerning the entity or organization;
  - (2) Members whose practice consists solely of serving as an arbitrator or mediator; and
  - (3) Members who are not actively engaged in the practice of law or who do not represent clients.
- (c) Each member who has previously reported being covered by professional liability insurance shall notify the State Bar of Georgia in writing in such form and manner as the Board may designate within 30 days if the insurance policy providing coverage lapses, terminates, or is no longer in effect for any reason.
- (d) Each member shall provide the State Bar of Georgia with confirmation of coverage upon request.
- (e) The information required by this Rule is due on July 1 of each year. A member who does not comply with the requirements of the Rule by September 1 shall cease to be a member in good standing. A member deemed not to be in good standing under this

57 Rule shall be returned to good standing upon making the disclosure required in subpart  
58 (a) to the Membership Department of the State Bar of Georgia.  
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OPTION 2  
Mandatory Disclosure Requirement with Voluntary Assessment

**Rule 1-210. Disclosure of Professional Liability Insurance**

- 66 (a) Each year, every member of the State Bar of Georgia shall certify:
- 67       1) Whether the member is engaged in the private practice of law; and
- 68       2) Whether the member is currently covered by a policy of professional liability
- 69       insurance.
- 70 (b) The following members shall be exempt from the requirements of this rule:
- 71       (1) Members who are employed by a governmental entity or other
- 72       organization and whose practice is limited to matters concerning the entity or
- 73       organization;
- 74       (2) Members whose practice consists solely of serving as an arbitrator or
- 75       mediator; and
- 76       (3) Members who are not actively engaged in the practice of law or who do
- 77       not represent clients.
- 78 (c) Each member who has previously reported being covered by professional liability insurance
- 79 as set forth in paragraph (a)(2) of this Rule shall notify the State Bar of Georgia in writing in
- 80 such form and manner as the Board may designate within 30 days if the insurance policy
- 81 providing coverage lapses, terminates, or is no longer in effect for any reason.
- 82 (d) The information required by this Rule shall be publicly available and included in the
- 83 member's listing in the Member Directory on the official website of the State Bar of Georgia.
- 84 Each lawyer's insurance status shall appear in the State Bar Member Directory as "covered,"

85 “not covered,” or “exempt.” Each member shall provide the State Bar of Georgia with  
86 confirmation of coverage upon request.

87 (e) The State Bar of Georgia encourages those members who do not have a policy of  
88 professional liability insurance to complete the Bar’s voluntary online self-assessment of the  
89 operation of their law practice and to avail themselves of the resources which it recommends to  
90 address any deficiencies identified by the self-assessment.

91 (f) The information required by part (a) of this Rule is due on July 1 of each year. A member  
92 who does not comply with the requirements of the Rule by September 1 shall cease to be a  
93 member in good standing. A member deemed not to be in good standing under this Rule shall be  
94 returned to good standing upon making the disclosure required in subpart (a) to the Membership  
95 Department of the State Bar of Georgia.

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OPTION 3A

98 Mandatory Disclosure Requirement with Mandatory CLE for Lawyers Without Insurance

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(Proactive Management-Based Assistance)

100 **Rule 1-210 Disclosure of Professional Liability Insurance.**

101 (a) Each active member of the State Bar of Georgia who is engaged in the private practice of law  
102 in Georgia shall disclose on the annual license fee statement whether the member is covered by a  
103 policy of professional liability insurance.

104 (b) The following members shall be exempt from the requirements of this rule:

105 (1) Members who are employed by a governmental entity or other organization and  
106 whose practice is limited to matters concerning the entity or organization;

107 (2) Members whose practice consists solely of serving as an arbitrator or mediator;  
108 and

109 (3) Members who are not actively engaged in the practice of law or who do not  
110 represent clients.

111 (c) Beginning with registration for 2023-2024, each lawyer covered by paragraph (a) who  
112 discloses that he or she is not covered by a policy of professional liability insurance shall  
113 complete a self-assessment of the operation of his or her law practice or shall obtain malpractice  
114 insurance and report that fact on the annual license fee statement for the following year.

115 (d) The Proactive Management-Based Assistance program is a free interactive online educational  
116 program provided by the Bar. It requires the lawyer to assess his or her law office and  
117 operations based upon the requirements of the Georgia Rules of Professional Conduct and best-  
118 practices for the operation of a law office. Lawyers may earn one hour of Ethics CLE credit for  
119 each module of the self-assessment completed. Upon completion of each module in the

120 Proactive Management Based self-assessment program, the lawyer will receive the results of the  
121 self-assessment and suggested resources to help the lawyer address any deficiencies identified by  
122 the self-assessment. All information related to the self-assessment shall be confidential and not  
123 shared with the Office of the General Counsel, except for the fact of completion of the self-  
124 assessment. Neither the Bar nor the lawyer may offer this information into evidence in a  
125 disciplinary proceeding. The Bar may report self-assessment data publicly in the aggregate.

126 (e) The information required by this Rule is due on July 1 of each year. A member who  
127 discloses that he or she is not covered by a professional liability insurance policy remains in  
128 good standing for one year in order to complete the Proactive Management-Based Assistance  
129 Program or to obtain insurance. If the member neither completes the self-assessment required at  
130 parts (c) and (d) nor obtains insurance, he or she goes out of good standing on July 1 of the  
131 following year. A member deemed not to be in good standing under this Rule shall be returned to  
132 good standing upon making the disclosure required in subpart (a) to the Membership Department  
133 of the State Bar of Georgia and, if not covered by a policy of malpractice insurance, by  
134 completing the self-assessment course.

135 (f) Each member shall provide the State Bar of Georgia with confirmation of coverage upon  
136 request.

137 (g) The Bar will provide the information required by part (a) of this rule upon request from any  
138 person but will not publish it as part of the member's listing in the Member Directory on the  
139 official website of the State Bar of Georgia.

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OPTION 3B

Mandatory Disclosure Requirement (with publication) with Mandatory CLE for Lawyers  
Without Insurance  
(Proactive Management-Based Assistance)

**Rule 1-210 Disclosure of Professional Liability Insurance.**

(a) Each active member of the State Bar of Georgia who is engaged in the private practice of law in Georgia shall disclose on the annual license fee statement whether the member is covered by a policy of professional liability insurance.

(b) The following members shall be exempt from the requirements of this rule:

(1) Members who are employed by a governmental entity or other organization and whose practice is limited to matters concerning the entity or organization;

(2) Members whose practice consists solely of serving as an arbitrator or mediator;  
and

(3) Members who are not actively engaged in the practice of law or who do not represent clients.

(c) Beginning with registration for 2023-2024, each lawyer covered by paragraph (a) who discloses that he or she is not covered by a policy of professional liability insurance shall complete a self-assessment of the operation of his or her law practice or shall obtain malpractice insurance and report that fact on the annual license fee statement for the following year.

(d) The information required by this Rule shall be publicly available and included in the member's listing in the Member Directory on the official website of the State Bar of Georgia. Each lawyer's insurance status shall appear in the State Bar Member Directory as "covered,"



163 “not covered,” or “exempt.” Each member shall provide the State Bar of Georgia with  
164 confirmation of coverage upon request.

165 (e) The Proactive Management-Based Assistance program is a free interactive online educational  
166 program provided by the Bar. It requires the lawyer to assess his or her law office and  
167 operations based upon the requirements of the Georgia Rules of Professional Conduct and best-  
168 practices for the operation of a law office. Lawyers may earn one hour of Ethics CLE credit for  
169 each module of the self-assessment completed. Upon completion of each module in the  
170 Proactive Management Based self-assessment program, the lawyer will receive the results of the  
171 self-assessment and suggested resources to help the lawyer address any deficiencies identified by  
172 the self-assessment. All information related to the self-assessment shall be confidential and not  
173 shared with the Office of the General Counsel, except for the fact of completion of the self-  
174 assessment. Neither the Bar nor the lawyer may offer this information into evidence in a  
175 disciplinary proceeding. The Bar may report self-assessment data publicly in the aggregate.

176 (f) The information required by this Rule is due on July 1 of each year. A member who  
177 discloses that he or she is not covered by a professional liability insurance policy remains in  
178 good standing for one year in order to complete the Proactive Management-Based Assistance  
179 Program or to obtain insurance. If the member neither completes the self-assessment required at  
180 parts (c) and (d) nor obtains insurance, he or she goes out of good standing on July 1 of the  
181 following year. A member deemed not to be in good standing under this Rule shall be returned to  
182 good standing upon making the disclosure required in subpart (a) to the Membership Department  
183 of the State Bar of Georgia and, if not covered by a policy of malpractice insurance, by  
184 completing the self-assessment course.

185 (g) Each member shall provide the State Bar of Georgia with confirmation of coverage upon  
186 request.

187 (h) The Bar will provide the information required by part (a) of this rule upon request from any  
188 person but will not publish it as part of the member's listing in the Member Directory on the  
189 official website of the State Bar of Georgia.

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OPTION 4  
Mandatory Insurance Requirement

**Rule 1-210. Professional Liability Insurance**

- 196 (a) All active members of the State Bar of Georgia engaged in the private practice of  
197 law in Georgia must be covered by a policy of professional liability insurance, in an  
198 amount no less than \$100,000 per claim and \$300,000 in the aggregate (“Minimum  
199 Limits”). For any Minimum Limits policy the expenses of defense must be outside the  
200 policy limits so that the Minimum Limits stated above are not reduced by payment of  
201 attorney’s fees or claims expenses incurred by the insurer for the investigation,  
202 adjustment, defense, or appeal of a claim.
- 203 (b) The following members shall be exempt from the requirements of this rule:
- 204 (1) Members who are employed by a governmental entity or other  
205 organization and whose practice is limited to matters concerning the entity or  
206 organization;
- 207 (2) Members whose practice consists solely of serving as an arbitrator or  
208 mediator; and
- 209 (3) Members who are not actively engaged in the practice of law or who do  
210 not represent clients.
- 211 (c) Each lawyer who is required by this rule to have professional liability insurance  
212 shall notify the Membership Department of the State Bar of Georgia in writing within 30  
213 days if coverage lapses, is no longer in effect, or terminates for any reason. Each lawyer’s  
214 insurance status shall appear in the State Bar Member Directory as either “covered,” “not

215 covered,” or “exempt.” Each member shall provide the State Bar of Georgia with  
216 confirmation of coverage upon request.

217 (d) The information required by this Rule is due on July 1 of each year. A member  
218 who does not comply with the requirements of the Rule by September 1 shall cease to be  
219 a member in good standing. A member deemed not to be in good standing under this  
220 Rule shall be returned to good standing upon providing the Executive Director of the  
221 State Bar of Georgia with proof of professional liability insurance coverage.

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**CLIENTS' SECURITY FUND**

September 21, 2021

Members of the State Bar of Georgia Board of Governors:

At the 2021 Annual Meeting, I presented some thoughts concerning the Clients' Security Fund (CSF). Several members of the Board asked for more information at that time. I'm writing to provide you with that information and with more detail for your consideration prior to the Fall Board of Governors (BOG) Meeting.

The CSF exists to pay claims where lawyers stole money from a client. The CSF does not cover lawyer malpractice and most malpractice policies exclude theft. The CSF Board of Trustees, consisting of seven members, can approve payment up to \$25,000 per claim. Trustees typically meet quarterly, and they evaluate the claims to determine whether or not the claims are eligible for payment. Trustees cannot disburse more than 10% of the fund balance to victims of a single lawyer. The CSF is funded by a \$100 fee payable by new lawyers over their first four years of practice. Also, if the CSF balance dips below \$1,000,000, Bar Rules require that all lawyers be assessed to recover the balance to \$1,000,000.

The \$100 new lawyer fee has generated \$168,000 or less in each year since the 2014 Bar year. In almost every year since the 2018 Bar year, the fund has paid almost \$500,000 which is the maximum amount of payments allowed by Bar Rule. Hence, the CSF was supplemented with \$500,000 from the general budget in 2014-2015, \$388,000 from the Commission on Continuing Lawyer Competency (CCLC) in 2019-2020, and \$1,000,000 from the ICLE indemnification fund in 2020-2021.

To go forward, the CSF needs to receive an amount of funds each year that exceeds or equals its total disbursements. To that end, you may consider changing the Bar Rules so all funds are available for disbursement each year, and there is an assessment of all dues paying Bar members that is sufficient to continue paying \$500,000 or more per year in claims. There have also been questions about the effectiveness of the CSF and the metrics related to the annual claims it considers.

To that end, I have attached the following information for consideration:

1. Bob Kauffman's February 2020 Memo in re. Darrell Sutton's request for more information re. CSF
2. William NeSmith's Annual Report on the CSF for Bar Year 2020-2021
3. Out-of-State BOG Member, Post 1, Scott McMillen's Comparison Review of CSF Programs from other States
4. Report of Historical Data from 2013 to 2021 (through May)
5. Q&A for Spreadsheet – Questions from Ivy Cadle re. Report of Historical Data from 2013 to 2021 (through May)
6. Spreadsheet of Claims – Question 3 to the Report of Historical Data.

I hope you find this information helpful. Please contact me with any questions.

  
Ivy N. Cadle

Memo re. Client Security Fund  
February, 2020

To: Darrell Sutton  
From: Bob Kauffman

As we discussed on the phone last week, I thought it would be helpful if I sent a full description of the current state of our finances and our group's suggestion for the path forward. Hopefully, this will help in your presentation to the Executive Committee and the Court.

I will first give you the facts and follow with our suggestions.

Facts:

- 1) There are two Bar rules approved by the Court that pertain to the finances of CSF. First, anytime the CSF drops below \$1,000,000, then the Bar is required to impose a mandatory assessment on all members equal to their pro rata share of the difference between the fund balance and \$1,000,000; however, the assessment shall not exceed \$25.00 per member. In addition, the aggregate amount that can be paid to all claimants in one Bar year is \$500,000.00.
- 2) The CSF Board of Trustees established internal rules on disbursements. We are limited to a maximum of \$25,000.00 per claimant and can't disburse more than 10% of the fund to claimants victimized by one lawyer. The Board can override these caps upon unanimous vote of the Board at a meeting.
- 3) As of June 30, 2019, the fund balance was \$1,031,012.00. After January meeting, our fund balance was \$689,155.00. That figure has since been reduced by some additional claims, but Ron Turner can give you the exact amount.
- 4) Since the current balance is now below \$1,000,000.00, the mandatory assessment is now triggered in order to raise the balance back to the \$1,000,000.00 level.
- 5) As you will see on the attached Exhibit, our average burn rate on the fund has been right about \$500,000.00, (our maximum amount we can pay each Bar year) There is no question in our minds that this will continue to be the trend given the recent claims and what we understand may be heading our way. (We already hit our max and there are still about 5 months left in the Bar year.) Obviously, without a funding solution, we will continue to have annual mandatory assessments on all lawyers.
- 6) Historically, our funding comes from new lawyers, interest, and restitution, but the bulk is via the new lawyer assessment since interest rates are still low and bad lawyers are either incarcerated or unemployed. The new lawyer assessment is \$25.00 per year for 4 years. Note: We are about to start with the new assessment formula whereby a new lawyer commences payment in year 2 of their Bar admission, so we will actually have a "gap" year when this program begins, which I think is next year. Regardless, the average

funds that come in via the new lawyer assessment is around \$150,000 per year ( this amount is for the entire group of 1 to 4 year lawyers paying into the fund each year)

- 7) You now see the problem: We have a lot more money going out than coming in. Unfortunately, due to the declining balance, we are really having to balance our desire to “right the wrong” of a dishonest lawyer versus being good stewards of the fund. Consequently, we rarely vote to override our maximum payout for even the most egregious cases. For instance, we recently had a legitimate claim of around \$267,000 and we only paid \$25,000 (our cap). Also, at a meeting in the past year, we had around 45 claims against one lawyer. These claims aren’t huge, probably around \$2,000 to \$4,000, and we approved somewhere around \$90,000. The bad news is we know there are a lot more claims coming in regarding this bad attorney, so I am sure we will bump up against our rule of not paying out more than 10% of the fund on account of one bad lawyer. Our issue with this rule is (i) it makes it a race to the Bar to present a claim and (ii) provides a limit on how much we can pay based upon the balance in the fund.

Suggestions:

- 1) Unless the Bar wants to have annual mandatory assessments, we can see no other way to balance the fund than implementing a mandatory assessment. At \$15.00 per lawyer, the fund our receive around \$720,000. ( As mentioned in an email last year to Ken Hodges and Jeff Davis, the current funding formula of only new lawyers paying in doesn’t work since we typically receive about \$150,000 per year and the program cost about \$73,000 per year to run per the Bar’s budget, leaving about \$77,000 to pay claims).
- 2) Given the growth of the Bar and the rise in claims, we feel it also makes sense to have the Board of Governors submit a proposed rule change to the Court to increase the annual cap to \$750,000 since we are bumping up against the hard cap each year and postponing any payments to aggrieved members of the public to the next year.
- 3) Last, an infusion of \$3,000,000 to \$4,000,000 will cover the shortfall in any receipts, especially if the Bar rule is amended, and it will allow us to budget a higher amount allocated to claims per each bad lawyer.

I hope this helps in the decision making, but we do need to do something now or there will be an annual assessment later this year. Let me know if you need anything further.

Best regards,  
Bob

**6 Year Clients' Security Fund Statistics (to date)**

	<u>2014-2015</u>	<u>2015-2016</u>	<u>2016-2017</u>	<u>2017-2018</u>	<u>2018-2019</u>	<u>2019-2020</u>
No. of Claims Filed	67	64	32	105	85	12
Total Amount Claimed	\$2,061,424.19	\$3,621,840.80	\$1,498,853.36	\$8,089,745.63	\$5,370,401.57	\$683,050.00
No. Claims Considered	58	60	51	99	91	46
Total Amount Approved	\$325,575.21	\$489,192.74	\$293,857.87	\$494,717.57	\$498,558.25	\$493,553.88
No. Claims Approved	25	46	39	73	83	45
Total Amount Paid	\$328,986.00	\$495,338.00	\$292,358.00	\$491,619.00	\$496,038.00	\$414,106.00
No. Attorneys Involved	1	35	13	46	22	13
No. Attorneys Involved in Claims Paid	1	28	11	29	18	13



**ANNUAL REPORT OF THE  
CLIENTS' SECURITY FUND  
FOR THE OPERATIONAL YEAR 2020-2021**

**By: William D. NeSmith, III  
Deputy General Counsel and  
Staff Liaison to the Clients' Security Fund**

The Clients' Security Fund is a public service of the legal profession in Georgia. The purpose of the Clients' Security Fund is to repay clients who have lost money due to a lawyer's dishonest conduct. Every lawyer admitted to practice in Georgia, including those admitted as a foreign law consultant or those who join the State Bar of Georgia without taking the Georgia Bar examination, contributes to this Fund.

On behalf of the Trustees of the Clients' Security Fund, it is a pleasure to present the 2020-2021 Clients' Security Fund Annual Report to the Board of Governors of the State Bar of Georgia. The Trustees of the Fund are proud of the efforts put forth to maintain the integrity of the legal profession.

**Creation of the Fund**

The Board of Governors of the State Bar of Georgia created the Clients' Security Fund by resolution on March 29, 1968. The Fund was formed "for the purpose of promoting public confidence in the administration of justice, and maintaining the integrity and protecting the good name of the legal profession by reimbursing, to the extent deemed proper and feasible by the Trustees of the Fund, losses caused by the dishonest conduct of members of the State Bar of Georgia." In 1991, the Supreme Court of Georgia adopted the Clients' Security Fund (Part X) rules, making it an official part of the rules of the State Bar of Georgia. That same year, pursuant to the rules, the Board of Governors assessed each of the State Bar members to fund and stabilize the Fund fully.

**Administration of the Fund**

The Clients' Security Fund Board of Trustees performs all acts necessary and proper to fulfill the purposes of and effectively administer the Fund. The rules, issued by order of the Supreme Court of Georgia, establish a Board of Trustees consisting of six-lawyer members and one non-lawyer member appointed to staggered terms by the President of the State Bar of Georgia. The Trustees serve five-year terms and receive no compensation or reimbursement for their service. The Trustees select the Chair and Vice-chair to serve as officers for the Fund. The Fund receives part-time assistance from one lawyer and one paralegal from the Office of the General Counsel.

## **Trustees for the 2020-2021 Bar-year**

Tyronia Monique Smith, Atlanta, Georgia  
Robert J. Kauffman, Douglasville, Georgia  
Michael G. Geoffroy, Covington, Georgia  
R. Javoyne Hicks, Decatur, Georgia  
Karl David Cooke, Jr., Macon, Georgia  
LaToya Simone Bell, Warner Robins, Georgia  
Sammy Strode, Savannah, Georgia (non-lawyer member)

The Trustees strive to meet at least quarterly during the year. If circumstances warrant, special meetings may be called to ensure that claims are processed in a timely fashion. These Trustees have served tirelessly, and their dedication to this program is greatly appreciated.

## **Funding**

Members of the State Bar of Georgia provide the primary funding for the Clients' Security Fund. On April 2, 1991, the Supreme Court of Georgia approved the motion to amend the Bar Rules to provide for an assessment of \$100 per lawyer to be paid over five years. On October 6, 2010, the rules were amended, making the assessment payable over four years. An amendment to the Bar rules, adopted by the Supreme Court of Georgia on June 14, 2018, allows new members of the State Bar of Georgia admitted after May 15 of each year to defer payment of the Clients' Security Fund assessment until the second full fiscal year following their admission to the Bar, giving them more time to seek employment and settle into the practice of law before being required to pay the assessment. In addition to the assessment, the Bar rules provide for future assessments triggered whenever the fund balance falls below a minimum of \$1,000,000.

Other efforts to maintain the stability of the Fund included an amendment to the Bar rules, adopted by the Supreme Court of Georgia on November 8, 2003, that provides that all members who are admitted to the State Bar of Georgia as a Foreign Law Consultant or who join without taking the Georgia Bar Examination are required to pay the full assessment of \$100 before or upon registration with the State Bar. Fund revenues are also supplemented by interest income, restitution payments from disbarred lawyers, and miscellaneous contributions.

In January 1996, the Board of Trustees adopted certain administrative rules to manage the Fund. These rules provide that the maximum amount the Trustees will pay on any individual claim is \$25,000. Also, the aggregate amount the Trustees will pay to all claimants victimized by a single lawyer is limited to 10% of the Fund balance as it existed on the date the first claim against the lawyer was paid. Both of these rules may be overridden by a unanimous vote of the Trustees in cases of undue hardship or extreme unfairness.

The efforts of the State Bar of Georgia and the Trustees of the Fund had proven successful over the years. However, in September 2014, the Trustees of the Clients' Security Fund brought to the attention of the State Bar of Georgia Executive Committee several coinciding issues that threatened the Fund's stability. These issues included the sustained reduction in the amount of interest income generated by the Fund's corpus and the resulting reduction in that corpus and the

filing of several substantial claims by clients of several Georgia attorneys. The Trustees were concerned that this combination of occurrences would cause the Fund balance to drop below \$1,000,000, which would trigger an automatic assessment from the members of the Bar pursuant to Bar Rule 10-103. The Trustees also expressed their concern that the current annual claims payment cap of \$350,000 would leave the Fund unable to address pending claims adequately.

To address these issue, at their 2015 Spring meeting, the Board of Governors approved a one-time contribution of \$500,000 from the State Bar of Georgia's unrestricted surplus to the Clients' Security Fund, reasoning the contribution would compensate for the reduction in the Fund's balance caused by several successive years of little to no interest income, and replenish the significant decrease in the Fund balance caused by the payment of claims currently under the Trustees' consideration. The Board also approved a proposed amendment to Bar Rule 10-103, which would increase the annual claims payment cap of \$350,000 to \$500,000. On March 3, 2016, the proposed amendment was approved by order of the Supreme Court of Georgia.

While the Trustees had hoped these measures would stabilize the Fund, the efforts proved to be less than effective in stabilizing the Fund. The corpus of the Fund continued to decline significantly over the past few years. Other options for providing a more stable source of funding are currently being considered.

All monies held in the name of the Clients' Security Fund are maintained by the Trustees of the Fund, who exclusively control the disbursement of the funds.

### **Loss Prevention Efforts**

An important role of the Trustees of the Fund is to promote and endorse rules and educational programs designed to prevent losses. Two significant programs exist that are intended to avoid lawyer theft of clients' funds.

#### **Overdraft Notification**

In November 1992, the Board of Trustees joined the Investigative Panel of the State Disciplinary Board in urging the Board of Governors to approve amendments to Disciplinary Standard 65 to create a trust account overdraft notification program. On August 22, 1995, the Supreme Court of Georgia approved the amendment to Standard 65, which became effective January 1, 1996. The primary purpose of the overdraft notification rule is to prevent misappropriation of clients' funds by providing a mechanism for early detection of improprieties in the handling of attorney trust accounts. Standard 65 was subsequently replaced with Rule 1.15(III) with the Supreme Court's adoption of the Georgia Rules of Professional Conduct on January 2, 2001 ([www.gabar.org/handbook](http://www.gabar.org/handbook)).

#### **Payee Notification**

During the 1993 legislative session, with the urging of the Board of Trustees, the Board of Governors endorsed legislation specifically designed to prevent lawyer theft of personal injury settlement funds. As of result of these efforts, the "payee notification rule" was approved in the

form of an amendment to the Insurance Code. This statute requires insurers to send notice to the payee of an insurance settlement when the check is mailed to the payee's attorney. This places the client on notice that the attorney has received settlement funds. The adoption of this procedure has substantially reduced claims involving the theft of insurance funds.

### Claims Process

Before the Clients' Security Fund pays a claim, the Trustees must determine that the loss was caused by the dishonest conduct of the lawyer who has been disbarred, indefinitely suspended, or has voluntarily surrendered his or her license and arose out of the client-lawyer relationship. The Rules define "dishonest conduct" as acts "committed by a lawyer in the nature of theft or embezzlement of money, or the wrongful taking or conversion of money, property, or other things of value." Typically, claims filed by corporations or partnerships, government entities, and certain members of the attorney's family are denied. Losses covered by insurance or resulting from malpractice or financial investments are also not considered reimbursable by the Fund. Claimants are responsible for providing sufficient documentation to support their claims.

The last meeting for the 2020-2021 Bar Year will be held on June 10, 2021. The Statement of Fund Balance, Income, and Expenses for the period ending April 30, 2021, is below.

### Annual Financial Statistics

	<u>2020-2021</u>
Balance on April 30, 2021	\$1,843,124
Income to Fund:	
1) Assessments:	\$ 77,379
2) Restitution:	\$ 12,895
3) Interest	\$ 11,033
4) Misc. Income:	\$1,000,000
(transfer from ICLE)	
5) Gain/Loss Investment Assessment:	\$ 8,043
Distributions from Fund:	
1) Claims Paid:	\$ 193,767
2) Restricted Expenses:	\$ 60,833
3) Bond Premium Amortization:	\$ 5,126
4) Investment Service Fee:	\$ 1,864

### SUMMARY OF CLAIMS ACTIVITY

The following summarizes claims activity beginning May 1, 2020, and ending April 30, 2021. The Trustees have met two times during this period to consider pending claims.

<u>Activity</u>	<u>2020-2021</u>
Recorded Application Requests	31
Claims Filed	31
Claims Considered	26
Claims Approved	20
Claims Denied	5
Claims Tabled	4
Claims Reconsidered	3
Claims Administratively Closed	4
Claims Withdrawn	0
Claims Pending	61
Inactive Claims	3
Number of Attorneys Involved in Paid Claims	13

**September 20, 2021**

**Memo:**

**To: President Fite, Ivy Cadle, and all Members of the Georgia Bar Board of Governors**

**From: Scott R. McMillen, Out-of-State Board Member, Post 1**

**Re: A Comparison Review of Client Security Fund Programs from other States**

Greetings to all.

During my former service on the Florida Bar Board of Governors, including working with the Florida Bar's Client Security Fund program, I became a strong proponent of Client Security Fund programs. For that reason, I volunteered to prepare this summary of CSF programs from other jurisdictions, and specifically also the Florida CSF program I have worked with.

To make my job easier, Executive Committee Member Ivy Cadle provided me with a copy of an American Bar Association Client Security Fund survey from 50 States and Canada. That ABA report is 50 pages long, so I have condensed that information down to approximately 3 pages here, which highlight CSF topics felt most likely to be of interest to those considering possible changes to the Georgia CSF program. The Florida Bar CSF program functions very well, but to my surprise and disappointment it did not respond to the ABA survey and is not represented in the survey results described below. Since I am familiar with its program, I have included a short summary of the Florida CSF program at the end of this memo, also with a specific comparison to Georgia's current program.

**The ABA Survey Results**

The ABA conducted its survey of Client Security Fund programs in the United States and Canada seeking data from the period of 2017 through 2019. Forty-four state bar associations and 5 jurisdictions in Canada responded with information about their existing CSF programs. What

follows is a summary of the ABA survey results broken down by specific categories.

**How are they funded?**

34 jurisdictions (70%) fund their CSF programs through lawyer assessments, and 29 out of the 34 have recurring annual assessments. One program has bi-annual assessments, and 4 jurisdictions have alternative assessments schedules “as needed.”

22 jurisdictions have their bar associations collect the annual assessments, 9 jurisdictions said “another agency” collected the annual assessments, and 3 jurisdictions reported that their court system collected the assessments.

**GEORGIA’s** method of funding its CSF program is different than the vast majority of other jurisdictions because Georgia does not charge its members steady recurring annual assessments. As a consequence, Georgia does not have a reliable recurring source of funding sufficient to sustain its program every year. The Georgia CSF program began with an initial assessment of \$100 per bar member, payable over 5 years, then later changed to payable over four years. Additional annual revenue now comes from any interest earned on the Fund’s corpus, which fluctuates significantly from year to year based on the economy, and in recent years has practically been non-existent. Traditionally smaller sources of periodic funding include such things as restitution payments from disbarred lawyers, and miscellaneous contributions to the Fund. Whenever the corpus of the Fund falls below \$1,000,000, additional assessments are required to be made on all Bar members to bring the corpus back up to \$1,000,000.

**How much are the recurring annual lawyer assessments in other jurisdictions?**

For states assessing on a sliding scale, such as by years of bar membership, the highest assessed amount is listed.

3 jurisdictions charge \$10 every year

2 jurisdictions charge \$15 every year

- 7 jurisdictions charge \$20 every year
- 9 jurisdictions charge \$25 every year
- 1 jurisdiction charges \$30 every year
- 1 jurisdiction charges \$35 every year
- 1 jurisdiction charges \$40 every year
- 3 jurisdictions charge \$50 every year
- 1 jurisdiction charges \$60 every year
- 1 jurisdiction charges \$75 every year
- 1 jurisdiction charges up to \$336 per year (based on years in practice)

**GEORGIA's** CSF assessment is a charge of \$100 per lawyer only on new Bar members, payable at \$25 per year over a 4-year period. As indicated previously, the entire membership is potentially subject to additional assessments should the Fund balance dip below \$1,000,000.

**Are any lawyers exempt from the assessments?**

- 21 jurisdictions exempt retired lawyers.
- 15 jurisdictions exempt Judges.
- 16 jurisdictions had miscellaneous exemptions, such as pro bono attorneys, active military, and practitioners over 70.

**GEORGIA** does not currently have assessment exemptions.

**Payment Caps Per Claimant**

- 34 States have a payment cap per claimant, with the average cap being \$100,000. Here is the breakdown:
  - 1 State cap is \$10,000
  - 1 State cap is \$15,000
  - 3 States cap at \$20,000



4 States cap at \$25,000

7 States cap at \$50,000

3 States cap at \$75,000

9 States cap at \$100,000

4 States cap at \$150,000

2 States cap at \$400,000

10 jurisdictions reported having no cap per claimant.

**GEORGIA** has a payment cap per claimant of \$25,000, meaning there are 25 States setting higher payment caps per claimant, plus there are 10 additional states with no claimant caps at all.

### **Payment Caps Per Lawyer**

28 States have a payment cap per lawyer, with the “average” being \$271,500.

20 jurisdictions have no per lawyer payment cap.

**GEORGIA** has a variable payment cap per lawyer consisting of 10% of the Fund’s balance at the time the first claim was awarded involving the attorney in question.

**GEORGIA** also has an annual aggregate cap paid to all claimants combined of \$500,000 in any Fund year. This aggregate annual cap was increased from \$350,000 per year in 2016.

### **Must Claims be Paid?**

30 jurisdictions provide that payment of claims is discretionary with their CSF Trustees or Boards.

10 jurisdictions just answered “no,” and 8 jurisdictions said eligible claims must be paid.

**GEORGIA** provides that claims are subject to Trustee discretion.

## **A Brief Look at Florida's CSF Program**

The Florida Bar CSF program assesses Florida lawyers \$25 every year and it is collected along with annual bar dues. The money collected is used for both CSF administrative costs (including assistance from Bar staff) and payment of all CSF claims. Payment of claims is discretionary, and for any year in which the assessments are insufficient to pay all claims, approved claims for that year are paid on a pro-rata basis. It is the payment of claims on a pro-rata basis that keeps the Florida CSF program from ever running short on funds or needing to seek additional assessments.

The Florida CSF program has two claim caps:

The first cap is \$5,000 per claim for those claims involving a client paying money to a lawyer for services, and then the lawyer provides no useful legal services. If any useful legal services are provided, it is considered a billing dispute regarding whether the provided services were worth the amount paid, and billing dispute claims are specifically disallowed. Any "no useful services" claims which are approved are paid throughout the fund year at the time they are approved for payment. Approval of these claims is first made by the CSF Committee, but then the Florida Bar Board of Governors must also approve payment at its next scheduled meeting, before these "no useful services" claims are paid.

The second cap is in the amount of \$250,000 per claim, and it applies to claims involving theft or misappropriation of client funds (usually trust funds). These are the vast majority of claims in both total dollar volume and total number of individual claimants. Once approved, all of these theft/misappropriation claims are held until the end of the fund year to determine if there is sufficient money to pay all claims in full, or if it will be necessary to pay this category of claims on a pro-rata basis.

Florida's cap on theft/misappropriation claims was raised from \$50,000 per claim to \$250,000 per claim in 2010. At that same time, Florida also raised its per-lawyer assessment from \$20 to \$25. Florida's program seems to have reached an equilibrium and for 6 of the last 8 years it has paid 100%

of the approved theft/misappropriation claims. For the other two years it paid claims at 90% of the approved amount. Consumers are generally very happy to be reimbursed 90 cents on the dollar from a Fund they initially never knew existed. Because it receives annual assessments from all bar members, and because of its “pro rata payment” provisions which kick in during years when claims are higher than available funds, the Florida CSF program has never needed to seek extra assessments from its lawyers.

**Comparison of Florida and Georgia CSF programs:**

**Similarities:**

Under both programs payment of claims is discretionary.

Both programs disallow claims arising from corporations or partnerships, lenders, and insurance companies, or arising from business or investment relationships with the lawyer.

Both programs disallow claims of family members, partners or employees of the lawyer causing the loss, or any business entity controlled by the lawyer. Claims of governmental agencies, publicly owned corporations, and claims from institutional lenders and insurance companies are also generally not compensable.

Both programs allow some degree of discretion to allow payment of certain claims that are not typically covered if nonpayment results in undue hardship or extreme unfairness. There are many other similarities in the Florida and Georgia CSF programs that probably do not warrant mention here.

**Primary Differences:**

Regular Georgia lawyer assessments are limited to new lawyers, at \$25 per lawyer for 4 years (with additional assessments of all members possible when Fund balance drops too low). Florida lawyer assessments are on all lawyers every year at \$25 per year.

Georgia’s per claimant cap is \$25,000 and Florida’s per claimant cap is ten times higher at \$250,000.

Georgia's per lawyer claim cap is 10% of the Fund's balance at the time of the first claim against the lawyer. Florida has no cap based on the number of clients a particular lawyer stole money from, with the idea being that all similar claimants should be treated equally, and it is not the client's fault if their lawyer stole from many clients, or only from them.

Georgia has an annual cap of \$500,000 maximum paid out in any fund year for all claims combined. Florida's annual cap on all claims in the aggregate is, by default, whatever the amount is remaining available to pay out after CSF administrative costs, subject to pro rata reduction if there is not enough money available to pay all claimants at 100%.

**Conclusion:**

The Florida Bar has twice as many lawyers as the Georgia Bar (approximately 107,000 vs 52,000). At \$25 per lawyer the Florida CSF budget is approximately \$2,675,000 per year.

With half as many lawyers, presumably Georgia also has roughly half as many CSF claims. If Georgia assessed its membership annually at \$25 per lawyer, its annual CSF budget would be approximately \$1,300,000 per year, and at \$20 per lawyer the annual budget would be \$1,040,000. If the Georgia assessment was made permanent at either amount and the program was restructured to pay claims on a pro rata basis for any year in which claims exceeded the available funding, then the Georgia CSF program would no longer need to impose its current payout cap of \$500,000 on all claims in the aggregate each year, and it would never need to seek "extra" assessments from Georgia Bar members or from other sources.

Although there would likely be some "resistance" to imposing a recurring annual CSF assessment in Georgia, it is doubtful that the resistance would be much greater than any resistance expected under the current rules at the time of the imposition of mandatory unexpected re-assessments when the Fund dips below \$1,000,000. Florida's experience has been that after the initial year or two of recurring annual CSF assessments, annual assessments become accepted as the norm, and resistance has evaporated.

By operating with the larger annual budget allowed from annual assessments on all members, Georgia could also consider raising its per claimant cap (currently \$25,000) to a number closer to the average per claimant cap in CSF programs across the country (currently \$100,000). The larger budget would also allow Georgia to consider joining the other 21 States which have no caps based on the number of claims made arising because of one specific lawyer. Georgia could also do away with its requirement that it maintain a Fund balance of \$1,000,000, and that money could presumably be used for other appropriate purposes.

Georgia's Fund is administered by 7 Trustees (six lawyers and one lay member), with 3 Trustees being considered a quorum. That is a relatively small number of people administering a large discretionary fund. By comparison, Florida has a CSF Committee of 26 members, and it is a regular Standing Committee of The Florida Bar. Like the Trustees of the Georgia CSF program, the Florida CSF Committee members are appointed to the Committee by the Bar President, with staggered terms of office.

The Florida BOG liaison to its CSF Committee reports to the entire Florida BOG. Once the CSF Committee prepares its annual payment plan with details of the claims to be paid for the Fund year, the entire Florida BOG (52 members) must vote to approve the payment plan before the claims are actually paid. This procedure is not nearly as cumbersome as it sounds, and the idea behind it is that a large discretionary fund should have a large amount of oversight for the safety of all, including the CSF Committee members (or Trustees) voting on payments to be made, or payments not to be made.

I hope this program comparison and analysis is of some assistance. If I can provide any other information, please feel free to contact me.

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Bar Year (ending June 30)	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021 (May 27)
Beginning Balance	\$2,321,351	\$2,141,983	\$2,432,607	\$2,035,238	\$1,836,994	\$1,450,249	\$1,031,012	\$1,009,586
Assessment Income	\$168,196	\$164,877	\$150,897	\$153,863	\$144,628	\$102,884	\$85,896	\$86,629
Restitution Income	\$5,038	\$14,532	\$9,744	\$5,386	\$25,250	\$30,451	\$30,027	\$22,195
Interest Income	\$9,020	\$13,202	\$10,328	\$7,865	\$8,028	\$8,293	\$13,214	\$11,033
Misc. Income		*\$500,000					**\$388,000	***1,000,000
Expenses	\$73,000	\$73,000	\$73,000	\$73,000	\$73,000	\$73,000	\$73,000	\$73,000
Amount Paid	\$288,622	\$328,986	\$495,338	\$292,358	\$491,619	\$496,038	\$474,387	\$235,839
No. Applications Requested	30	80	59	33	169	100	Not Available	31
No. Claims Filed	42	60	66	34	73	109	25	31
No. Claims Considered	37	40	60	62	76	95	113	26
No. Claims Approved	32	25	46	39	52	74	97	20
No. Claims Denied	5	5	12	9	23	6	9	5
No. Claims Tabled	1	8	2	14	9	17	27	4
No. Claims Reconsidered (including previously tabled claims)	5	18	3	7	4	7	10	3
No. Claims Administratively Closed	0	0	25	0	0	5	0	4
No. Claims Pending	72	95	102	82	99	120	75	61
No. Inactive Claims	33	33	9	15	4	7	3	3
No. Attorneys Involved in Paid Claims	25	11	25	11	39	21	30	13
Minimum Claim Paid	\$250							
Maximum Claim Paid	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000	\$25,000
Average Claim Paid								
* Funds transferred from unrestricted surplus								
** Funds transferred from the Commission on Continuing Lawyer Competency								
*** Funds transferred from the ICLE indemnification fund								

## Question and Answer for Spreadsheet

1. Can we explain why is the number of applications requested for 2019-2020 not available?

These records were not maintained in the appropriate file. However, based on the number of applications received during this time frame (15) I would presume at least that many applications were requested. I believe this number is low due to COVID.

2. Can we explain why were payments in 2016-2017 only \$292,358 when payments for 2015-2016 and 2017-2018 in excess of \$490,000?

Pursuant to Supreme Court order dated March 3, 2016, Bar Rule 10-103 was amended increasing the aggregate amount paid to claimant from \$350,000 to \$500,000 per year.

3. Per Bill's email below, we do not track individual metrics on claims. Can that be information be learned from the data that we do have? Based on what I heard at the BoG meeting, I think the members want to know if we are paying a sufficient amount on the individual claims to be doing good. For instance, if we got 25 claims last year for \$75,000 but we only paid \$25,000 for each of those claims, we would need to ask for a higher limit per claim. I think the Board wants to see the metrics that show how good of a job we are doing paying claims on a per claim basis. Maybe if that information is not available going back to 2013, it could be compiled going back to 2018?

Between 7-1-2013 and 6-30-2021, 46 claims were paid the maximum amount allowed by the rules of the Fund (\$25,000), totaling \$1,150,000. The total amount claimed on these 46 claims equal \$6,670,107.30.

4. Can we explain why did we only have 25 claims filed in 2019-2020?

The CSF is not advertised or promoted. The public is made aware of the Fund from various sources, such as word-of-mouth and the State Bar's grievance department, CAP and Fee Arbitration. Applications are oftentimes sent directly to individuals from these departments (which are not tracked). The number of claims filed often times follows discipline. For instance if an attorney misappropriated money from a large number of clients, the number of claims filed with the CSF increases. The number of claims filed in 2019-2020 can be due to attorney discipline or a decline in the number of applications distributed by from other sources. It could also be Covid related.

5. Can we give definitions or explanations for the categories? For instance, Claims Tabled: These claims were heard by the Board but were tabled for consideration in a following year, likely because the application was not complete or there were facts developing that needed to be considered before a decision was rendered.

- Claims Filed: Claims received in the Office of the General Counsel
- Claims Considered: Claims Placed on CSF meeting agenda
- Claims Approved: Claims the Trustees determined were eligible for reimbursement by the Fund

- Claims Denied: Claims the Trustees determined were not eligible for reimbursement by the Fund.
  - Claims Tabled: Claims considered by the Trustees but determined to need additional information to decide whether the claim is eligible for reimbursement by the Fund. These claims will be considered at a subsequent meeting.
  - Claims Reconsidered: Previously tabled claims or previously decided claims that are considered again at the claimant's request (additional information must be provided).
  - Claims Administratively Closed: Claims closed pursuant to Internal Operating Rule 6F – Claims, which are clearly ineligible for reimbursement, that are denied by Bar staff (with the approval of the Chair or Vice-chair) without being submitted to the Board of Trustees.
  - Claims Pending: Claims filed with the State Bar of Georgia that are pending review/consideration by the Trustees.
  - Inactive Claims: Claims filed against attorneys who have a pending disciplinary action.
6. Can we add a row for Average Claim Paid, Max Claim Paid, Minimum Claim Paid (if that information is available)? [Done](#)
7. Can we explain why Assessment Income in 2014-2015 was about \$500,000 higher than in other years? Was that the one-time contribution approved by the BOG from the unrestricted fund referenced in Bill's Annual Report? [Yes](#)



### Analysis of Claims for Question 3 from QA for Spreadsheet

Claim No.	Claim Amount	Eligible Amount	Amount Paid	% of Eligible Amount Paid
13-32	\$100,000.00	\$82,541.23	\$25,000.00	30%
13-34	\$65,000.00	\$65,000.00	\$25,000.00	38%
13-45	\$100,000.00	\$66,666.67	\$25,000.00	37%
13-55	\$289,045.12	\$289,045.12	\$25,000.00	8%
14-06	\$95,000.00	\$57,000.00	\$25,000.00	43%
14-10	\$50,500.00	\$35,500.00	\$25,000.00	70%
14-13	\$59,099.34	\$59,099.34	\$25,000.00	42%
14-15	\$100,000.00	\$100,000.00	\$25,000.00	25%
14-22	\$69,000.00	\$69,000.00	\$25,000.00	36%
14-23	\$890,795.00	\$890,795.00	\$25,000.00	2%
14-37	\$50,000.00	\$33,333.33	\$25,000.00	75%
15-11	\$53,120.00	\$53,120.00	\$25,000.00	47%
15-34	\$40,000.00	\$31,320.00	\$25,000.00	79%
15-71	\$64,610.00	\$64,610.00	\$25,000.00	38%
15-72	\$100,000.00	\$100,000.00	\$25,000.00	25%
15-81	\$95,000.00	\$73,435.00	\$25,000.00	34%
16-06	\$472,505.41	\$217,059.49	\$25,000.00	11%
16-08	\$57,500.00	\$57,500.00	\$25,000.00	43%
16-12	\$53,362.67	\$53,362.67	\$25,000.00	46%
16-18	\$218,075.00	\$37,400.00	\$25,000.00	66%
16-19	\$55,000.00	\$55,000.00	\$25,000.00	45%
16-26	\$35,000.00	\$35,000.00	\$25,000.00	71%
16-36	\$77,631.67	\$77,631.67	\$25,000.00	32%
17-07	\$227,855.00	\$227,855.00	\$25,000.00	11%
17-14	\$77,279.59	\$66,191.00	\$25,000.00	38%
17-31	\$100,000.00	\$25,000.00	\$25,000.00	100%
18-33	\$95,000.00	\$58,900.00	\$25,000.00	42%
18-41	\$65,000.00	\$65,000.00	\$25,000.00	38%
18-86	\$130,000.00	\$130,000.00	\$25,000.00	19%
18-88	\$48,000.00	\$48,000.00	\$25,000.00	52%
18-100	\$100,000.00	\$63,000.00	\$25,000.00	40%
18-105	\$100,000.00	\$65,000.00	\$25,000.00	38%
18-110	\$100,000.00	\$100,000.00	\$25,000.00	25%
18-115	\$100,000.00	\$66,666.67	\$25,000.00	37%
18-129	\$96,928.15	\$96,928.15	\$25,000.00	26%
18-132	\$150,000.00	\$105,000.00	\$25,000.00	24%
19-02	\$37,082.33	\$37,082.33	\$25,000.00	67%
19-04	\$67,556.34	\$67,556.34	\$25,000.00	37%
19-09	\$50,000.00	\$50,000.00	\$25,000.00	50%
19-29	\$100,000.00	\$100,000.00	\$25,000.00	25%
19-30	\$150,000.00	\$141,000.00	\$25,000.00	18%
19-33	\$1,300,000.00	\$1,300,000.00	\$25,000.00	2%
19-37	\$110,000.00	\$82,500.00	\$25,000.00	30%
19-39	\$122,500.00	\$85,750.00	\$25,000.00	29%
19-43	\$380,000.00	\$380,000.00	\$25,000.00	7%
20-05	\$48,000.00	\$48,000.00	\$25,000.00	52%



**MEMORANDUM**

To: Board of Governors  
From: Bill NeSmith  
Date: September 28, 2021  
Re: Proposed Rule Changes

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Below is a short explanation of the proposed rules changes on the agenda for the October 23, 2021, Board of Governors Fall Meeting:

1. **Rule 1-506. Clients' Security Fund Assessment.** The proposed amendments are necessary to maintain the Clients' Security Fund. Currently each Georgia lawyer pays \$25/year into the Fund for the first four years of practice, for a total of \$100. The proposed change will require that all categories of members who are required to pay membership fees also pay an annual CSF assessment of \$15. Additionally, the proposed rule requires out-of-state lawyers seeking admission *pro hac vice* to contribute to the Clients' Security Fund.
2. **Rule 10-103. Funding.** This proposed change removes the requirement that the Fund maintain a \$1,000,000 gross aggregate balance in order to avoid an assessment of all Bar members. The proposed change removes the annual payment cap of \$500,000, allowing the Clients' Security Fund to spend no more than it brings in each Bar year.

1 Rule 1-506. Clients' Security Fund Assessment

- 2 (a) The State Bar of Georgia is authorized to assess each member ~~a~~ an annual fee of ~~\$100~~  
3 \$15.00. ~~This \$100 fee may be paid in minimum annual installments of \$25 for a period of~~  
4 ~~four years. Each new member of the State Bar of Georgia will also be assessed a similar~~  
5 ~~amount upon admission to the State Bar of Georgia.~~ ~~This fee-~~ assessment shall be used  
6 only to fund the Clients' Security Fund and shall be in addition to the annual license fee  
7 as provided in Bar Rule 1-501 through Bar Rule 1-502.
- 8 (b) ~~For a member who joins the State Bar of Georgia after taking the Georgia Bar~~  
9 ~~Examination, the Clients' Security Fund Assessment shall be due and payable in \$25~~  
10 ~~installments on July 1 of each year, beginning with the second full fiscal year following~~  
11 ~~the year of admission, until the balance of \$100 is paid.~~ ~~The failure of a~~ dues-paying  
12 member to pay the ~~minimum annual installments~~assessment shall subject the member to  
13 the same penalty provisions, including late fees and suspension of membership, as  
14 ~~pertain~~ ing apply to the failure to pay the annual license fee as set forth in Bar Rules 1-501  
15 and 1-501.1.
- 16 (c) ~~For a~~ A member who is admitted as a Foreign Law Consultant or who joins without  
17 taking the Georgia Bar Examination, ~~and who has not previously paid the Clients'~~  
18 ~~Security Fund Assessment, the full assessment~~ shall be responsible for the annual  
19 assessment due and payable prior to or upon registration with the State Bar of Georgia.
- 20 ~~(d)~~ (d) Lawyers admitted to the various courts in Georgia, pro hac vice, shall be  
21 responsible for paying the annual assessment upon applying for admission, pro hac vice.

22

23

1 Rule 1-506. Clients' Security Fund Assessment

- 2 (a) The State Bar of Georgia is authorized to assess each member an annual fee of \$15.00.  
3 This assessment shall be used only to fund the Clients' Security Fund and shall be in  
4 addition to the annual license fee as provided in Bar Rule 1-501 through Bar Rule 1-502.
- 5 (b) The failure of a dues-paying member to pay the assessment shall subject the member to  
6 the same penalty provisions, including late fees and suspension of membership, as  
7 apply to the failure to pay the annual license fee as set forth in Bar Rules 1-501 and  
8 1-501.1.
- 9 (c) A member who is admitted as a Foreign Law Consultant or who joins without taking the  
10 Georgia Bar Examination shall be responsible for the annual assessment upon registration  
11 with the State Bar of Georgia.
- 12 (d) Lawyers admitted to the various courts in Georgia *pro hac vice*, shall be responsible for  
13 paying the annual assessment upon applying for admission *pro hac vice*.

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15

1 Part X – Clients' Security Fund

2 . . .

3 Rule 10-103. Funding.

- 4 (a) The State Bar of Georgia shall provide funding for the payment of claims and the costs of  
5 administering the Fund. ~~In any year following a year in which the gross aggregate~~  
6 ~~balance of the Fund falls below \$1,000,000, the State Bar of Georgia shall assess and~~  
7 ~~collect from each dues-paying member a pro rata share of the difference between the~~  
8 ~~actual Fund balance and \$1,000,000, provided that such assessments shall not exceed \$25~~  
9 ~~in any single year. The aggregate amount paid to claimants from the Fund in any year~~  
10 ~~shall not exceed \$500,000. Funding shall be through an annual assessment of \$15.00 per~~  
11 ~~dues-paying lawyer and by any lawyer seeking admission, pro hac vice. The Trustees~~  
12 ~~shall not spend more than received through the annual assessment in a single year. The~~  
13 Board of Governors may, from time to time, adjust the Fund's ~~minimum aggregate~~  
14 ~~balance, maximum annual payout, or~~ maximum annual assessment to advance the  
15 purposes of the Fund or to preserve the fiscal integrity of the Fund.
- 16 (b) All monies or other assets of the Fund shall constitute a trust and shall be held in the  
17 name of the Fund, subject to the direction of the Board.
- 18 (c) Only the Board of Trustees may authorize the payment of money from the Fund.

19

1 Part X – Clients' Security Fund

2 ...

3 Rule 10-103. Funding.

- 4 (a) The State Bar of Georgia shall provide funding for the payment of claims and the costs of  
5 administering the Fund. Funding shall be through an annual assessment of \$15.00 per  
6 dues-paying lawyer and by any lawyer seeking admission, pro hac vice. The Trustees  
7 shall not spend more than received through the annual assessment in a single year. The  
8 Board of Governors may, from time to time, adjust the Fund's maximum annual payout,  
9 or maximum annual assessment to advance the purposes of the Fund or to preserve the  
10 fiscal integrity of the Fund.
- 11 (b) All monies or other assets of the Fund shall constitute a trust and shall be held in the  
12 name of the Fund, subject to the direction of the Board.
- 13 (c) Only the Board of Trustees may authorize the payment of money from the Fund.

14

# Advisory Committee on Legislation (ACL) Funding Proposal Form

## FORM B

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

*Name of Proposal: Civil Legal Services to Victims of Domestic Violence*

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

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

(a) the purpose of this funding is to provide civil legal services to victims of domestic violence throughout Georgia. Georgia Legal Services and Atlanta Legal Aid receive the majority of this to represent victims in protective orders, divorce, child custody, child support, in obtaining financial benefits, healthcare, and services related to housing and employment. (b) The total budget request is for \$3,000,000. This additional funding will restore portions of the amount reduced by funding cuts in the last legislative session. (c) the state agency that receives and administers these funds is the Judicial Council of Georgia through the Administrative Office of the Courts.

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

These funds were reduced by almost \$1 million dollars in FY2020 and 21. Restoration and increase of the funding will represent additional legal services available for victims in rural areas and in the metropolitan Atlanta area. Victims who are self-represented are at a severe disadvantage when their batterers are represented in protective order and custody proceedings.

**3. Has the State Bar supported this appropriation in the past?** Yes, this proposal has been supported by the Bar since it was originally proposed and funded 1999.

**4. Provide a statement of the issues to be addressed by this appropriation.**

The funding would restore some of the domestic violence civil legal services grant funding. The funding will provide additional funds to legal service providers to allow them to provide civil legal services to low-income domestic violence victims and their families, including children. Services include representation at protective order hearings to protect survivors and help them successfully escape abuse, legal services related to the family's economic security and stability including benefits, housing issues, and unemployment-related issues, as well as legal services related to education and healthcare. Excluded services include criminal defense, deportation proceedings, and indirect legal services such as attorney training.

**5. Why should the State Bar take an official position to support or oppose this funding?** Victims without legal representation are at a serious disadvantage when litigating safety, custody, support, property, and financial security. Victims also need holistic legal representation to protect their families, including healthcare, food security, and unemployment benefits. Victims can end up homeless or returning to violent homes without legal representation to help them secure their housing. Courts are able to more efficiently and effectively process cases when survivors are represented in protective order cases. These are issues of safety for our community and access to justice.

**6. Describe how support for this appropriation (1) regulates the legal profession, or (2) improves the quality of legal services.**<sup>1</sup> This proposal improves the quality of legal services by making lawyers more available and legal services cost-effective. The proposal seeks to allow more citizens access to rights and remedies afforded them by the state legislature.

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



- 7. Are there any potential proponents or opponents of this appropriation, including, but not limited to, other State Bar sections, specialty bar associations, governmental entities, and outside interest groups? If so, please list them here.** For many years, the Committee to Promote Inclusion in the Profession has supported this proposal to help ensure access to justice for victims of domestic violence. A copy of the letter of support from the Committee to Promote Inclusion is attached to this Form B.
- 8. Which other State Bar committees or sections may have an interest in this appropriation?** For many years the Bar's Access to Justice Committee and the Child Protection and Advocacy Section have supported this funding to protect victims and their families.
- a. Have you provided interested State Bar committees/sections with a copy of this request? If so, have they provided any comments?** We have provided the aforementioned Bar committees of the proposal, but have not received any comments.
- 9. What is the recommendation that your section/committee wishes to be adopted by the State Bar?** We ask for support for the Judicial Council's recommended appropriation of \$3,000,000 for the domestic violence grant appropriation.
- 10. Please attach any additional information that the committee may find helpful in assessing this request.** Attached is the Request Summary from the Judicial Council of Georgia and the letter of support from the Committee to Promote Inclusion in the Profession.

FY2022



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

RE: Legislative proposal – Domestic Violence Funding

Dear Ms. Butcher Hayes:

I write on behalf of the Committee to Promote Inclusion in the Profession (CPIP) to request the State Bar of Georgia's endorsement of legislation that would provide an appropriation for civil legal services to low income victims of domestic violence. Each year the CPIP Committee seeks the endorsement of the State Bar of Georgia for this legislation, which provides for an appropriation to non-profit organizations that provide civil legal services to low-income Georgians. It is our Committee's understanding that for the State Bar of Georgia to endorse this legislation for the upcoming fiscal year, the proposal must be renewed before the advisory Committee on Legislation. As a result, our Committee wishes to again propose an increased appropriation for the Domestic Violence grant award. In addition, we understand that the Judicial Council is also making this request in their budget and we ask that the State Bar advisory committee on legislation support the request.

In 1998, the General Assembly appropriated \$2 million as part of the Administrative Office of the Court's budget. The funds were appropriated for use in providing civil legal services to low-income victims of domestic violence. That year, the General Assembly recognized the importance of providing legal services to victims of domestic violence and has provided funding to do so every year since that time. We support current proposed increases in funding to positively impact the legal representation that Georgia Legal Services and Atlanta Legal Aid's provides for survivors of domestic violence.

This funding helps to meet the need that would otherwise go unmet. Many rural areas in Georgia have been referred to as legal deserts because of the lack of lawyers to represent survivors, including 59 rural counties that have less than 10 lawyers. Even in urban areas where lawyers are present, it is nearly impossible to find lawyers to represent low income survivors without substantial cost.



<https://www.law.com/dailyreportonline/2020/07/28/rural-georgias-legal-deserts-are-further-stressed-by-pandemic/?slreturn=20200726112651>

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

The Committee to Promote Inclusion in the Profession is not aware of opposition to this proposal for the appropriation of \$3 million for this fiscal year, however, we are aware of the competing needs for funding and we ask that the Bar make full funding of the Family Violence grant a legislative priority. It is our Committee's understanding that we do not need to submit the specific language for the legislation because this is a budget item. Furthermore, this proposal satisfies the *Keller* criteria because it is within the scope and purposes of the State Bar of Georgia to advance the administration of justice. It also is consistent with past actions by the Board of Governors in support of access to legal services by the poor. If you have any questions regarding this matter, please contact us further.

Thank you for your consideration of our request.

Very truly yours,

Avarita L. Hanson  
Committee to Promote Inclusion in the Profession



# State Bar of Georgia

To: Bar Officers  
Finance Committee

From: Ron Turner RWT

Date: September 1, 2021

Re: June 2021 Financial Statements-Bar Operations and Bar Center

Attached please find the June 2021 financial statements. **As June 30 is the year-end of the Bar, full departmental detail is attached. The amounts provided in the attached financial statements are subject to change due to the receipt of any additional invoices, if significant in nature, related to June 30, 2021 and the audit by the Bar's outside accountants.**

Line item variance explanations follow. Department managers are expected to specify savings elsewhere in their budgets when exceeding a line item, unless there was a budgeting error. Line item variances < \$100 are not explained to conserve your time.

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

## Executive Summary

In total, the Bar budgeted a profit of \$214,511 for the year ended June 30, 2021. This total budgeted profit for the Bar was calculated as a budgeted loss for the Bar of \$336,081 and a budgeted profit for Bar Center operations of \$550,592. Bar Center operations realized an actual profit of \$500,127 for the year. The Bar also realized a profit of \$466,171 instead of the budgeted loss of \$336,081. This difference of \$802,252 is comprised of the following six components: (1) savings in salaries and related personnel costs of \$331,609, (2) savings in officer expenses (both Bar and YLD) of \$135,285, (3) savings in attorney, staff and investigator travel of \$127,919, (4) savings in meetings of \$115,676, (5) savings in contract special master costs of \$71,848 and (6) savings in YLD Committees expenses of \$70,591. The savings on these six items total \$852,928.

## General Comments

The following three comments related to salaries, computer hardware and subscriptions and books are generally related to all departments across the Bar. Instead of providing the same comment in each applicable department, the comments are provided below in a summary form.

**Salaries** – In certain cases salaries may have exceeded the budget minimally in certain departments due to a timing issue. Salaries are based upon the actual number of days in a particular reporting period.

**General Comments - Continued**

Computer Hardware – In most cases computer hardware has exceeded the budget for the year for every department. This overage is primarily due to the following reasons associated with COVID-19: (1) additional hardware was purchased for many staff. It has been the policy of the Bar to rotate computer hardware every three years. However, due to COVID-19 and with Bar staff working 100% remotely from home, a decision was made to rotate the computers for half of the Bar in 2020-2021 and the remaining one-half of the Bar in 2021-2022. (2) it was determined that the most efficient means of working remotely would be to use laptops and related equipment (i.e. docking stations, etc.) rather than desktop computers. When Bar staff returns to work from the office, these laptops will be used in the office as well. The budget comprehended the three-year rotation policy along with the purchase of desktop computers rather than laptops.

Subscriptions and Books – In many cases, subscriptions and books have exceeded the budget due to the renewal of the Zoom subscription services. When the 2020 – 2021 budget was originally established, Zoom costs were not known and the pandemic was in its initial stages.

Unless specifically noted in a comment related to each department, **savings were** realized in other line items within the department so that the department, in total, was not over budget.

**Specific Comments**

**The following comments relate to the department indicated.**

Administration

**Salaries for administration is over the budget for the following reasons: (1) for a limited period of time the Executive Director’s salary was paid to both the current and former Executive Director and (2) the final payment of accrued vacation pay for both the former Executive Director and the former Chief Operating Officer.**

**Miscellaneous expenses are over budget by \$689 primarily due to the purchase of a retirement gift for an employee who had been with the Bar for many years.**

Bank fees exceeded the budget by **\$18,738** primarily due to the decrease in interest rates on compensating balances that the Bar has on deposit with the financial institution. The Bar receives a credit against charges for amounts held at the financial institution. This credit offsets the amount of balance based charges from the financial institution. Due to the decrease in interest rates the amount of the credit decreased, and thus the amount of bank fees increased.

**Credit card discount and fees is over budget by \$24,634 primarily due to the increased use of credit cards for payments. This increased use was the result of the following: (1) more Bar members paid by credit card in the current period due to the continued COVID-19 pandemic and (2) more Bar members used a credit card for payment because of a concern about the United States Postal Service.**

Office of General Counsel and Client Assistance Program

Telephone is over budget by **\$1,216** due to a telephone allowance provided to one of the employees. When the budget was developed, this employee was not receiving a telephone allowance.

Contract Programming

**The contract programming budget was \$8,500 but the actual costs were \$20,875. This overage is primarily due to the establishment of web-based applications for certain functions along with contract programming work performed to put both Disciplinary Board e-filings and Pro Hac Vice in place.**

Communications

Computer software was budgeted at \$1,600 but the actual costs were \$1,817. They were over budget as this account was under-budgeted based upon the prior year's costs.

**Website server/redesign exceeds the budget due to the allocation of contract hours with the independent website redesign company. The Bar signed a contract with a total amount of hours, such hours to be allocated to both the Bar and to ICLE. In this case, the Bar used more of the hours than were originally anticipated in the allocation.**

**Membership certificates were over budget due to additional certificates needed. This increase in cost was offset by an increase in revenue charged for them.**

The supplemental directory budget was \$6,000, however, actual costs were \$6,673. This item exceeded the budget primarily due to the following: (1) a better quality of paper was used in the current year and (2) a different vendor was used last year as compared to the current year.

Fee Arbitration

**Taxes and benefits exceed the budget by \$5,422. This overage is due to an employee changing their type of insurance coverage to add dependents.**

Law Practice Management

Seminars and training is over budget by \$676 primarily due to the way that certain seminar registration expenses were categorized in the budget compared to the way the actual expenses were coded. Historically, these registration expenses would have been charged to staff travel since they were part of the travel. However, due to COVID-19, these seminars were expensed to seminars and training as there was no travel involved. In the future, these amounts will be separated between the actual cost of the seminar or training and the actual travel cost.

Unauthorized Practice of Law

**Supplies exceeded the budget by \$469 due to purchase more three-ring binders and inserts than usual. They are routinely given to the subjects of investigations in order to educate them as to the state of the law. A significant number of new appointees will be on the committees, and it has become necessary to procure a corresponding number of binders.**

Savannah

**Taxes and benefits exceeded the budget by \$523 due to the accrual of additional vacation pay.**

**Telephone exceeded the budget by \$3,729 due to system upgrades at the Savannah location. With these system upgrades we were able to reduce our overall telephone costs in the Atlanta location.**

Rent and utilities for the Savannah office is over budget due to an increase in the rent that occurred in the current year. The new lease was negotiated after the budget for 2020-2021 was completed and approved.

Tifton

**Taxes and benefits exceed the budget by \$816 due to the payout of vacation pay to an employee who resigned from employment at the Bar.**

**Telephone costs for the Tifton office exceeded the budget by \$1,161 primarily due to the following: (1) a slight under-budget of the account and (2) due to changes in service at that location we incurred a cancellation fee.**

Law Related Education

Subscriptions and books exceeded the budget by \$1,076 primarily due to the renewal of a domain name for the law museum for five years along with a subscription for Zoom, neither of which were included in the original budget.

High School Mock Trial

Postage and freight is over budget by **\$301** due to additional mailing costs. These mailing costs were required due to COVID-19.

**Attorney and staff travel exceeded the budget by \$2,668 as the HSMT director attended the annual meeting to assist in the virtual component of this meeting. When the budget was prepared it was not anticipated that he would attend the annual meeting.**

Other

**State Disciplinary Board Lawyers – In prior years, the Bar paid the SDB lawyer a flat amount per quarter/year. For 2020-2021, it was originally anticipated that there would be fewer cases and less time would be spent by outside counsel. As such, a lower budget and a flat hourly amount was established. This overage occurred because outside counsel incurred more time on the cases than what was originally anticipated.**

The budget for Fastcase is \$244,000 while the actual expense is \$253,598. This overage is primarily due to the following: (1) the number of attorneys for which we are paying a charge per attorney and (2) an increase in the charge per attorney from the prior year. Both of these were greater than the amount originally anticipated.

**Other - Continued**

First Floor Office Furniture Project – This account exceeded the budget by \$1,037 primarily due to the disposal fees associated with the removal of the old furniture.

Bond Premium Amortization - Bond premium amortization has exceeded the budget and, in all likelihood, will continue to do so for the rest of the fiscal year. The account has exceeded the budget primarily due to bond prices and interest yields as a result of the economy and the pandemic. Bonds are being purchased at an amount higher than the face amount and this excess premium is being amortized over the life of the bond to the ultimate maturity amount.

Investment Service Fees - These costs exceeded the budget primarily because when the budget was originally prepared we did not have good historical data related to fees and used our best calculation. The portfolio value was greater than anticipated.

**Sections**

**Attorney and staff travel exceeded the budget by \$475 due to additional costs incurred in attendance at the annual meeting.**

**Furniture and equipment exceeded the budget by \$338 as this line item was not originally budgeted for.**

**Conference Center**

Furniture and equipment exceeded the budget by \$853. This occurred due to the purchase of additional storage and overhead bins that exceeded the amount originally anticipated.

**Other Bar Center Operations**

**Museum and 1<sup>st</sup> Floor exhibit costs have exceeded the budget by \$300 as certain minor costs were incurred and a budget was not originally anticipated for this item.**

Audio Video, Furniture and Equipment has exceeded the budget by \$317 primarily due to additional repairs. These repairs were not originally budgeted for.

Rehabilitation costs exceeded the budget by \$70,622 primarily due to following: (1) costs of \$47,526 associated with the installation of a new video and security system for the Bar building and related elevators. This was a continuing project from the prior fiscal year. The Executive Committee approved the security system and video cameras as a necessary upgrade even though it was not anticipated in the budget. (2) costs of \$23,096 for repairs and replacements to the sprinkler system in the building as required for renewal of the insurance on the building.

**Rental Operations**

**Management fees and repairs and maintenance salaries both exceeded the budget due to an increase charged by Cushman & Wakefield (C&W). When the budget was originally prepared it was anticipated that these expense accounts would not have an increase. However, C&W increased both of these by approximately 3%.**



**Rental Operations - Continued**

**Likewise repairs and maintenance taxes and benefits also increased due to the same reason.**

Repairs and maintenance costs for life safety have exceeded the budget by **\$28,265** primarily due to an additional server and other costs required that were associated with the command center upgrade, which were not anticipated.

Repairs and maintenance costs for the elevators has exceeded the budget by **\$37,771** due to costs of approximately \$38,320 associated with the command center upgrade. At time of budget preparation, this upgrade was not originally contemplated.

Gas for the building is over budget by **\$4,629** primarily due to the following reasons: (1) an increase in consumption over the originally anticipated amounts and the prior year and (2) an increase in the price per therm for the gas.

**Insurance exceeded the budget by \$4,543 primarily due to a significant increase in the insurance billed. We budgeted for an increase of approximately 3%, however the actual increase was between 12% and 13%.**

**Parking**

Repairs and maintenance associated with parking has exceeded the budget by **\$1,933** due to a repair for the rooftop generator for the parking deck. This repair was not anticipated when the budget was originally prepared and the amount was in excess of \$4,300.

**Garage insurance, management fee and miscellaneous were each over budget by \$106, \$180 and \$266 respectively. These overages were due to an under-budget for each of these lines items.**

**Shared Office Overhead**

Shared office allocations exceed actual shared office expense by approximately **\$91,700**. 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

8/25/2021

**State Bar of Georgia**  
**Consolidated Revenues and Expenditures**  
**Operations and Bar Center Combined**  
**For the Current Period Ending June 30, 2021**

Category	Year Ending 6/30/2020 Actual	Year To Date 6/30/2021 Actual	% of Budget	Year Ending 6/30/2021 Annual Budget
<b>Membership Numbers</b>				
Active Members	39,892	40,611	101.02 %	40,200
Inactive Members	8,713	8,459	97.79 %	8,650
Provisional Members	15	28	11.20 %	250
Associates/Affiliates	17	15	107.14 %	14
Foreign Legal Consultants	6	7	116.67 %	6
Students	362	344	86.00 %	400
Emeritus	3,127	3,434	116.41 %	2,950
<b>Total Membership Numbers</b>	<b>52,132</b>	<b>52,898</b>	<b>100.82 %</b>	<b>52,470</b>
<b>Revenue</b>				
Dues Active	\$ 10,097,880	\$ 10,242,211	100.31 %	\$ 10,210,800
Dues Inactive	1,127,351	1,115,041	101.50 %	1,098,550
Dues Provisional	2,159	32,004	100.80 %	31,750
Dues Associates	1,550	1,350	96.43 %	1,400
Dues Foreign Legal Consultant	1,524	1,270	83.33 %	1,524
Dues Late Fees	248,175	66,060	30.03 %	220,000
Dues NSF Check Fee	140	180	60.00 %	300
Dues Prior Years	6,615	6,309	105.15 %	6,000
<b>Total License &amp; Dues</b>	<b>\$ 11,485,394</b>	<b>\$ 11,464,425</b>	<b>99.08 %</b>	<b>\$ 11,570,324</b>
CLE Contribution to SBG	\$ 0	\$ 0	0.00 %	\$ 300,000
Section Expense Reimbursement	\$ 190,644	\$ 187,835	100.00 %	\$ 187,835
CSF Expense Reimbursement	\$ 73,000	\$ 73,000	100.00 %	\$ 73,000
Advertising and Sales	\$ 49,895	\$ 47,225	104.48 %	\$ 45,200
Membership Income	\$ 129,012	\$ 167,079	138.08 %	\$ 121,000
Credit Card Processing Fees	\$ 0	\$ 50,754	0.00 %	\$ 0
Interest Income	\$ 462,171	\$ 175,392	103.17 %	\$ 170,000
Miscellaneous Revenues	\$ 30,976	\$ 489	8.29 %	\$ 5,900
<b>Total Bar Revenue</b>	<b>\$ 12,421,092</b>	<b>\$ 12,166,199</b>	<b>97.54 %</b>	<b>\$ 12,473,259</b>
<b>Total Bar Expenses</b>	<b>\$ 12,183,113</b>	<b>\$ 11,700,028</b>	<b>91.34 %</b>	<b>\$ 12,809,340</b>
<b>SBG Net Gain (Loss)</b>	<b>\$ 237,979</b>	<b>\$ 466,171</b>	<b>(138.71) %</b>	<b>\$ (336,081)</b>
<b>Total Bar Center Operations Revenue</b>	<b>\$ 3,241,522</b>	<b>\$ 2,663,244</b>	<b>82.42 %</b>	<b>\$ 3,231,138</b>
<b>Total Bar Center Operations Expenses</b>	<b>\$ 2,589,261</b>	<b>\$ 2,163,117</b>	<b>80.70 %</b>	<b>\$ 2,680,546</b>
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 652,261</b>	<b>\$ 500,127</b>	<b>90.83 %</b>	<b>\$ 550,592</b>
<b>Combined Revenue</b>	<b>\$ 15,662,614</b>	<b>\$ 14,829,443</b>	<b>94.43 %</b>	<b>\$ 15,704,397</b>
<b>Combined Expenses</b>	<b>\$ 14,772,374</b>	<b>\$ 13,863,145</b>	<b>89.50 %</b>	<b>\$ 15,489,886</b>
<b>Total Combined Net Income (Loss)</b>	<b>\$ 890,240</b>	<b>\$ 966,298</b>	<b>450.47 %</b>	<b>\$ 214,511</b>

**Legend**

- Bar Operations
- Bar Center
- Combined Bar Operations and Bar Center

Note: Non-Cash depreciation expense and operations of ICLE are excluded from this schedule.

8/25/2021

**State Bar of Georgia  
Total Bar Center Operations  
Revenues and Expenditures - Executive Summary  
For the Current Period Ending June 30, 2021**

Category	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Bar Center Income and Cash Receipts</b>							
Bar Center Assessments	\$0	0.00 %	\$100	10.00 %	\$1,000	\$900	\$1,150
Conference Center Copier	0	0.00 %	0	0.00 %	850	850	506
Gain/Loss Investments Interest Allocation	(7,692)	0.00 %	(51,762)	0.00 %	0	51,762	96,937
CLE Contributions to Bar Center	79,1495	59.74 %	1,291,495	97.47 %	1,325,000	33,505	1,322,797
Interest Income	26,462	41.35 %	97,965	153.07 %	64,000	(33,965)	92,295
<b>Bar Center Income and Cash Receipts</b>	<b>\$ 810,265</b>	<b>58.26 %</b>	<b>\$ 1,337,798</b>	<b>96.19 %</b>	<b>\$ 1,390,850</b>	<b>\$ 53,052</b>	<b>\$ 1,513,686</b>
<b>Bar Center Expenses and Cash Disbursements</b>							
Bond Premium Amortization	9,588	79.90 %	30,561	254.68 %	12,000	(18,561)	16,918
Investment Service Fees	4,824	40.20 %	16,866	140.55 %	12,000	(4,866)	13,312
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	2,510
Conference Center Contingency	0	0.00 %	0	0.00 %	0	0	37
Conference Center Renovations	0	0.00 %	36,791	67.63 %	54,400	17,609	29,299
Museum and Woodrow Wilson Exhibit	300	0.00 %	300	0.00 %	0	(300)	0
Audio Video, Furniture and Equipment	0	0.00 %	16,317	101.98 %	16,000	(317)	0
Rehabilitation	0	0.00 %	70,623	0.00 %	0	(70,623)	350,650
President's Boardroom	0	0.00 %	0	0.00 %	5,000	5,000	610
<b>Bar Center Expenses and Cash Disbursements</b>	<b>14,712</b>	<b>14.80 %</b>	<b>171,488</b>	<b>172.49 %</b>	<b>99,400</b>	<b>(72,058)</b>	<b>413,336</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ 795,553</b>	<b>61.60 %</b>	<b>\$ 1,166,340</b>	<b>90.31 %</b>	<b>\$ 1,291,450</b>	<b>\$ 125,110</b>	<b>\$ 1,100,350</b>
<b>Conference Center Income and Expenses</b>							
Room Rentals and Various Charges	0	0.00 %	0	0.00 %	15,800	15,800	12,284
Conference Center Operating Expenses	31,082	6.93 %	383,815	85.57 %	448,526	64,711	428,618
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (31,082)</b>	<b>7.18 %</b>	<b>\$ (383,815)</b>	<b>88.70 %</b>	<b>\$ (432,726)</b>	<b>\$ (48,911)</b>	<b>\$ (416,334)</b>
<b>Rental Income and Expenses</b>							
Rental Income	98,603	6.81 %	1,301,083	89.89 %	1,447,488	146,405	1,422,142
Building Operating Expenses	126,109	6.98 %	1,481,971	82.08 %	1,805,430	323,459	1,477,412
<b>Rental Combined Net Cash Flow</b>	<b>\$ (27,506)</b>	<b>7.68 %</b>	<b>\$ (180,888)</b>	<b>50.54 %</b>	<b>\$ (357,942)</b>	<b>\$ (177,054)</b>	<b>\$ (65,270)</b>
<b>Parking Income and Expenses</b>							
Parking Income	10,389	2.76 %	24,363	6.46 %	377,000	352,637	293,411
Parking Deck Operating Expenses	11,887	3.63 %	125,872	38.47 %	327,190	201,318	269,894
<b>Parking Combined Net Cash Flow</b>	<b>\$ (1,498)</b>	<b>(3.01) %</b>	<b>\$ (101,509)</b>	<b>(203.79) %</b>	<b>\$ (49,810)</b>	<b>\$ 151,319</b>	<b>\$ 23,517</b>
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 735,467</b>	<b>133.56 %</b>	<b>\$ 500,128</b>	<b>90.83 %</b>	<b>\$ 550,592</b>	<b>\$ 50,465</b>	<b>\$ 652,263</b>

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

8/25/2021

**State Bar of Georgia**  
**Income Statement YTD - Operations**  
**For the Current Period Ending June 30, 2021**

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Revenues</b>				
Dues - Active	\$ 10,242,211	\$ 10,210,800	100.31 %	\$ 10,097,880
Dues - Inactive	1,115,041	1,098,550	101.50 %	1,127,351
Dues - Provisional	32,004	31,750	100.80 %	2,159
Dues - Misc. Types	2,620	2,924	89.60 %	3,074
Dues - Late Fees	72,549	226,300	32.06 %	254,930
<b>Total Dues &amp; Licenses</b>	<b>11,464,425</b>	<b>11,570,324</b>	<b>99.08 %</b>	<b>11,485,394</b>
CLE Contributions to SBG	0	300,000	0.00 %	0
Section Expense Reimbursement	187,835	187,835	100.00 %	190,644
CSF Expense Reimbursement	73,000	73,000	100.00 %	73,000
Advertising and Sales	47,225	45,200	104.48 %	49,895
Membership Income	70,354	71,000	99.09 %	73,711
Pro Hac Vice	411,725	290,000	141.97 %	310,501
Pro Hac Vice Contra	(315,000)	(240,000)	131.25 %	(255,200)
Credit Card Processing Fees	50,754	0	0.00 %	0
Interest Income	175,392	170,000	103.17 %	462,171
Miscellaneous Revenues	489	5,900	8.29 %	30,976
<b>Total Revenues</b>	<b>12,166,199</b>	<b>12,473,259</b>	<b>97.54 %</b>	<b>12,421,092</b>
<b>Expenses</b>				
Administration	2,463,115	2,502,712	98.42 %	2,455,429
General Counsel	4,081,948	4,338,494	94.09 %	4,230,188
Communications	745,962	885,005	84.29 %	912,876
Lawyer's Assistance Program	85,000	85,000	100.00 %	63,712
Fee Arbitration	548,941	559,460	98.12 %	526,262
Law Practice Management	408,396	438,714	93.09 %	428,555
Sections	187,291	187,834	99.71 %	186,025
Savannah Office	263,176	258,120	101.96 %	251,416
Tifton Office	129,140	140,558	91.88 %	163,851
Young Lawyers	276,039	457,434	60.35 %	334,875
Unauthorized Practice of Law	834,444	842,308	99.07 %	845,741
Law Related Education	288,293	385,461	74.79 %	369,794
High School Mock Trial	116,482	159,730	72.92 %	127,920
MLAP	0	0	0.00 %	120,663
Pro Bono	212,216	212,216	100.00 %	212,216
Fastcase	253,597	244,000	103.93 %	240,436
Officers' Expenses	29,781	112,677	26.43 %	34,461
BASICS Program Contribution	37,500	37,500	100.00 %	150,000
Resource Center Contribution	110,332	110,332	100.00 %	110,332
Other Expenses	720,120	851,785	84.54 %	527,919
Unallocated Services	(91,746)	0	0.00 %	(109,558)
<b>Total Expenses</b>	<b>11,700,027</b>	<b>12,809,340</b>	<b>91.34 %</b>	<b>12,183,113</b>
<b>Net Income</b>	<b>\$ 466,172</b>	<b>\$ (336,081)</b>	<b>(138.71) %</b>	<b>\$ 237,979</b>

8/25/2021

**State Bar of Georgia**  
**Income Statement YTD - Operations**  
**For the Current Period Ending June 30, 2021**

	<u>YTD Actual</u>	<u>Annual Budget</u>	<u>YTD % of Budget</u>	<u>Prior Year</u>
<b>Other Expenses</b>				
BOG and Member Meetings	347,883	380,000	91.55 %	99,990
Supreme Court Meetings	15,549	45,000	34.55 %	33,553
Executive Committee Meetings	7,091	60,000	11.82 %	43,333
Southern Conference	0	0	0.00 %	50,359
State Disciplinary Board Lawyers	31,887	20,000	159.44 %	30,000
Elections	34,898	39,685	87.94 %	34,082
Dues Notice	27,905	40,000	69.76 %	34,724
Letters of Good Standing	2,072	2,900	71.45 %	2,526
Bar Membership Cards	7,895	11,100	71.13 %	9,355
50 Year Certificates	2,034	2,000	101.70 %	2,075
Membership Database Project	12,605	13,000	96.96 %	0
Recruitment Costs	74,934	100,000	74.93 %	0
State Bar Committees	7,491	29,000	25.83 %	27,113
Strategic Plan	0	0	0.00 %	40,000
Georgia Diversity Program	20,000	20,000	100.00 %	20,000
Conference Sponsorship	0	0	0.00 %	4,000
ABA Delegate Breakfast	0	2,500	0.00 %	2,591
1st Floor Office Furniture Project	15,137	14,100	107.35 %	0
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	70,758	34,000	208.11 %	45,882
Investment Service Fees	39,481	36,000	109.67 %	35,836
Access to Justice/Pro Bono	0	0	0.00 %	10,000
<b>Other Expenses</b>	<b>720,120</b>	<b>851,785</b>	<b>84.54 %</b>	<b>527,919</b>

**State Bar of Georgia**  
**Status and Use of Cash and Investments as of June 30, 2021**

**Cash and Investments - June 30, 2021 - Bar** **31,827,968**

**Less:**

Georgia Bar Foundation Cash Included in Above Amount (13,677)  
CCLC Cash Included in Above Amount (6,149,442)

**Net Cash Available for State Bar** **25,664,849**

**Use of Cash:**

**Less:**

Board Designated - See Separate Schedule Attached (8,598,291)  
Temporarily Restricted - See Separate Schedule Attached (2,009,171)

**Total Board Designated and Temporarily Restricted** **(10,607,462)**

**Other - Cash Allocated:**

Collection of Outstanding Accounts Receivable 173,015  
Payment of Accounts Payable (900,231)  
Payment of Accrued Vacation (691,188)  
Deferred Income (7,547,947)  
Payment of Credit Card Bill (21,469)  
Payment of Accrued Salary (572,851)  
Payment of Accrued Taxes (43,823)  
Other Accrued Expenses (primarily pension) (636,527)  
Payment to Client Security Fund (1,798,187)  
Operational Expenses for Remaining Bar Year 0  
Additional Revenue for Bar Operations (Excluding Bar Center) 0  
Net Amount to be received from Related Entities 549,735

**Total Other - Cash Allocated** **(11,489,472)**

**Estimated Cash and Investments - June 30, 2021 - Bar** **3,567,915**

**Cash and Investments - June 30, 2021 - Bar Center** **18,531**

**Other Cash Allocated - Bar Center:**

Collection of Outstanding Accounts Receivable 63,262  
Payment of Accounts Payable 0  
Deferred Income 0  
Other Accrued Expenses (196,532)

**Total Other - Cash Allocated - Bar Center** **(133,270)**

**Estimated Cash and Investments - June 30, 2021 - Bar Center** **(114,739)**

**Total Estimated Cash Balance at June 30, 2021** **3,453,176**

*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.*

8/25/2021

**State Bar of Georgia**  
**Board-Designated and Donor Temporarily Restricted Net Assets**  
**For the Current Period Ending June 30, 2021**

	2018 June 30	2019 June 30	2020 June 30	2021 June 30
<b>Board Designated</b>				
General Operations - Bar	2,750,000	2,750,000	2,750,000	2,750,000
General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	300,000
Cornerstones of Freedom	600,000	0	0	0
Sections	2,660,285	2,793,143	3,097,034	3,431,439
YLD Meetings	33,481	29,716	87,819	116,852
<b>Total Board-Designated excludes ICLE</b>	<b>8,343,766</b>	<b>7,872,859</b>	<b>8,234,853</b>	<b>8,598,291</b>
<b>Donor Temporarily Restricted</b>				
Legislative	1,257,657	1,285,674	1,094,092	1,350,873
Law Related Education/Marshall fund	312,580	316,570	233,708	231,160
High School Mock Trial	9,018	14,095	15,486	15,482
National Mock Trial	20,161	0	0	0
Basics Program	65,414	67,032	69,517	119,460
Younger Lawyers	154,216	125,032	170,213	115,020
Lawyers Assistance	30,454	32,553	34,698	34,650
Georgia Diversity Program	17,588	18,957	13,596	55,807
Bar Media Conference	21,247	18,697	20,839	21,834
Justice Hunstein's Portrait	0	7,813	15,152	25,651
Law Day	6,276	6,356	6,517	6,516
Access to Justice	1,437	1,456	1,493	1,492
iCivics Program	(245)	603	868	0
Promote Inclusion	10,235	11,120	14,211	13,285
State Bar of Georgia Foundation	1,280	0	100	3,134
Military Vet Pro Bono	13,680	13,854	14,711	14,807
Unauthorized Practice of Law	100,518	0	0	0
<b>Total Donor Temporarily Restricted</b>	<b>2,021,516</b>	<b>1,919,812</b>	<b>1,705,201</b>	<b>2,009,171</b>
<b>Net Board Designated and Donor Temporarily Restricted</b>	<b>10,365,282</b>	<b>9,792,671</b>	<b>9,940,054</b>	<b>10,607,462</b>

**State Bar of Georgia  
Summary of Members and Voluntary Legislative Contributions  
With Contributions Paid Through June 30, 2021**

Dues	2021-22 Dues Season	2020-21 Dues Season	2019-20 Dues Season
<b>Total Number of Members at Apr 30 of Previous Bar year (active and inactive)</b>	<b>48,965</b>	<b>48,538</b>	<b>47,964</b>
Active - Number Paid	23,698	41,043	40,379
Inactive - Number Paid	4,582	8,780	8,929
<b>Total Number of Members With Dues Paid</b>	<b>28,280</b>	<b>49,823</b>	<b>49,308</b>
<b>Percent of Total Members With Dues Paid</b>	<b>57.8%</b>	<b>102.6%</b>	<b>102.8%</b>
Number of Members Who Made A Contribution	4,817	8,325	3,704
Percent of Members Who Made A Contribution	17.0%	16.7%	7.5%
<b>Total Contribution Amount</b>	<b>\$ 459,860</b>	<b>\$ 766,123</b>	<b>\$ 322,708</b>
<b>Average Amount Paid</b>	<b>\$ 95</b>	<b>\$ 92</b>	<b>\$ 87</b>

**Legislative Contribution Amounts by Dues Year**

2021 - 2022	\$ 459,860
2020 - 2021	\$ 766,123
2019 - 2020	\$ 322,708
2018 - 2019	\$ 494,906
2017 - 2018	\$ 546,905
2016 - 2017	\$ 557,991
2015 - 2016	\$ 565,004
2014 - 2015	\$ 640,505
2013 - 2014	\$ 691,736
2012 - 2013	\$ 685,283

*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 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**  
**Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)**  
**With Contributions Paid Through June 30, 2021**

Dues	2021-22 Dues Season	2020-21 Dues Season	2019-20 Dues Season
<b>Total Number of Members</b> at Apr 30 of Previous Bar year (active and inactive)	48,965	48,538	47,964
Active - Number Paid	23,698	41,043	40,379
Inactive - Number Paid	4,582	8,780	8,929
<b>Total Number of Members With Dues Paid</b>	<b>28,280</b>	<b>49,823</b>	<b>49,308</b>
<b>Percent of Total Members With Dues Paid</b>	<b>57.8%</b>	<b>102.6%</b>	<b>102.8%</b>
Number of Members Who Made A Contribution	1,911	3,509	3,001
Percent of Members Who Made A Contribution	6.8%	7.0%	6.1%
<b>Total Contribution Amount</b>	<b>\$ 263,825</b>	<b>\$ 436,815</b>	<b>\$ 366,674</b>
<b>Average Contribution Amount</b>	<b>\$ 138</b>	<b>\$ 124</b>	<b>\$ 122</b>

**GLSP Contribution Amounts by Dues Year**

2021 - 2022	\$ 263,825
2020 - 2021	\$ 436,815
2019 - 2020	\$ 366,674
2018 - 2019	\$ 295,454
2017 - 2018	\$ 312,251
2016 - 2017	\$ 276,487
2015 - 2016	\$ 264,492
2014 - 2015	\$ 255,713
2013 - 2014	\$ 241,362
2012 - 2013	\$ 244,707

*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**  
**Legislative Activity Report**  
**From July 1, 2020 Thru June 30, 2021**

<b>July 1, 2020 Beginning Balance</b>	<b>\$ 1,094,092</b>
<b>Income:</b>	
Interest Income	20,330
Gain/Loss on Investments	(11,030)
Contributions	769,072
<b>Total Income</b>	<b><u>778,372</u></b>
<b>Expenditures:</b>	
Staff and Contract Lobbyists	478,217
Grassroots Efforts	-
Travel	2,167
Legislative Guests/Meetings	3,924
Shared Office Allocation	15,520
Computer Hardware	1,414
Miscellaneous	20,349
<b>Total Expenditures</b>	<b><u>521,591</u></b>
<b>Net Donor Temporarily Restricted Balance at June 30, 2021</b>	<b><u><u>\$ 1,350,873</u></u></b>

8/25/2021

**Client Security Fund**  
**Summary of Client Security Fund Activity**  
**For the Current Period Ending June 30, 2021**

	2017 June 30	2018 June 30	2019 June 30	2020 June 30	2021 June 30
<b>Fund Balance, Beginning of Year</b>	<b>2,035,238</b>	<b>1,836,994</b>	<b>1,450,249</b>	<b>1,031,012</b>	<b>1,009,586</b>
<b>Income:</b>					
Interest Income	8,007	8,028	11,922	13,214	17,568
Gain/Loss Investment Interest Allocation	(142)	0	4,544	13,064	(9,942)
Client Security Fund Assessments	153,863	144,628	102,884	85,896	78,279
Restitution Income	5,386	25,250	30,451	30,027	23,095
<b>Total Income:</b>	<b>167,114</b>	<b>177,906</b>	<b>149,801</b>	<b>142,201</b>	<b>109,000</b>
<b>Transfer from Others:</b>					
Transfer from State Bar of Georgia	0	0	0	0	0
Transfer from Commission on Continuing Lawyer Competency	0	0	0	388,000	0
Transfer from Institute of Continuing Legal Education	0	0	0	0	1,000,000
<b>Total Transfer from Others:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>388,000</b>	<b>1,000,000</b>
<b>Expenses:</b>					
Restricted Expenses	(73,000)	(73,032)	(73,000)	(73,000)	(73,000)
Client Security Fund Claims Payments	(292,358)	(491,619)	(496,038)	(474,387)	(238,713)
Bond Premium Amortization	0	0	0	(2,341)	(5,630)
Investment Service Fees	0	0	0	(1,899)	(3,056)
<b>Total Expenses:</b>	<b>(365,358)</b>	<b>(564,651)</b>	<b>(569,038)</b>	<b>(551,627)</b>	<b>(320,399)</b>
<b>Net Income</b>	<b>(198,244)</b>	<b>(386,745)</b>	<b>(419,237)</b>	<b>(21,426)</b>	<b>788,601</b>
<b>Fund Balance, End of Period</b>	<b>1,836,994</b>	<b>1,450,249</b>	<b>1,031,012</b>	<b>1,009,586</b>	<b>1,798,187</b>

Administration

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	130,183	10.15 %	1,306,438	101.82 %	\$ 1,283,046	\$ (23,392)	\$ 1,253,756
Overtime	4,178	58.03 %	4,649	64.57 %	7,200	2,551	5,758
Taxes and Benefits	(4,386)	(1.24) %	308,095	87.08 %	353,815	45,720	349,917
Pension	(7,228)	(7.39) %	82,416	84.28 %	97,793	15,377	94,304
<b>Total Personnel Services</b>	<b>122,747</b>	<b>7.05 %</b>	<b>1,701,598</b>	<b>97.69 %</b>	<b>1,741,854</b>	<b>40,256</b>	<b>1,703,735</b>
<b>Operating Expenses</b>							
Shared Office Allocation	32,334	8.33 %	388,008	100.00 %	388,008	0	391,579
Postage and Freight	20	0.18 %	4,905	44.60 %	11,000	6,094	9,105
Printing	41	27.35 %	100	66.57 %	150	50	54
Supplies	76	3.16 %	1,606	66.92 %	2,400	794	2,848
Telephone	300	8.33 %	3,525	97.92 %	3,600	75	3,600
Subscriptions and Books	43	6.66 %	1,791	275.43 %	650	(1,140)	725
Dues and Memberships	0	0.00 %	1,805	64.46 %	2,800	995	1,070
Licenses and Certifications	0	0.00 %	90	0.00 %	0	(90)	30
Seminars and Training	0	0.00 %	598	29.90 %	2,000	1,402	189
Miscellaneous	692	34.60 %	2,689	134.45 %	2,000	(689)	1,701
Attorney and Staff Travel	12,763	31.40 %	14,442	35.53 %	40,650	26,207	23,020
Executive Director Travel	4,405	34.96 %	5,192	41.20 %	12,600	7,409	12,917
Luncheons	0	0.00 %	205	34.23 %	600	394	208
Bank Fees	10,916	574.50 %	20,638	1,086.22 %	1,900	(18,738)	2,449
Credit Card Discount and Fees	66,202	33.61 %	221,634	112.50 %	197,000	(24,634)	220,620
Computer Hardware	0	0.00 %	17,038	173.85 %	9,800	(7,238)	1,713
Computer Software	0	0.00 %	323	58.10 %	900	378	349
Membership Software License	6,104	8.11 %	75,242	99.92 %	75,300	58	75,242
Contract Programming	844	11.25 %	843	11.25 %	7,500	6,656	2,687
<b>Total Operating Expenses</b>	<b>134,740</b>	<b>17.76 %</b>	<b>760,874</b>	<b>100.27 %</b>	<b>758,858</b>	<b>(2,017)</b>	<b>750,106</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>643</b>	<b>32.13 %</b>	<b>2,000</b>	<b>1,357</b>	<b>1,587</b>
<b>Total Expenses</b>	<b>\$ 257,487</b>	<b>10.29 %</b>	<b>\$ 2,463,115</b>	<b>98.42 %</b>	<b>\$ 2,502,712</b>	<b>\$ 39,596</b>	<b>\$ 2,455,429</b>

OGC & CAP Income Statement Combined

**State Bar of Georgia**  
**Expenditure Statement - Operations**  
**For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	209,792	8.22 %	2,528,063	99.04 %	\$ 2,552,468	\$ 24,405	2,605,018
Salaries-Hourly PT	2,266	4.93 %	28,413	61.86 %	45,933	17,520	27,623
Overtime	0	0.00 %	0	0.00 %	4,300	4,300	1,010
Taxes and Benefits	102,936	14.56 %	705,760	99.82 %	707,067	1,307	735,833
Pension	12,993	6.95 %	184,345	98.62 %	186,929	2,584	180,284
<b>Total Personnel Services</b>	<b>327,987</b>	<b>9.38 %</b>	<b>3,446,581</b>	<b>98.57 %</b>	<b>3,496,697</b>	<b>50,116</b>	<b>3,549,768</b>
<b>Operating Expenses</b>							
Shared Office Allocation	37,507	8.33 %	450,089	100.00 %	450,089	0	463,501
Postage and Freight	1,006	4.19 %	13,174	54.90 %	24,000	10,825	16,635
Printing	0	0.00 %	0	0.00 %	1,000	1,000	122
Supplies	788	8.04 %	3,476	35.46 %	9,800	6,325	6,716
Telephone	305	14.52 %	3,316	157.92 %	2,100	(1,216)	2,530
Subscriptions and Books	293	1.32 %	15,121	67.93 %	22,260	7,138	14,790
Dues and Memberships	250	2.50 %	8,098	80.97 %	10,000	1,903	8,040
Seminars and Training	0	0.00 %	4,972	52.89 %	9,400	4,428	6,582
Miscellaneous	11	0.37 %	160	5.32 %	3,000	2,840	2,365
Recruitment Costs	0	0.00 %	0	0.00 %	0	0	2,000
Attorney and Staff Travel	13,293	20.19 %	13,660	20.74 %	65,849	52,189	28,046
Investigator Travel	67	1.33 %	377	7.54 %	5,000	4,623	4,745
Lunches	0	0.00 %	0	0.00 %	2,625	2,625	2,298
Computer Hardware	1,560	12.68 %	25,807	209.82 %	12,300	(13,508)	16,330
Computer Software	12	0.60 %	1,131	56.55 %	2,000	869	3,504
Contract Labor	0	0.00 %	25	0.60 %	4,000	3,976	6,938
Contract Programming	19,875	233.82 %	20,875	245.59 %	8,500	(12,375)	4,000
Receiverships	0	0.00 %	2,662	26.63 %	10,000	7,337	5,740
State Disciplinary Board Panel	31,379	41.84 %	33,470	44.63 %	75,000	41,531	27,697
Contract Special Master	4,699	5.22 %	18,153	20.17 %	90,000	71,847	14,390
Lexis Online	3,375	16.98 %	19,160	96.40 %	19,875	715	20,413
<b>Total Operating Expenses</b>	<b>114,420</b>	<b>13.84 %</b>	<b>633,726</b>	<b>76.65 %</b>	<b>826,798</b>	<b>193,072</b>	<b>657,782</b>
<b>Furniture/Equipment</b>	<b>779</b>	<b>5.19 %</b>	<b>1,642</b>	<b>10.94 %</b>	<b>15,000</b>	<b>13,358</b>	<b>22,638</b>
<b>Total Expenses</b>	<b>\$ 443,186</b>	<b>10.22 %</b>	<b>\$ 4,081,948</b>	<b>94.09 %</b>	<b>\$ 4,338,495</b>	<b>\$ 256,547</b>	<b>\$ 4,230,188</b>

Communications

**State Bar of Georgia**  
**Expenditure Statement - Operations**  
**For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	23,304	8.41 %	238,345	85.96 %	277,262	38,917	320,305
Overtime	0	0.00 %	0	0.00 %	1,600	1,600	51
Taxes and Benefits	11,271	10.33 %	75,600	69.32 %	109,061	33,461	126,056
Pension	(6,313)	(39.78) %	8,235	51.89 %	15,871	7,636	18,255
<b>Total Personnel Services</b>	<b>28,262</b>	<b>7.00 %</b>	<b>322,180</b>	<b>79.79 %</b>	<b>403,794</b>	<b>81,614</b>	<b>464,667</b>
<b>Expenses</b>							
Shared Office Allocation	5,173	8.33 %	62,081	100.00 %	62,081	0	79,914
Postage and Freight	190	12.65 %	1,289	85.92 %	1,500	211	1,017
Supplies	0	0.00 %	532	53.22 %	1,000	468	519
Telephone	0	0.00 %	450	50.00 %	900	450	900
Subscriptions and Books	40	1.28 %	3,498	111.93 %	3,125	(373)	2,509
Dues and Memberships	0	0.00 %	405	100.00 %	405	0	405
Seminars and Training	0	0.00 %	390	7.50 %	5,200	4,810	2,465
Miscellaneous	397	24.07 %	487	29.56 %	1,650	1,163	1,915
Attorney and Staff Travel	6,092	34.03 %	6,092	34.03 %	17,900	11,808	7,950
Lunches	0	0.00 %	0	0.00 %	100	100	0
Computer Hardware	0	0.00 %	5,427	130.77 %	4,150	(1,277)	2,028
Computer Software	0	0.00 %	1,817	113.53 %	1,600	(217)	1,816
Media Consultants	8,724	17.45 %	46,336	92.67 %	50,000	3,664	39,263
Website Server/Redesign	2,910	9.83 %	31,502	106.43 %	29,600	(1,902)	32,927
Membership Certificates	1,587	79.36 %	2,929	146.45 %	2,000	(929)	1,221
<b>Subtotal</b>	<b>25,113</b>	<b>13.86 %</b>	<b>163,235</b>	<b>90.08 %</b>	<b>181,211</b>	<b>17,976</b>	<b>174,649</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>500</b>
<b>Subtotal</b>	<b>53,375</b>	<b>9.12 %</b>	<b>485,415</b>	<b>82.98 %</b>	<b>585,005</b>	<b>99,590</b>	<b>640,016</b>
<b>Publications</b>							
Bar Journal	40,928	14.06 %	253,874	87.24 %	291,000	37,126	267,415
Supplemental Directory	0	0.00 %	6,673	111.23 %	6,000	(673)	5,446
Special Publications and Printing	0	0.00 %	0	0.00 %	3,000	3,000	0
<b>Total Publications</b>	<b>40,928</b>	<b>13.64 %</b>	<b>260,547</b>	<b>86.85 %</b>	<b>300,000</b>	<b>39,453</b>	<b>272,861</b>

Communications

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Total Communications</b>	94,303	10.66 %	745,962	84.29 %	885,005	139,043	912,876

Fee Arbitration

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	22,851	8.38 %	270,971	99.42 %	\$ 272,557	\$ 1,586	\$ 261,277
Overtime	0	0.00 %	0	0.00 %	1,500	1,500	390
Taxes and Benefits	10,699	10.16 %	110,736	105.15 %	105,314	(5,422)	96,887
Pension	1,306	6.93 %	18,592	98.60 %	18,857	265	18,151
<b>Total Personnel Services</b>	<b>34,856</b>	<b>8.75 %</b>	<b>400,299</b>	<b>100.52 %</b>	<b>398,228</b>	<b>(2,071)</b>	<b>376,705</b>
<b>Operating Expenses</b>							
Shared Office Allocation	5,173	8.33 %	62,081	100.00 %	62,081	0	63,931
Postage and Freight	754	9.19 %	6,954	84.81 %	8,200	1,246	4,863
Printing	0	0.00 %	0	0.00 %	2,800	2,800	0
Supplies	227	10.31 %	746	33.90 %	2,200	1,454	545
Subscriptions and Books	0	0.00 %	1,346	269.10 %	500	(845)	327
Dues and Memberships	0	0.00 %	305	76.25 %	400	95	0
Seminars and Training	0	0.00 %	0	0.00 %	400	400	0
Miscellaneous	0	0.00 %	337	28.10 %	1,200	862	72
Attorney and Staff Travel	0	0.00 %	0	0.00 %	2,500	2,500	22
Luncheons	0	0.00 %	0	0.00 %	3,400	3,400	1,369
Computer Hardware	0	0.00 %	3,528	0.00 %	0	(3,528)	4,492
Contract Labor	6,000	8.00 %	72,000	96.00 %	75,000	3,000	72,248
Contract Programming	344	17.19 %	1,344	67.19 %	2,000	656	843
<b>Total Operating Expenses</b>	<b>12,498</b>	<b>7.78 %</b>	<b>148,641</b>	<b>92.51 %</b>	<b>160,681</b>	<b>12,040</b>	<b>148,712</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>550</b>	<b>550</b>	<b>844</b>
<b>Total Expenses</b>	<b>\$ 47,354</b>	<b>8.46 %</b>	<b>\$ 548,940</b>	<b>98.12 %</b>	<b>\$ 559,459</b>	<b>\$ 10,519</b>	<b>\$ 526,262</b>



**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Consultation	94	5.21 %	450	25.00 %	1,800	1,350	913
Publications	0	0.00 %	26	10.52 %	250	224	99
In-House Training Income	0	0.00 %	0	0.00 %	150	150	0
Vendor Directory	2,800	32.94 %	14,150	166.47 %	8,500	(5,650)	18,900
Miscellaneous Income	90	2.57 %	873	24.93 %	3,500	2,627	1,497
<b>Total Revenues</b>	<b>2,984</b>	<b>21.01 %</b>	<b>15,499</b>	<b>109.15 %</b>	<b>14,200</b>	<b>(1,299)</b>	<b>21,409</b>
<b>Personnel Services</b>							
Salaries	4,429	1.70 %	237,525	91.32 %	260,095	22,570	260,074
Overtime	0	0.00 %	0	0.00 %	2,300	2,300	1,103
Taxes and Benefits	8,783	8.41 %	95,961	91.91 %	104,403	8,442	102,571
Pension	(6,626)	(38.18) %	9,281	53.48 %	17,353	8,072	17,096
<b>Total Personnel Services</b>	<b>6,586</b>	<b>1.71 %</b>	<b>342,767</b>	<b>89.23 %</b>	<b>384,151</b>	<b>41,384</b>	<b>380,844</b>
<b>Operating Expenses</b>							
Shared Office Allocation	5,173	8.33 %	62,081	100.00 %	62,081	0	63,931
Postage and Freight	0	0.00 %	0	0.00 %	1,600	1,600	1,184
Printing	0	0.00 %	0	0.00 %	600	600	1,832
Supplies	0	0.00 %	27	3.53 %	750	724	1,160
Telephone	0	0.00 %	0	0.00 %	100	100	0
Subscriptions and Books	38	0.39 %	6,945	71.61 %	9,700	2,754	8,451
Dues and Memberships	0	0.00 %	485	32.33 %	1,500	1,015	125
Seminars and Training	0	0.00 %	1,176	235.20 %	500	(676)	338
Miscellaneous	0	0.00 %	0	0.00 %	350	350	(80)
Attorney and Staff Travel	3,812	38.11 %	3,812	38.11 %	10,000	6,189	3,303
Lunches	0	0.00 %	0	0.00 %	200	200	0
Computer Hardware	0	0.00 %	1,441	144.15 %	1,000	(442)	10,216
Computer Software	320	5.95 %	5,161	95.88 %	5,382	222	4,363
<b>Total Operating Expenses</b>	<b>9,343</b>	<b>9.96 %</b>	<b>81,128</b>	<b>86.52 %</b>	<b>93,763</b>	<b>12,636</b>	<b>94,823</b>
<b>Total Expenses</b>	<b>15,929</b>	<b>3.33 %</b>	<b>423,895</b>	<b>88.70 %</b>	<b>477,914</b>	<b>54,019</b>	<b>475,667</b>

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Solo and Small Firm	0	0.00 %	0	0.00 %	25,000	25,000	25,703
Net Income	\$ (12,946)	2.95 %	\$ (408,396)	93.09 %	\$ (438,714)	\$ (30,318)	\$ (428,555)

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	9,165	8.46 %	108,725	100.38 %	\$ 108,308	\$ (417)	102,164
Overtime	0	0.00 %	0	0.00 %	500	500	0
Taxes and Benefits	4,146	12.72 %	32,317	99.13 %	32,602	285	30,805
Pension	516	7.88 %	6,510	99.55 %	6,539	29	6,033
<b>Total Personnel Services</b>	<b>13,827</b>	<b>9.35 %</b>	<b>147,552</b>	<b>99.73 %</b>	<b>147,949</b>	<b>397</b>	<b>139,002</b>
<b>Operating Expenses</b>							
Shared Office Allocation	2,587	8.33 %	31,041	100.00 %	31,041	0	31,966
Postage and Freight	0	0.00 %	30	0.00 %	0	(31)	0
Supplies	24	1.73 %	25	1.73 %	1,400	1,376	0
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	159	0.00 %	1,898	0.00 %	0	(1,899)	60
Dues and Memberships	0	0.00 %	0	0.00 %	150	150	135
Seminars and Training	0	0.00 %	0	0.00 %	300	300	295
Attorney and Staff Travel	4,352	61.88 %	4,632	65.65 %	7,055	2,424	5,768
Computer Hardware	0	0.00 %	1,414	141.38 %	1,000	(414)	0
Computer Software	0	0.00 %	363	99.53 %	365	2	363
Committee Brochures	0	0.00 %	0	0.00 %	7,500	7,500	6,263
President	5,957	21.42 %	6,112	21.98 %	27,813	21,701	14,683
President Elect	3,571	16.79 %	4,540	21.34 %	21,277	16,737	10,391
Immediate Past President	3,189	17.63 %	4,134	22.86 %	18,085	13,951	10,696
Treasurer	1,300	100.00 %	1,300	100.00 %	1,300	0	929
Secretary	1,300	100.00 %	1,300	100.00 %	1,300	0	499
Meetings	0	0.00 %	47,500	100.00 %	47,500	0	52,730
Newsletter	0	0.00 %	890	1.80 %	49,500	48,610	13,437
<b>Total Operating Expenses</b>	<b>22,514</b>	<b>10.40 %</b>	<b>106,079</b>	<b>49.00 %</b>	<b>216,486</b>	<b>110,407</b>	<b>149,115</b>
<b>Committees Activities</b>							
Committees Income	0	0.00 %	0	0.00 %	(10,000)	(10,000)	(9,063)
Committees Expense	11,499	11.16 %	22,409	21.76 %	103,000	80,591	55,821
<b>Total Committees Activities</b>	<b>11,499</b>	<b>12.36 %</b>	<b>22,409</b>	<b>24.10 %</b>	<b>93,000</b>	<b>70,591</b>	<b>46,758</b>

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Total Expenses	\$ 47,839	10.46 %	276,039	60.35 %	457,435	181,395	\$ 334,875

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	43,408	8.46 %	514,975	100.38 %	513,002	\$ (1,973)	\$ 516,948
Overtime	0	0.00 %	0	0.00 %	255	255	86
Taxes and Benefits	21,895	12.09 %	180,188	99.46 %	181,159	971	181,707
Pension	2,961	8.29 %	35,691	99.96 %	35,706	15	35,855
<b>Total Personnel Services</b>	<b>68,264</b>	<b>9.35 %</b>	<b>730,854</b>	<b>100.10 %</b>	<b>730,122</b>	<b>(732)</b>	<b>734,596</b>
<b>Operating Expenses</b>							
Shared Office Allocation	7,760	8.33 %	93,122	100.00 %	93,122	0	95,897
Postage and Freight	157	9.23 %	780	45.90 %	1,700	920	675
Printing	0	0.00 %	0	0.00 %	150	150	0
Supplies	1,122	74.79 %	1,969	131.24 %	1,500	(469)	679
Subscriptions and Books	0	0.00 %	188	23.56 %	800	612	750
Dues and Memberships	0	0.00 %	350	49.02 %	714	364	675
Seminars and Training	0	0.00 %	89	17.80 %	500	411	300
Miscellaneous	0	0.00 %	0	0.00 %	1,500	1,500	1,634
Attorney and Staff Travel	0	0.00 %	0	0.00 %	1,000	1,000	1,240
Investigator Travel	516	9.93 %	1,348	25.92 %	5,200	3,852	2,610
Lunches	0	0.00 %	0	0.00 %	2,200	2,200	0
Computer Hardware	293	0.00 %	2,045	0.00 %	0	(2,045)	2,634
Lexis Online	617	16.22 %	3,699	97.35 %	3,800	101	4,051
<b>Total Operating Expenses</b>	<b>10,465</b>	<b>9.33 %</b>	<b>103,590</b>	<b>92.34 %</b>	<b>112,186</b>	<b>8,596</b>	<b>111,145</b>
<b>Total Expenses</b>	<b>\$ 78,729</b>	<b>9.35 %</b>	<b>\$ 834,444</b>	<b>99.07 %</b>	<b>\$ 842,308</b>	<b>\$ 7,864</b>	<b>\$ 845,741</b>

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	7,431	8.46 %	88,154	100.39 %	87,816	(338)	86,165
Overtime	0	0.00 %	0	0.00 %	250	250	86
Taxes and Benefits	5,694	14.68 %	39,323	101.35 %	38,800	(523)	43,755
Pension	(1,497)	(28.29) %	3,355	63.38 %	5,293	1,938	3,323
<b>Total Personnel Services</b>	<b>11,628</b>	<b>8.80 %</b>	<b>130,832</b>	<b>99.00 %</b>	<b>132,159</b>	<b>1,327</b>	<b>133,329</b>
<b>Operating Expenses</b>							
Shared Office Allocation	1,293	8.33 %	15,520	100.00 %	15,520	0	15,983
Postage and Freight	0	0.00 %	30	29.66 %	100	70	7
Printing	0	0.00 %	0	0.00 %	100	100	0
Supplies	0	0.00 %	0	0.00 %	1,300	1,300	1,557
Telephone	4,479	28.52 %	19,429	123.75 %	15,700	(3,729)	13,727
Miscellaneous	0	0.00 %	57	11.35 %	500	443	406
Attorney and Staff Travel	1,953	75.12 %	1,953	75.12 %	2,600	647	1,249
Parking Savannah	185	4.63 %	2,220	55.50 %	4,000	1,780	2,321
Luncheons	0	0.00 %	0	0.00 %	100	100	17
Computer Hardware	0	0.00 %	2,583	68.87 %	3,750	1,168	0
Computer Software	0	0.00 %	0	0.00 %	90	90	74
Equipment Maintenance	532	13.31 %	1,878	46.94 %	4,000	2,122	3,086
Equipment Rental	0	0.01 %	0	0.15 %	100	100	34
Rent and Utilities	7,140	10.06 %	83,216	117.21 %	71,000	(12,217)	70,925
Facilities Maintenance	220	4.89 %	2,905	64.56 %	4,500	1,595	4,521
Building and Other Insurance (Not Group)	213	8.18 %	2,553	98.18 %	2,600	48	2,428
<b>Total Operating Expenses</b>	<b>16,015</b>	<b>12.71 %</b>	<b>132,344</b>	<b>105.07 %</b>	<b>125,960</b>	<b>(6,383)</b>	<b>116,835</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>1,752</b>
<b>Total Expenses</b>	<b>\$ 27,643</b>	<b>10.71 %</b>	<b>\$ 263,175</b>	<b>101.96 %</b>	<b>\$ 258,119</b>	<b>\$ (5,056)</b>	<b>\$ 251,416</b>

Tifton

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>	<b>3,497</b>	<b>4.35 %</b>	<b>75,432</b>	<b>93.86 %</b>	<b>80,368</b>	<b>4,936</b>	<b>109,953</b>
Salaries	0	0.00 %	46,600	89.62 %	\$ 52,000	\$ 5,400	74,230
Salaries-Hourly PT	1,696	8.31 %	20,080	98.39 %	20,408	328	19,090
Taxes and Benefits	1,723	25.59 %	7,549	112.12 %	6,733	(816)	12,076
Pension	78	6.38 %	1,203	96.04 %	1,227	24	4,557
<b>Total Personnel Services</b>	<b>3,497</b>	<b>4.35 %</b>	<b>75,432</b>	<b>93.86 %</b>	<b>80,368</b>	<b>4,936</b>	<b>109,953</b>
<b>Operating Expenses</b>	<b>970</b>	<b>8.33 %</b>	<b>11,640</b>	<b>100.00 %</b>	<b>11,640</b>	<b>0</b>	<b>11,987</b>
Shared Office Allocation	0	0.00 %	344	114.57 %	300	(44)	479
Postage and Freight	0	0.00 %	4	0.00 %	0	(4)	65
Printing	10	0.51 %	442	22.10 %	2,000	1,558	1,684
Supplies	1,538	11.56 %	14,462	108.73 %	13,300	(1,161)	13,655
Telephones	0	0.00 %	99	99.88 %	100	0	127
Subscriptions and Books	0	0.00 %	55	18.25 %	300	245	1
Miscellaneous	41	1.70 %	488	20.34 %	2,400	1,912	1,158
Attorney and Staff Travel	0	0.00 %	0	0.00 %	50	50	74
Lunches	0	0.00 %	2,828	141.38 %	2,000	(828)	776
Computer Hardware	0	0.00 %	0	0.00 %	200	200	100
Computer Software	0	0.00 %	0	0.00 %	200	200	100
Equipment Maintenance	188	11.08 %	1,534	90.21 %	1,700	167	1,364
Equipment Rental	0	0.27 %	0	0.36 %	100	99	18
Rent and Utilities	1,696	7.89 %	18,990	88.32 %	21,500	2,510	19,637
Facilities Maintenance	150	15.00 %	270	27.00 %	1,000	730	346
Building and Other Insurance (Not Group)	213	8.18 %	2,552	96.18 %	2,600	48	2,428
<b>Total Operating Expenses</b>	<b>4,806</b>	<b>8.12 %</b>	<b>53,708</b>	<b>90.74 %</b>	<b>59,190</b>	<b>5,482</b>	<b>53,899</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>1,000</b>	<b>1,000</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 8,303</b>	<b>5.91 %</b>	<b>\$ 129,140</b>	<b>91.88 %</b>	<b>\$ 140,558</b>	<b>\$ 11,418</b>	<b>\$ 163,852</b>

Law Related Education

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Miscellaneous Income	0	0.00 %	0	0.00 %	0	0	162
<b>Total Revenues</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>162</b>
<b>Personnel Services</b>							
Salaries	13,606	6.76 %	161,418	80.18 %	201,317	39,899	201,770
Overtime	0	0.00 %	0	0.00 %	500	500	26
Taxes and Benefits	10,628	9.66 %	67,406	61.27 %	110,016	42,610	100,103
Pension	(1,305)	(9.38) %	11,452	82.29 %	13,917	2,465	13,657
<b>Total Personnel Services</b>	<b>22,929</b>	<b>7.04 %</b>	<b>240,276</b>	<b>73.76 %</b>	<b>325,750</b>	<b>85,474</b>	<b>315,756</b>
<b>Operating Expenses</b>							
Shared Office Allocation	3,880	8.33 %	46,561	100.00 %	46,561	0	47,948
Postage and Freight	0	0.00 %	14	9.36 %	150	136	9
Printing	0	0.00 %	0	0.00 %	1,000	1,000	135
Supplies	0	0.00 %	62	3.45 %	1,800	1,738	538
Subscriptions and Books	0	0.00 %	1,126	2,251.26 %	50	(1,076)	5
Seminars and Training	0	0.00 %	254	25.40 %	1,000	746	0
Miscellaneous	0	0.00 %	0	0.00 %	1,400	1,400	502
Attorney and Staff Travel	0	0.00 %	0	0.00 %	7,600	7,600	4,135
Luncheons	0	0.00 %	0	0.00 %	150	150	0
Computer Hardware	0	0.00 %	0	0.00 %	0	0	928
<b>Total Operating Expenses</b>	<b>3,880</b>	<b>6.50 %</b>	<b>48,017</b>	<b>80.42 %</b>	<b>59,711</b>	<b>11,694</b>	<b>54,200</b>
<b>Total Expenses</b>	<b>26,809</b>	<b>6.96 %</b>	<b>288,293</b>	<b>74.79 %</b>	<b>385,461</b>	<b>97,168</b>	<b>369,956</b>
<b>Net Income</b>	<b>\$ (26,809)</b>	<b>6.96 %</b>	<b>\$ (288,293)</b>	<b>74.79 %</b>	<b>\$ (385,461)</b>	<b>\$ (97,168)</b>	<b>\$ (369,794)</b>



**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>	0	0.00 %	198	33.00 %	600	402	565
Miscellaneous Income							
<b>Total Revenues</b>	<b>0</b>	<b>0.00 %</b>	<b>198</b>	<b>33.00 %</b>	<b>600</b>	<b>402</b>	<b>565</b>
<b>Personnel Services</b>							
Salaries	5,469	8.46 %	64,887	100.38 %	64,638	(249)	65,135
Taxes and Benefits	3,344	9.17 %	34,669	95.14 %	36,442	1,773	32,066
Pension	323	8.33 %	3,885	99.99 %	3,885	0	3,848
<b>Total Personnel Services</b>	<b>9,136</b>	<b>8.70 %</b>	<b>103,441</b>	<b>98.55 %</b>	<b>104,965</b>	<b>1,524</b>	<b>101,049</b>
<b>Operating Expenses</b>							
Shared Office Allocation	1,293	8.33 %	15,520	100.00 %	15,520	0	15,983
Postage and Freight	0	0.00 %	1,202	133.49 %	900	(301)	1,010
Supplies	0	0.00 %	645	75.92 %	850	204	2,753
Telephone	0	0.00 %	0	0.00 %	20	20	0
Subscriptions and Books	0	0.00 %	604	0.00 %	0	(604)	0
Dues and Memberships	0	0.00 %	200	100.00 %	200	0	200
Miscellaneous	0	0.00 %	3	0.89 %	400	397	37
Attorney and Staff Travel	2,605	520.85 %	3,168	633.57 %	500	(2,668)	586
Lunches	0	0.00 %	0	0.00 %	400	400	363
Computer Software	0	0.00 %	364	111.78 %	325	(38)	513
<b>Total Operating Expenses</b>	<b>3,898</b>	<b>20.39 %</b>	<b>21,706</b>	<b>113.55 %</b>	<b>19,115</b>	<b>(2,590)</b>	<b>21,445</b>
<b>HSMT Events</b>							
Law Academy	0	0.00 %	508	50.76 %	1,000	492	1,256
Regional Competition	(600)	26.67 %	(11,316)	502.91 %	(2,250)	9,066	(3,840)
State Competition	0	0.00 %	65	0.52 %	12,500	12,435	939
National Competition	10	0.06 %	2,352	14.70 %	16,000	13,648	850
District Competition	0	0.00 %	0	0.00 %	9,000	9,000	6,362
2019 NHSMT-C-Athens	0	0.00 %	(76)	0.00 %	0	76	423
<b>Total HSMT Events</b>	<b>(590)</b>	<b>(1.63) %</b>	<b>(8,467)</b>	<b>(23.36) %</b>	<b>36,250</b>	<b>44,717</b>	<b>5,990</b>

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Total Expenses	12,443	7.76 %	116,680	72.77 %	160,330	43,651	128,484
Net Income	(12,443)	7.79 %	(116,482)	72.92 %	(159,730)	(43,249)	(127,919)

**Military Legal Assistance Program**

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	0	0.00 %	0	0.00 %	0 \$	0 \$	79,405
Taxes and Benefits	0	0.00 %	0	0.00 %	0	0	23,809
<b>Total Personnel Services</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>103,214</b>
<b>Operating Expenses</b>							
Shared Office Allocation	0	0.00 %	0	0.00 %	0	0	15,983
Postage and Freight	0	0.00 %	0	0.00 %	0	0	107
Miscellaneous	0	0.00 %	0	0.00 %	0	0	430
Computer Hardware	0	0.00 %	0	0.00 %	0	0	929
<b>Total Operating Expenses</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0</b>	<b>17,449</b>
<b>Total Expenses</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>0 \$</b>	<b>0 \$</b>	<b>120,663</b>

**State Bar of Georgia**  
**Expenditure Statement - Operations**  
**For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Other Activities and Miscellaneous</b>							
<b>Other Activities</b>							
SBG President	10,385	21.26 %	13,871	28.40 %	48,849	34,978	14,622
SBG President Elect	4,160	13.41 %	6,448	20.78 %	31,029	24,581	13,419
SBG President Elect Elect	0	0.00 %	0	0.00 %	2,000	2,000	0
SBG Treasurer	1,041	26.03 %	1,041	26.03 %	4,000	2,959	1,958
SBG Secretary	2,034	50.85 %	2,034	50.85 %	4,000	1,966	812
SBG Immed. Past Pres.	6,387	30.71 %	6,387	30.71 %	20,799	14,412	3,650
SBG Past Past President	0	0.00 %	0	0.00 %	2,000	2,000	0
<b>Total Officer's Expenses</b>	<b>24,007</b>	<b>21.31 %</b>	<b>29,781</b>	<b>26.43 %</b>	<b>112,877</b>	<b>82,896</b>	<b>34,461</b>
<b>Miscellaneous</b>							
BOG and Member Meetings	343,080	90.28 %	347,883	91.55 %	380,000	32,117	99,990
Supreme Court Meetings	15,322	34.05 %	15,549	34.55 %	45,000	29,451	33,553
Executive Committee Meetings	134	0.22 %	7,092	11.82 %	60,000	52,908	43,333
Southern Conference	0	0.00 %	0	0.00 %	0	0	50,359
Lawyer's Assistance Program	0	0.00 %	85,000	100.00 %	85,000	0	63,712
Sections	18,640	9.92 %	187,292	99.71 %	187,835	543	186,026
State Disciplinary Board Lawyers	0	0.00 %	31,887	159.44 %	20,000	(11,887)	30,000
Elections	0	0.00 %	34,899	87.94 %	39,685	4,786	34,082
Letters of Good Standing	(119)	(0.30) %	27,904	69.76 %	40,000	12,096	34,724
Bar Membership Cards	270	9.31 %	2,072	71.45 %	2,900	828	2,526
50 Year Certificates	325	2.93 %	7,895	71.13 %	11,100	3,205	9,354
Dues Notice	0	0.00 %	2,033	101.65 %	2,000	(33)	2,076
Membership Database Project	0	0.00 %	253,598	103.93 %	244,000	(9,598)	240,436
Recruitment Costs	0	0.00 %	12,605	96.96 %	13,000	395	0
State Bar Committees	5,907	20.37 %	74,934	74.93 %	100,000	25,066	27,113
Strategic Plan	0	0.00 %	7,490	25.83 %	29,000	21,510	40,000
Georgia Diversity Program	0	0.00 %	0	0.00 %	20,000	0	20,000
Conference Sponsorship	0	0.00 %	0	0.00 %	0	0	4,000
ABA Delegate Breakfast	0	0.00 %	0	0.00 %	2,500	2,500	2,591
1st Floor Office Furniture Project	0	0.00 %	15,137	107.35 %	14,100	(1,037)	0
Commitment to Equality Awards	0	0.00 %	2,500	100.00 %	2,500	0	2,500
Resource Center Contribution	0	0.00 %	110,332	100.00 %	110,332	0	110,332
BASICS Program Contribution	0	0.00 %	37,500	100.00 %	37,500	0	150,000
Bond Premium Amortization	(7,026)	(20.66) %	70,759	208.11 %	34,000	(36,759)	45,882
Investment Service Fees	(4,998)	(13.88) %	39,481	109.67 %	36,000	(3,481)	35,836
Access to Justice/Pro Bono	0	0.00 %	0	0.00 %	0	0	10,000

**State Bar of Georgia**  
**Expenditure Statement - Operations**  
**For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Total Miscellaneous	393,498	25.95 %	1,393,842	91.91 %	1,516,452	122,610	1,278,425
Pro Bono	17,685	8.33 %	212,216	100.00 %	212,216	0	212,216
Total Other Activities	435,190	23.63 %	1,635,839	88.84 %	1,841,345	205,606	1,525,102
Unallocated Services	(24,655)	0.00 %	(91,746)	0.00 %	(0)	91,746	(109,658)
<b>Grand Total</b>	<b>1,467,575</b>	<b>11.46 %</b>	<b>11,700,028</b>	<b>91.34 %</b>	<b>12,809,340</b>	<b>1,109,312</b>	<b>12,183,114</b>

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Shared Office Overhead</b>							
Telephone	4,666	6.22 %	62,411	83.21 %	75,000	12,589	75,938
Computer Software	329	8.02 %	2,951	71.98 %	4,100	1,149	4,534
Equipment Rental	1,760	2.71 %	51,442	79.14 %	65,000	13,558	46,819
Kitchen	0	0.00 %	2,283	9.93 %	23,000	20,717	17,036
Facilities Maintenance	475	1.40 %	21,951	64.56 %	34,000	12,049	16,100
Payroll Service	2,238	13.99 %	14,797	92.48 %	16,000	1,203	17,938
Audit	0	0.00 %	30,450	117.12 %	26,000	(4,450)	23,722
Building and Other Insurance (Not Group)	9,528	8.43 %	116,931	103.48 %	113,000	(3,931)	110,590
Supplies and Printing	2,008	3.94 %	31,858	62.47 %	51,000	19,142	52,895
<b>Subtotal</b>	<b>21,004</b>	<b>5.16 %</b>	<b>335,074</b>	<b>82.31 %</b>	<b>407,100</b>	<b>72,026</b>	<b>365,572</b>
<b>Other Services</b>							
Accounting	24,809	5.63 %	417,400	94.78 %	440,410	23,010	406,840
Human Resources	15,016	7.48 %	192,184	95.71 %	200,795	8,611	197,434
Mailroom	8,646	11.01 %	79,090	100.70 %	78,538	(552)	77,045
Receptionist	18,200	11.91 %	148,422	97.12 %	152,817	4,395	141,792
Management Information System	41,860	7.34 %	586,374	102.76 %	570,631	(15,743)	587,105
<b>Subtotal Other Services</b>	<b>108,531</b>	<b>7.52 %</b>	<b>1,423,470</b>	<b>98.63 %</b>	<b>1,443,191</b>	<b>19,721</b>	<b>1,410,216</b>
<b>Total Shared Office Overhead</b>	<b>129,535</b>	<b>7.00 %</b>	<b>1,758,544</b>	<b>95.04 %</b>	<b>1,850,291</b>	<b>91,747</b>	<b>1,775,788</b>
<b>Total Allocated Services</b>	<b>(154,191)</b>	<b>8.33 %</b>	<b>(1,850,291)</b>	<b>100.00 %</b>	<b>(1,850,291)</b>	<b>0</b>	<b>(1,885,346)</b>
<b>Unallocated Services</b>	<b>(24,656)</b>	<b>0.00 %</b>	<b>(91,747)</b>	<b>0.00 %</b>	<b>0</b>	<b>91,747</b>	<b>(109,559)</b>

**State Bar of Georgia**  
**Expenditure Statement - Operations**  
**For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Related Organizations - Shared Office Allocations</b>							
Georgia Bar Foundation	\$ 292	8.33 %	3,500	100.00 %	3,500	0	3,500
Continuing Legal Education	6,466	8.33 %	77,601	100.00 %	77,602	1	79,914
TILPP	3,881	8.33 %	46,561	100.00 %	46,560	(1)	47,948
Pro Bono	4,548	8.33 %	54,577	100.00 %	54,577	0	36,328
Professionalism	291	8.33 %	3,500	100.00 %	3,500	0	3,500
Sections	2,587	8.33 %	31,041	100.00 %	31,041	0	31,966
ICLE	26,514	8.33 %	318,166	100.00 %	318,166	0	303,873
<b>Subtotal</b>	<b>44,579</b>	<b>8.33 %</b>	<b>534,946</b>	<b>100.00 %</b>	<b>534,946</b>	<b>0</b>	<b>506,829</b>
<b>State Bar Departments - Shared Office Allocations</b>							
Membership	6,467	8.33 %	77,601	100.00 %	77,602	1	79,914
Meetings	2,587	8.33 %	31,041	100.00 %	31,040	(1)	31,966
Executives	23,280	8.33 %	279,366	100.00 %	279,366	0	279,699
General Counsel	37,507	8.33 %	450,088	100.00 %	450,088	0	463,501
Communications	5,174	8.33 %	62,081	100.00 %	62,081	0	79,914
Fee Arbitration	5,173	8.33 %	62,081	100.00 %	62,082	1	63,831
Law Practice Management	5,174	8.33 %	62,082	100.00 %	62,081	(1)	63,831
Savannah Office	1,293	8.33 %	15,520	100.00 %	15,520	0	15,983
Tifton Office	970	8.33 %	11,640	100.00 %	11,640	0	11,987
Younger Lawyers	2,587	8.33 %	31,041	100.00 %	31,041	0	31,966
Unauthorized Practice of Law	7,760	8.33 %	93,122	100.00 %	93,122	0	95,897
Law Related Education	3,880	8.33 %	46,561	100.00 %	46,561	0	47,948
High School Mock Trial	1,293	8.33 %	15,520	100.00 %	15,520	0	15,983
Military Legal Assistance Prog	0	8.33 %	0	0.00 %	0	0	15,983
Conference Center	5,174	8.33 %	62,081	100.00 %	62,081	0	63,931
Legislative Program	1,293	8.33 %	15,520	100.00 %	15,520	0	15,983
<b>Subtotal</b>	<b>109,612</b>	<b>8.33 %</b>	<b>1,316,345</b>	<b>100.00 %</b>	<b>1,316,345</b>	<b>0</b>	<b>1,378,617</b>
<b>Total Allocated Services</b>	<b>\$ 154,191</b>	<b>8.33 %</b>	<b>\$ 1,850,291</b>	<b>100.00 %</b>	<b>\$ 1,850,291</b>	<b>\$ -</b>	<b>\$ 1,885,346</b>

Sections

**State Bar of Georgia  
Expenditure Statement - Operations  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Personnel Services</b>							
Salaries	8,977	8.46 %	106,498	100.38 %	\$ 106,090	\$ (408)	106,900
Overtime	0	0.00 %	0	0.00 %	700	700	505
Taxes and Benefits	4,191	12.93 %	32,384	99.87 %	32,425	41	32,795
Pension	149	2.18 %	6,376	93.85 %	6,794	418	6,347
<b>Total Personnel Services</b>	<b>13,317</b>	<b>9.12 %</b>	<b>145,258</b>	<b>99.49 %</b>	<b>146,009</b>	<b>751</b>	<b>146,547</b>
<b>Operating Expenses</b>							
Shared Office Allocation	2,587	8.33 %	31,041	100.00 %	31,041	0	31,966
Postage and Freight	244	81.39 %	375	125.24 %	300	(76)	174
Supplies	0	0.00 %	69	4.56 %	1,500	1,432	902
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	1,600	0.00 %	0	(1,600)	1,551
Dues and Memberships	0	0.00 %	0	0.00 %	135	135	360
Seminars and Training	0	0.00 %	0	0.00 %	1,000	1,000	1,020
Miscellaneous	442	44.19 %	462	46.19 %	1,000	538	720
Attorney and Staff Travel	1,975	131.67 %	1,975	131.67 %	1,500	(475)	135
Computer Hardware	0	0.00 %	4,187	194.77 %	2,150	(2,038)	1,024
Computer Software	0	0.00 %	1,087	98.78 %	1,100	14	727
Special Meetings	0	0.00 %	0	0.00 %	1,200	1,200	0
<b>Total Operating Expenses</b>	<b>5,323</b>	<b>12.73 %</b>	<b>41,696</b>	<b>99.69 %</b>	<b>41,826</b>	<b>130</b>	<b>39,479</b>
<b>Furniture/Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>338</b>	<b>0.00 %</b>	<b>0</b>	<b>(338)</b>	<b>0</b>
<b>Total Expenses</b>	<b>\$ 18,639</b>	<b>9.92 %</b>	<b>\$ 187,292</b>	<b>99.71 %</b>	<b>\$ 187,835</b>	<b>\$ 543</b>	<b>\$ 186,026</b>



Conference Center

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Set Up Fees	0	0.00 %	0	0.00 %	\$ 1,600	\$ 1,600	600
After Hours Fees	0	0.00 %	0	0.00 %	8,000	8,000	7,675
Beverage Service	0	0.00 %	0	0.00 %	3,000	3,000	2,057
Cleaning Fees	0	0.00 %	0	0.00 %	2,000	2,000	1,052
Audio Video Support	0	0.00 %	0	0.00 %	1,200	1,200	900
<b>Total Revenues</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>15,800</b>	<b>15,800</b>	<b>12,284</b>
<b>Personnel Services</b>							
Salaries	18,176	8.48 %	215,099	100.41 %	214,226	(873)	215,877
Overtime	0	0.00 %	0	0.00 %	11,500	11,500	8,397
Taxes and Benefits	5,662	6.08 %	76,470	82.18 %	93,055	16,585	82,217
Pension	448	3.29 %	12,927	94.96 %	13,614	687	13,420
<b>Total Personnel Services</b>	<b>24,286</b>	<b>7.31 %</b>	<b>304,496</b>	<b>91.61 %</b>	<b>332,395</b>	<b>27,899</b>	<b>319,911</b>
<b>Operating Expenses</b>							
Shared Office Allocation	5,173	8.33 %	62,081	100.00 %	62,081	0	63,931
Supplies	502	16.72 %	1,039	34.62 %	3,000	1,961	2,470
Subscriptions and Books	139	46.33 %	8,101	2,700.53 %	300	(7,801)	450
Miscellaneous	0	0.00 %	95	11.18 %	850	755	1,140
Conference Center Copier	0	0.00 %	0	0.00 %	1,500	1,500	0
Computer Hardware	0	0.00 %	1,442	0.00 %	0	(1,442)	929
Computer Software	0	0.00 %	0	0.00 %	100	100	0
After Hours Security	0	0.00 %	0	0.00 %	8,500	8,500	6,467
Room Turn Around Costs	0	0.00 %	0	0.00 %	2,000	2,000	1,320
Contract Programming	500	62.50 %	500	62.50 %	800	300	125
Equipment Maintenance	168	2.81 %	1,850	30.83 %	6,000	4,151	3,699
Furniture Repairs and Maintenance	0	0.00 %	469	5.21 %	9,000	8,531	9,415
Kitchen	314	3.14 %	889	8.89 %	10,000	9,110	6,570
Audio Video	0	0.00 %	0	0.00 %	10,000	10,000	11,397
<b>Total Operating Expenses</b>	<b>6,796</b>	<b>5.95 %</b>	<b>76,466</b>	<b>67.00 %</b>	<b>114,131</b>	<b>37,665</b>	<b>107,913</b>
<b>Total Expenses</b>	<b>31,082</b>	<b>6.96 %</b>	<b>380,962</b>	<b>85.32 %</b>	<b>446,526</b>	<b>65,564</b>	<b>427,825</b>

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Furniture/Equipment	0	0.00 %	2,853	142.66 %	2,000	(853)	794
Net Income	\$ (31,082)	7.18 %	\$ (383,815)	88.70 %	\$ (432,726)	\$ (48,911)	\$ (416,335)

Other Bar Center Operations

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Interest Income	\$ 26,462	41.35 %	\$ 97,965	153.07 %	\$ 64,000	\$ (33,965)	\$ 92,295
Gain/Loss Investment Allocation	(7,692)	0.00 %	(51,762)	0.00 %	0	51,762	96,938
Bar Center Assessments	0	0.00 %	100	10.00 %	1,000	900	1,150
CCLC Contributions to Bar Center	791,495	59.74 %	1,291,495	97.47 %	1,325,000	33,505	1,322,797
Conference Center Copier	0	0.00 %	0	0.00 %	850	850	506
<b>Total Revenues</b>	<b>810,265</b>	<b>58.26 %</b>	<b>1,337,798</b>	<b>96.19 %</b>	<b>1,390,850</b>	<b>53,052</b>	<b>1,513,686</b>
<b>Operating Expenses</b>							
Bond Premium Amortization	9,588	79.90 %	30,561	254.67 %	12,000	(18,561)	16,918
Investment Service Fees	4,824	40.21 %	16,866	140.55 %	12,000	(4,866)	13,312
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	2,510
Conference Center Contingency	0	0.00 %	0	0.00 %	0	0	37
Conference Center Renovations	0	0.00 %	36,792	67.63 %	54,400	17,608	29,299
Museum and 1st Floor Exhibit	300	0.00 %	300	0.00 %	0	(300)	0
Audio Video, Furniture and Equipment	0	0.00 %	16,317	101.98 %	16,000	(317)	0
Rehabilitation	0	0.00 %	70,622	0.00 %	0	(70,622)	350,650
President's Boardroom	0	0.00 %	0	0.00 %	5,000	5,000	610
<b>Total Operating Expenses</b>	<b>14,712</b>	<b>14.80 %</b>	<b>171,458</b>	<b>172.49 %</b>	<b>99,400</b>	<b>(72,058)</b>	<b>413,336</b>
<b>Total Expenses</b>	<b>14,712</b>	<b>14.80 %</b>	<b>171,458</b>	<b>172.49 %</b>	<b>99,400</b>	<b>(72,058)</b>	<b>413,336</b>
<b>Net Income</b>	<b>\$ 795,553</b>	<b>61.60 %</b>	<b>\$ 1,166,340</b>	<b>90.31 %</b>	<b>\$ 1,291,450</b>	<b>\$ 125,110</b>	<b>\$ 1,100,349</b>

**Rental**

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>	\$ 98,603	6.81 %	\$ 1,301,083	89.89 %	\$ 1,447,488	\$ 146,405	\$ 1,422,142
Income Rental Operations							
<b>Total Revenues</b>	<b>98,603</b>	<b>6.81 %</b>	<b>1,301,083</b>	<b>89.89 %</b>	<b>1,447,488</b>	<b>146,405</b>	<b>1,422,142</b>
<b>Operating Expenses</b>							
Personnel Management Salary	2,984	5.85 %	46,307	90.80 %	51,000	4,693	46,771
Administrative Taxes and Benefits	274	3.67 %	5,974	80.03 %	7,464	1,490	4,750
Travel	0	0.00 %	0	0.00 %	630	630	61
Supplies	0	0.00 %	94	6.25 %	1,500	1,406	589
Telephone Expense	2	0.21 %	1,156	96.39 %	1,200	44	1,204
Management Fees	10,134	17.81 %	59,920	105.33 %	56,895	(3,025)	58,175
Tenant Services	0	0.00 %	0	0.00 %	1,750	1,750	0
Bank Fees	113	8.20 %	1,416	102.61 %	1,380	(36)	1,409
R&M Salaries	12,809	7.67 %	169,689	101.61 %	167,000	(2,689)	165,216
R&M Taxes and Benefits	5,854	9.29 %	63,497	100.79 %	63,000	(497)	54,943
R&M HVAC	945	0.51 %	74,372	40.50 %	183,640	109,268	30,865
R&M Plumbing	0	0.00 %	6,841	58.97 %	11,600	4,759	17,429
R&M Fire/Life Prevention	0	0.00 %	2,052	29.32 %	7,000	4,948	2,162
R&M Electrical/Lamps	970	3.34 %	5,491	18.93 %	29,000	23,509	24,411
R&M Water Treatment	0	0.00 %	9,106	75.89 %	12,000	2,894	9,934
R&M Life Safety Contract	400	4.11 %	38,015	389.90 %	9,750	(28,265)	5,507
R&M Tools/Radios	0	0.00 %	2,660	88.64 %	3,000	340	3,238
R&M Elevators	1,995	7.67 %	63,771	245.28 %	26,000	(37,771)	29,450
R&M Pest Control	0	0.00 %	2,828	70.70 %	4,000	1,172	2,679
R&M Rubbish Removal	890	6.10 %	13,695	93.85 %	14,592	897	10,185
R&M Other: Locks and Keys	0	0.00 %	43	4.25 %	1,000	957	0
R&M Painting	0	0.00 %	6,695	83.70 %	8,000	1,305	0
R&M Other: General Building	0	0.00 %	3,027	90.62 %	3,340	313	12,303
R&M Lobby	0	0.00 %	0	0.00 %	500	500	0
Uniforms	0	0.00 %	909	39.51 %	2,300	1,391	54
Electric	44,236	9.62 %	310,000	67.39 %	460,000	150,000	412,237
Water	535	0.89 %	53,960	89.93 %	60,000	6,040	52,161
Gas	(1,957)	(7.83 %)	29,629	118.52 %	25,000	(4,629)	17,844
Security Contract	10,757	3.28 %	253,815	77.31 %	328,289	74,474	254,718
Cleaning	30,276	14.84 %	198,078	97.10 %	204,000	5,922	203,947
Grounds Supplies and Maintenance	314	3.07 %	3,988	39.09 %	10,200	6,212	6,230
Insurance	4,578	9.08 %	54,943	109.01 %	50,400	(4,543)	48,940

Rental

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Total Operating Expenses	126,109	6.99 %	1,481,971	82.08 %	1,805,430	323,459	1,477,412
Total Expenses	126,109	6.99 %	1,481,971	82.08 %	1,805,430	323,459	1,477,412
Net Income	<u>(27,507)</u>	7.68 %	<u>(180,888)</u>	50.54 %	<u>(357,942)</u>	<u>(177,054)</u>	<u>(55,270)</u>

**Parking**

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Revenues</b>							
Monthly Parking Operations	0	0.00 %	7,787	4.12 %	\$ 189,000	\$ 181,213	\$ 145,608
Daily Parking Operations	0	0.00 %	848	1.60 %	53,000	52,152	47,006
Special Events Parking Operations	10,389	7.70 %	15,728	11.65 %	135,000	119,272	100,797
<b>Total Revenues</b>	<b>10,389</b>	<b>2.76 %</b>	<b>24,363</b>	<b>6.46 %</b>	<b>377,000</b>	<b>352,637</b>	<b>293,411</b>
<b>Operating Expenses</b>							
Salaries	4,616	4.27 %	55,223	51.13 %	108,000	52,777	101,448
Payroll Taxes	485	4.12 %	5,798	49.35 %	11,750	5,952	10,651
Workers' Compensation	438	4.34 %	5,246	51.94 %	10,100	4,854	9,638
Medical Ins/Benefits	662	3.68 %	7,925	44.02 %	18,000	10,076	14,558
Signs	0	0.00 %	0	0.00 %	900	900	0
Uniforms	0	0.00 %	0	0.00 %	240	240	261
Repairs and Maintenance	545	2.37 %	24,932	108.40 %	23,000	(1,933)	17,956
Tickets	0	0.00 %	0	0.00 %	1,000	1,000	534
Cell Phone/Beeper	0	0.00 %	3,343	41.27 %	8,100	4,757	4,138
Office Expenses	3,279	40.98 %	7,983	99.79 %	8,000	17	5,975
Invoicing Expenses	285	6.48 %	3,420	77.73 %	4,400	980	3,420
Bank Charges	56	2.25 %	1,472	58.86 %	2,500	1,028	2,513
Credit Card Fees	87	2.18 %	553	13.84 %	4,000	3,447	2,074
Garage Insurance	525	8.47 %	6,306	101.70 %	6,200	(106)	6,282
Business License	0	0.00 %	650	27.08 %	2,400	1,750	671
Management Fee	530	12.62 %	4,380	104.28 %	4,200	(180)	4,200
Security	0	0.00 %	(3,240)	(3.18) %	102,000	105,240	79,818
Payroll Processing	113	5.96 %	1,452	16.34 %	1,900	448	2,560
Equipment and Supplies	266	0.00 %	163	16.34 %	1,000	837	1,159
Miscellaneous	0	0.00 %	266	0.00 %	0	(266)	0
Cleaning	0	0.00 %	0	0.00 %	6,400	6,400	0
Fire Safety	0	0.00 %	0	0.00 %	500	500	0
Incentive Management Fees	0	0.00 %	0	0.00 %	2,600	2,600	2,038
<b>Total Operating Expenses</b>	<b>11,887</b>	<b>3.63 %</b>	<b>125,872</b>	<b>38.47 %</b>	<b>327,190</b>	<b>201,318</b>	<b>269,894</b>
<b>Total Expenses</b>	<b>11,887</b>	<b>3.63 %</b>	<b>125,872</b>	<b>38.47 %</b>	<b>327,190</b>	<b>201,318</b>	<b>269,894</b>
<b>Net Income</b>	<b>\$ (1,498)</b>	<b>(3.01) %</b>	<b>\$ (101,509)</b>	<b>(203.79) %</b>	<b>\$ 49,810</b>	<b>\$ 151,319</b>	<b>\$ 23,517</b>

***INSTITUTE OF CONTINUING LEGAL EDUCATION  
OF THE STATE BAR OF GEORGIA, LLC (ICLE)***

***Note: The State Bar of Georgia financial statements does not include the operations of ICLE.***

Institute of Continuing Legal Education

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Program Revenue</b>							
Registration Revenue	194,065	3.53 %	4,481,405	81.48 %	5,500,000	1,018,595	5,803,994
Sponsorship	0	0.00 %	0	0.00 %	30,000	30,000	30,078
Program Discounts	(2,650)	0.00 %	(17,387)	0.00 %	0	17,387	0
Affiliate Contribution	0	0.00 %	0	0.00 %	0	0	18,249
Other	0	0.00 %	0	0.00 %	0	0	2,776
Exhibitor	0	0.00 %	0	0.00 %	0	0	500
<b>Total Program Revenue</b>	<b>191,415</b>	<b>3.46 %</b>	<b>4,464,018</b>	<b>80.72 %</b>	<b>5,530,000</b>	<b>1,065,982</b>	<b>5,855,597</b>
<b>Total Program Expenditures</b>	<b>37,341</b>	<b>2.26 %</b>	<b>503,192</b>	<b>30.50 %</b>	<b>1,650,000</b>	<b>1,146,808</b>	<b>1,615,256</b>
<b>Net Margin on Programs</b>	<b>154,074</b>	<b>3.97 %</b>	<b>3,960,826</b>	<b>102.08 %</b>	<b>3,880,000</b>	<b>(80,826)</b>	<b>4,240,341</b>
<b>Personnel Services</b>							
Salaries Full Time	139,398	10.73 %	982,186	75.63 %	1,298,606	316,420	1,035,099
Salaries Part Time	0	0.00 %	0	0.00 %	33,600	33,600	33,477
Temporary/Part Time	0	0.00 %	0	0.00 %	30,000	30,000	0
Overtime Pay	0	0.00 %	0	0.00 %	20,000	20,000	21,167
Taxes and Benefits	44,055	8.85 %	327,369	65.76 %	497,833	170,464	358,029
Pension	(13,545)	(17.32) %	58,136	74.34 %	78,197	20,061	63,990
<b>Total Personnel Services</b>	<b>169,908</b>	<b>8.68 %</b>	<b>1,367,691</b>	<b>69.84 %</b>	<b>1,958,236</b>	<b>590,545</b>	<b>1,511,762</b>
<b>Operating Expenses</b>							
Shared Office Allocation	26,514	8.33 %	318,166	100.00 %	318,166	0	303,673
Board and Committee Meetings	0	0.00 %	0	0.00 %	4,000	4,000	873
Dues and Memberships	245	6.13 %	1,260	31.50 %	4,000	2,740	1,175
Licenses and Certification	0	0.00 %	245	12.25 %	2,000	1,755	894
Seminars and Training	150	0.68 %	3,186	14.48 %	22,000	18,814	5,006
Attorney and Staff Travel	3,400	22.67 %	3,729	24.86 %	15,000	11,271	10,177
Supplies	404	2.69 %	3,100	20.67 %	15,000	11,900	11,308
Printing	0	0.00 %	5	0.23 %	2,000	1,995	567
Subscriptions and Books	0	0.00 %	360	36.00 %	1,000	640	943

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

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Institute of Continuing Legal Education

**State Bar of Georgia  
Income Statement  
For the Current Period Ending June 30, 2021**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Postage and Freight	0	0.00 %	262	17.50 %	1,500	1,238	714
Telephone	375	4.41 %	4,500	52.94 %	8,500	4,000	5,164
Internet Services	160	2.67 %	2,183	36.37 %	6,000	3,817	2,222
Computer Software	1,334	1.33 %	34,461	34.46 %	100,000	65,540	48,366
Contract Programming	(379)	(0.38) %	16,593	16.59 %	100,000	83,406	39,845
Computer Hardware	0	0.00 %	18,395	30.66 %	60,000	41,605	6,701
Miscellaneous	0	0.00 %	118	2.36 %	5,000	4,882	2,601
Professional Fees	0	0.00 %	0	0.00 %	15,000	15,000	6,810
Equipment Maintenance and Rental	76	0.95 %	492	6.15 %	8,000	7,508	3,773
Other Business Insurance (Not Group)	2,127	6.65 %	25,527	79.77 %	32,000	6,473	30,050
Credit Card Discount and Fees	6,811	4.48 %	110,817	72.91 %	152,000	41,183	157,477
Banking Fees	95	94.72 %	1,063	1,063.12 %	100	(963)	14
Lunches	0	0.00 %	0	0.00 %	2,000	2,000	754
Recruitment	0	0.00 %	0	0.00 %	6,500	6,500	0
Contract Labor	0	0.00 %	0	0.00 %	3,500	3,500	7,931
<b>Total Operating Expenses</b>	<b>41,312</b>	<b>4.68 %</b>	<b>544,462</b>	<b>61.64 %</b>	<b>883,266</b>	<b>338,804</b>	<b>647,038</b>
<b>Furniture and Equipment</b>	<b>0</b>	<b>0.00 %</b>	<b>0</b>	<b>0.00 %</b>	<b>10,000</b>	<b>10,000</b>	<b>21,451</b>
<b>Total Expenses</b>	<b>211,220</b>	<b>7.41 %</b>	<b>1,912,153</b>	<b>67.06 %</b>	<b>2,851,502</b>	<b>939,350</b>	<b>2,180,251</b>
<b>Net Income Before Other Inc and Exp</b>	<b>(57,146)</b>	<b>(5.56) %</b>	<b>2,048,673</b>	<b>199.19 %</b>	<b>1,028,498</b>	<b>(1,020,175)</b>	<b>2,060,089</b>
<b>Other Income and Expenses</b>							
Interest Income	983	1.51 %	37,753	58.08 %	65,000	27,247	92,060
Miscellaneous Revenues	0	0.00 %	0	0.00 %	0	0	902
Bond Premium Amortization	(451)	0.00 %	(9,826)	0.00 %	0	9,826	(10,092)
Investment Service Fees	(771)	7.71 %	(9,378)	93.78 %	(10,000)	(622)	(9,200)
<b>Total Other Income and Expenses</b>	<b>(239)</b>	<b>(0.43) %</b>	<b>18,549</b>	<b>33.73 %</b>	<b>55,000</b>	<b>36,451</b>	<b>73,670</b>
<b>Net Income</b>	<b>\$ (57,386)</b>	<b>(5.30) %</b>	<b>\$ 2,067,222</b>	<b>190.79 %</b>	<b>\$ 1,083,498</b>	<b>\$ (983,724)</b>	<b>\$ 2,133,759</b>

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

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September 28, 2021

Board of Governors,

I am pleased to give you an update on what we have accomplished in the first few months of the 2021-22 Bar year and on our future plans. The YLD is committed to continually promoting the mission of our Bar through its younger members, who number nearly 10,000.

## **YLD COMMITTEES**

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The YLD has more than 25 committees working to support our motto of service to the community and profession. Each committee works diligently to provide substantive programming in their respective focus areas. Below are some of the accomplishments and events planned by our YLD committees this year:

### **YLD Corporate Counsel**

#### ***Raquel Crump and Tanesha Steward, Co-Chairs***

The YLD Corporate Counsel Committee is planning a virtual panel discussion, A Peek Behind the Curtain—An Intimate Conversation with In-House Counsel, scheduled for Monday, Oct. 18, from 12-1 p.m. The panel will discuss the panelists' 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 include 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.

### **YLD Criminal Law**

#### ***Eufemia Cabrera-D'Amour and Ryan English, Co-Chairs***

We are currently working with the YLD Women in the Profession Committee on a joint event slated for Friday, Oct. 22. It will be called Just Desserts: Criminal Justice in Chatham and Surrounding Counties. Included in the speaker panel will be Hon. Rizza O'Connor, Toombs County chief magistrate judge and 2018-19 YLD president.

After the new year, the committee plans to put on a lunch and learn CLE at the State Bar.

### **YLD Family Law**

#### ***Samantha Lennon and Megan Wyss, Co-Chairs***

The YLD Family Law Committee cleared the entire Child Support Worksheet Helpline backlog. We are currently planning lunch and learns with judges, working on growing the committee roster, and recruiting volunteers for the Child Support Worksheet Helpline. Our next meeting is scheduled for Monday, Oct. 18.

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

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

The YLD Inclusion in the Profession Committee dedicates its time and energy to promote the participation, inclusion, representation, and retention of young lawyers from diverse and historically underrepresented groups. To that end, the committee offers programming, initiatives, social events, support, and resources to diverse young attorneys in Georgia to encourage equality amongst the young lawyers of today and the leaders of tomorrow.

The committee has exciting plans in store for the 2021-22 YLD year. We'll be kicking off the year with more virtual book club meetings. At our meetings, members can join us to discuss a particular book or film chosen for the month. The books or films selected touch on important issues of inclusion and diversity. Moreover, the committee plans to host community outreach events with Dress for Success and Big Brothers Big Sisters of Metro Atlanta, respectively. We are planning to engage with our members through continued committee-specific newsletters, the further development and launch of a mentorship initiative, and exciting social events, including a meet-and-greet at a tea house, a holiday get together and a beginner's golfing tutorial.

For more information about the committee's initiatives, please contact Mishael Najm, Chanel Chauvet or Essie Lazarus at [inclusionlpa@gmail.com](mailto:inclusionlpa@gmail.com).

### **YLD Intrastate Moot Court Competition**

***Hannah Couch and Megan Howerter, Co-Chairs***

In light of the increased concerns amongst Georgia law schools regarding COVID-19 and the delta variant, we have decided to follow the path of other moot court competitions held throughout the country and hold a virtual competition again this year. Similar to previous years, the competition will be held in March. We should have a set date soon. We are brainstorming and researching problem topics and plan to send out our first email to our committee members by the end of the month to make them aware of these developments and provide them with a date for our first virtual meeting, which we plan to hold in October or November.

### **YLD Judicial Law Clerk**

***Mary Beth Handte, Chair***

The YLD Judicial Law Clerk Committee plans to host a monthly virtual info swap meet for committee members and those interested in the inner workings of the judicial system. Committee members and other law clerks will have a platform to talk about interesting or complicated cases they were or are involved in, offer professional tips, showcase writing examples, and discuss any concerns. Because I understand how stressful and demanding the job can be, I also intend to develop a group chat or platform that committee members and other law clerks can utilize to contact each other and discuss mental health, imposter syndrome or worries about the future. Ultimately, the committee will focus on personal and professional growth, mental health, and positivity.

### **YLD Law School Outreach**

***Eric Abney and Brandon Rosenstein, Co-Chairs***

We plan to have either monthly or bi-weekly committee meetings via zoom to create a plan to host at least one lunch and learn event at each of Georgia's law schools during the academic year. Our plan includes having committee members speak at the lunch and learn about transition from law school to lawyer, early practice, YLD involvement, and include aspects of the Georgia Bar that students might find interesting. We will plan to host our first committee planning meeting the first week of October.

## **YLD Public Interest Internship Program**

*Jamie Rush, Chair*

The YLD Public Interest Internship Program (PIIP) Committee will recognize the 2020 and 2021 grant recipients at the Pro Bono and Public Interest Awards Reception at The Glenn Hotel in November. This event is sponsored by the State Bar Access to Justice Committee, the Pro Bono Resource Center, and the Young Lawyers Division. On Saturday, Dec. 11, PIIP is partnering with the Atlanta Volunteer Lawyers Foundation to sponsor their Saturday Lawyer Program. We will share more details soon, but please save the date and consider volunteering.

## **YLD Women in the Profession**

*Merry Layman and Lindsey Macon, Co-Chairs*

We're excited to announce our first event of the year, a Virtual Lunch Q&A with Justice Sarah Warren, scheduled for Wednesday, Sept. 29, from 12-1 p.m. on Zoom.

Our next event is scheduled for Friday, Oct. 22, at 2:30 p.m. in conjunction with the Fall Meeting and will be co-sponsored by the YLD Criminal Law Committee. We hope that you will be able to join us for an exciting panel, Just Desserts: Criminal Justice in Chatham and Surrounding Counties, plus coffee and desserts!

The committee is planning to host another wills clinic in conjunction with Atlanta Legal Aid during the holiday season. More details to come.

Please don't hesitate to reach out with any questions. We're excited for a great WIP Committee year!

## **YLD Workers' Compensation**

*Oliver Ladd and Liz Phrampus, Co-Chairs*

The YLD Workers' Compensation is gearing-up to restart its virtual Lunch & Learn series for the 2021-2022 year. The initial event in May of 2021 featuring Judge David Imahara had around 30 virtual attendees. The next event will feature Judge Kimberly Boehm, State Board of Workers' Compensation. An application for CLE credit is in progress. Topics will include litigation preparation and effective use of alternative dispute resolution tools. The committee plans to offer two events per quarter and will continue to monitor the public health crisis to assess offering in-person attendance options in the future.

## **YLD AFFILIATES**

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The YLD currently has seven recognized active affiliates around the state: Young Lawyers of Augusta, Cobb County Younger Lawyers Division, Columbus YLD, Glynn County YLD, Houston County YLD, Macon YLD and Savannah YLD. Additionally, although the Western Circuit YLD has been inactive for a few years, we have received reports of interest in revitalizing this affiliate branch!

## **MEETINGS**

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### **Fall Meeting | Oct. 22-24 | Savannah, Georgia**

The YLD Fall Meeting will be held in conjunction with the State Bar's Fall Meeting at The Westin Savannah Harbor Golf & Spa and Savannah Convention Center. In addition to the YLD General Session, members will be encouraged to attend the Fall Board of Governors Meeting. The YLD Leadership Academy Committee will also meet to choose 8-10 members for the 2022 Leadership Academy class which will be combined with our 2021 class.

**Midyear Meeting | Jan. 6-8 | Atlanta, Georgia**

The YLD Midyear Meeting will be held in conjunction with the State Bar's Midyear Meeting at The Westin Buckhead Atlanta. In addition to the YLD General Session, members will be encouraged to attend the Midyear Board of Governors Meeting. The 2022 YLD Leadership Academy will kick off their year with their first session of activities.

**Spring Meeting | March 17-20 | Chattanooga, Tennessee**

The YLD Spring Meeting will be held at The Westin Chattanooga. The YLD is planning a CLE, service project, a General Session meeting, and a group dinner. The 2022 YLD Leadership Academy will have their third session of activities. Stay tuned for more information.

**Annual Meeting | June 2-5 | Fernandina Beach, Florida**

The YLD Annual Meeting will be held in conjunction with the State Bar's Annual Meeting at Omni Amelia Island Resort. The YLD is planning a General Session, the annual Pool Party and Meet the Candidates Reception, and the YLD Awards Dinner and Swearing-In Ceremony. The 2022 YLD Leadership Academy will have their closing session and graduation ceremony.

Thank you again for your continued support and we hope to see you at one of our events soon!

Sincerely,



Elissa B. Haynes  
2021-22 YLD President



To: Members, Board of Governors

From: Paula Frederick

Date: September 27, 2021

Re: Quarterly Report of the Office of the General Counsel

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I am pleased to report on the activity of the Office of the General Counsel.

Client Assistance: The Client Assistance Program continues to average around 50 calls/contacts each day. Since the Annual Meeting the Program has opened 2,528 new cases and handled a total of 3,631 calls, letters and emails from members of the public.

Discipline: The State Disciplinary Board met in person at the Annual Meeting but resumed meeting by Zoom in August and September. Members are investigating 87 matters, with an additional 520 undergoing initial screening in the Office of the General Counsel. The Year-to-Date Report on Lawyer Regulation (covering the period May 1, 2021 through August 31, 2021) appears at page 3 of this memorandum.

The Clerks of the Disciplinary Boards are in the final stages of testing an e-filing system for public disciplinary cases. If all goes well, the system should go live by the Fall meeting.

Formal Advisory Opinion Board: The Georgia Defense Lawyers Association filed a brief in opposition to proposed Formal Advisory Opinion 20-1, a rewrite of opinion 94-3 (communication with former employees of a represented entity). The Supreme Court granted oral argument, which is scheduled for October 19.

The Board met in September and agreed to draft an opinion regarding the application of Rule 5.5(b) to remote work situations when the lawyer is physically located in a jurisdiction where they are not licensed.

Receiverships: Although we have not filed any Petitions for Appointment of Receiver since the Annual Meeting, the Office has fielded several calls regarding disposition of client files of a deceased attorney.

Committees and other meetings:

- Clients' Security Fund--The trustees of the Fund met September 17, 2021. They reviewed 15 claims, including a claim for reconsideration from the previous meeting. Two claims were tabled, 2 claims were denied and 11 claims were approved for a total of \$99,618.84. The claims involved 8 disciplined attorneys and 1 deceased attorney.

The Fall Board agenda will include a proposal regarding long-term funding for the Fund. The next meeting is tentatively scheduled for Friday, January 7, 2022, at 10:00 a.m., to be held in conjunction with the State Bar of Georgia Midyear meeting

- Professional Liability Insurance Committee—the Committee met in July to finalize its recommendation regarding insurance disclosure or coverage. Chair Chris Twyman will deliver a final report to the Board at the Fall meeting.
- OGC Overview Committee—the Committee met in August and again in October. A top priority for the year is succession planning for the Office.
- International Trade in Legal Services—the committee has met twice since the Annual meeting.
- Disciplinary Rules & Procedures Committee—the Committee has finalized its review of Part 7 of the Rules of Professional Conduct, dealing with Marketing, Advertising and Soliciting. It plans a public meeting to allow for input from the Bar before finalizing its proposals.

CLE Presentations: OGC lawyers and staff have served as presenters at seven Continuing Legal Education programs since the Annual meeting.

**Year-to-Date Report on Lawyer Regulation  
May 1, 2021 through August 31, 2021**

Grievance forms sent back to Office of General Counsel for screening..... 824  
 Grievances pending as April 30, 2021 ..... 271

TOTAL..... 1095

Grievances referred to State Disciplinary Board members .....43  
 Grievances being screened by Grievance Counsel (GC) ..... 311  
 Grievances closed by Grievance Counsel ..... 739  
 Grievances moved to moot status by GC after attorney was disbarred.....2

TOTAL..... 1095

**Regulatory Action May 1, 2021 through August 31, 2021**

	<u>Attorneys</u>	<u>Cases</u>
Letters of Admonition Accepted	9	9
Confidential Reprimands Administered	3	3
Review Board Reprimands	2	2
Public Reprimands	2	2
Suspensions	19	24
Disbarments/Voluntary Surrenders	<u>21</u>	<u>27</u>
TOTAL	56	64
Reinstatements Granted	2	2
Reinstatements Denied	0	0



To: Members, Board of Governors

From: Rick Rufolo, Executive Director, Georgia Legal Services Program

Date: September 2021

Re: Update from Georgia Legal Service Program

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On Friday, September 17, Georgia Legal Services Program (GLSP) held the **Rural Georgia Justice and Poverty Summit**, as part of our 50<sup>th</sup> anniversary celebration. The Summit brought attention to the numerous legal and social issues faced by communities across the state of Georgia, from housing to education to public health. The event was conducted with support from Georgia State University School of Law. The keynote address was given by Stacey Abrams, a political leader, voting rights activist and *New York Times* bestselling author. Over the course of the day, topics addressed included education, domestic violence, health care, housing, public benefits, and racial equity.

It was an incredible day of information and stories about how access to justice through organizations like GLSP can truly change lives. Since our early beginnings when a group of young lawyers began working together on our vision, providing legal service to Georgians in need has been an integral part of who we are as lawyers.

“It was an honor to join Georgia Legal Services Program for their Rural Georgia Justice and Poverty Summit,” said keynote speaker Stacey Abrams. “I thank GLSP for the opportunity to speak to Summit attendees about the sorely needed solutions that, by working together, we can deliver to people across all corners of Georgia — and particularly to our rural communities.”

The Summit brought together researchers, state agencies, the philanthropic community, policy makers, and legal advocates to better understand complex problems facing low-income rural communities and marginalized populations, and particularly as they relate to access to justice and opportunities out of poverty.

A special thanks to our sponsors of the Summit: UPS, King & Spalding, State Representative Mary Margaret Oliver, Atlantic Capital Bank, and the Center for Access to Justice at Georgia State University. We also appreciate the congratulatory messages from the following: Governor Brian Kemp; Ambassador Andrew Young; Ron Flagg, President of Legal Services Corporation; Nicole Clifton, President of Social Impact and The UPS Foundation, Damon Elmore,

Executive Director of the State Bar of Georgia; Tennell Lockett, President of the GLSP Board; and Jack Hardin, President of the Georgia Legal Services Foundation.

To culminate our 50<sup>th</sup> anniversary, GLSP will host an award and fundraising gala. This inaugural event takes place on Saturday, April 30, 2022, at Ventana's, Downtown Atlanta. Information about this event can be found at [www.glsp.org](http://www.glsp.org). You'll also find video presentations from the Rural Georgia Justice and Poverty Summit on the Newsroom tab on our website.

In closing, let provide an update on the "And Justice for All" Campaign in which members of the State Bar can make voluntary contributions to GLSP when they return their bar dues invoice. In the 2020-21 Campaign which concluded March 31, 2021, Bar members contributed \$437,156 through this process, a 19% increase over the previous year! The 2021-22 Campaign began April 1 and through August 31, we have received \$453,507, already surpassing the previous years' total. With 7 months left in Campaign, there's still time to donate to GLSP and make this the best campaign ever! As always, thank you for your commitment to GLSP and our clients.



# CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

## Members

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

Ms. LaToya Simone Bell  
Houston Circuit Public Defenders Office  
Warner Robins, GA

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  
Drew Eckl & Farnham, LLP  
Atlanta, Georgia

Mr. Francis 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. Maclay  
Watkinsville, Georgia

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

The Honorable Shondaeana 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 Ghartey-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

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:** October 23, 2021

**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 judges and lawyers. **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 September 30, 2021, is as follows.

## NEW COMMISSION MEMBERS, ADVISORS, AND LIAISON

The Commission welcomed several new members beginning July 1, 2021, including our new Chair, Chief Justice David E. Nahmias. The other new Commission members and liaisons are as follows: Ms. Elissa B. Haynes (M); Judge T. Russell McClelland (M); Mr. Christopher J. Chan (M); Ms. Molly Barrett Gillis (M); Ms. Nekia Hackworth Jones (M) and Mr. Joshua Bosin (L). In addition, the Commission will also welcome back several Commission members for an additional term. Those members are as follows: Ms. Elizabeth L. Fite, Judge Clyde L. Reese III, and Professor Patrick E. Longan. Judge Andrew Pinson's term as a Commission member, representing an attorney who works for a governmental entity, ended on August 30, 2021, when he was sworn in as a judge of the Court of Appeals of Georgia. Nevertheless, Judge Pinson will continue his service as an Advisor to the Commission.

## SAVE THE DATE: DECEMBER 17, 2021, DESIGNATED ATTORNEY FELLOWSHIP AND CLE (CURRENTLY PLANNED IN-PERSON)

The Commission will hold an **in-person (hopefully) CLE on December 17, 2021**. The time and location of the CLE will be announced at a later date. The Program Co-Chairs are **Ms. Terrica Ganzy**, Deputy Director, Southern Center for Human Rights and **Mr. William C. (Bill) Gentry**, Founder and Managing Attorney, Gentry Law Firm. Commission Member, **Molly Gillis**, and State Bar of Georgia General Counsel, **Paula Frederick**, will also serve on the planning team for the program.

Over the past several years, the State Bar of Georgia has asked each Bar member to name a designated attorney when they complete their Bar dues statement, in case the Bar member becomes an “absent attorney.” The Commission’s Executive Director (ED) had the idea for the CLE because she realized that when she was in private practice she had to designate an attorney for her malpractice carrier. The Commission’s ED talked to her designated attorney before she named her, but she never again in her almost 18 years of practice revisited the discussion with the designated attorney or updated the designated attorney information with the malpractice carrier. The Commission’s Executive Director hopes that the *Designated Attorney Fellowship and CLE* will encourage Bar members to meet with and talk with their designated attorney about the roles and responsibilities of the Bar member who names the designated attorney and of the designated attorney. The CLE would also help everyone to better understand the impact of succession planning on clients, colleagues, opposing counsel, and the courts. Hopefully, during the CLE, attorneys will also receive practical tips to help make succession planning impactful. The Commission’s ED commends the State Bar of Georgia’s Senior Lawyers Committee for its many years of work on issues related to designated attorneys and succession planning. Nevertheless, the CLE will not be geared solely towards senior lawyers because the unexpected and untimely deaths of attorneys like Antonio Mari and Marissa McCall Dodson remind us that choosing a designated attorney and having a succession plan is a good professionalism practice for all attorneys and all legal organizations. Commission Chair, Chief Justice David E. Nahmias, is the special invited guest to make remarks at the CLE. As more information about the program becomes available, the Commission will post updates at [www.cjcpga.org](http://www.cjcpga.org).

**NOMINATIONS FOR THE 22<sup>ND</sup> ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE AND PROGRAM INFORMATION FROM THE 21<sup>ST</sup> ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE**

The Commission is accepting nominations for the 22<sup>nd</sup> Anniversary of the Justice Robert Benham Awards from October 22, 2021, until **11:59 pm on November 30, 2021**. This year, the Commission is only accepting nomination applications electronically and only nomination applications that are **complete on or before November 30, 2021, at 11:59 pm will be considered**. No extensions of the deadline will be granted. Planning for the 22<sup>nd</sup> Anniversary of the Justice Robert Benham Awards for Community Service is in its early stages, but the **Awards Ceremony is scheduled for Saturday, March 19, 2022**. If your local bar association presents a professionalism award, consider whether one of those honorees also meets the criteria for a Justice Robert Benham Award for Community Service or for a Lifetime Achievement Award.

The Commission held the 21<sup>st</sup> Annual Justice Robert Benham Awards for Community Service on June 26, 2021. For information regarding the honorees and sponsors, and to view the Program Book from the awards ceremony visit <http://cjcpga.org/benhamcsa21/>.

**You may learn more about the award criteria and listen** to Justice Robert Benham talk about the purpose for the awards on the Commission’s YouTube channel at [https://www.youtube.com/watch?v=V7Vssl6mgk&list=PLWniEcFMtuh7I9WOFpEggrvdGqA\\_DudzM](https://www.youtube.com/watch?v=V7Vssl6mgk&list=PLWniEcFMtuh7I9WOFpEggrvdGqA_DudzM).

For more information or to nominate a judge or attorney for a Justice Robert Benham Community Service Award, please visit <http://cjcpga.org/nominationsbenhamcsa/>.

**FINAL REPORT REGARDING COMMISSION CLE ON MAY 26, 2021: ETHICS, PRO BONO AND PROFESSIONALISM**

On **May 26, 2021**, the Chief Justice's Commission on Professionalism held its final FREE CLE – entitled *Ethics, Pro Bono, and Professionalism* – prior to the May 31, 2021, deadline for Georgia attorneys to complete their 2020 CLE requirements. The program participants were as follows: **Program Chair and Moderator of Ethics/Professionalism Panel: Professor Patrick Longan**, William Augustus Bootle Chair in Ethics and Professionalism in the Practice of Law at Mercer University School of Law; **Moderator of Pro Bono Panel: Honorable Tabitha Ponder**, Part-time Judge, Magistrate Court of Cobb County and Staff Attorney for the Georgia Judicial Council's Access to Justice Committee; **Special Guest Speaker: Honorable Charlie Bethel**, Justice, Supreme Court of Georgia; **Confirmed Speakers: Honorable Bill Adams**, Retired Judge, State Court of Bibb County; **Honorable Susan Edlein**, Chief Judge, State Court of Fulton County; **Mr. James Ellington**; **Mr. C. Allen Garrett**; **Professor Elizabeth Grant**; **Ms. LaRhonda Nicks**; **Ms. Aimee Pickett Sanders**; and **Mr. J. Edward Shipp**.

The Commission hosted the CLE on the Zoom Webinar platform. According to the Zoom report generated for the CLE, the CLE was attended by 2,012 "Unique Viewers." The Commission reported attendance for 1,978 attorneys to the State Bar of Georgia's Commission on Continuing Lawyer Competency Department.

During the program, attorneys were asked about their interest in participating in pro bono efforts. There were 728 attorneys that said they would agree to be contacted by one or more of the following organizations: Atlanta Legal Aid Society (227); Georgia Justice Project - Expungement/Record Restriction Clinic (239); Georgia Legal Services Program (160); Middle Georgia Justice Project (24); State Bar of Georgia Pro Bono Resource Center (297); and Southern Center for Human Rights (179). In addition, there were 429 attorneys that agreed to have someone from Georgia Free Legal Answers to contact them regarding volunteering. To view the complete materials from the CLE, please visit: at <http://cjcpga.org/052621-cjcp-cle/>.

**FINAL REPORT REGARDING COMMISSION CLE ON APRIL 30, 2021: SUICIDE AWARENESS PROGRAM**

On **Friday, April 30, 2021**, the Commission held a *Suicide Awareness Program*. The purpose of the program was to make the case that death by suicide is preventable, and to tell lawyers and judges that it is okay to ask for help. The program was held virtually via Zoom. The planning team for the program included **Judge Clyde L. Reese III**, Court of Appeals of Georgia (State Bar of Georgia SOLACE Committee Co-Chair); **Judge Render Heard**, Juvenile Courts of the Tifton Judicial Circuit (State Bar of Georgia SOLACE Committee Co-Chair); **Judge Shondeana Crews Morris**, Superior Court of DeKalb County (State Bar of Georgia Suicide Awareness and Prevention Committee Chair); **Mr. Joseph Chancey**, Managing Partner, Drew Eckl and Farnham LLP; and **Ms. Layne Bridges** (former Staff, SOLACE Committee).

The program participants were as follows: **Ms. Sally Yates**, Moderator, Partner, King & Spalding LLP; **Hon. William "Bill" Reinhardt**, Chief Judge of Superior Courts Tifton Judicial Circuit; **Ms. Rachael Holloman**, MS, LPC, Suicide Prevention Director, Georgia Department of Behavioral Health and Developmental Disabilities; **Ms. R. Javoyne Hicks**, Clerk of State Court and Magistrate Courts, DeKalb County, Chair, State Bar of Georgia Attorney Wellness Committee; **Ms. Robin Frazer Clark**, Atlanta Injury Attorney, 50<sup>th</sup> President of the State Bar

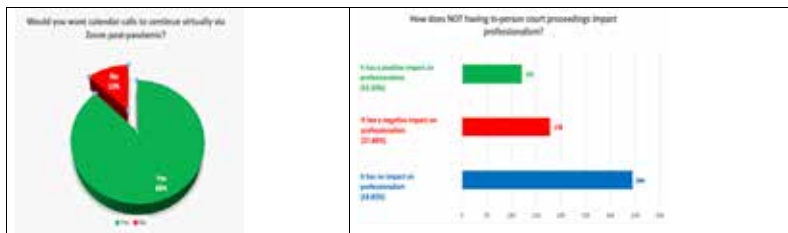
of Georgia (2012-2013); **Dr. Ben Hunter, MD**, Psychiatrist and Medical Director, Skyland Trail; **Mr. Eric C. Lang**, Attorney, Speaker and Writer on Mental Health Issues and the Practice of Law; **Hon. Wesley B. “Wes” Taylor**, Judge, State Court of Fulton County, President, Council of State Court Judges; **Dr. Mark Swancutt**, MD, PhD, DTM&H, Staff physician, Fulton County Board of Health Respiratory (Tuberculosis) Clinic, Deputy Area Commander and Safety Officer, Unified Atlanta Fulton County Emergency Management Agency (AFCEMA) COVID-19 Pandemic Response; **Ms. Lynn S. Garson**, Counsel, BakerHostetler, Chair, State Bar of Georgia Lawyer Assistance Program Committee and Author, Speaker and Mental Health Advocate; and **Dr. Alex E. Crosby**, MD, MPH, Senior Medical Advisor, Division of Injury Prevention Centers for Disease Control and Prevention.

The Commission’s Executive Director provided staff support for the program. Staff from the Administrative Office of the Courts provided additional staff support for this program. The AOC support team included **Ms. Michelle Barclay**, **Ms. Noelle Lagueux-Alvarez**, **Mr. Bruce Shaw**, **Mr. John E. Ramspott**, and **Ms. Latoinna Lawrence**. To view the complete materials for the CLE, please visit <http://cjcpga.org/suicide-awareness-program/>. The Commission hosted the CLE on the Zoom Webinar platform. According to the Zoom report generated for the CLE, the CLE was attended by 1,512 “Unique Viewers.” The Commission reported attendance for 1,446 attorneys to the State Bar of Georgia’s Commission on Continuing Lawyer Competency Department.

**FINAL REPORT REGARDING COMMISSION CLE ON SEPTEMBER 28, 2021: PROFESSIONALISM AFTER THE STATEWIDE JUDICIAL EMERGENCY ORDER**

On **September 28, 2021**, the Commission hosted a free CLE entitled *Professionalism After the Statewide Judicial Emergency Order*. The CLE program co-chairs were **State Bar of Georgia President Elizabeth L. Fite** and the **Honorable T. Russell McClelland**, Vice Chair of the Judicial Council COVID-19 Task Force, Chair of the Task Force’s Civil Sub-Committee, Past President of the Council of State Court Judges, and Chief Judge, State Court of Forsyth County. **Chief Justice David E. Nahmias** made closing remarks on professionalism. A complete list of program participants is available on the Commission’s website at <http://cjcpga.org/092821-cjcp-cle/>. The Commission thanks the many lawyers and judges who contributed their time, talents, and expertise to make the CLE a great success. The Commission hosted the CLE on the Zoom Webinar platform. According to the Zoom report generated for the CLE, the CLE was attended by 1,257 “Unique Viewers.” The Commission will report attendance for the CLE to the State Bar of Georgia’s Commission on Continuing Lawyer Competency Department.

During the CLE, the Commission took two non-scientific polls to learn more about the opinions of lawyers and judges on in-person court proceedings and professionalism. The poll results are as follows:



## **LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM REPORTS**

In August 2021, the Commission coordinated the professionalism orientations at each of Georgia's five law schools in its role as the staff support for the State Bar of Georgia's Committee on Professionalism (SBCOP), which oversees the Law School Orientations. This year, SBCOP updated two of the hypothetical problems used for the orientations with the assistance of several law school students. The hypothetical problems raised a wide variety of issues, including substance abuse, plagiarism, unfair advantages in academia, communications on social media, harassment, and discrimination. The Law School Orientations could not succeed without the time and talents of Georgia's judges and lawyers. The Commission and SBCOP were very grateful for the many individuals who volunteered. For more information regarding the 2021 Law School Orientations on Professionalism, visit <http://cjcpga.org/law-school-orientations-on-professionalism-2021/>. In addition, the Commission's Professionalism Page in the October 2021 Bar Journal will highlight the Law School Orientations on Professionalism and will include a list of the names of all of the volunteers.

## **PROFESSIONALISM PAGE ARTICLES**

One of the ways the Commission communicates with judges and lawyers is through its Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published six times per year. The June 2021 Georgia Bar Journal Professionalism Page entitled *Space and Grace: Continue the Conversation on Unparalleled Unity* also featured tributes to then-Commission Chair, Chief Justice Harold D. Melton (Retired) and is attached as Exhibit A. The August 2021 Georgia Bar Journal discussed the Commission's Suicide Awareness Program and is attached as Exhibit B.

## **COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS**

The Commission's Executive Director is available to assist members of the State Bar of Georgia in planning Professionalism CLE programming. Please contact the Commission's Executive Director, Karlise Y. Grier, via e-mail at [kygrier@cjcpga.org](mailto:kygrier@cjcpga.org) if you would like assistance in planning a professionalism CLE program.

## **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>



## Space and Grace: Continue the Conversation on Unparalleled Unity

The Commission encourages lawyers to continue this conversation or start one of their own, beginning with getting to know someone who might think differently than they do.

BY KARLISE Y. GRIER

On March 19, the Chief Justice's Commission on Professionalism convened a CLE of approximately 1,600 lawyers and judges to discuss whether lawyers can lead efforts, using the tools of professionalism, to bridge the political, racial and social divisions in America. In advance of the CLE, a diverse panel of lawyers and judges<sup>1</sup> submitted written responses to a series of questions, which served as the framework for discussion. Each panelist was asked to introduce themselves in the context of a Commission "Calling to Task," which is part of the Commission's mission statement,<sup>2</sup> and also discussed what "unparalleled unity" meant to each of them, sharing their responses to the questions submitted to them in advance.<sup>3</sup>

As she shared her answer about the meaning of "unparalleled unity," Justice Carla Wong McMillian spoke about the values and goals that lawyers and judges share, many of which are set forth in *A Lawyers Creed*<sup>4</sup> and the *Aspirational Statement on Professionalism*.<sup>5</sup> Hon. Nina Markette Baker discussed the importance of

lawyers using an elevated level of civility. She shared that, during one of her first cases as a new lawyer, she had a cup of coffee with an older colleague who taught her that being a lawyer isn't about fighting—it is about trying to find some common ground. Baker went on to highlight the work of the State Bar of Georgia's Seeking Equal Justice and Addressing Racism & Racial Bias Committee, which has instituted a series of "Courageous Conversations" under the leadership of State Bar President Dawn M. Jones.

On the subject of conversations, Ashley Bell discussed his thoughts on having a constructive conversation with others when they ascribe to different "factual records."

"History matters," said Bell. "If you don't understand how we get to certain points, people from different backgrounds are automatically dealing with a different set of facts. ... I keep books near me. If someone comes to me and says, 'I don't understand something,' I give them a book. Once I have given someone infor-







“As leaders, lawyers have the opportunity and ability to speak up for others who may not be able to speak up for themselves. Lawyers need to do so.”—Justice Carla Wong McMillian

mation, the choice is theirs whether they take the information and learn a different perspective. You can't help people who choose not to learn.”

Jake Evans stressed the importance of including all voices in making decisions, even if someone else's opinion might be painful for a person with differing views to hear. “Seek first to understand then to be understood,” suggested Evans.

Additionally, Hon. Dax López shared what it means to have courage in the face of injustice or inequality, saying, “Sometimes it's easier to sit silently and let others engage in the difficult conversations. ... I will say the things that other people also want to say and don't, and then I will get these private texts saying, ‘Hey, I agree with you,’ or ‘Great job,’ or ‘Thanks for saying what you said.’ ... Thanks for the affirmation, but I would rather others step out on that limb with me and not just leave it for me and others to have the hard conversations. If you believe it and you agree with it, have the courage to step up and say it.”

Patrise M. Perkins-Hooker expressed that a starting point for unparalleled unity was for lawyers to lead the way in helping everyone to “view one another as people. ... The civility and respect all [panelists] mentioned begins with seeing one another as people—not as subservient people, not as lesser people, not as inferior people. We need to start looking at each other as people.” Doing so, she reiterated, would introduce a different, unparalleled method lawyers could use to promote unity.

Panelists also addressed whether silence was a valid professionalism option. Justice McMillian responded that silence was a good thing “when you are listening.” She asserted that lawyers are leaders in their spheres of influence, saying, “As leaders, lawyers have the opportunity and ability to speak up for others who may not be able to speak up for themselves. Lawyers need to do so.” In one example, McMillian highlighted the rise of anti-Asian harassment in the United States over the

# A Thank You to Chief Justice Harold D. Melton

From Commission members, advisors and staff, we thank Chief Justice Melton for his leadership in professionalism.

**"I have had the privilege of knowing Chief Justice Melton since 1996. He was a section leader in the Georgia Attorney General's Office under Michael J. Bowers when I began work there after graduation from law school. I have considered him a career mentor since that time. He epitomizes everything there is regarding grace, class, leadership and professionalism. His service to the state of Georgia is to be highly praised."**—Hon. Clyde L. Reese III

**"A Lawyer's Creed states, 'As to my colleagues in the practice of law, I will aspire to respect the needs of others, especially the need to develop as a whole person.' Chief Justice Melton has demonstrated an exemplary commitment to promote overall lawyer wellness. Working with him the last five years on the SOLACE, Attorney Wellness, and Suicide Awareness & Prevention committees of the State Bar of Georgia, and more recently on the Chief Justice's Commission on Professionalism, I witnessed Chief Justice Melton's compassion and kindness towards all members of the Bar."**—Hon. Shondeana Morris

**"I have long admired Chief Justice Melton's respect for those of us non-lawyers who are part of the Commission. He embodies professionalism by regarding lay members with equal respect, viewing us as peers rather than insignificant voices. He has always been welcoming, inclusive and appreciative, regularly seeking our input on issues that impact the justice system—even beyond the Commission's work. As in the Aspirational Statement on Professionalism, Chief Justice Melton clearly strives to make 'the law, the legal system and other dispute resolution processes available to all."**—Jennifer Davis Ward

**"A principle that animates the legal profession is it is one of service, as A Lawyer's Creed reminds us. Chief Justice Melton is the absolute embodiment of this principle. He has dedicated his time and many talents—and, indeed, his entire legal career—to serving the public and our system of justice. When he leaves the bench, we will miss his presence, but his service to the people of Georgia will be a legacy that we will not forget."**—Justice Sarah Hawkins Warren

**"Justice Melton epitomizes A Lawyer's Creed and those characteristics recognized therein: honesty, civility, candor and courtesy. Not only that, but he truly has dedicated his life to the service of the public, the profession and the legal system. He is an example to us all and the embodiment of professionalism."**—President-Elect Elizabeth L. Fite

**"Early in the pandemic, my 11-year-old son heard Chief Justice Melton speaking at one of our Commission meetings. He asked who he was, and I explained that he was the chief justice of the Supreme Court of Georgia. Throughout the meeting, my son sat at my door and watched, in awe of how Justice Melton spoke. He inspired a middle-schooler that day, not just because of his title or the color of his skin, but because of the content of his character. He is a formidable inspiration to me, my son and countless others; for that, I am grateful."**—Adwoa Ghartey-Tagoe Seymour

past year, including in Atlanta. "Asian attorneys in Atlanta who are being harassed are our friends and colleagues," she said. "We should not stand by and remain silent but try to do something about it." McMillian referred the audience to a list of resources for those interested in learning more about speaking out against anti-Asian harassment.<sup>5</sup>

Prof. Tanya Washington summarized the discussion with the phrase "Space and grace," saying, "We all require it, and we all should give it. ... We all need the space to speak honestly, and we also all need the grace to hear without attacking others even as we respond with our own opinions."

During his closing remarks, Chief Justice Harold D. Melton expressed that he was heartened by the discussion. "We as lawyers have the skillset to do what we are talking about doing, even though it is a huge challenge. ... [Seeking] unparalleled unity doesn't mean we agree, but it does mean we can disagree and yet understand that we can still be brothers and sisters." He added, "I hope we all look at the role we play and not look at [having the difficult conversations] as something for somebody else to do."

The Commission encourages lawyers to continue this conversation or start one of their own, beginning with getting to know someone who might think differ-

ently than they do. López and McMillian both emphasized the importance of getting to know people on a human level first before you begin having the hard conversations. McMillian noted, "It is hard to cancel someone out if you know their heart."

If your bar association or legal organization wants to hold a conversation on a group level, you are invited to use the Commission's questions to get you started; simply contact the Commission to let us know that you are using the materials. To view the "Unparalleled Unity" CLE and all its written materials, visit the Commission's website at [cjcpa.org/unity-cle](http://cjcpa.org/unity-cle).



"I first met Chief Justice Melton when I began serving on the Chief Justice's Commission on Professionalism, and I've gotten to know him through many conversations. I love and appreciate his humor, his humanness and the way in which he has led the Supreme Court of Georgia, working closely with not just the Commission, but also with the Executive Committee of the State Bar, the Georgia Association of Criminal Defense Lawyers, and undoubtedly all of the individuals and groups he touches."—**Nicki Vaughan**

"Part of the *Aspirational Statement on Professionalism* reads, 'I will aspire ... [to] assist my colleagues become better people in the practice of law.' Chief Justice Melton has taught me that part of being a good leader is striving to find a pathway to get to 'yes' even though it might be easier to say 'no.' He demonstrates joy, peace, forbearance, kindness, goodness, faithfulness, gentleness and self-control. I thank him for his inspired and courageous leadership."—**Karlise Y. Grier**

"Chief Justice Melton is the epitome of professionalism in thought, word and deed. His grace and dignity inspire attorneys across this state, as does the diplomacy he demonstrates in his interactions with everyone. Over the course of this most difficult year and in the midst of a tragic pandemic, it is difficult to imagine a finer leader to have been our guide. I am honored to call him Chief, but more importantly, I am honored to call him my friend."—**Justice Shawn Ellen LaGruta**

"Chief Melton once told me, 'Our most effective tool as a lawyer is who we are as a person, and we must bring this tool into everything we do.' His tool box is filled with integrity, faithfulness and fairness, but I believe humility is the glue that holds it all together. Justice Melton—or simply 'Harold'—treats people with dignity, courtesy and respect. To me, that encompasses the true meaning of professionalism."—**Maria Mackay**

"Our Lawyer's Creed provides, 'To the public and our systems of justice, I offer service.' Chief Justice Melton embodies so much that is right about our profession: he offers trusted ethical and professional guidance; he is collaborative and thoughtful in his decision-making; he has always been gracious with his time and offered to lend advice to young attorneys; and he has been intentional in shaping our profession for the better, especially during the pandemic. It has been an honor to work with him, and I am thankful for his years of service to the Bar, our profession and Georgia."—**YLD President Bert Hummel**

"Chief Justice Harold D. Melton: honorable, compassionate, egalitarian and inscrutable. He is, for me, the 'Justice of Cool.'"—**Monica Willis-Parker, MD**

Whatever form it takes, continue the conversation with space and grace. ●



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

#### Endnotes

1. Carla Wong McMillian, justice, Supreme Court of Georgia; Hon. Nina Markette Baker, judge, Superior Court, Coweta Judicial Circuit; Ashley Bell, partner, Dentons US LLP; Jake Evans, partner, Holland & Knight LLP; Hon. Dax E.

López, judge, State Court of DeKalb County; and Patrise M. Perkins-Hooker, past president, State Bar of Georgia, and administrative partner, Johnson & Freeman, LLC. Prof. Tanya M. Washington (Georgia State University College of Law, Center for Access to Justice) served as the panel moderator. Dawn M. Jones, president, State Bar of Georgia, brought greetings, and Chief Justice Harold D. Melton, Supreme Court of Georgia, gave the concluding remarks. Kevin C. Wilson, staff attorney at the Supreme Court of Georgia, was instrumental in planning the CLE.

2. The "Calling to Tasks" are part of the Commission's mission statement found at [cjcpga.org/mission](http://cjcpga.org/mission).

3. See <http://cjcpga.org/wp-content/uploads/2021/03/Cover-Page-and-Speaker-Prepared-Responses.pdf>.
4. See <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf>.
5. See <http://cjcpga.org/wp-content/uploads/2021/03/RESOURCES-TO-ADDRESS-ANTI-ASIAN-HARASSMENT.pdf>.

## You Matter

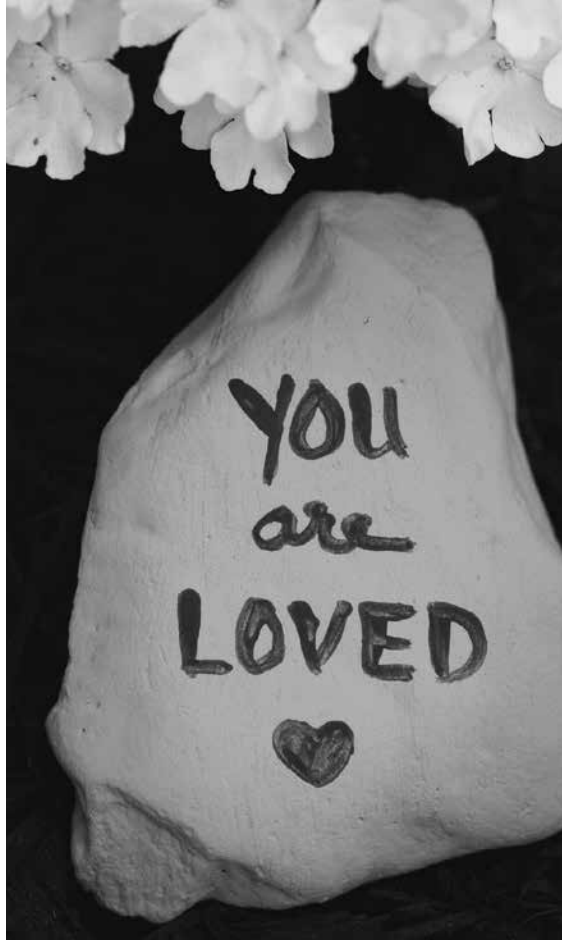
As lawyers and judges, we specialize in helping people with problems. We mask the fact that we have our own problems. It is okay to ask others if they need help. It is okay to ask for help. Your life matters. You matter.

BY KARLISE Y. GRIER

**"I did not think anyone would care if I was here or not,"** shared Dr. Mark Swancutt, a panelist at the Suicide Awareness Program convened by the Chief Justice's Commission on Professionalism on April 30. Dr. Swancutt then shared how wrong he was, as evidenced by the outpouring of support he received when he was hospitalized for an illness. His powerful testimony was not unique. Throughout the Suicide Awareness Program, which had as one of its goals making the case that suicide is preventable, we heard many times how people often feel their family, friends and colleagues would be better off without them. We also learned during the program that it is untrue when believe that we don't matter.

### **Your Life Matters. You Matter.**

Suicide is a difficult topic, and even more so when it is something that you have personal experience with. A number of the program's speakers and panelists shared these experiences with those participating as this extremely important dialogue began. Moderator Sally Yates shared the impact that her father's death had on her life. J. Kelley Quillian, a former judge of



GETTYIMAGES.COM/JOEY WIELE

the Court of Appeals of Georgia, died by suicide in 1986.<sup>1</sup> State Bar Attorney Wellness Committee Chair R. Javyone Hicks spoke about the challenges she faced as a single parent after her children lost their father, attorney Charles Hicks, to suicide. And it was those unique experiences that played a large part in Hicks' role helping to launch the State Bar's Attorney Wellness Program—Lawyers Living Well.<sup>2</sup>

State Bar Past President Robin Frazer Clark and Hon. Bill Reinhardt highlighted the tremendous professional and personal contributions made by some of our colleagues who died by suicide, including 2004-05 State Bar President Rob Reinhardt. Their lives mattered—as does each of our lives. And because we all matter, one of Clark's initiatives during her year as president was to launch the State Bar of Georgia's Suicide Awareness Prevention Campaign.

Suicide is preventable, and we as a legal community can each play a role in creating an environment that makes it less likely that another colleague will die by suicide. In professionalism parlance, I would say, "To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship."<sup>3</sup> As a practical matter, I would offer these suggestions gleaned from the Suicide Awareness Program.

### Be Lovingly Present

Attorney Lynn Garson shared in a paper she wrote for the program:

"Recognizing that depression is a disease of isolation, others can try to spend time with the person or check in by phone if in person is not possible. The calls and visits from my friends propped me up enough to stay alive until I got the help I needed. If I had thought that no one cared, I wouldn't have made it through. If you see any spark of interest or liveliness, do your best to fan the flame. Given the person's low state, it may not work, but

## Chief Justice's Commission on Professionalism Suicide and Awareness Program Resources

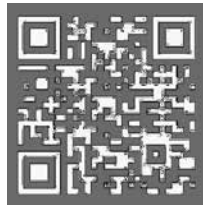
Access all of the resources and materials compiled for the Suicide Awareness Program via the QR Codes below:



SUICIDE AWARENESS PROGRAM



SUICIDE AWARENESS PROGRAM RESOURCES



STATE BAR OF GEORGIA  
LAWYERS LIVING WELL

if it does, you will have gained some ground. If the person wants to talk, listen. Don't listen so that you can respond and fix it (which you can't and will make you both miserable). Listen to be present to that person's distress. Don't hide from it, don't dramatize it and don't inject your own pain or experience into the conversation unless invited. Just be lovingly present."<sup>4</sup>

**Colleagues, friends and family don't have to have a solution, just have referral numbers in your phone.**

While we as lawyers and judges may be hard-wired to solve problems, being present for colleagues, friends or family who may need help doesn't mean we are the ones who are best equipped to provide that help. Rachael Holloman, suicide preven-

tion director for the Georgia Department of Behavioral Health and Developmental Disabilities, made this clear when she discussed the QPR program. QPR stands for Question, Persuade and Refer, three steps anyone can learn to help prevent suicide. Just like CPR, QPR is an emergency response to someone in crisis and can save lives. Asking someone about the presence of suicidal thoughts and feelings opens up a conversation that may lead to a referral for help. There are numerous resources available to help those in crisis (both lawyers and non-lawyers) including the National Suicide Prevention Lifeline by phone at 1-800-273-TALK (8255) or by chat at [suicidepreventionlifeline.org/chat/](https://suicidepreventionlifeline.org/chat/).<sup>3</sup> Holloman reminded the audience that everyone can do this one thing—put the referral numbers for resources discussed during the program into their phones.

#### **If You Have Suicidal Thoughts, Ask for Help**

Attorney Eric Lang stressed self-awareness in his panelist remarks. He shared that before getting the appropriate treatment, he believed that most people regularly thought about death by suicide.

He did not initially understand that this condition warranted treatment; that it was treatable.

Other people may not always recognize that they need help. Psychiatrist and program panelist Dr. Ben Hunter, medical director of outpatient services at Skyland Trail in Atlanta, recommended that if an individual regularly thinks about death by suicide, or if an individual has a family history of depression or death by suicide, that person should seek professional counseling. In Georgia, one place to begin—just to talk to someone and start a conversation—is the Georgia Crisis and Access Line (GCAL), 1-800-715-4225. GCAL is available 24/7 to both lawyers and non-lawyers. Reading the article “Help Is Out There” by Lynn Garson and “Choosing A Therapist” by Plamen Russev is also a good first step.<sup>6</sup>

#### **Employee Assistance Programs, #UseYour6 and a Helpline for Judges Can Help Save Lives**

Judge Wes Taylor shared the challenges he experienced as an attorney after being in New York City and near ground zero when the World Trade Center collapsed.

He received help from the Employee Assistance Program of his then-employer—a large Atlanta law firm. Taylor also shared that he has taken advantage of the State Bar of Georgia’s #UseYour6 sessions.<sup>7</sup> All Georgia lawyers have access to six free counseling sessions each year through the State Bar of Georgia’s Lawyer Assistance Program.

Joe Chancey, the Managing Partner at Drew Eckl & Farnham LLP and a member of the Planning Team for the Suicide Awareness Program, contributed a paper entitled “Talking To Employees About Mental Health—Can I? Should I? Must I? Navigating The Medical Privacy Maze In Georgia,” to assist law firms in navigating the legal issues related to supporting the mental health of attorneys.<sup>8</sup> Another Drew Eckl Partner, Taylor S. Poncz, also shared her experiences after losing a colleague to death by suicide in “Attorney Mental Health & Wellness—A Personal Essay on Why I Believe We Have an Ethical Obligation to Act on it in the Workplace.”<sup>9</sup>

Judge Shondeana Crews Morris, another member of the Suicide Awareness Planning Team, responded to a question about resources solely for judges.

## **ACKNOWLEDGMENTS**

The planning team for the Suicide Awareness Program, with staff support from the Commission and the program co-sponsors, began working on the program in May 2019, after learning of the death by suicide of an associate at Drew Eckl Farnham, LLP. The Commission is grateful to everyone who contributed in any manner to the Suicide Awareness Program.

#### **PLANNING TEAM MEMBERS**

##### **SOLACE Committee Co-Chair**

Hon. Clyde L. Reese III, Court of Appeals of Georgia

##### **SOLACE Committee Co-Chair**

Hon. Render M. Heard, Tifton Circuit Juvenile Court

##### **Suicide Prevention Committee Program Chair**

Hon. Shondeana Crews Morris, DeKalb County Superior Court

Partner Joe Chancey, Drew Eckl Farnham<sup>10</sup>

#### **PROGRAM CO-SPONSORS**

Georgia Department of Behavioral Health and Developmental Disabilities

Judicial Council of Georgia/Administrative Office of the Courts

State Bar of Georgia Attorney Wellness Committee

State Bar of Georgia Suicide Awareness and Prevention Committee

#### **SPECIAL RECOGNITION**

The Suicide Awareness Program took place under the leadership of then-Chief Justice Harold D. Melton in his role as Commission chair. We thank him for his work in bring this program to light.

Need help but don't know where to start? Contact the Georgia Crisis and Access Line (GCAL) at 800-715-4225 and begin a conversation. GCAL is available 24/7 to both lawyers and non-lawyers.

She told the audience that the American Bar Association has a National Helpline for Judges Helping Judges available at 1-800-219-6474.<sup>10</sup>

### Take Care of Yourself and One Another

Dr. Alex Crosby, senior medical advisor, Division of Injury Prevention for the Centers for Disease Control and Prevention, closed by reiterating that death by suicide is preventable and that we as a community of professionals each have a role to play in prevention. Not everyone can perform the same role, but we can all do something, including checking on others and taking care of ourselves. Dr. Crosby shared a variety of ways that individuals can consider when determining how they can best help to prevent death by suicide.<sup>11</sup> Hicks then reminded the audience that we don't have to wait until we feel like we are in crisis to get help. She encouraged everyone to be proactive in taking care of themselves before sharing the many ways that the State Bar of Georgia Attorney Wellness Committee is helping lawyers to live well.<sup>12</sup>

### Available Resources

The Commission compiled numerous resources to help you help yourself and others. The resources highlighted in this article are only some of the information that you can find as our legal community works to prevent death by suicide. Use the QR Codes on page 83 to access all of the resources and materials compiled for the Suicide Awareness Program, or visit [cjcpga.org/suicide-awareness-program/](http://cjcpga.org/suicide-awareness-program/).

As lawyers and judges, we specialize in helping people with problems. Lawyers help craft creative solutions to assist people in solving their problems. Judges make decisions—sometimes life and death—that resolve the problems of those in conflict. We mask the fact that we have our own problems. We sometimes don't know how to check in on others we may be worried about. It is okay to ask others if they need help. It is okay to ask for help.

Your life matters. You matter. ●



**Karlise Y. Grier**

Executive Director  
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on Professionalism  
[kygrier@cjcpga.org](mailto:kygrier@cjcpga.org)

### Endnotes

1. You can read more about Yates' experience with her father's battle with depression at: <https://www.cnn.com/2018/06/11/opinions/when-my-dad-lost-his-struggle-with-depression-sally-yates>.
2. Learn more about Lawyers Living Well at <https://www.gabar.org/wellness/>.
3. See *A Lawyer's Creed and the Aspirational Statement on Professionalism* at: <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf>.
4. You may read the complete essay by Lynn Garson, *Everything I Know About Suicide*, at the link here: <http://cjcpga.org/wp-content/uploads/2021/04/Updated-v-04-27-21-Everything-I-Know-about-Suicide-4813-4438-5509-v.3.pdf>
5. A resource page from the Suicide Awareness Program is available at the link here: <http://cjcpga.org/suicide-awareness-program-resources-qr-code-page/>.
6. See <http://cjcpga.org/wp-content/uploads/2021/04/Help-Is-Out-There-by-Lynn-Garson.pdf>.
7. #UseYour6 is the informal name for the State Bar of Georgia's Lawyer Assistance Program. For more information, visit <https://www.gabar.org/wellness/upload/Use-Your-6.pdf>.
8. See <http://cjcpga.org/wp-content/uploads/2021/04/Drew-Eckl-Farnham-from-Joe-Chancey-Suicide-Awareness-Employee-Privacy-Branded.pdf>.
9. See <http://cjcpga.org/wp-content/uploads/2021/04/DRI-For-Life-Article-Mental-Health-and-Awareness-Branded.pdf>.
10. See also [https://www.americanbar.org/groups/lawyer\\_assistance/articles\\_and\\_info/resources\\_for\\_judges/](https://www.americanbar.org/groups/lawyer_assistance/articles_and_info/resources_for_judges/)
11. See [http://cjcpga.org/wp-content/uploads/2021/07/Alex-Crosby-06-28-21-Cleared-Slides-StateBarGeorMentHlthPromo\\_June2021shrtA.pdf](http://cjcpga.org/wp-content/uploads/2021/07/Alex-Crosby-06-28-21-Cleared-Slides-StateBarGeorMentHlthPromo_June2021shrtA.pdf).
12. See Note 2, *supra*.
13. Staff support was provided by Karlise Y. Grier, executive director, Chief Justice's Commission on Professionalism and Layne Bridges (State Bar of Georgia South Georgia Office, on behalf of the State Bar of Georgia SOLACE Program). Previous staff support was provided by Bonne Cella. The Administrative Office of the Courts, under the leadership of Cynthia Clanton, provided assistance with webinar logistics and support, provided by Michelle Barclay, Noelle Lagueux-Alvarez, Bruce Shaw and Lainna Lawrence. Amber Rikard provided graphic design support on behalf of the State Bar of Georgia's Attorney Wellness Committee.

**STATE BAR OF GEORGIA  
EXECUTIVE COMMITTEE MEETING  
MINUTES  
Friday, May 14, 2021 at 1:00 p.m.  
Zoom Meeting**

Members Participating

Dawn M. Jones, President; Elizabeth L. Fite, President-Elect; Sally B. Akins, Treasurer; Tony DelCampo, Secretary; Darrell L. Sutton, Immediate Past President; William T. Davis, YLD Immediate Past President; Amy V. Howell; Ivy N. Cadle; David S. Lipscomb; Martin Valbuena; and Nicki N. Vaughan.

Members Absent

Bert D. Hummel, IV, YLD President; Elissa B. Haynes, YLD President-Elect; R. Javoyne Hicks.

Staff Participating

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

Call to Order

President Dawn M. Jones called the meeting to order at 1:02 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Dawn M. Jones reviewed the Future Meetings Schedule. President-Elect Elizabeth L. Fite reported that her goal was to stagger the Executive Committee meetings, virtual and hybrid, for convenience and as a cost-savings measure. The first meeting of the 2021-22 Bar year will be July 9 and virtual since it will be directly following the Annual Meeting. She said the joint meeting on Sept. 16-17 of the Executive Committee and Supreme Court will be rescheduled to another date, and she will follow-up with the Court to find an appropriate date that works for all.

Executive Committee Minutes

Secretary Tony DelCampo presented for approval the minutes of four Executive Committee meetings. By unanimous voice vote, after revision, the Executive Committee approved the revised minutes of March 16, 2021, and the revised minutes of April 15, 2021.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Stewart Walter Karge-762339, Eliot Owen Brandy-076667, Craig Mordock-521925, Sheri L. Bocher-065119, Alisa Ann Blanford-383302.

Inactive Sections

President Dawn Jones reminded the Executive Committee of the prior discussions that began last August and continued through the Midyear Board of Governors meeting regarding inactive sections of the Bar and what to do about them. Since then, several sections had responded and have become active, with the exception of two. President Jones reported that Section Liaison Mary Jo Sullivan had contacted both section leaders and section members of the Individual Rights Law Section and Law and Economics Section multiple times in an attempt to find interested parties to rejuvenate the sections. Those attempts were unsuccessful. Pursuant to State Bar Rule Article IX, Section 5, the Executive Committee agreed by consent to recommend to the Board of Governors to abolish the Individual Rights Law Section and Law and



Economics Section due to inactivity for three or more years. Pursuant to the rule, the following notice will be sent to each section:

**Notice of Intent to Abolish**

Pursuant to Article IX, Section 5 of the State Bar of Georgia Bylaws, this serves as notice of the intent to abolish the {section name}.

The Bylaws require notice to the Section by mail or email to the last-known leadership and members of the Section, and by posting a notice of intent to abolish the Section on the official website of the State Bar of Georgia. On {date}, the State Bar of Georgia notified the Immediate Past Chair of the Section of the Intent to Abolish. The Notice of Intent will be published on the Bar's website on {date}.

The Bylaws provide that a section may be abolished if it has been inactive for three or more years. The State Bar of Georgia is not aware of any activity by the {section} since {date/year}.

The Board will vote whether to abolish the Section at the {meeting and date}. Upon an affirmative vote the Section will be abolished immediately.

If you object to abolition of the Section, contact Sections Director Mary Jo Sullivan at maryjos@gabar.org.

President's Report

President Dawn M. Jones reported that she continues to be asked to speak at local bar association events, most recently speaking at the Clayton County Bar Association at their Law Day event on the importance of the rule of law. She said she has also enjoyed working with the Wellness Committee and other various committees. She mentioned the Louisiana Bar and Mississippi Bar are also having hybrid annual meetings, and there might be information they and other organizations can share with us regarding planning hybrid meetings.

Additional details regarding the Annual Meeting were discussed.

- Cpl. Dexter Harden attended to answer any security questions from Executive Committee members.
- Many members expressed their concern about the increased registration costs for Annual Meeting events. With the new Bizzabo platform, packages were not offered to lawyers and judges. President Jones instructed Bar staff to come up with messaging and pricing to offer packages and resend to all members in hopes of increasing attendance. President Jones and President-Elect Fite will approve the language and decreased pricing on behalf of the Executive Committee. Those who have already registered will be contacted to switch to packages and/or receive refunds if necessary.
- If further updates or decisions are needed for any Annual Meeting concerns, a specially called Executive Committee meeting will be planned.

Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss further Annual Meeting details. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

### Executive Director's Report

Executive Director Damon Elmore updated the Executive Committee on the following:

- The crisis communications consultant, Castle, was hired. The scope and direction have changed slightly from the initial contact with them. Instead of a heavy crisis communications portion, it has been switched to more of a member benefits and services campaign. They will advise us on crisis communications when needed.
- The Safety and Crisis Response Liaison is still in the works. The Bar's internal safety team has not met yet. Plans are still going forward to utilize UPL investigators in that role. Cpl. Dexter Harden also offered his services if anything additional is needed.
- The Woodrow Wilson display still in the lobby, which was voted on in July 2020 for removal. Finding and coordinating with the owner of the artifacts has been difficult and that has been the main hurdle. Another plan is in place to store the artifacts and disassemble the display.
- On the credit card messaging regarding passing a utilization fee to our members, Bar staff added information to the website, including the online dues payment screens, and offered an option for our members to use bill pay to avoid the processing fee.
- The Bar Center Committee will meet in the near future to evaluate a proposal to bring the Cushman contract in-house.
- GLSP might renew their lease for 5 years. More details to come as negotiations progress.
- On July 6, we will begin to bring employees back into the building on a staggered schedule at first, working up to everyone being back in the office full time over the next few months.

### Treasurer's Report

Treasurer Sally Akins reported on the Bar's budget and the financial statement through March 2021 was provided to the Executive Committee.

### State Bar Audit Report

Treasurer Akins congratulated and thanked Chief Financial Officer Ron Turner and his staff for receiving a clean audit report with no issues found and no changes in accounting principles needing to be made. In addition, the Investment Committee met with Greystone consulting and asked them to look at the Bar's investment policy statement to see if we can be more aggressive with investing.

### Office of the General Counsel Report

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

### Clients' Security Fund Proposed Rules

Deputy General Counsel Bill NeSmith gave a brief background on the history of the Clients' Security Fund, and then he presented the proposed changes to Rule 1-506 and Rule 10-103 to create a permanent solution to funding the program and more stability. By majority vote, the Executive Committee agreed to recommend the proposed changes to Rule 1-506 and Rule 10-103 to the Board of Governors. It will be presented to the Board for discussion at the 2021 Annual Meeting and then for a vote at the 2021 Fall Meeting.

### YLD President's Report

YLD President Bert Hummel was not in attendance, but President Jones wanted to reflect in the minutes that she appreciated his leadership and has enjoyed working with him this year, and that he has been very helpful and supportive of her.

### Legislative Report

Director of Governmental Affairs Christine Hayes reported on the legislative program. She stated that if anyone has relationships with legislators, that she would appreciate an introduction in order to create more relationships between the Bar and the Legislature. She stressed the importance of legislators having connections to the Bar and its lawyers so they can easily come to us with questions when needed and vice versa.

### Committee Updates

The following committee updates were given:

- David Lipscomb reported on the following: The Disciplinary Rules and Procedures Committee will be meeting at the Annual Meeting; Judicial Procedure and Administration/Uniform Rules has not met recently; and the Professional Liability Insurance Committee continues to wait for an in-person meeting to present their findings to the Board.
- President Dawn M. Jones reported that the Seeking Equal Justice and Addressing Racism & Racial Bias Committee is not meeting at the Annual Meeting. The SEJ committee and the Committee to Promote Inclusion in the Profession are both hosting 3-hour CLEs at the Annual Meeting. She said that the Judicial Qualifications Commission Nominating Committee met yesterday, and she was proud of the discussion and the various perspectives offered by their members.
- Treasurer Sally Akins reported on the Supreme Court Lawyer Competency Task Force. She said that they have been separated into three study committees focusing on the following: the future of the bar exam; other admission into the Bar (admission on motion, etc.); and the third is CLE and transition into law, the competency part of the study committee. Sally said she would ensure that the Bar is included in the discussions. Sally and Keith Blackwell will be non-voting members of every committee.
- Martin Valbuena reported that the iCivics Committee will be sunsetted in 2021 and that the Fee Arbitration Committee only meets when needed. The Georgia Bar Journal Editorial Board regularly meets every other month. The Local and Voluntary Bar Committee made assignments to members and reached out to all local bars to encourage their participation in the local bar awards.

### Informational Items

As information, the Executive Committee received a draft of the March 20, 2021, Board of Governors meeting minutes.

### Old Business

There was no old business.

### New Business

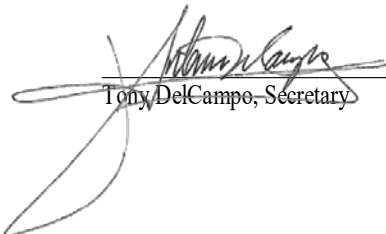
Amy Howell announced that she will not seek reelection on the Executive Committee. She will be nominating Shiriki Jones for her empty seat at the Annual Meeting.

### Announcements

It being their last meeting, Immediate Past President Darrell Sutton and Immediate Past YLD President Will Davis were both thanked for their service to the Bar on the Executive Committee. President Jones also thanked everyone for their attention and dedication this year.

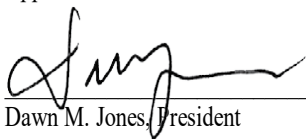
### Adjournment

There being no further business, the meeting was adjourned at 4:57 p.m.



Tony DelCampo, Secretary

Approved:



Dawn M. Jones, President

**STATE BAR OF GEORGIA  
EXECUTIVE COMMITTEE MEETING  
MINUTES  
Friday, July 9, 2021 at 1 p.m.  
Zoom Meeting**

Members Participating

Elizabeth L. Fite, President; Sally B. Akins, President-Elect; Ivy N. Cadle, Secretary; Dawn M. Jones, Immediate Past President; Elissa B. Haynes, YLD President; Ronald E. Daniels, YLD President-Elect; 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

Tony DelCampo, Treasurer.

Staff Participating

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

Call to Order

President Elizabeth L. Fite called the meeting to order at 1:10 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule. As it concerns the Executive Committee Extended Meeting on August 20-22 at Barnsley Resort, she said that Michelle Garner is working with the hotel on available options to participate virtually. She added that there will be an open time in the schedule Saturday afternoon, and there will be a dinner Saturday night.

As it concerns the joint meeting of the Executive Committee and Supreme Court of Georgia on September 23, the Executive Committee will meet in the morning and have lunch together. That afternoon, the Executive Committee will meet jointly with the Supreme Court and then have dinner that night. For the Executive Committee meetings on the schedule that aren't assigned a location, President Fite said that she is confirming those details and will have more information at the next meeting.

Executive Committee Minutes

President Elizabeth L. Fite presented for approval the minutes of the May 14, 2021, Executive Committee meeting. By unanimous vote, after revision, the Executive Committee approved the revised minutes.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by majority voice vote, with Javoyne Hicks abstaining: James Bly-064642, Thomas Bannigan 036441, Susan Gerrits-291725, Kyle Thomas Jones-383693, Carla Anne Ford-267935, Tyler Stuart Brown-089715, Wade Ross Wright-778787, Michael James Welch-747198, Andrew Robert H. Newton-541623, Simmons I. Patrick Jr.-566225, Karen Marcus Cucolo-470270, Christine Hye Won Park-815516, Lillian Mee Jing Moy-527525, William Keith Bryant-092030, Keith Noble Wilson-004667, Jialing Shen-631075, Gabrielle Nicole DiBernardi-102924, Ross Edward Longood-457630, Marshall H. Ross-615187, Sarah Swanson Higgins-352116, James D. Bridgeman-080476.

### Member Status Appeals

The Executive Committee, by unanimous voice vote, approved a request by Elizabeth Thompson for an extension until March 30, 2022, to complete fitness and reinstatement from Administrative Suspension due to non-payment of fees. In the event that it becomes necessary, the Executive Committee is willing to review a second request from Thompson if more time is needed.

### Amendments to Rules & Summary of Proposed Rule Changes

The Executive Committee tabled proposed changes to “Rule 1-501. License Fees” until the August meeting. They discussed whether certified mail was necessary as a last form of communication prior to suspension. Deputy General Counsel Bill NeSmith informed the Executive Committee that the Membership Department sends several notices by mail and email to members prior to this step. Past President Dawn Jones raised the issue that first class mail has been less than dependable lately, and that sending the notice by certified mail was important as a way to confirm that the letter was received. Secretary Ivy Cadle pointed out that receiving a piece of certified mail is difficult if you miss the initial delivery. NeSmith asked that the Executive Committee also review all of part (d) in the rule, because the appeals process was very complicated and difficult, and it can be amended to be more efficient. He will ask the Membership Department for additional information regarding notifying members of suspension and the Executive Committee will review that information along with section (d) to Rule 1-501 in its entirety.

The Executive Committee, by unanimous voice vote, approved changes to “Article V, Section 4. The Immediate Past President,” updating the ICLE Board of Trustees language because there is no longer an ICLE Board of Trustees, but rather an ICLE Board.

### Member Benefits Committee Recommendation

The Member Benefits Committee voted unanimously to recommend to the Executive Committee that Member Benefits, Inc., the State Bar’s recommended broker, pursue and include a MEWA (Multiple Employer Welfare Arrangement) insurance option on the Private Insurance Exchange for Bar members. Nick Trefry and John Kelly, representatives from Member Benefits, Inc., presented information about the Members Health Plan to the Executive Committee. After a lengthy discussion by the Executive Committee, it was decided that additional due diligence was needed prior to voting on this issue, and the committee will discuss it further at the August meeting. Executive Director Damon Elmore will contact the Texas Bar to find out more information about how the program is working for them, and General Counsel Paula Frederick will look more into the concerns to avoid a situation similar to what happened with ANLIR. It was suggested that the chair of the Member Benefits Committee attend the August meeting to answer questions as well. The Executive Committee, by unanimous voice vote, agreed to table this item until the August meeting.

### CCLC Executive Committee Appointment

The Executive Committee, by unanimous vote, approved the President’s recommendation to appoint President-Elect Sally Akins to the CCLC Board as the Executive Committee Appointment.

### New Judicial Circuit/Augusta Board of Governors Posts (Rule 1-302)

As of July 1, Senate Bill 9 created a new Columbia judicial circuit comprised of Columbia County. Per Bar Rule 1-701, “whenever a new judicial circuit is created, the Executive Committee shall determine, under the provisions of Bar Rule 1-302 (b) and the bylaws, the number of members of the Board of Governors the new circuit is entitled to elect...” Per Article III Section 8. New Positions Unfilled Positions, Vacancies, and Lost Positions, “if any new position is created as a result of legislation establishing a new judicial circuit, the President shall appoint an active member of the State Bar in such circuit to hold office for the remaining term.”

Currently, there are two lawsuits pending over the creation of the new circuit, and there is a moratorium preventing the split of the circuit. Before the moratorium, President Elizabeth L. Fite appointed current Augusta Circuit, Post 2, Board of Governors member Danny Durham to serve as the Board of Governors member for the new Columbia Circuit. However, as a result of the moratorium, it was decided that Durham would continue to serve as the Post 2 member of the Board of Governors until the courts issue a decision. General Counsel Paula Frederick will monitor the lawsuit and advise the Executive Committee on next steps as applicable.

#### President's Report

President Elizabeth L. Fite reported on her plans for the upcoming year. For Bar committees, she requested that Executive Committee members who may be on committees that require any rules changes that would make things consistent with current practices, to bring them to the Executive Committee for consideration. She said this will be a good year for house-keeping changes. She stated that continuing to refine virtual participation is important, which includes balancing the expense and the virtual experience with the number of remote participants. She said remote participation is important, and virtual options could include simply using a conference call line, livestreaming a meeting, or continued use of Zoom. President Fite asked Executive Committee members to share platforms they have used with other organizations that may be beneficial for the Bar to consider. Bar staff are also reviewing options for virtual voting.

President Fite said one of her biggest goals this year is educating Bar members and the public on what the Bar does, how it operates, and what member benefits are available. The Law Practice Management Program was highlighted at the Annual Meeting, and additional programs and benefits will be highlighted in the upcoming year. Building relationships within the Legislature will be a priority and will be pursued through a coordinated effort with Governmental Affairs Director Christine Hayes, President Fite, Executive Committee members, and other key stakeholders.

President Fite reported that the Office of the General Counsel Oversight Committee will be working on a succession plan, and the Unified Bar Committee will continue to meet to address challenges the mandatory bar faces.

#### Treasurer's Report

Due to unavoidable conflicts, Treasurer Tony DelCampo and Chief Financial Officer Ron Turner were absent from the meeting. Executive Director Damon Elmore gave the treasurer's report. He referenced the detailed financial reports that were provided with the written materials and noted that there will be more information and discussion at the next Executive Committee meeting.

#### YLD Report

YLD President Elissa Haynes reported that she's excited about this year and looking forward to the involvement of the YLD and Bar holding activities together. She encouraged the Executive Committee to attend as many YLD meetings as they can. One of her main goals this year will be to create a YLD listserv for those who don't have the benefit of other listservs. She said it will take time, but she thinks it's an important resource to provide to young lawyers.

#### Executive Director's Report

Executive Director Damon Elmore reported that reopening the Bar offices is going well, and that Bar staff will continue to thoughtfully adjust protocols and be mindful of safety. He said that the Woodrow Wilson exhibit relocation was stalled because of an individual who was unresponsive, but all signage has been removed and there is a new plan in place. He reported that two of the parking deck gates are currently not working, and we are waiting on those to be repaired. Executive Director Elmore said that along with the

Bar Center Committee, he is reviewing the Cushman Wakefield Management agreement with an eye toward savings. Additional review and evaluation is necessary.

He reported that he visited both the Tifton and Savannah offices, and they were good meetings where he was able to meet with members in the area and the property owner for the Tifton location.

#### Office of the General Counsel's Report

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

#### Proposed Rules Changes to Fee Arbitration Program (Part VI – Arbitration of Fee Disputes)

Deputy General Counsel Bill NeSmith briefly explained how the Fee Arbitration Program currently operates. If a case is accepted by the Fee Arbitration Committee, the respondent has a choice of being bound or not bound. In a joint meeting with the Supreme Court of Georgia in March 2019, the Court expressed their preference that the Bar's fee arbitration program be like any other arbitration program, that if you choose to participate, then you're bound by the ruling. The Fee Arbitration Committee is working on an amendment to the rules to reflect that.

Executive Committee member and liaison to the Fee Arbitration Committee David Lipscomb reported that the Fee Arbitration Program changed from in-house lawyers to a contract attorney about 10 years ago, and the program is now on its fourth contract attorney in 10 years.

If the rules are amended, the program would be a consent-only program where both the petitioner and respondent must agree to be bound by the arbitration award. The proposed amendments would also allow the Fee Arbitration Committee to refer a petition to the Office of the General Counsel for consideration of a disciplinary investigation should a lawyer refuse to be bound by the arbitration proceeding. The Executive Committee will consider the amended rules at their August meeting.

#### Discussion of 2021-2022 Lobbyists Contracts

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss the 2021-2022 lobbyists' contracts. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session. While in Executive Session, the Executive Committee voted unanimously to renew each of the lobbyists' contracts at their current rates for the 2021-2022 Bar year.

#### Committee Updates

President Elizabeth L. Fite reminded the Executive Committee members of their responsibility to report to the Executive Committee on all Bar committees they are liaisons to, specifically what those committees are working on and accomplishing. She said the Committee Chair Orientation will be on July 29, and the committee chairs will receive information in regard to expectations and rules, etc. Executive Committee members were also reminded that the Bar rules allow Executive Committee liaisons to serve as voting members of the committees where they serve as an Executive Committee liaison. President Fite also pointed out there are many committees that overlap in their purposes. She specifically asked Immediate Past President Dawn M. Jones to be the Executive Committee liaison to the Georgia Diversity Program Committee, the Committee to Promote Inclusion in the Profession and the Seeking Equal Justice and Addressing Racism & Racial Bias Committee, in order to help the committees collaborate with each other in their similar purposes and roles.

#### Staff Accolades

Written letters were provided to the Executive Committee highlighting the work of the Communications



Department and the *Georgia Bar Journal*; Amanda Draper in the Membership Department, specific to her role as staff liaison to the Elections Committee; and a report from LRE Director Deborah Craytor that she received great feedback from the Georgia PTA on their presentation and individual school PTAs are requesting presentations as well.

Members of the Executive Committee commended Bar staff on all their hard work ensuring that the first hybrid Annual Meeting was a huge success.

Old Business

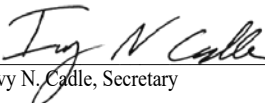
There was no old business.

New Business


There was no new business.

Adjournment

There being no further business, the meeting was adjourned at 5 p.m.

  
Ivy N. Cadle, Secretary

Approved:

  
Elizabeth L. Fite, President

**STATE BAR OF GEORGIA**  
**EXECUTIVE COMMITTEE EXTENDED MEETING**  
**MINUTES**  
**August 20-21, 2021 at 1 p.m.**  
**Zoom Meeting**

Members Participating

Elizabeth L. Fite, President; Tony DelCampo, Treasurer; Ivy N. Cadle, Secretary; Dawn M. Jones, Immediate Past President; Elissa B. Haynes, YLD President; Ronald E. Daniels, YLD President-Elect; Bert D. Hummel, IV, YLD Immediate Past President (via Zoom Aug. 20/in person Aug. 21); William C. Gentry; R. Javoyne Hicks; Shiriki Jones; David S. Lipscomb (via Zoom); Martin Valbuena; and Nicki N. Vaughan (via Zoom).

Members Absent

Sally B. Akins, President-Elect.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Michelle Garner, Director of Meetings; 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 1:03 p.m. Members of the Executive Committee in attendance are indicated above. The beginning of the meeting was spent in introductions of those in attendance both in person and on Zoom.

President Elizabeth L. Fite discussed the responsibilities of the Executive Committee, including serving as Executive Committee liaisons to State Bar committees. She then called upon each of the following for more information: Executive Director Damon Elmore, Chief Financial Officer Ron Turner, General Counsel Paula Frederick and Director of Governmental Affairs Christine Butcher Hayes.

Executive Director Damon Elmore discussed the duties of the Executive Director: managing the Bar as a whole; overseeing several managers who report directly to his office; focusing on operating the Bar in the current environment, improving procedures, protecting the fiscal responsibility of the Bar and spending; looking for efficiencies in procedure; and making sure we have competent and qualified staff in the right positions. Executive Director Elmore said many of the duties are based on accountability, and not focusing on the project right in front of us, but rather long-range planning and anticipating issues on the horizon. He reported that he is intentional when speaking to committee and section leaders about remarks and statements to the press, trying to ensure that correspondence goes through the Communications Department for consistency and accuracy. He stated that his secondary role is to serve as a representative of the Bar, reminding Bar members of the value of the Bar and why they should be proud to be a Georgia lawyer.

Chief Financial Officer Ron Turner discussed the Officer Reimbursement Policy. Two years ago, the Bar went to a practice of per diem rates rather than looking at individual expenses. The information on the financial statements they receive each month is only as good as the timeliness of expenses being turned in. Financial audits have been conducted in January, February and March in the past, but the goal is to have that done closer to the end of the year. He reported that for members of the Executive Committee that are non-officers, the current policy provides for accommodations and group meals to be covered only for the following from the Executive Committee line item: Executive Committee extended meeting, Supreme

Court and Executive Committee joint meeting. For officers, officer budgets cover those as well. The Bar doesn't cover travel costs or meals outside provided meals for non-officers.

General Counsel Paula Frederick reviewed Standing Board Policy 600 (Conflicts of Interest). A volunteer member "shall disclose any conflicting interest to the officer or chairperson immediately presiding over the business of the Bar to which the conflict may relate." General Counsel Frederick spoke to the Executive Committee about revising the policy in order to allow for Bar staff to report to either the Executive Director or General Counsel conflicts that are brought to their attention, among other issues. She also brought Standing Executive Committee Policy 1200 (Endorsement of Political or Judicial Candidates) to the attention of the Executive Committee, which states in part, "State Bar officers may not use their official title or include their connection to the Bar in any public endorsement of political or judicial candidates. When an officer of the State Bar of Georgia verbally endorses a candidate, the officer shall clearly state that the endorsement is made in his or her personal capacity and is not the endorsement of the State Bar of Georgia." She explained *Keller*, which prohibits spending mandatory Bar dues for anything that is not germane to the purposes of the Bar or the Bar's activities related to regulating the profession. She stated we are not allowed to spend Bar dues on anything that is political or ideological, which she acknowledged is difficult to define now. General Counsel Frederick said that Executive Committee members will be contacted by the public regarding discipline matters. Because the disciplinary process is confidential, the Executive Committee should not respond but rather forward those matters to her to handle.

Director of Governmental Affairs Christine Butcher Hayes discussed the Bar's Legislative Program, which is governed by Standing Board Policy 100 (Legislative Policy and Procedure). She explained that all proposals must go through the Advisory Committee on Legislation to move forward in the process. There is a special process in place for the Executive Committee to approve support of or opposition to legislation if the timing of an ACL meeting is not possible. Director of Governmental Affairs Hayes reviewed the following advice for Executive Committee members: 1) Know the rules before you start the process; 2) Be respectful of all players, regardless of position or party; 3) Use social media judiciously, as leaders of the Bar, many are watching; 4) Be smart enough to know what you don't know, no answer is better than the wrong answer and you should always be prepared; 5) When working within the government, substance is expected and a sophisticated work product is vital; 6) You can never get in trouble by saying nothing; 7) You can never have a statewide view if you forget the view from your hometown; 8) Never lie, trustworthiness is the only currency you have with government officials; 9) Help the Bar speak as one non-partisan voice, always let Christine know if you are going to be at the Capitol and in what capacity; and 10) Positive relationships influence people, it's important to build relationships.

#### Future Meetings Schedule

President Elizabeth L. Fite reviewed the Future Meetings Schedule. She announced that the January and February Executive Committee Meetings will be switched, January will be on Zoom and February will be in person in Tifton, realizing everything is subject to change in respect to COVID restrictions, etc.

Director of Meetings Michelle Garner reported on the current landscape of the hotel industry. With almost all hotels either being closed or having limited staff during the pandemic, the shareholders are looking to recoup their earnings. Director of Meetings Garner said the costs are increasing exponentially, and it will be difficult to negotiate good rates for meetings going forward. Many properties are turning down groups of our size and increasing the rates. We always hear feedback about keeping Bar meetings in the state, but that is then countered by feedback of those who want to go to a beach location. The Executive Committee then discussed current pricing and other obstacles and scenarios to keep in mind when planning future meetings. Treasurer Tony DelCampo suggested appointing a small group to further look into these ideas and issues and discuss them further: hotel costs, subsidizing costs, being more economical in order to be more inclusive so more can attend, virtual costs, etc.

### Executive Committee Minutes

Secretary Ivy Cadle presented for approval the minutes of the July 9, 2021, Executive Committee meeting. By unanimous voice vote, after revision, the Executive Committee approved the revised minutes of July 9, 2021.

### Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous voice vote: Martine A. De Proost Ford-000990, Alixe Elisabeth Steinmetz-612460, Judith Inge Harris-382990, Denise Lynn Savage-630720, Joshua Reed Drexler-751684, Emilien Omer Loiselte Jr.-456305, Melissa Leigh Gross-313563, Latanya Mapp Frett-468998, Diana Lynn Myers-533078, Robert Edward Dudley Jr.-231760, Richard C. Murphy-513047, Michael John Woodworth-006580, Louis Hugh Pugh-589524, Stephen Andrew Sacks-622000, Carol Russell Geiger-288882, Melissa Pignatelli O'Brien-496416, S. Richard Gard Jr.-283928, Helen Adrian Cooper-005459, Gary A. Rosen-614411, Kimberlye F. Cornelson-188470, Mark Edward Harman-327160, Mathilde L. Genovese-289750, Shauna Lyn Turnbull-718810, Susan His-Yung Raimo-452858, Kenneth Paul Hyle-381746, Daniel Ethan Zytnick-550151, Penny L. Bellinger-049710, Angela O. Pesnell-102932, Barry S. Mittenthal-513850, Jacqueline F. Stein-677840, Todd W. Ponder-583492, Kara Deanne Ford-756273, Katherine A. Moss-234637, Tracy Lynn Hurt-380108, David Jay Tigges-712146, Victor Ming-Chun Lai-431113, Margaret Cadigan-101637, Gerald K. Stephens Jr.-678870, Meredith Leigh Silliman-392433, Daniel John Greenberg-342780, Nancy Rosenberg Johnson-986336, Lissa Gill Newman-004770, Robert Weller McCarthy-482267, Michael Robert McCarthy-006090, Musa L. Eubanks-143177, Traci Cerise Belmore-532741, Lance Casey-787933, Laurel Catherine Schmitt-629543, Lindsay Marie Hodgson-142491, Ann Claire Phillips-359608, Tamara Denise Rorie-615155, Betty Carolyn Strom-688660, Lorna Marie Rhoades-940669.

### Disability Status

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

### Member Status Appeals

The Executive Committee, by unanimous voice vote, approved the staff recommendation for James "Burton" Vance to waive his late fees and reinstatement fees to acknowledge the problems caused by the pandemic but the Executive Committee did not approve the staff recommendation to require fitness be completed to emphasize his personal responsibility related to his State Bar of Georgia license; by unanimous voice vote, approved the staff recommendation for Lindsay Tatum to grant a military waiver request for active dues plus professionalism fee; and by unanimous voice vote, agreed to waive the late fee for Arathi Venkatesh.

### Fee Arbitration Rules

Deputy General Counsel Bill NeSmith briefly explained how the Fee Arbitration Program currently operates. If the Fee Arbitration Committee accepts a case, the respondent has a choice of being bound or not bound. In a joint meeting with the Supreme Court of Georgia in March 2019, the Court expressed their preference that the Bar's Fee Arbitration Program be like other arbitration programs, that if you choose to participate, then you're bound by the ruling. The Fee Arbitration Committee has worked to amend the rules to reflect that. These revisions are referred to as "the Florida model."

If the rules are amended, the program would be a consent-only program where both the petitioner and respondent must agree to be bound by the arbitration award. The proposed amendments would also allow the Fee Arbitration Committee to refer a petition to the Office of the General Counsel for a disciplinary investigation should a lawyer refuse to be bound by the arbitration proceeding. Another revision is to limit

the petition and response to 50 pages and change the threshold from \$750 to \$1,000.

The Executive Committee, by majority voice vote, with one abstention by David Lipscomb, voted to refer the revised rules to the Board of Governors for their consideration.

#### Rule 1-501(d). License Fees

Deputy General Counsel Bill NeSmith reported that the Membership Department would like to change the rule to allow for first-class mail rather than certified mail prior to suspension. The Executive Committee, by majority voice vote, rejected the change on line 50 (changing “certified mail” to “First-Class U.S. Mail, postage paid”), but then accepted the remainder of the housekeeping changes in Rule 1-501(d) License Fees, to recommend to the Board of Governors for their consideration.

#### New Judicial Circuit/Augusta Board of Governors Posts

As of July 1, Senate Bill 9 created the new Columbia Judicial Circuit comprised of Columbia County. Per Bar Rule 1-701, “whenever a new judicial circuit is created, the Executive Committee shall determine, under the provisions of Bar Rule 1-302 (b) and the bylaws, the number of members of the Board of Governors the new circuit is entitled to elect....” Per Article III Section 8. New Positions Unfilled Positions, Vacancies, and Lost Positions, “if any new position is created as a result of legislation establishing a new judicial circuit, the President shall appoint an active member of the State Bar in such circuit to hold office for the remaining term.”

The Executive Committee, by unanimous voice vote, approved the creation of one post for the Columbia Circuit and determined the Augusta Circuit would continue to have four posts. President Elizabeth L. Fite will appoint Danny Durham, who currently holds an Augusta post, to the new Columbia Circuit, and she will appoint a new member to the Augusta Circuit.

#### Committee Updates

The following committee updates were provided:

- President Elizabeth L. Fite reported the Office of the General Counsel Oversight Committee met to discuss succession planning and review the 2020-2021 OGC report.
- Shiriki Jones reported the Editorial Board met last week for the first meeting of the year and had robust discussions regarding the articles submitted for possible publication in the *Georgia Bar Journal*.
- David Lipscomb reported that the Fee Arbitration Committee has not yet met this Bar year; the Professional Liability Committee has now made a recommendation to the Executive Committee and will likely no longer meet; and the Judicial Procedures Committee only meets as needed.
- Immediate Past President Dawn Jones reported that the Seeking Equal Justice Committee will meet next on Sept. 10.
- Javoyne Hicks reported the Lawyer Assistance Program met in July and the #UseYour6 campaign is still working well. So well, in fact, that CorpCare Inc., who administers the LAP program, will likely increase their costs in the next contract, because of the large increase in usage.
- Bill Gentry said there are no updates on the Children and the Courts Committee or the Attorney-Client Solicitation Committee, but that Avarita Hanson is working on a cognitive impairment program for the Senior Lawyers Committee.

#### ACL/Legislative Report

Director of Governmental Affairs Christine Butcher Hayes notified the Executive Committee of the upcoming Advisory Committee on Legislation Committee dates: September 14, November 30, and February 5 (reserved if needed). Kyle Williams is chairing the ACL this year. Director of Governmental

Affairs Hayes stressed the importance of building relationships with individual legislators, and that she's available to help coordinate meetings or lunches. She also asked Executive Committee members to let her know of any established relationships.

An outing with the Executive Committee and the Governor's Office is scheduled for October 1. Director of Governmental Affairs Hayes said that it is a good opportunity to get to know the Governor's staff.

Director of Governmental Affairs Hayes reported that a Special Legislative Session will likely be held in mid-October or early November. The Governor sets the date in an executive order. It is unlikely to involve anything regarding any of our legislation, but will focus on redistricting. She said she receives many calls and emails regarding the Remote Online Notary Bill, especially outside of Atlanta. It is a unique bill that touches on UPL and the Rules of Professional Conduct, and it involves the Bar a fair amount. The Executive Committee had a discussion regarding if this issue is a business issue or a regulation/practice of law issue. After their discussion, it was advised that should the Real Property Section's position have changed on the Remote Online Notary Bill, then the section should ask ACL to make a recommendation to the Executive Committee and the Board of Governors.

#### Executive Director's Report

Executive Director Damon Elmore reported on the Member Benefits Committee recommendation regarding the Member Benefits Inc. request to add a MEWA (Multiple Employer Welfare Arrangement) insurance option on the Private Insurance Exchange for Bar members. He spoke with Committee Vice Chairperson Ron Lowry who said the committee vote was unanimous, but some had reservations, and there was a possible economic impact of about \$100,000 to the Bar. This will be reviewed and discussed further. Executive Director Elmore also reported that the Elections Committee will have a plan in place to notify Bar members of the change to the election method of opting in to paper ballots rather than opting out.

Executive Director Elmore additionally reported that Director of the Military Legal Assistance Program Christopher Pitts will be resigning his position to accept a job with the United States Court of Appeals for the Armed Forces. MLAP is a joint program of the State Bar of Georgia and the Georgia Legal Services Program.

Executive Director Elmore updated the Executive Committee on the state of the Bar staff. He said that masks are mandatory in the Bar buildings, and staffing will remain at 2-3 days per week in the office and 2-3 days working from home. The Conference Center is open and available for small meetings, and everyone is proceeding with caution following COVID safety protocols. He said the staff seems comfortable with the current COVID-19 protocols, and everyone remains focused on salaries and what that means for the next budget year.

#### Treasurer's Report

Treasurer Tony DelCampo reported on the Bar's finances and the Executive Committee reviewed the budget variances. The Coastal Georgia Office is slightly over budget by \$2,000-\$3,000 because of the increase in rent. The current report is through May 31, 2021, and Chief Financial Officer Ron Turner said that June 30, 2021, will be closed in the next couple of weeks.

#### Office of the General Counsel's Report

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.

Additionally, General Counsel Paula Frederick provided a copy of Standing Executive Committee Policy

100 (*Amicus* Brief Policy). She said that per the policy, “in determining whether to file an *Amicus* brief the Executive Committee should, among other considerations, determine that: 1) the outcome of the litigation will effect persons other than the litigants, and; 2) the outcome of the litigation will be of general interest to the members of the State Bar of Georgia.” General Counsel Frederick reported that she has had a request regarding a possible *Amicus* brief, and that she will provide further information if and when she is contacted about it again. There is time for the Executive Committee to consider it at their September meeting or for the Board of Governors to consider it at the Fall Meeting.

#### YLD Report

YLD President Elissa Haynes reported that the YLD had a successful Officer and Director’s meeting the previous weekend, and she said many expressed their appreciation of President Elizabeth L. Fite attending and said it showed a proactive effort in encouraging the big Bar to get involved with what the YLD is doing. YLD President Haynes said she appointed a subcommittee to look more into technology and producing a podcast. She is bringing back the YLD Signature Fundraiser, and the beneficiary this year will be Kate’s Club, an organization that empowers children and teens facing life after the death of a parent, sibling or caregiver. She reported that the 2022 YLD Leadership Academy is currently being planned and a scholarship will be offered to encourage participation by those who may not be able to afford it. She also let the Executive Committee know that she is starting a “Bring a Buddy to a Meeting” program, where individuals or firms can sponsor young lawyers in order for them to attend meetings, and those sponsors will be recognized at the Annual Meeting. President Fite asked YLD President Haynes to send the sponsorship information to the Executive Committee when it is available.

#### Sunsetting Committees

President Elizabeth L. Fite reported on sunseting committees and highlighted the process for those coming up through the officer ranks. Per Bar rules: 1) special committees may be sunset at the President Elect’s discretion during the committee appointment process; and 2) standing committees may be abolished by the Board of Governors. She asked that the officers, along with the Executive Committee, stay abreast of all Bar committees and what they are doing, what they are needed for, and to make sure they are still working within their purpose.

#### Rule 1-501(d). License Fees (appeals process)

Deputy General Counsel Bill NeSmith explained the appeals process related to licensing fees. He said that in thirty years, it had been used once, unsuccessfully. He suggested instead of the current lengthy process that involves a member appealing to the Executive Committee, if the committee wishes to keep the appeal process in place, a special master could be used instead. Executive Committee David Liscomb suggested using a small subcommittee of the Executive Committee in order to avoid the costs of a special master. Deputy General Counsel NeSmith said that the purpose of using a special master would be to have a disinterested third party hearing the appeals rather than the Executive Committee. President Elizabeth L. Fite asked the Office of the General Counsel to draft the revision for consideration at a future Executive Committee meeting.

#### Uniform Rule for Juvenile Courts

Uniform Rules require that any proposals/rules changes be sent to the State Bar of Georgia for comment by Bar members. Anne M. Kirkhope, Staff Attorney for the Council of Juvenile Court Judges, sent three proposed rules changes to the Uniform Rules for the Juvenile Courts. She asked for feedback from the Executive Committee to the Council and the Supreme Court concerning the changes. The Executive Committee has commented and has declined to comment on these types of rules changes in the past.

The proposed changes include one amended and two new uniform rules adopted by the Council of Juvenile Court Judges at its spring business meeting. The two new rules were drafted in compliance with recently

enacted legislation. The proposed amendment is sought to make permanent a change made by the Declaration of Statewide Judicial Emergency concerning the use of remote video conferences to conduct certain types of juvenile court proceedings. All three proposed rules changes have been submitted to the Supreme Court for approval. The Executive Committee had no comments on the proposed rules changes and Deputy General Counsel Bill NeSmith will convey that to Ms. Kirkhope.

#### Clients' Security Fund

Secretary Ivy Cadle reported on the Clients' Security Fund and the proposed rules changes in order to make the fund self-sustaining per the Supreme Court of Georgia's request. He provided the Executive Committee with a draft of preliminary information that was created in order to answer the outstanding questions gathered at the June Board of Governors meeting. He asked the Executive Committee to review the data and let him know what other questions they have in anticipation of creating a more comprehensive memo for the Board of Governors well in advance of the Fall Meeting Board Book in order for all members to have time to ask additional information. After a lengthy discussion and additional feedback by the Executive Committee, Secretary Cadle said he would write the comprehensive memo and provide it to Bar staff to send to the Board of Governors prior to the mailing of the Board Book.

#### Virtual Meeting Participation and Electronic Voting

President Elizabeth L. Fite reported on virtual meeting participation and electronic voting. Questions that need to be addressed are: what does virtual participation mean; balancing the cost of virtual participation and how many utilize the feature; and should we shift to livestreaming for a more economical option. The current Executive Committee meeting AV costs for virtual participation is \$2,000, but it was \$65,000 for the Annual Meeting board meetings with two rooms connected to each other and Zoom participants. Hotels either will not allow you to bring in your own AV equipment or they will charge you to bring in your own AV. Bar staff is reviewing and researching different platforms for electronic voting because a livestream of the meeting and allowing the BOG to vote electronically is likely the most economical option. More information will be provided at the September Executive Committee meeting.

#### Lawyer Competency Task Force

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss the Lawyer Competency Task Force. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

#### ICLE Report

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss the Institute of Continuing Legal Education of the State Bar of Georgia. Thereafter, by unanimous voice vote, the Executive Committee emerged from Executive Session.

#### Professional Liability Insurance Update

President Elizabeth L. Fite outlined the report and options provided by the Professional Liability Insurance Committee. The committee has done its due diligence and vetted all possible options, with the process lasting a few years. Their goal was to give a final recommendation to the Executive Committee and Board of Governors, but no option received a majority vote. Executive Committee Member David Lipscomb provided a summary and vote count of each option. President Elizabeth L. Fite noted that she did not remove or appoint any members to the committee during her committee appointments in order to continue status quo. The Executive Committee discussed how to present the information to the Board of Governors at the Fall Meeting in order to make a final vote. All the options will be provided with an executive summary prior to the Fall Meeting Board Book being mailed, in order for the Board of Governors to have adequate time to review the information.



Officer and Executive Committee Expense and Reimbursement Policy

Tabled for the next meeting.

Strategic Plan

Tabled for the next meeting.

President's Report

President Elizabeth L. Fite reported that the COVID-19 Task Force appeared to be winding down, but with the variants and increase in cases, the task force will continue for the foreseeable future. She said without a Judicial Emergency Order, protocols are up to the individual circuits. The Administrative Office of the Court's website is the repository for the work of the Task Force and any orders entered by the individual circuits. President Fite is working with Director of Communications Jennifer Mason to reorder and review the COVID-19 resource page on the Bar's website in order to bring the most important information to the forefront. President Fite has also been involved with helping to plan a Lunch & Learn for judges and their staffs to help courts learn and adopt additional technology in order to operate most efficiently during the pandemic.

Board of Governors Minutes

The Executive Committee received a draft version of the minutes from the June 11 and June 12, 2021, Board of Governors meetings.

Old Business

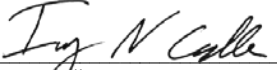
There was no old business.

New Business

YLD Immediate Past President Bert Hummel reported that the YLD received an award this year from the ABA YLD for the best single project of any affiliate for the YLD's Pollworker Program. He also said he attended a recent Cobb County Bar Association meeting where chief judges updated those in attendance on how their courts are running and what they are seeing, and it was super informative. He encouraged Executive Committee members who are members of their local bars to do the same – that it promotes good camaraderie with the bench and bridges the gap of information.

Adjournment

There being no further business, the two-day meeting was adjourned.

  
Ivy N. Cadle, Secretary

Approved:



Elizabeth L. Fite, President

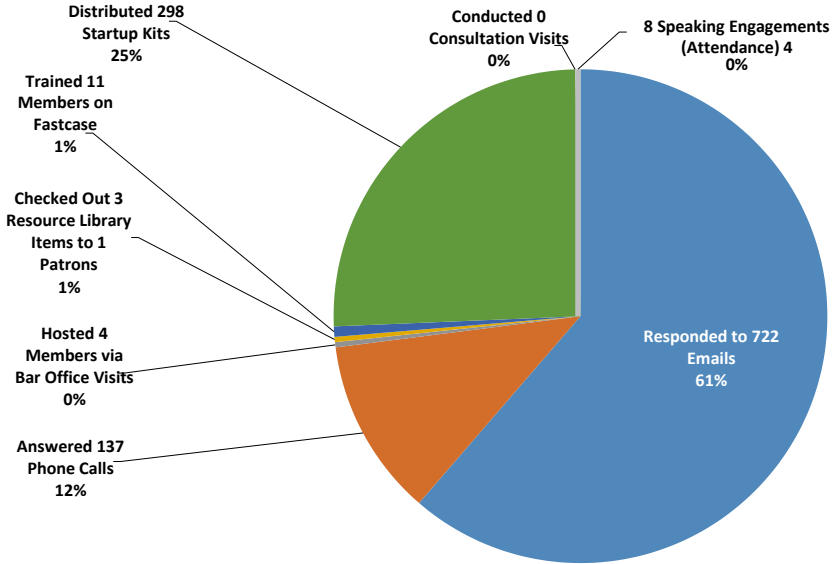
# Law Practice Management Program

(Abbreviated report for the 2021-2022 Bar Year)

## Members Served by LPMP

Total Number of Members Served – 1,184

July 1, 2021 – September 24, 2021



### Office Visits/Phone Calls/Emails

A total of **1** member visited LPMP. There were **0** startup discussions, **4** walk-in visits, and **0** visits to the software library conducted by the Program. In addition, LPM distributed **298** *Starting Your Georgia Law Practice* booklets as requested by attorneys, as well as, answered and responded to **137** phone calls and **1184** emails to and from members.

### Consultations

There were **0** general consultation virtual visits during this period due to this service being temporarily suspended.

### Resource Library

Our lending library has a grand total of **1,618** 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. During this period, there were a total of **1** checkout by **1** patron.

### Speaking Engagements

There were a total of **8** completed and scheduled 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 **4** Georgia Bar members. **0** programs are scheduled at a future date.

**State Bar of Georgia – Private Health Insurance Exchange Report**

September 24, 2021

<b>WEBSITE ANALYTICS</b>	
Total Users	56,398
Total Sessions	78,255
Total Pageviews	216,121

<b>INDIVIDUAL ENROLLMENTS</b>	
Total Enrollments	4,780
• Medical	1,922
• Medicare Supplement	24
• Dental	681
• Vision	353
• Telehealth	481
• ID Theft Protection	43
• Life/AD&D	986
• Disability	223
• Long-Term Care Enrollments	67

<b>EMPLOYER ENROLLMENTS</b>	
Total Enrollments	1038
• Medical	596
• Ancillary	289
• Workers' Comp	14
• Professional Liability	137
• Cyber Security	2

## CloudLawyers Report

**New Site:** CloudLaw is excited to announce the launch of the new [Find A Lawyer](#) site! The new site makes it easier for consumers to connect with members via its modern user interface, intuitive design, and more comprehensive search process. Members will appreciate the greatly improved contact process, ease of profile editing, and enhanced dashboard analytics.

**New Name:** In addition to rolling out the completely redesigned and engineered directory, CloudLaw has a new name: **ReliaGuide**. The name more effectively states our value proposition, has better name recognition, and replaces Zeekbeek and CloudLawyers.

2021 YTD Find a Lawyer Results:

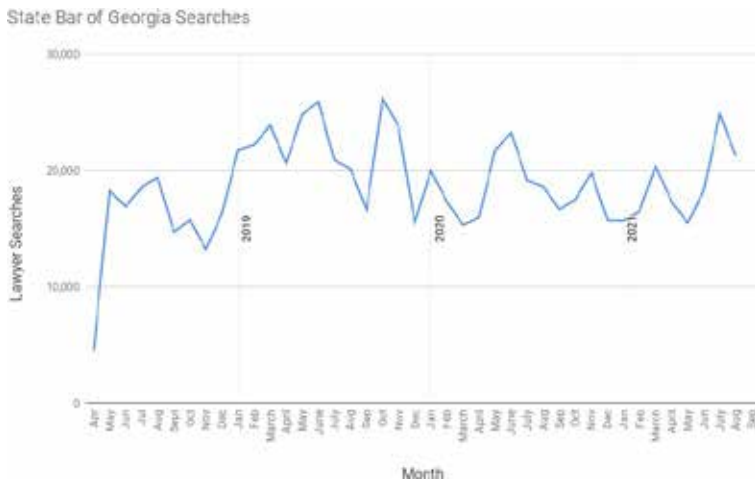
- 1,519,323 pages have been viewed in the old directory
- 784,428 searches performed
  - Example new site statistic: Profiles of members in Atlanta, Marietta, and Decatur were the most viewed.
- 939 messages were sent to Georgia lawyers through the contact form since January
- 4,364 members have signed in to their CloudLawyer/ReliaGuide profile (increase of 513 sign ins over last year)

### **New Subscriptions:**

- 6 new Profile Plus subscriptions since September 13.

### **New Member Benefit:** ReliaGuide Travel Marketplace

ReliaGuide Travel's patented technology incorporates artificial intelligence to deliver the best itinerary for each individual member in seconds and provides a quick and easy purchasing experience. Members may search flights from over 800 airlines (including Southwest) and 2.5 million hotel properties from a single site. Members can save time, save money, and earn cash back to spend on future business or leisure travel.



**Fastcase Report**  
**July 1, 2021 – September 24, 2021**

Since implementation, **29,562** members have logged on at least once with an increase of **105** first time users this period: Over 50% of our members have used Fastcase since it was available as a bar member benefit. There were a total of **21,2670** logins since July 1, 2021.

Since implementation, **2,511** attorneys and **114** staff members have attended Fastcase live training. Others have taken advantage of webinar training.

**Fastcase update concerning the merge with Casemaker.**

The big project for the first half of the year was to get our Casemaker partners ready to move into the Fastcase platform. With that, all bar associations will be fully transitioned to Fastcase by October 1st, with half already moved.

Parallel to that, we have begun moving over data that was only available in Casemaker into the Fastcase platform. This includes pre-1950 caselaw in many jurisdictions, court rule libraries, tribal law from many tribes and much more. Expect a larger update towards the end of the year.

During 2022, bar members can expect a significant improvement to our search and citator within the platform. Much more to come!

**Fastcase Partner Usage Report**

July 1, 2021 – September 24, 2021

	Jul	Aug	Sept	Total
First Time Logins	62	43	0	105
Total Logins	10,266	11,001	0	21,267
Total Users Who Logged In	2,763	2,846	0	5,609
Searches Conducted	35,772	40,305	0	76,077
Documents Viewed	127,776	146,610	0	274,386
Documents Printed	27,703	30,645	0	58,348
Total Transactions	204,342	231,450	0	435,792

**Fastcase Report**

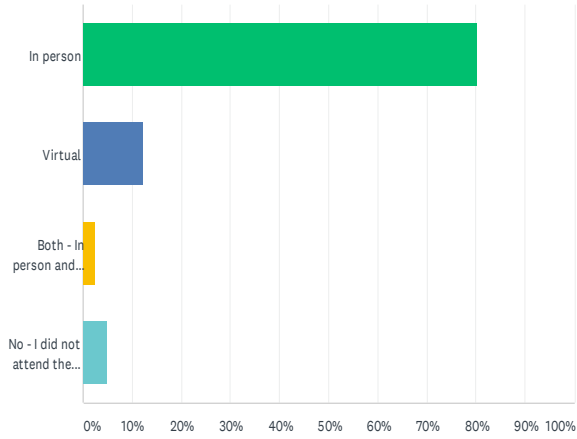
No reported problems during this period.

<b>PUBLISHED ARTICLES 2021-2022</b>			<b>Circulation</b>
<b>Date</b>	<b>Newspaper</b>	<b>Headline</b>	
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 Georgian, 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	Mroczo 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	Moultrie 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	Dally 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
		<b>TOTAL CIRCULATION</b>	<b>291,001</b>

### Q1 How did you attend the annual meeting?

Answered: 162 Skipped: 0

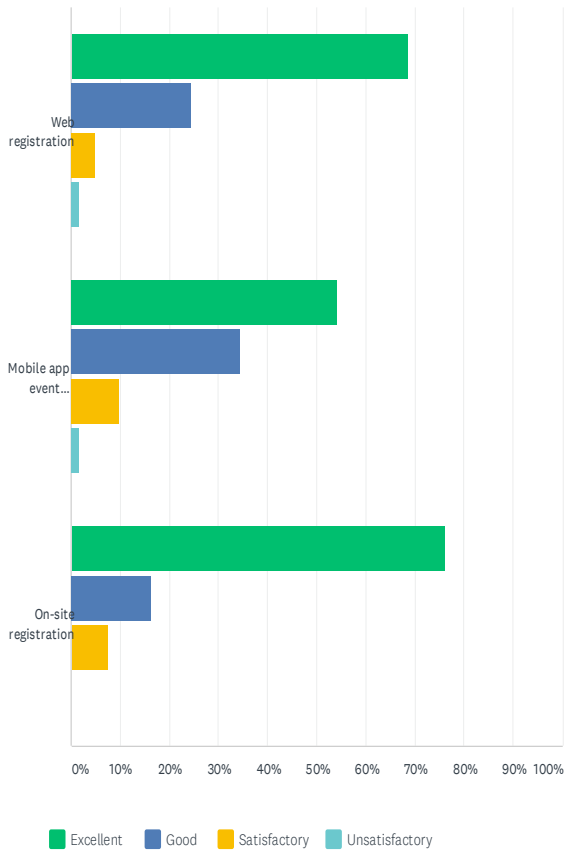


ANSWER CHOICES	RESPONSES	
In person	80.25%	130
Virtual	12.35%	20
Both - In person and Virtually	2.47%	4
No - I did not attend the Annual meeting	4.94%	8
TOTAL		162



## Q2 How would you rate the registration process?

Answered: 133 Skipped: 29



	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Web registration	68.64% 81	24.58% 29	5.08% 6	1.69% 2	118
Mobile app event registration	54.10% 33	34.43% 21	9.84% 6	1.64% 1	61
On-site registration	76.25% 61	16.25% 13	7.50% 6	0.00% 0	80

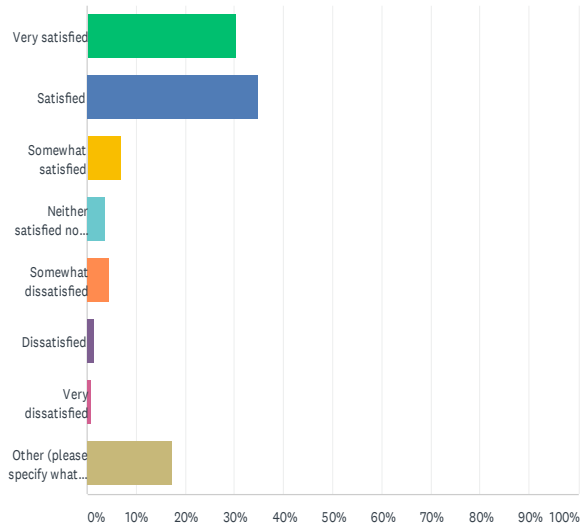
#	PLEASE SPECIFY ANY ISSUES YOU MAY HAVE HAD WHILE REGISTERING FOR OR ATTENDING THIS EVENT	DATE
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## 2021 Annual Meeting

1	I didn't even know there was a mobile app!	8/16/2021 2:09 PM
2	n/a	8/16/2021 10:43 AM
3	The online registration wouldn't work but I spoke with someone on the phone and it was handled quickly.	8/13/2021 8:05 PM
4	Nothing I registered for was consistent with the actual day of. A bit misleading having me check boxes and then day of event saying I was not registered to attend and too late to do registration.	8/13/2021 12:35 PM
5	None	8/13/2021 11:55 AM
6	didn't even know app was a thing	8/13/2021 11:26 AM
7	There was a pricing issue that was later resolved as far as the packages that are normally available	8/13/2021 11:13 AM
8	Registration was smooth in every regard.	8/13/2021 11:10 AM
9	It was confusing -- the registration was so much later than the hotel reservations. I had a hard time finding the registration on the bar's website.	8/10/2021 1:10 PM
10	Distances walked to register	8/10/2021 1:55 AM
11	None	8/7/2021 1:43 PM
12	Nothing sticks on my mind so it must have been fine.	8/6/2021 10:56 PM
13	Appreciated the pricing change.	8/6/2021 4:36 PM
14	It was difficult to decipher the mobile app	8/6/2021 4:17 PM
15	The CLE registration being separate from the main registration was difficult and confusing.	8/6/2021 11:38 AM
16	Absolutely NONE!	8/6/2021 11:32 AM
17	Logistically, it would have made more sense for registration to be closer to the events that took place in the first few days.	8/6/2021 11:19 AM

### Q3 How satisfied were you with the hybrid platform experience?

Answered: 132 Skipped: 30



ANSWER CHOICES	RESPONSES
Very satisfied	30.30% 40
Satisfied	34.85% 46
Somewhat satisfied	6.82% 9
Neither satisfied nor dissatisfied	3.79% 5
Somewhat dissatisfied	4.55% 6
Dissatisfied	1.52% 2
Very dissatisfied	0.76% 1
Other (please specify what features you liked or disliked about the platform)	17.42% 23
<b>TOTAL</b>	<b>132</b>

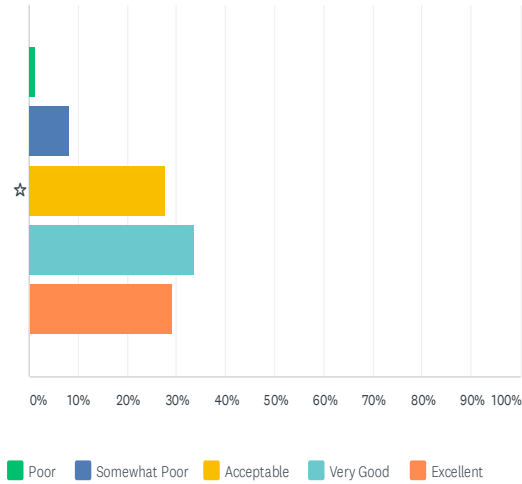
#	OTHER (PLEASE SPECIFY WHAT FEATURES YOU LIKED OR DISLIKED ABOUT THE PLATFORM)	DATE
1	I attended as an employee of the bar	8/17/2021 9:17 AM
2	Does not apply	8/16/2021 11:16 AM
3	The hybrid format allowed for virtual input during "in house" sessions. After much planning, this seemed to have come off effectively.	8/16/2021 10:43 AM

## 2021 Annual Meeting

4	NA	8/13/2021 8:05 PM
5	Was physically present, didn't use on line programs.	8/13/2021 2:16 PM
6	Did not use virtual	8/13/2021 12:47 PM
7	I was not in the "main" room for both days of meetings. Definitely felt like the red headed stepchild room. It would have been better to switch attendees between rooms for the days so we felt more involved in the meetings	8/13/2021 12:22 PM
8	wasn't real pleased with being in the "other" room on the first day, but I understand why that was done.	8/13/2021 11:48 AM
9	Didn't find out until there that committee meeting would be hybrid; should have known that ahead of time to make other choices/decisions.	8/13/2021 11:33 AM
10	Somewhat satisfied. Y'all did a good job all things considered.	8/13/2021 11:11 AM
11	I didn't use the hybrid platform.	8/10/2021 1:10 PM
12	The whole thing was a bit confusing.	8/10/2021 12:19 PM
13	I would not attend again if I was not able to be in the main room. There was not any point to attending in person to be in the breakout room.	8/9/2021 12:57 PM
14	I was only in person and did not use the hybrid experience.	8/9/2021 9:35 AM
15	I would have preferred that we were all together. Tallying votes from three locations was cumbersome.	8/7/2021 5:03 PM
16	Voting was terribly slow, and it generally slowed down the sessions	8/6/2021 5:40 PM
17	BOG meeting in two rooms was awkward. Everyone had a device so all votes could have been done online for ease and accuracy.	8/6/2021 4:36 PM
18	It was not necessary	8/6/2021 2:13 PM
19	It was a little confusing as to which options were available for which platform. Also, the two rooms for the BOG was insulting and made everyone in the broadcast room feel second class. If I am going to be put in the second room, I might as well have just logged in in my pajamas.	8/6/2021 1:19 PM
20	didn't use	8/6/2021 11:37 AM
21	I attended everything in person	8/6/2021 11:26 AM
22	I love the concept of the hybrid format, but I can't comment on the virtual side of things since I attended in person.	8/6/2021 11:19 AM
23	Very satisfied	8/6/2021 11:16 AM

### Q4 Did you find the registration to the event platform using the mobile app easy to navigate?

Answered: 86 Skipped: 76



	POOR	SOMEWHAT POOR	ACCEPTABLE	VERY GOOD	EXCELLENT	TOTAL	WEIGHTED AVERAGE
☆	1.16%	8.14%	27.91%	33.72%	29.07%	86	1.63
	1	7	24	29	25		

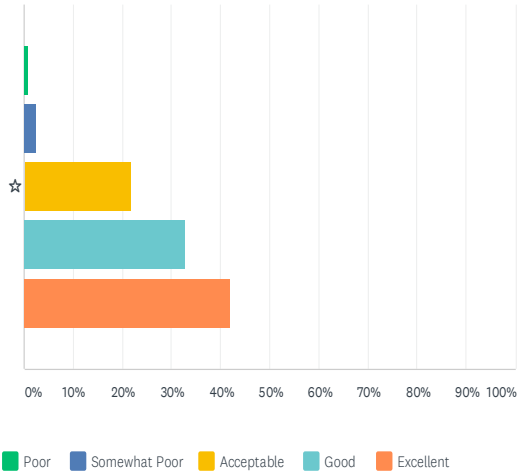
#	OTHER (PLEASE SPECIFY THE FEATURES USED MOST ON THE APP)	DATE
1	I didn't know there was a mobile app.	8/16/2021 2:09 PM
2	n/a	8/16/2021 10:43 AM
3	didn't use	8/15/2021 8:51 AM
4	Acceptable—it will not let me select one answer	8/14/2021 11:36 AM
5	I didn't use the mobile app.	8/13/2021 12:35 PM
6	Didn't use it.	8/13/2021 11:48 AM
7	didn't use mobile app	8/13/2021 11:46 AM
8	didn't use it so can't rate it	8/13/2021 11:26 AM
9	n/a	8/13/2021 11:11 AM
10	didn't use	8/13/2021 11:04 AM
11	I did not use the app.	8/10/2021 12:19 PM
12	i did have some issues getting it to connect.	8/9/2021 12:57 PM
13	I did not use the app.	8/9/2021 9:35 AM
14	n/a	8/8/2021 6:24 PM

## 2021 Annual Meeting

15	I didn't use the mobile app	8/7/2021 5:03 PM
16	I did not use the mobile app	8/6/2021 5:40 PM
17	N/A	8/6/2021 3:34 PM
18	I will not use apps because of privacy concerns but I do understand that most people use them.	8/6/2021 1:19 PM
19	i had trouble, but then I am an older member	8/6/2021 12:26 PM
20	Didn't use the mobile app	8/6/2021 11:46 AM
21	I hate having to download and use a separate app and would prefer a WWW interface that can be accessed on any device.	8/6/2021 11:38 AM
22	didn't use	8/6/2021 11:37 AM
23	N/A	8/6/2021 11:32 AM
24	wasn't able to use it..	8/6/2021 11:28 AM
25	The schedule was a little hard to navigate as a whole. Not having my pre-registered schedule on a front page was inconvenient. It was easier to navigate on a computer. I ended up not really using the app a lot.	8/6/2021 11:25 AM

Q5 How would you rate the audio visual quality at the meeting/s attended.

Answered: 119 Skipped: 43

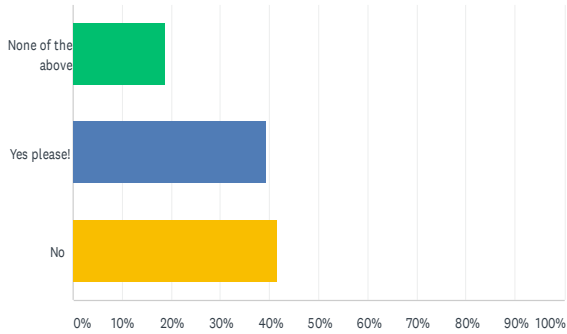


	POOR	SOMEWHAT POOR	ACCEPTABLE	GOOD	EXCELLENT	TOTAL	WEIGHTED AVERAGE
☆	0.84%	2.52%	21.85%	32.77%	42.02%	119	4.13
	1	3	26	39	50		

#	OTHER (PLEASE SPECIFY THE NAME OF THE MEETING/S REFERENCED.)	DATE
1	Plenary	8/13/2021 11:55 AM
2	Issues with being in two rooms. Couldn't see a lot of the other people.	8/13/2021 11:48 AM
3	BOG	8/13/2021 11:11 AM
4	I was unable to access the YLD dinner at all, despite many attempts	8/9/2021 10:34 AM
5	I only attended in person.	8/9/2021 9:35 AM
6	ok :acceptable....given the split meeting rooms	8/6/2021 12:26 PM
7	since in person don't know	8/6/2021 11:16 AM
8	BOG x2, Annual Business meeting of members.	8/6/2021 11:16 AM

Q6 If networking is a priority, would you be interested in using the mobile app while onsite to network with your peers in real time at future venues and events?

Answered: 127 Skipped: 35

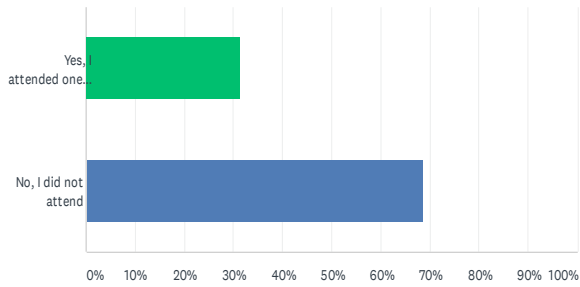


ANSWER CHOICES	RESPONSES	
None of the above	18.90%	24
Yes please!	39.37%	50
No	41.73%	53
TOTAL		127



### Q7 Did you attend any Alumni events listed? • Mercer University School of Law Reception • UGA School of Law Alumni Reception

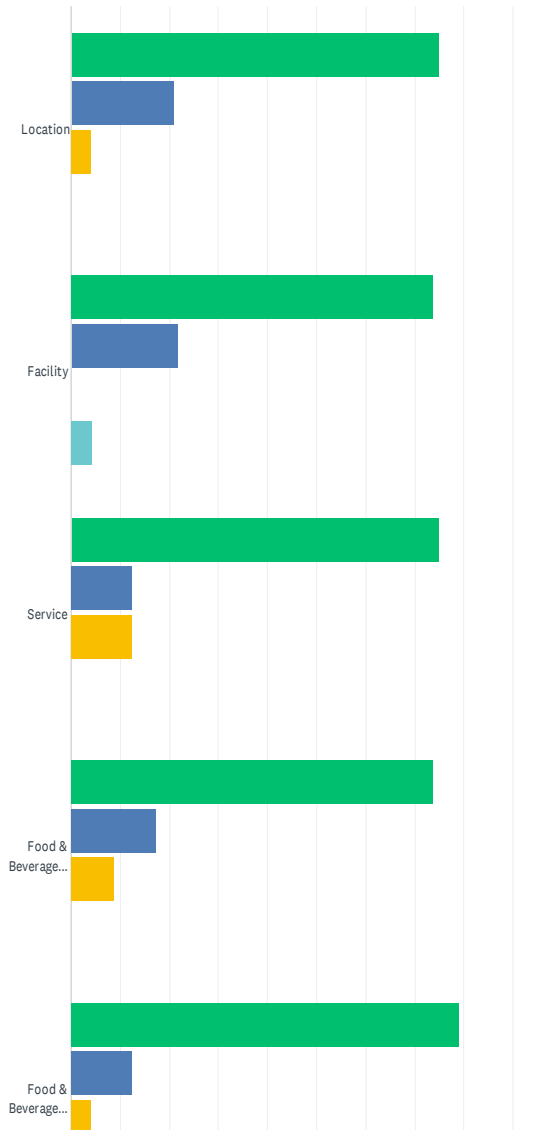
Answered: 134 Skipped: 28



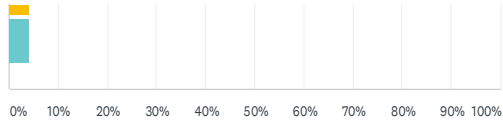
ANSWER CHOICES	RESPONSES	
Yes, I attended one or multiple events	31.34%	42
No, I did not attend	68.66%	92
TOTAL		134

### Q8 Mercer University School of Law Reception

Answered: 24 Skipped: 138



### 2021 Annual Meeting



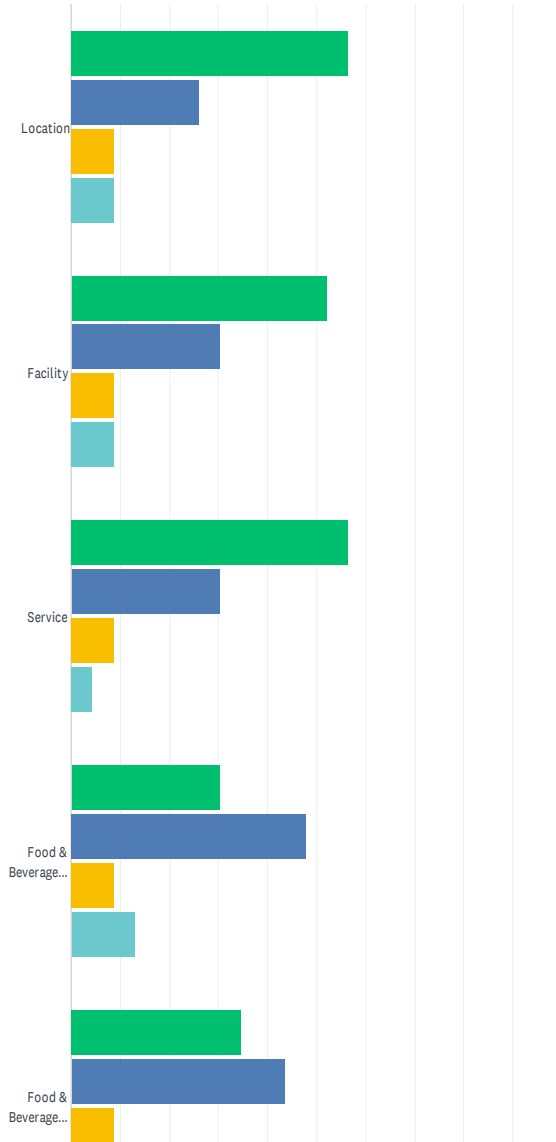
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	75.00% 18	20.83% 5	4.17% 1	0.00% 0	24
Facility	73.91% 17	21.74% 5	0.00% 0	4.35% 1	23
Service	75.00% 18	12.50% 3	12.50% 3	0.00% 0	24
Food & Beverage Selection	73.91% 17	17.39% 4	8.70% 2	0.00% 0	23
Food & Beverage Quality	79.17% 19	12.50% 3	4.17% 1	4.17% 1	24

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	Poor signage for moved location in rain to inside	8/10/2021 1:57 AM
2	Best food had while at the resort. Just ran out.	8/6/2021 4:37 PM

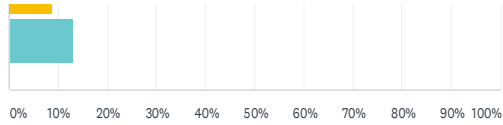
## Q9 UGA School of Law Alumni Reception

Answered: 23 Skipped: 139



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### 2021 Annual Meeting



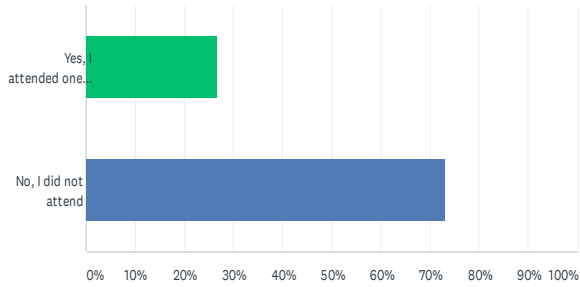
■ Excellent 
 ■ Good 
 ■ Satisfactory 
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	56.52% 13	26.09% 6	8.70% 2	8.70% 2	23
Facility	52.17% 12	30.43% 7	8.70% 2	8.70% 2	23
Service	56.52% 13	30.43% 7	8.70% 2	4.35% 1	23
Food & Beverage Selection	30.43% 7	47.83% 11	8.70% 2	13.04% 3	23
Food & Beverage Quality	34.78% 8	43.48% 10	8.70% 2	13.04% 3	23

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	It was a small space for the number of attendees (for social distancing purposes). There was a great view though!	8/13/2021 2:39 PM
2	One of the best events of the entire meeting.	8/6/2021 1:19 PM

Q10 Did you attend any CLEs?• In Session ... Lawyers as Legislators• Institutional Bias in the Justice System• War Stories and Georgia Evidence Update

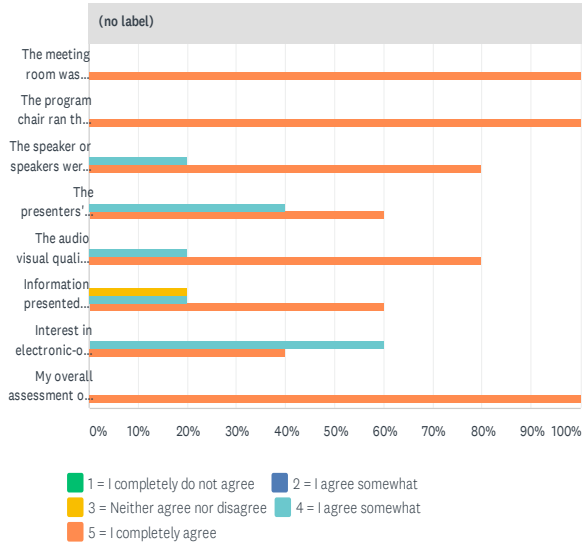
Answered: 41 Skipped: 121



ANSWER CHOICES	RESPONSES	
Yes, I attended one or multiple events	26.83%	11
No, I did not attend	73.17%	30
TOTAL		41

### Q11 Institutional Bias in the Justice System

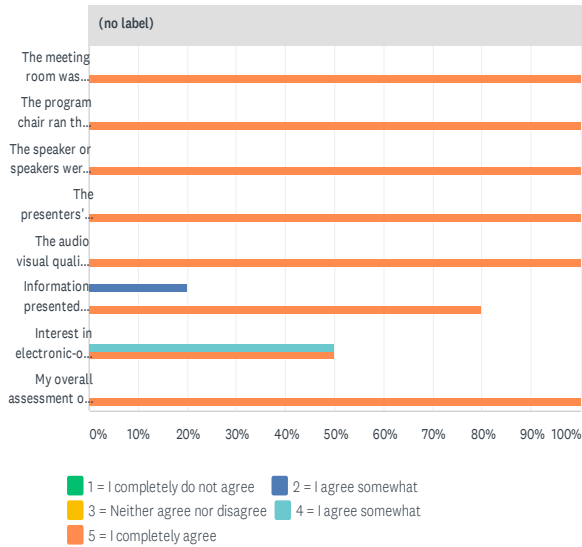
Answered: 6 Skipped: 156



(no label)	1 = I COMPLETELY DO NOT AGREE	2 = I AGREE SOMEWHAT	3 = NEITHER AGREE NOR DISAGREE	4 = I AGREE SOMEWHAT	5 = I COMPLETELY AGREE	TOTAL
The meeting room was comfortable and clean	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 6	6
The program chair ran the seminar effectively	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
The speaker or speakers were clear and well organized	0.00% 0	0.00% 0	0.00% 0	20.00% 1	80.00% 4	5
The presenters' style of speaking kept me interested	0.00% 0	0.00% 0	0.00% 0	40.00% 2	60.00% 3	5
The audio visual quality of the presentations were?	0.00% 0	0.00% 0	0.00% 0	20.00% 1	80.00% 4	5
Information presented benefited my practice	0.00% 0	0.00% 0	20.00% 1	20.00% 1	60.00% 3	5
Interest in electronic-only materials	0.00% 0	0.00% 0	0.00% 0	60.00% 3	40.00% 2	5
My overall assessment of the seminar is	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 4	4

### Q12 In Session ... Lawyers as Legislators

Answered: 5 Skipped: 157



(no label)	1 = I COMPLETELY DO NOT AGREE	2 = I AGREE SOMEWHAT	3 = NEITHER AGREE NOR DISAGREE	4 = I AGREE SOMEWHAT	5 = I COMPLETELY AGREE	TOTAL
The meeting room was comfortable and clean	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
The program chair ran the seminar effectively	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
The speaker or speakers were clear and well organized	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
The presenters' style of speaking kept me interested	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
The audio visual quality of the presentations were?...	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5
Information presented benefited my practice	0.00% 0	20.00% 1	0.00% 0	0.00% 0	80.00% 4	5
Interest in electronic-only materials	0.00% 0	0.00% 0	0.00% 0	50.00% 2	50.00% 2	4
My overall assessment of the seminar is	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 5	5

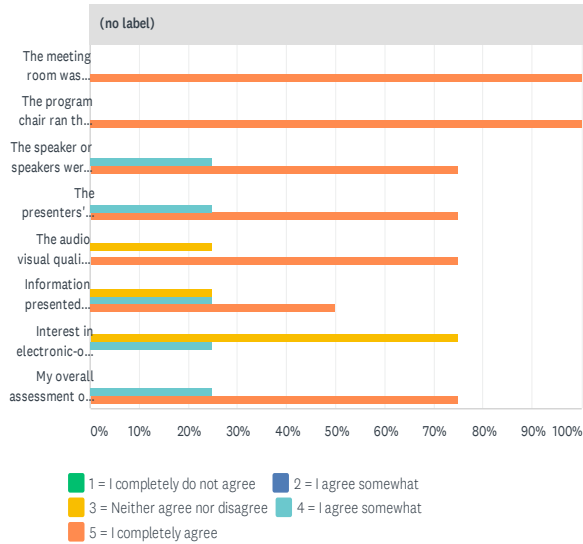


2021 Annual Meeting

#	PLEASE OFFER ADDITIONAL COMMENTS ABOUT THE SEMINAR, SPEAKER/S AND ADDITIONAL SEMINAR TOPICS YOU THINK WE SHOULD OFFER	DATE
1	Really informative seminar! The topic was timely and the speakers were very knowledgeable.	8/13/2021 2:41 PM
2	It was a great seminar.	8/13/2021 11:13 AM

### Q13 War Stories and Georgia Evidence Update

Answered: 4 Skipped: 158



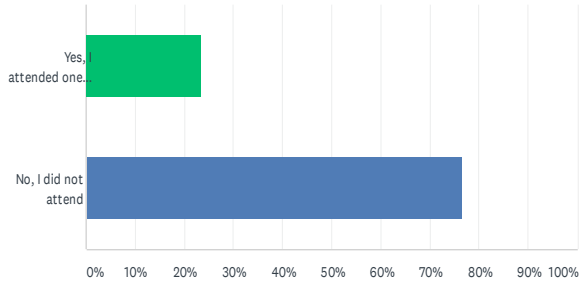
(no label)	1 = I COMPLETELY DO NOT AGREE	2 = I AGREE SOMEWHAT	3 = NEITHER AGREE NOR DISAGREE	4 = I AGREE SOMEWHAT	5 = I COMPLETELY AGREE	TOTAL
The meeting room was comfortable and clean	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 4	4
The program chair ran the seminar effectively	0.00% 0	0.00% 0	0.00% 0	0.00% 0	100.00% 4	4
The speaker or speakers were clear and well organized	0.00% 0	0.00% 0	0.00% 0	25.00% 1	75.00% 3	4
The presenters' style of speaking kept me interested	0.00% 0	0.00% 0	0.00% 0	25.00% 1	75.00% 3	4
The audio visual quality of the presentations were?...	0.00% 0	0.00% 0	25.00% 1	0.00% 0	75.00% 3	4
Information presented benefited my practice	0.00% 0	0.00% 0	25.00% 1	25.00% 1	50.00% 2	4
Interest in electronic-only materials	0.00% 0	0.00% 0	75.00% 3	25.00% 1	0.00% 0	4
My overall assessment of the seminar is	0.00% 0	0.00% 0	0.00% 0	25.00% 1	75.00% 3	4

2021 Annual Meeting

#	PLEASE OFFER ADDITIONAL COMMENTS ABOUT THE SEMINAR, SPEAKER/S AND ADDITIONAL SEMINAR TOPICS YOU THINK WE SHOULD OFFER	DATE
1	This seminar was a good one. I thoroughly enjoyed it.	8/16/2021 2:12 PM

**Q14 Did you attend any Section events listed?• Construction Law Reception• Criminal Law Section Lunch• General Practice & Trial Law Breakfast, Tradition of Excellence• General Practice & Trial Law Reception, Tradition of Excellence• Judicial Section Lunch**

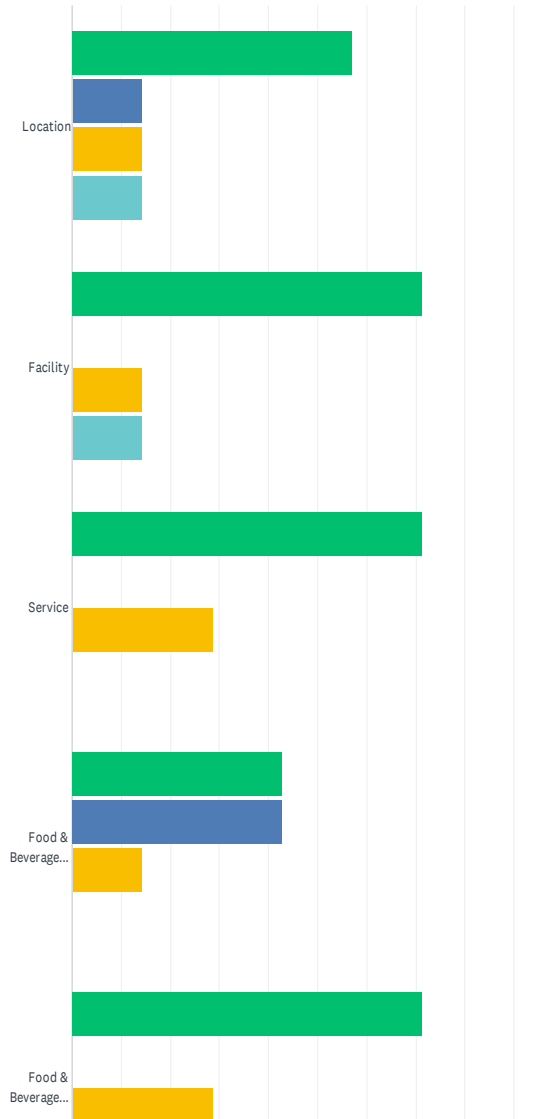
Answered: 132 Skipped: 30



ANSWER CHOICES	RESPONSES	
Yes, I attended one or multiple events	23.48%	31
No, I did not attend	76.52%	101
<b>TOTAL</b>		<b>132</b>

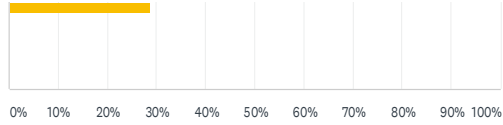
## Q15 Construction Law Reception

Answered: 7 Skipped: 155



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### 2021 Annual Meeting



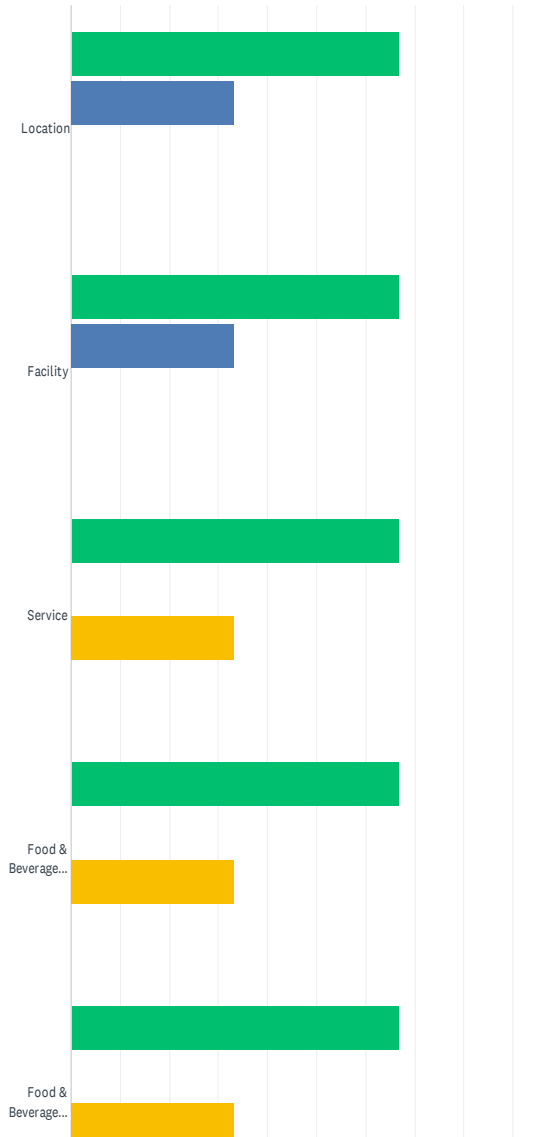
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	57.14% 4	14.29% 1	14.29% 1	14.29% 1	7
Facility	71.43% 5	0.00% 0	14.29% 1	14.29% 1	7
Service	71.43% 5	0.00% 0	28.57% 2	0.00% 0	7
Food & Beverage Selection	42.86% 3	42.86% 3	14.29% 1	0.00% 0	7
Food & Beverage Quality	71.43% 5	0.00% 0	28.57% 2	0.00% 0	7

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	n/a	8/8/2021 6:26 PM
2	Great event	8/6/2021 5:41 PM
3	N/A	8/6/2021 3:36 PM

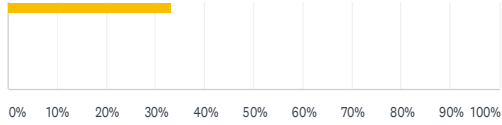
## Q16 Criminal Law Section Reception

Answered: 3 Skipped: 159



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### 2021 Annual Meeting



■ Excellent 
 ■ Good 
 ■ Satisfactory 
 ■ Unsatisfactory

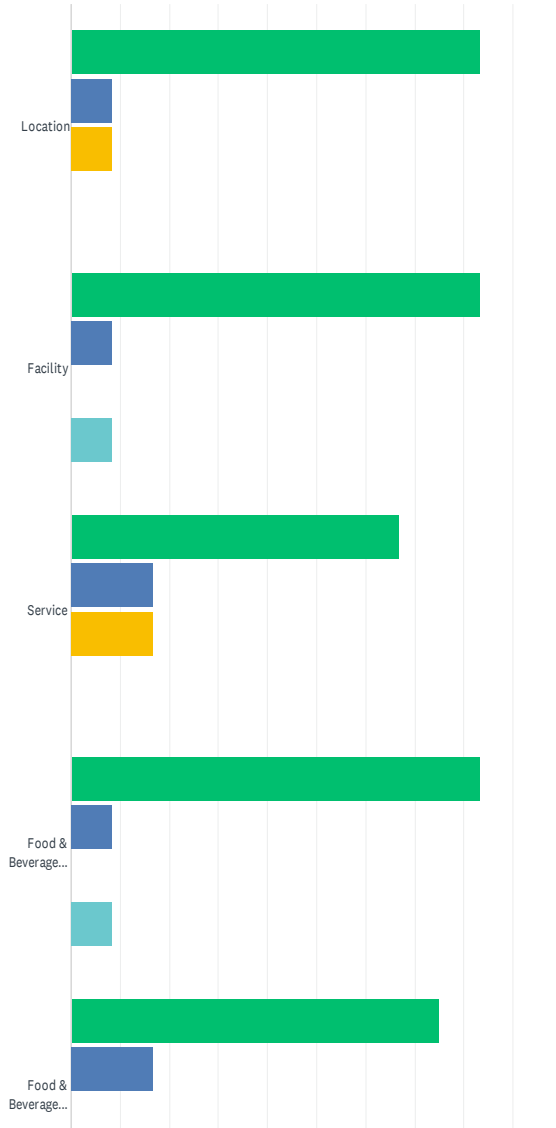
	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	66.67% 2	33.33% 1	0.00% 0	0.00% 0	3
Facility	66.67% 2	33.33% 1	0.00% 0	0.00% 0	3
Service	66.67% 2	0.00% 0	33.33% 1	0.00% 0	3
Food & Beverage Selection	66.67% 2	0.00% 0	33.33% 1	0.00% 0	3
Food & Beverage Quality	66.67% 2	0.00% 0	33.33% 1	0.00% 0	3

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	I attempted to attend remotely but could not access the program.	8/13/2021 11:14 AM
2	n/a	8/8/2021 6:26 PM
3	N/A	8/6/2021 3:36 PM



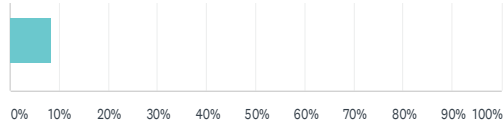
### Q17 General Practice & Trial Law Breakfast, Tradition of Excellence

Answered: 12 Skipped: 150



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## 2021 Annual Meeting



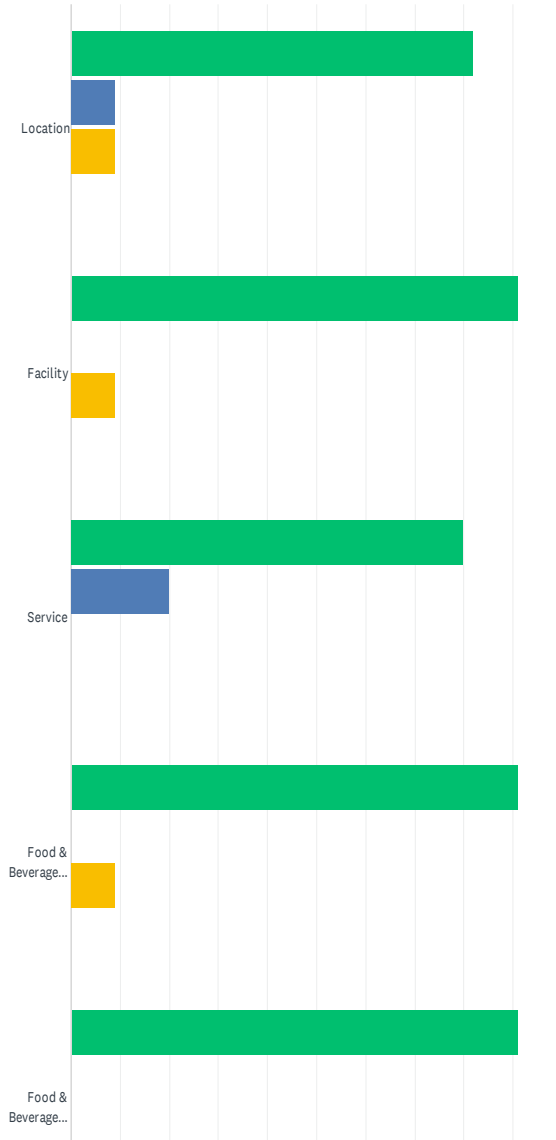
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	83.33% 10	8.33% 1	8.33% 1	0.00% 0	12
Facility	83.33% 10	8.33% 1	0.00% 0	8.33% 1	12
Service	66.67% 8	16.67% 2	16.67% 2	0.00% 0	12
Food & Beverage Selection	83.33% 10	8.33% 1	0.00% 0	8.33% 1	12
Food & Beverage Quality	75.00% 9	16.67% 2	0.00% 0	8.33% 1	12

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	I ordered the section breakfast off menu and all were satisfied however it was expensive any way you ordered	8/16/2021 11:24 AM
2	n/a	8/8/2021 6:26 PM

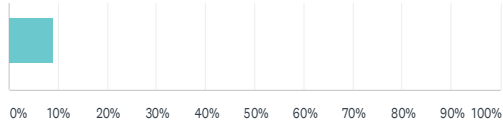
## Q18 General Practice & Trial Law Reception, Tradition of Excellence

Answered: 11 Skipped: 151



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### 2021 Annual Meeting



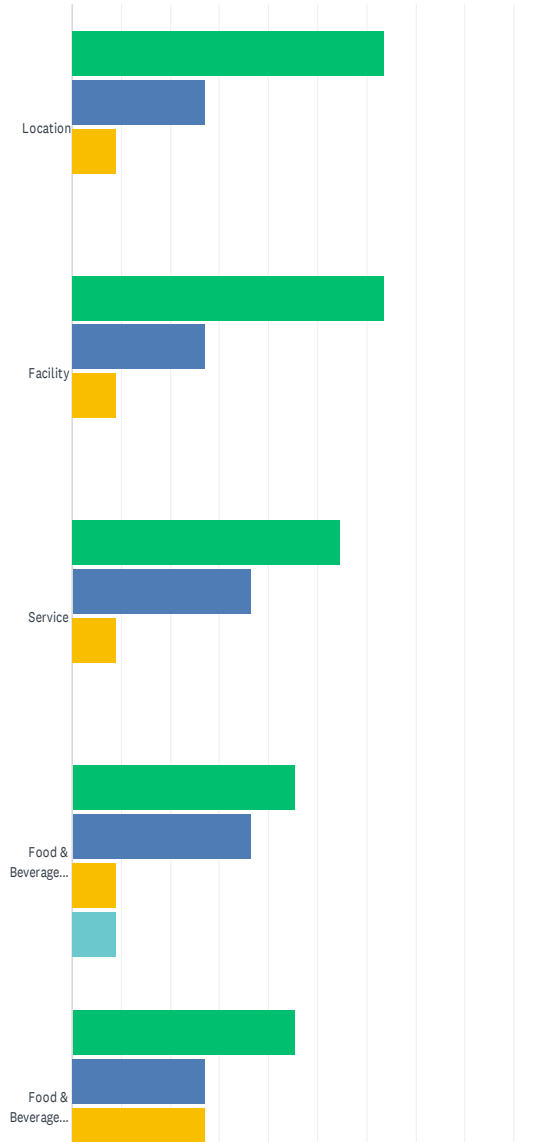
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	81.82% 9	9.09% 1	9.09% 1	0.00% 0	11
Facility	90.91% 10	0.00% 0	9.09% 1	0.00% 0	11
Service	80.00% 8	20.00% 2	0.00% 0	0.00% 0	10
Food & Beverage Selection	90.91% 10	0.00% 0	9.09% 1	0.00% 0	11
Food & Beverage Quality	90.91% 10	0.00% 0	0.00% 0	9.09% 1	11

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	n/a	8/8/2021 6:26 PM
2	I missed the Georgia alumni event because I could not find it. The on-going construction made it hard to find the various buildings.	8/7/2021 5:04 PM

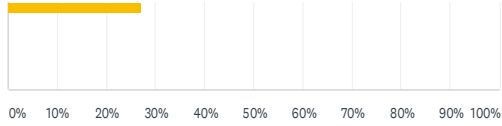
## Q19 Judicial Section Lunch

Answered: 11 Skipped: 151



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### 2021 Annual Meeting



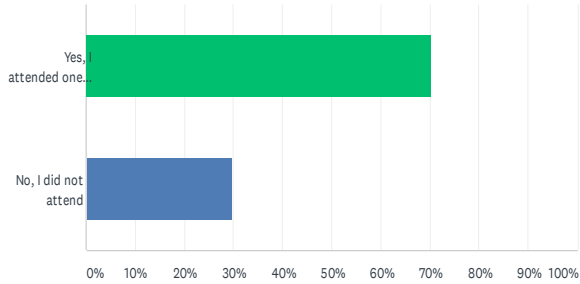
■ Excellent 
 ■ Good 
 ■ Satisfactory 
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	63.64% 7	27.27% 3	9.09% 1	0.00% 0	11
Facility	63.64% 7	27.27% 3	9.09% 1	0.00% 0	11
Service	54.55% 6	36.36% 4	9.09% 1	0.00% 0	11
Food & Beverage Selection	45.45% 5	36.36% 4	9.09% 1	9.09% 1	11
Food & Beverage Quality	45.45% 5	27.27% 3	27.27% 3	0.00% 0	11

#	IF YOU HAVE SPECIFIC COMMENTS, PLEASE TELL US	DATE
1	N/A	8/6/2021 3:36 PM
2	I found a piece of glass in the marinara sauce. I brought it to the resort's service staff. No injury.	8/6/2021 2:27 PM

Q20 Did you attend any networking receptions listed?• Opening Night Festival• Supreme Court/Court of Appeals Reception/Presidential Inaugural Gala

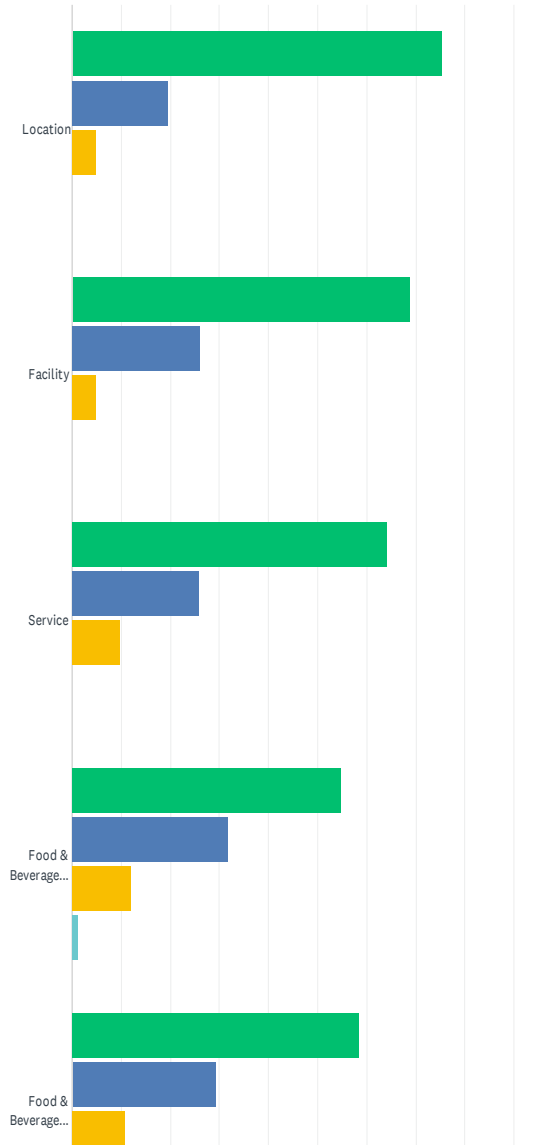
Answered: 131 Skipped: 31



ANSWER CHOICES	RESPONSES	
Yes, I attended one or multiple Receptions	70.23%	92
No, I did not attend	29.77%	39
<b>TOTAL</b>		<b>131</b>

## Q21 Opening Night Festival

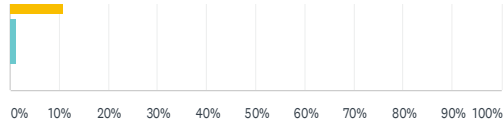
Answered: 82 Skipped: 80



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## 2021 Annual Meeting



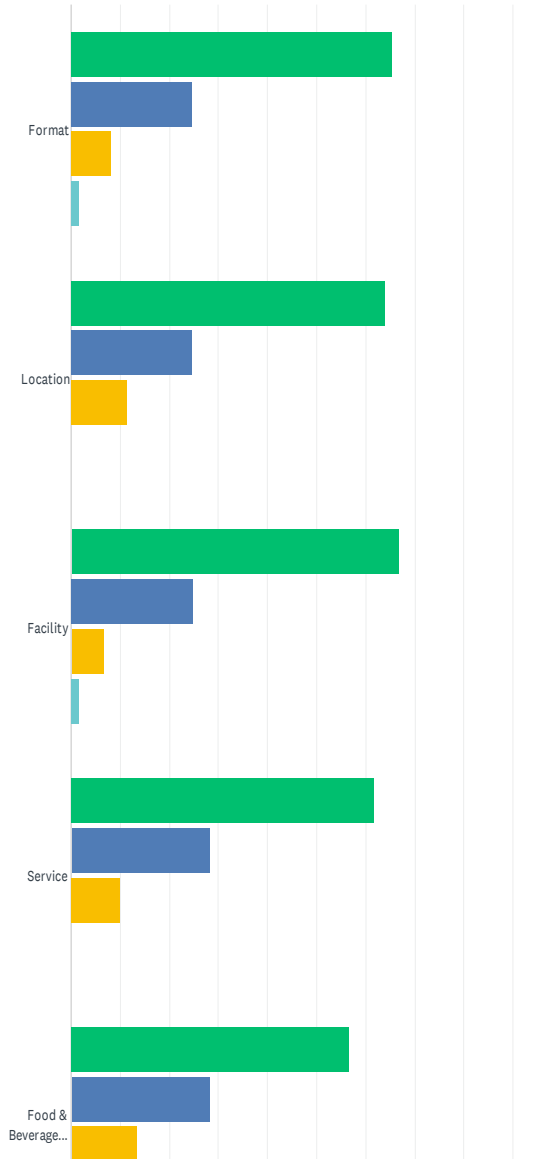
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	75.31% 61	19.75% 16	4.94% 4	0.00% 0	81
Facility	68.75% 55	26.25% 21	5.00% 4	0.00% 0	80
Service	64.20% 52	25.93% 21	9.88% 8	0.00% 0	81
Food & Beverage Selection	54.88% 45	31.71% 26	12.20% 10	1.22% 1	82
Food & Beverage Quality	58.54% 48	29.27% 24	10.98% 9	1.22% 1	82

#	ADDITIONAL COMMENTS	DATE
1	Too few options for special dietary restrictions; GF in particular - which is common allergen. I was relegated to eating salad. That was an expensive salad!!	8/13/2021 11:36 AM
2	I became ill from the food.	8/13/2021 11:15 AM
3	The band was too loud for easy conversation.	8/6/2021 11:00 PM
4	Outdoor events in June are always hot and uncomfortable, and rain is always a concern	8/6/2021 5:43 PM
5	Very nice event with good food and excellent entertainment although overpriced.	8/6/2021 4:42 PM
6	Fabulous	8/6/2021 4:20 PM
7	Would have preferred "beach music", steel drum or something "Carolina". After all, we were at the beach. Band was so-so.	8/6/2021 3:20 PM
8	did not attend	8/6/2021 12:07 PM
9	Food was amazing!	8/6/2021 11:48 AM
10	Great event . My entire family enjoyed!	8/6/2021 11:45 AM
11	The food and drink were good, with the buffets being served by staff they tended to move much slower than past self serve buffets. Though the reasons why this change was implemented were understandable.	8/6/2021 11:28 AM

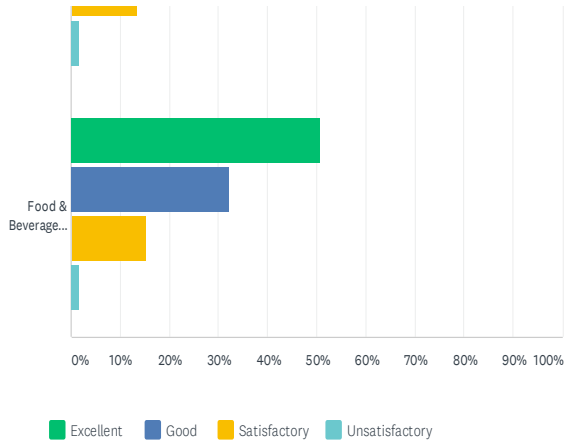
## Q22 Supreme Court/Court of Appeals Reception/Presidential Gala

Answered: 61 Skipped: 101



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2021 Annual Meeting



	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Format	65.57% 40	24.59% 15	8.20% 5	1.64% 1	61
Location	63.93% 39	24.59% 15	11.48% 7	0.00% 0	61
Facility	66.67% 40	25.00% 15	6.67% 4	1.67% 1	60
Service	61.67% 37	28.33% 17	10.00% 6	0.00% 0	60
Food & Beverage Selection	56.67% 34	28.33% 17	13.33% 8	1.67% 1	60
Food & Beverage Quality	50.85% 30	32.20% 19	15.25% 9	1.69% 1	59

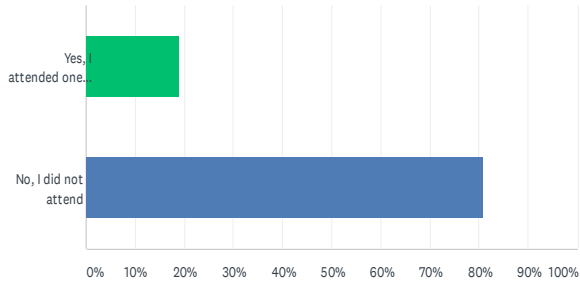
#	ADDITIONAL COMMENTS	DATE
1	the flow of the evening was somewhat hampered by the weather and need to bus from one facility to another. . . all things considered still demonstrated good planning.	8/16/2021 10:48 AM
2	The band was fantastic!	8/13/2021 2:42 PM
3	Didn't attend but glad I didn't after understanding that the event was split between the ballroom and a rooftop venue that required a long hike/elevator trip in formal wear. It seemed that other than the poolside venue for opening night, this resort could not accommodate the number of people for anything - our gatherings or in particular meals - all day, every day.	8/13/2021 11:36 AM
4	in state meetings would be preferable	8/13/2021 11:06 AM
5	The space was way too small. Again, outdoor events in June may get rained out, which forces the event indoors	8/6/2021 5:43 PM
6	Food was not good for price. Concept and entertainment were excellent and well executed. Thank you.	8/6/2021 4:42 PM
7	Overpriced. Did not attend	8/6/2021 3:20 PM
8	The food was outstanding and I loved the alternate venues.	8/6/2021 12:07 PM
9	Great atmosphere!	8/6/2021 11:48 AM

## 2021 Annual Meeting

10	Did not attend	8/6/2021 11:45 AM
11	Same comments per food service as Opening night. In addition, the separation of the Gala in relation to the meeting prior was clumsy. Also having the rooftop so far separated from the main Gala, while necessary was confusing to some.	8/6/2021 11:28 AM
12	I had no clue there were two different locations for the Gala. It would be great to know that ahead of time.	8/6/2021 11:21 AM

Q23 Did you attend any YLD functions listed?• YLD Leadership Academy• YLD Pool Party & Meet the Candidates Reception• YLD Dinner & Swearing-In Ceremony

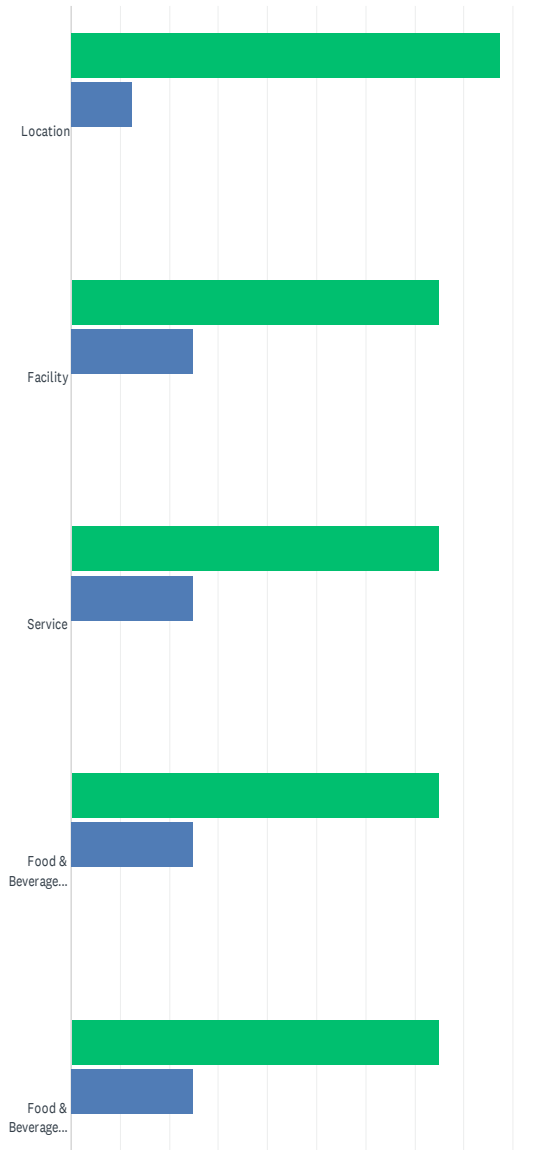
Answered: 131 Skipped: 31



ANSWER CHOICES	RESPONSES	
Yes, I attended one or multiple YLD functions/receptions	19.08%	25
No, I did not attend	80.92%	106
<b>TOTAL</b>		<b>131</b>

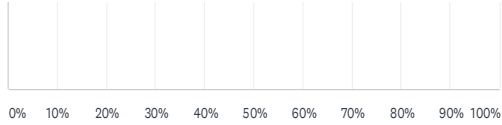
## Q24 YLD Leadership Academy

Answered: 8 Skipped: 154



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2021 Annual Meeting



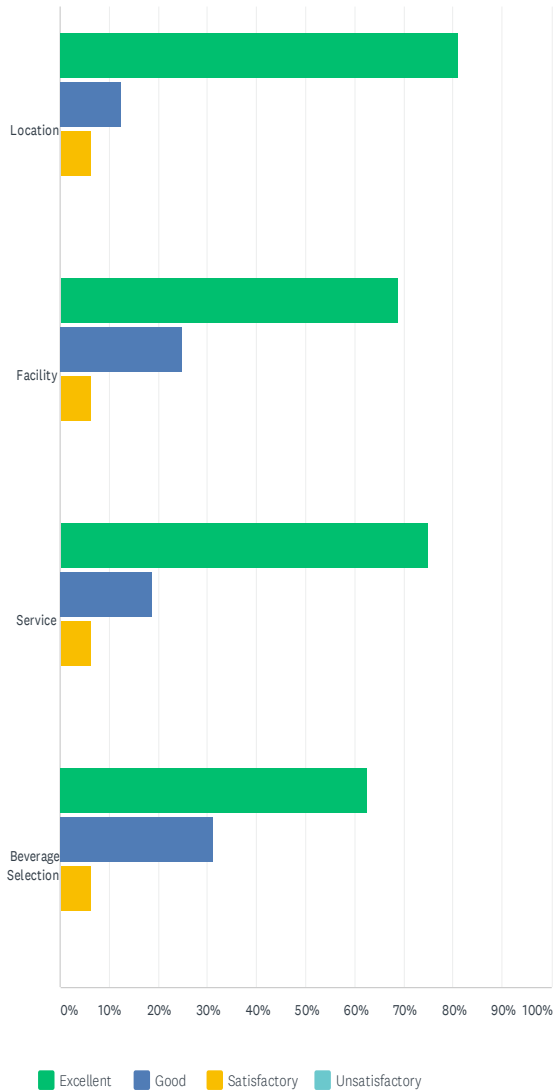
■ Excellent 
 ■ Good 
 ■ Satisfactory 
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	87.50% 7	12.50% 1	0.00% 0	0.00% 0	8
Facility	75.00% 6	25.00% 2	0.00% 0	0.00% 0	8
Service	75.00% 6	25.00% 2	0.00% 0	0.00% 0	8
Food & Beverage Selection	75.00% 6	25.00% 2	0.00% 0	0.00% 0	8
Food & Beverage Quality	75.00% 6	25.00% 2	0.00% 0	0.00% 0	8

#	ADDITIONAL COMMENTS	DATE
1	did not attend	8/13/2021 11:27 AM
2	N/A	8/6/2021 4:00 PM
3	We had some technical issues.	8/6/2021 11:24 AM

## Q25 YLD Pool Party & Meet the Candidates Reception

Answered: 16 Skipped: 146





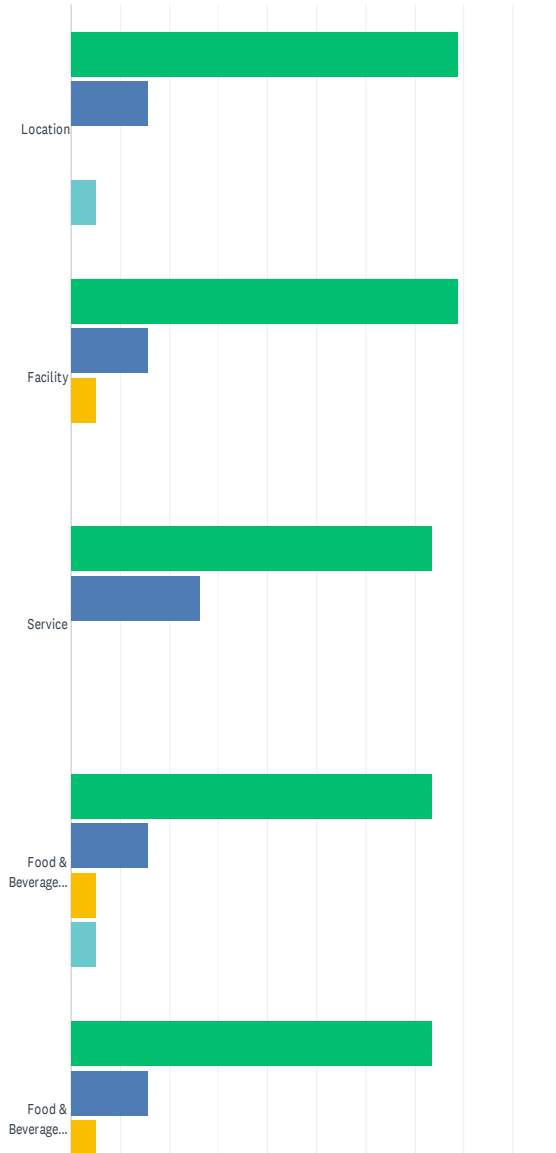
2021 Annual Meeting

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	81.25% 13	12.50% 2	6.25% 1	0.00% 0	16
Facility	68.75% 11	25.00% 4	6.25% 1	0.00% 0	16
Service	75.00% 12	18.75% 3	6.25% 1	0.00% 0	16
Beverage Selection	62.50% 10	31.25% 5	6.25% 1	0.00% 0	16

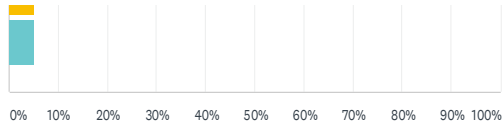
#	ADDITIONAL COMMENTS	DATE
1	Needed to have a second bartender.	8/6/2021 11:41 AM

## Q26 YLD Dinner & Swearing-In Ceremony

Answered: 19 Skipped: 143



## 2021 Annual Meeting



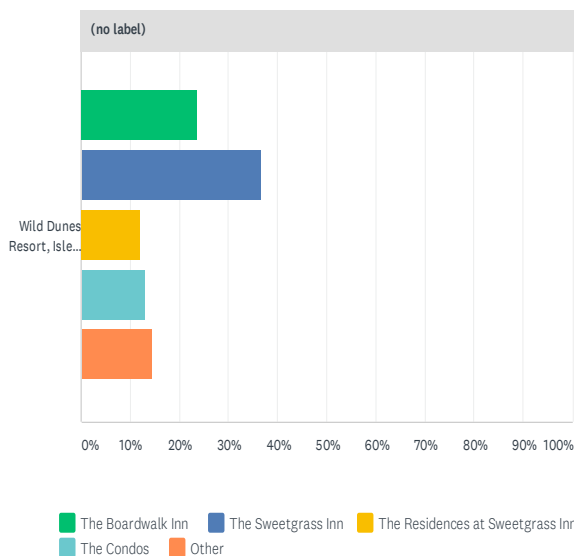
■ Excellent   
 ■ Good   
 ■ Satisfactory   
 ■ Unsatisfactory

	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Location	78.95% 15	15.79% 3	0.00% 0	5.26% 1	19
Facility	78.95% 15	15.79% 3	5.26% 1	0.00% 0	19
Service	73.68% 14	26.32% 5	0.00% 0	0.00% 0	19
Food & Beverage Selection	73.68% 14	15.79% 3	5.26% 1	5.26% 1	19
Food & Beverage Quality	73.68% 14	15.79% 3	5.26% 1	5.26% 1	19

#	ADDITIONAL COMMENTS	DATE
1	tried to view via app but was unable to do so	8/9/2021 10:35 AM
2	Speeches went a little long, no need to recognize people individually who weren't in attendance. Could've networked more if the presentation was shorter.	8/6/2021 11:49 AM

## Q27 What was your choice of accommodations?

Answered: 131 Skipped: 31



(no label)						
	THE BOARDWALK INN	THE SWEETGRASS INN	THE RESIDENCES AT SWEETGRASS INN	THE CONDOS	OTHER	TOTAL
Wild Dunes Resort, Isle of Palms, SC	23.66%	36.64%	12.21%	12.98%	14.50%	131
	31	48	16	17	19	

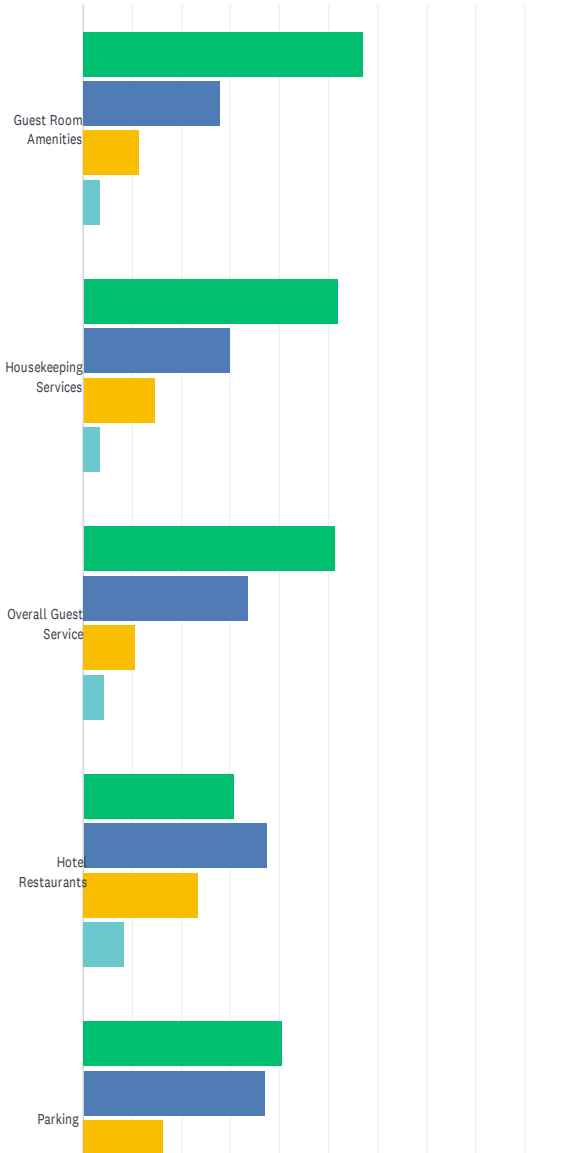
#	OTHER (PLEASE SPECIFY)	DATE
1	attended virtually	8/16/2021 5:40 PM
2	I did not attend in person.	8/13/2021 12:36 PM
3	virtual	8/13/2021 11:32 AM
4	Virtual	8/13/2021 11:15 AM
5	only attended virtually	8/13/2021 11:12 AM
6	virtual	8/13/2021 11:05 AM
7	n/a virtual	8/9/2021 10:36 AM
8	Virtual	8/6/2021 5:17 PM
9	Not applicable	8/6/2021 1:09 PM
10	Off site	8/6/2021 11:54 AM
11	virtual	8/6/2021 11:29 AM

2021 Annual Meeting

12	home	8/6/2021 11:17 AM
13	Did not attend in person	8/6/2021 11:17 AM

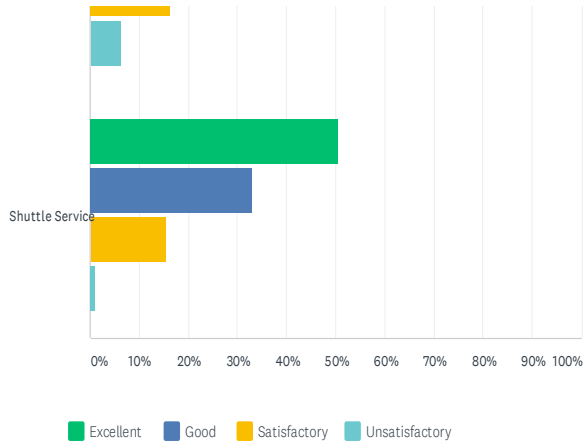
### Q28 Please rate your accommodations below

Answered: 116 Skipped: 46



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2021 Annual Meeting



	EXCELLENT	GOOD	SATISFACTORY	UNSATISFACTORY	TOTAL
Guest Room Amenities	57.02% 65	28.07% 32	11.40% 13	3.51% 4	114
Housekeeping Services	51.82% 57	30.00% 33	14.55% 16	3.64% 4	110
Overall Guest Service	51.33% 58	33.63% 38	10.62% 12	4.42% 5	113
Hotel Restaurants	30.84% 33	37.38% 40	23.36% 25	8.41% 9	107
Parking	40.54% 45	36.94% 41	16.22% 18	6.31% 7	111
Shuttle Service	50.55% 46	32.97% 30	15.38% 14	1.10% 1	91

#	ADDITIONAL COMMENTS	DATE
1	Initial room was over air conditioning unit for the building and had a broken and loud water heater.	8/17/2021 9:19 AM
2	When you spend a large sum of money for a room and there is no coffee in the kitchen and you wait for guest services almost 2 hours to bring you some coffee it is unacceptable, then you find out there is no room service. Guests should have been warned so they are prepared before they arrive.	8/16/2021 4:21 PM
3	Overpriced.	8/13/2021 8:07 PM
4	I did not attend in person.	8/13/2021 12:36 PM
5	Too few food options for the number of people at the resort; and they closed too early! Room was fine after we made them switch rooms from one where the very loud bathroom fan never turned off to one which was more quiet. Had we had to stay in the first room (they were 100% booked), it would not have been pleasant!	8/13/2021 11:38 AM
6	n/a	8/13/2021 11:32 AM
7	I loved my room and the location. I only ate in one restaurant for lunch. I had to return the fish tacos due to poor quality. The club sandwich I ultimately received was fine. My only issues related to food quality at the venue.	8/13/2021 11:18 AM

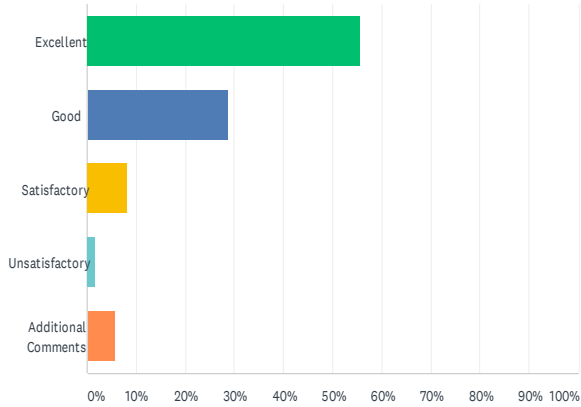
## 2021 Annual Meeting

8	Virtual attendance	8/13/2021 11:15 AM
9	The restaurants did not stay open late	8/13/2021 11:15 AM
10	Problem with the fire alarm	8/13/2021 11:07 AM
11	n/a	8/13/2021 11:05 AM
12	Shuttles were excellent during the rain.	8/10/2021 12:20 PM
13	The hotel did not seem to be 100% ready for occupancy	8/7/2021 5:06 PM
14	I did not know that there was a shuttle service	8/7/2021 10:06 AM
15	The hotel had several maintenance issues that needed repair. Never received housekeeping service	8/6/2021 5:44 PM
16	Virtual	8/6/2021 5:17 PM
17	Lovely resort and would return. Need to better handle fire alarm. Food needs improvement.	8/6/2021 4:45 PM
18	The condos we were first assigned at the Lagoon were musty and had mildew on the windows and bathroom. We were moved to some units down the road that were perfect. The restaurants were so full had to go off-campus.	8/6/2021 3:08 PM
19	Air conditioning didn't wrk 1st night. Shower only had scalding hot water. Could not exchange rooms. Repaired the next day, but no reductions in room costs.	8/6/2021 1:53 PM
20	The fine dining options were limited. The poolside food was excellent as was the final dinner.	8/6/2021 12:12 PM
21	They were understaffed. I know this had to do with a nationwide staff shortage due to covid, but hopefully next year's facility won't have this issue. Getting food at any of the restaurants was at least a 2-hour event, even for lunch and breakfast.	8/6/2021 11:51 AM
22	there should be a nicer bar/lounge area. that felt like an overly brightly lit airport bar.	8/6/2021 11:41 AM
23	I missed not having room service available. I believe this was removed at the Boardwalk due to staffing issues.	8/6/2021 11:29 AM
24	I was disappointed that the room service was not working, especially when there were many activities that went well into the night. I also had issues with the valet service, as they left my car in front of the Inn the entire night and couldn't tell me why. There were also some issues with Ubers and Lyfts, as many would not come out to the Island.	8/6/2021 11:25 AM
25	the lack of room service was not good	8/6/2021 11:21 AM
26	false fire alarms were an inconvenience	8/6/2021 11:20 AM
27	The Fire Alarm went off during inconvenient hours.	8/6/2021 11:17 AM



### Q29 In thinking about your entire event experience, how safe did you feel attending this meeting?

Answered: 122 Skipped: 40



ANSWER CHOICES	RESPONSES	
Excellent	55.74%	68
Good	28.69%	35
Satisfactory	8.20%	10
Unsatisfactory	1.64%	2
Additional Comments	5.74%	7
<b>TOTAL</b>		<b>122</b>

#	ADDITIONAL COMMENTS	DATE
1	It was online, so very safe.	8/13/2021 12:40 PM
2	Overall, it was an exceptional event - given COVID concerns.	8/13/2021 11:18 AM
3	I was virtual	8/13/2021 11:16 AM
4	I was virtual	8/6/2021 5:18 PM
5	Great Job Michelle!!!!	8/6/2021 3:50 PM
6	The meetings team did a great job with the logistics, communication and overall service.	8/6/2021 3:15 PM
7	many people were not wearing masks (including judges)	8/6/2021 11:19 AM

## Q30 What did you like the best?

Answered: 64 Skipped: 98

#	RESPONSES	DATE
1	Food	8/18/2021 4:00 PM
2	General Practice reception	8/16/2021 4:24 PM
3	Fellowshipping with everyone. It was good to be back with my friends and colleagues.	8/16/2021 2:24 PM
4	Nice location. Good meeting spaces.	8/16/2021 10:10 AM
5	Supreme Court Gala	8/13/2021 7:57 PM
6	It was great to see everyone and having multiple spaces (the run of the property) was really great.	8/13/2021 2:43 PM
7	The facility and the beach	8/13/2021 2:32 PM
8	The location was great (hotel, beach, etc.); the programming was great.	8/13/2021 1:09 PM
9	Seeing old friends	8/13/2021 12:48 PM
10	I liked the meetings that I was able to attend, although it was only 2... but one had issues with log in.	8/13/2021 12:40 PM
11	The location and having the opportunity to see everyone	8/13/2021 11:58 AM
12	Opening night festival was great!	8/13/2021 11:52 AM
13	Being able to see people.	8/13/2021 11:51 AM
14	networking events	8/13/2021 11:29 AM
15	Seeing everyone in person	8/13/2021 11:27 AM
16	the facilities were great and being in person to see people was wonderful	8/13/2021 11:17 AM
17	Facilities were fabulous - GREAT to see everyone LIVE!	8/13/2021 11:14 AM
18	The pools and proximity to the beach	8/13/2021 11:08 AM
19	seeing colleagues	8/13/2021 11:07 AM
20	The comradery.	8/13/2021 11:07 AM
21	Beach	8/13/2021 11:06 AM
22	Location	8/13/2021 11:05 AM
23	Seeing everyone in person again.	8/10/2021 12:20 PM
24	I really enjoyed the Opening reception and thought you did a fantastic job of conducting the meeting while keeping us safe.	8/10/2021 12:09 PM
25	being back in person	8/9/2021 12:58 PM
26	learning and meeting new people	8/8/2021 6:28 PM
27	Seeing everyone again!	8/7/2021 5:06 PM
28	The staff's availability and assistance.	8/7/2021 1:47 PM
29	Location	8/7/2021 10:06 AM
30	Opening night	8/7/2021 8:51 AM
31	opening night gala	8/7/2021 2:48 AM

## 2021 Annual Meeting

32	Wild Dunes was a very nice resort. No complaints.	8/6/2021 6:18 PM
33	the beach	8/6/2021 5:44 PM
34	Virtual Option	8/6/2021 5:18 PM
35	Saturday night. State Bar Meeting staff efforts. It was good to see people in person who did everything we needed to enjoy and learn, while handling our business. Thanks!!	8/6/2021 4:51 PM
36	Networking	8/6/2021 4:22 PM
37	Loved connecting in person again	8/6/2021 4:01 PM
38	We were back in person!	8/6/2021 3:50 PM
39	location	8/6/2021 3:38 PM
40	The closeness of our hotel to the seminar building.	8/6/2021 3:33 PM
41	Being at the beach. Going into Charleston. Local area dining facilities.	8/6/2021 3:27 PM
42	The opening night event was really nice. I think everyone was happy to be there.	8/6/2021 3:15 PM
43	The 5K Run	8/6/2021 2:34 PM
44	Social events	8/6/2021 2:30 PM
45	Resort was great. Wish we had booked a room in the new hotel instead of the condos. The condos were dated and not very good. I wish we had more details in the registration materials that the hotel offered two bedroom to accommodate families.	8/6/2021 2:17 PM
46	I liked being around everyone again, and few people seemed worried about social distancing and masks.	8/6/2021 1:24 PM
47	Condo	8/6/2021 1:00 PM
48	General resort feeling	8/6/2021 12:20 PM
49	The ability to meet in person and attend events virtually in the hotel room.	8/6/2021 12:13 PM
50	Being in person finally.	8/6/2021 12:07 PM
51	Being around people	8/6/2021 11:54 AM
52	Wonderful facility	8/6/2021 11:46 AM
53	Facilities.	8/6/2021 11:46 AM
54	Reuniting with colleagues in person.	8/6/2021 11:42 AM
55	Being in person with fellow bar members	8/6/2021 11:40 AM
56	Having the option of an in-person meeting with safety protocols in place.	8/6/2021 11:30 AM
57	Being able to see everyone again	8/6/2021 11:30 AM
58	Getting to socialize with everyone in such a beautiful setting.	8/6/2021 11:27 AM
59	location	8/6/2021 11:22 AM
60	Beautiful setting and great food!	8/6/2021 11:21 AM
61	The location	8/6/2021 11:19 AM
62	bar staff did an amazing job in a challenging situation	8/6/2021 11:19 AM
63	convenience	8/6/2021 11:18 AM
64	I enjoyed the Facility	8/6/2021 11:17 AM

## Q31 What did you like the least?

Answered: 58 Skipped: 104

#	RESPONSES	DATE
1	timing of classes	8/18/2021 4:00 PM
2	Hotel services	8/16/2021 4:24 PM
3	The resort was not ideal. Too many buildings that were not cohesively organized. We should not go back to this location.	8/16/2021 2:24 PM
4	. . . the proximity of numerous tenants also visiting the property.	8/16/2021 10:55 AM
5	To far for Georgia Bar Assoc.	8/13/2021 2:19 PM
6	Split meetings	8/13/2021 12:48 PM
7	Registration process and day of event trying to get into events I had signed up for.	8/13/2021 12:40 PM
8	Having to sit in two separate locations for the plenary meetings	8/13/2021 11:58 AM
9	Being split into two rooms for BOG meetings. Also wasn't real thrilled with the hotel rooms or services there.	8/13/2021 11:52 AM
10	Food quality.	8/13/2021 11:51 AM
11	Not enough food options for the number of people there (including staying open long enough); too far from beach; over priced for what we got; Resort to chopped up for this event; meetings allowed to be hybrid given that in June those vaccinated were able to meet (within CDC guidelines) without masks.	8/13/2021 11:41 AM
12	we were spread out for BOG meetings in 2 separate rooms	8/13/2021 11:17 AM
13	Traffic on Isle of Palms!!!	8/13/2021 11:14 AM
14	The fire alarm went off several times in the middle of the night	8/13/2021 11:08 AM
15	the meeting was out of state	8/13/2021 11:07 AM
16	COVID.	8/13/2021 11:07 AM
17	Separate locations for reception and gala	8/13/2021 11:06 AM
18	Hotel was new, growing pains. But good overall	8/13/2021 11:05 AM
19	Lack of on-site food options.	8/10/2021 12:20 PM
20	not being in the main session	8/9/2021 12:58 PM
21	having BOG meeting in two different rooms - that was terrible	8/9/2021 9:43 AM
22	n/a	8/8/2021 6:28 PM
23	The facility was not quite ready for an event like this	8/7/2021 5:06 PM
24	Not applicable	8/7/2021 1:47 PM
25	I did not know shuttle service was available so driving around and parking was a challenge	8/7/2021 10:06 AM
26	YLD swearing in.	8/7/2021 8:51 AM
27	Lack of a hospitality room where you could talk informally and meet new people.	8/7/2021 2:48 AM
28	the food was not good at the events and at the on premises locations	8/6/2021 5:44 PM
29	in person meeting	8/6/2021 5:18 PM
30	Food at onsite restaurants. Breakfast options. Early Sunday morning fire alarm.	8/6/2021 4:51 PM

## 2021 Annual Meeting

31	Too spread out	8/6/2021 4:22 PM
32	The room was not ideal due to mildew and we were unable to change rooms on site.	8/6/2021 4:01 PM
33	Food at the inaugural gala was not great. Food at opening was excellent though.	8/6/2021 3:50 PM
34	parking	8/6/2021 3:38 PM
35	Distance from the beach	8/6/2021 3:33 PM
36	Not much choice in seminars/programs to attend. None really related to my practice or me.	8/6/2021 3:27 PM
37	I had some difficulty initially getting the zoom committee meeting set up with some difficulty with the internet connection.	8/6/2021 3:15 PM
38	difficulty parking at main hotel	8/6/2021 2:30 PM
39	Having the board of governors split into two rooms was unnecessary and ridiculous.	8/6/2021 2:17 PM
40	All of the reminders about masks and social distancing. Also the two BOG rooms was a terrible idea. Just don't let people come next time so they can stay home or in their rooms.	8/6/2021 1:24 PM
41	Restaurant service was uneven	8/6/2021 1:00 PM
42	They took up the food for the board of governors meetings too quickly	8/6/2021 12:20 PM
43	Having the meetings in 2 rooms.	8/6/2021 12:07 PM
44	The place being understaffed, not being closer to the city (i.e. restaurant options); judges should have a brightly covered ribbon on their nametags that they're required to wear so younger attorneys (and non-attorney significant others) can easily identify them and address them correctly	8/6/2021 11:54 AM
45	Too spread out. Resort needs upgrading. Chairs in my room were dirty and stained.	8/6/2021 11:52 AM
46	traffic on Isle of Palm	8/6/2021 11:46 AM
47	BOG meeting in two locations. Program on racism.	8/6/2021 11:46 AM
48	Ambiguity in health-related messaging and compliance.	8/6/2021 11:42 AM
49	Fire alarms at random hours of the night	8/6/2021 11:40 AM
50	How spread out the property was.	8/6/2021 11:30 AM
51	everything was great!	8/6/2021 11:30 AM
52	How spaced out everything was. And the weather.	8/6/2021 11:27 AM
53	lack of socializing lack of vendors (if they were there I did not find them!)	8/6/2021 11:23 AM
54	no room service	8/6/2021 11:22 AM
55	Construction made it hard to get to different locations with ease.	8/6/2021 11:21 AM
56	the hotel was totally unprepared location was not convenient	8/6/2021 11:19 AM
57	missed the in person aspects	8/6/2021 11:18 AM
58	Fire Alarm	8/6/2021 11:17 AM

## Q32 Future program or topic ideas?

Answered: 14 Skipped: 148

#	RESPONSES	DATE
1	Ethics CLE - seems this profession needs a lot of it. Also, mailed advertisements - Defendant letters was a topic left on the table and not addressed.	8/13/2021 12:40 PM
2	maybe more adventurous off site networking events	8/13/2021 11:29 AM
3	Qualified Immunity	8/13/2021 11:14 AM
4	No	8/7/2021 1:47 PM
5	Real estate, fiduciary law, housing	8/6/2021 5:18 PM
6	Self reflection and development for us to be better lawyers. How do we begin to develop an anti-racist workplace and look at our implicit bias.	8/6/2021 4:22 PM
7	Hold at Disney World or Universal	8/6/2021 3:50 PM
8	-	8/6/2021 3:38 PM
9	Just more choices of events to do or seminars to attend. More variety.	8/6/2021 3:27 PM
10	Maybe some practical areas such as how to file in the courts, what to do when the ethics rules seem too general, how to avoid trust accounting issues. These may be good topics for the Young Lawyer Division or for attorneys going out on their own with no staff.	8/6/2021 3:15 PM
11	A panel covering "what I would have done differently earlier in my legal career" for the YLD	8/6/2021 11:54 AM
12	Consider eliminating Saturday evening gala	8/6/2021 11:46 AM
13	I would love to see some diversity and inclusion programming at the state bar meetings.	8/6/2021 11:27 AM
14	Savannah	8/6/2021 11:22 AM

## Q33 Other comments or suggestions?

Answered: 22 Skipped: 140

#	RESPONSES	DATE
1	Saturday night's band was AMAZING!!!!	8/16/2021 2:24 PM
2	Should be held in Georgia.	8/13/2021 2:19 PM
3	Make sure system is in line with options. I selected to attend events, where as the day of I could not get into them. Some paid and some unpaid, but it never asked me to pay. If I could pay and register day of event that would be good. But I registered far in advance, still couldn't attend. Should record all sessions.	8/13/2021 12:40 PM
4	Find a better resort to accommodate our crowd that is much less chopped up and that is committed to having food services for hours that can accommodate this number of people. Honestly would have preferred the opening night not be full of children.	8/13/2021 11:41 AM
5	Offer some excursions that people can do individually or family events	8/13/2021 11:17 AM
6	We should continue the virtual option for attendance. Doing so will provide connections for more attorneys to participate (even if in a more limited manner for some).	8/13/2021 11:16 AM
7	meet in Georgia. Savannah or Jekyll Island.	8/13/2021 11:07 AM
8	NO VIRTUAL CRAP, MASKING, OR SEPARATE ROOMS FOR BOG	8/13/2021 11:05 AM
9	I thought this was an excellent venue.	8/10/2021 12:09 PM
10	Very nice. It was my first time attending.	8/8/2021 6:28 PM
11	None	8/7/2021 1:47 PM
12	Great new location.	8/6/2021 4:51 PM
13	-	8/6/2021 3:38 PM
14	Georgia Bar Association ought to meet in GEORGIA.	8/6/2021 3:27 PM
15	Encourage attendance by giving scholarships. Leadership taking a more direct interest in the sponsors as an appreciation for their support.	8/6/2021 3:15 PM
16	It was all very confusing in registration as to whether a mask would be required or not. I cannot wear a mask, so I did not want to pay and then be turned away. I am glad I took the chance. People who register for the event probably wouldn't have come if they didn't feel safe or if it jeopardized their health.	8/6/2021 1:24 PM
17	The upstairs room at the Saturday night gala was well done and very enjoyable. While being able to listen to the band and dance is a must, it was nice to have a place you could go and just relax with friends.	8/6/2021 12:07 PM
18	Bar meetings should be in Georgia even if it costs more.	8/6/2021 11:52 AM
19	No more programs on race relations posing as CLE.	8/6/2021 11:46 AM
20	Would have preferred to stay in Georgia.	8/6/2021 11:42 AM
21	I would like it to be closer to Ga if it can't be in Ga	8/6/2021 11:23 AM
22	never go back	8/6/2021 11:19 AM

