



State Bar
of Georgia

BOG BOARD BOOK

**2024 Annual Meeting
Amelia Island, FL**

This book serves as the agenda and materials for the State Bar of Georgia's 2024 Annual Meeting.



302nd BOARD OF GOVERNORS MEETING
&
MEMBERS MEETING AND PLENARY SESSION

Friday, June 7, 2024
9:00 a.m. – 12:00 p.m.

The Omni Amelia Island Resort
Amelia Island, Florida

Zoom Webinar Link
Webinar ID: 860 9915 6326
Passcode: 645574
One tap mobile: +13092053325

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	J. Antonio DelCampo President	1
b) Pledge of Allegiance	Bert Hummel Cobb Circuit, Post 7	
c) Invocation	R. Javoyne Hicks Stone Mountain Circuit, Post 8	
d) Recognition of Past Presidents, Judges, and Special Guests	Tony DelCampo	
e) Recognition of Retiring Executive Committee Members and Retiring Board Members.....	Tony DelCampo	17
• Sarah B. Akins, Immediate Past President, 14 years on the Board		
• Ronald E. Daniels, Immediate YLD Past President, 3 years on the Board		
• Kent Edward Altom, Atlanta Circuit, Post 2, 9 years on the Board		
• Jennifer Auer Jordan, Atlanta Circuit, Post 20, 8 years on the Board		
• Frank B. Strickland, Atlanta Circuit, Post 22, 38 years on the Board		
• Anthony B. Askew, Atlanta Circuit, Post 26, 32 years on the Board		
• Michael Dickinson Hobbs Jr., Atlanta Circuit, Post 38, 14 years on the Board		
• Randall H. Davis, Cherokee Circuit, Post 1, 17 years on the Board		
• Harold B. Watts, Clayton Circuit, Post 2, 20 years on the Board		
• Kenneth Brown Crawford, Douglas Circuit, 4 years on the Board		
• John Philip Webb, Flint Circuit, Post 2, 22 years on the Board		
• Carl A. Veline Jr., Houston Circuit, 32 years on the Board		
• Ralph Lee Van Pelt Jr., Lookout Mountain Circuit, Post 3, 2 years on the Board		

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
<ul style="list-style-type: none"> • Christopher Donald Huskins, Ocmulgee Circuit, Post 3, 14 years on the Board • Daniel Shelton Digby, Rockdale Circuit, 6 years on the Board • Lawton Chad Heard Jr., South Georgia Circuit, Post 1, 12 years on the Board 		
f) Roll Call	William C. Gentry..... Secretary	18
g) Future Meetings Schedule.....	Tony DelCampo	23

2) ACTION

a) Minutes of the 301 st Meeting of the Board of Governors on April 20, 2024	Bill Gentry	25
b) Proposed Amendments to the Bylaws	William D. NeSmith.....	31
of the State Bar of Georgia		
(1) Bylaws Article III. Section 11 – Meetings		
(2) Bylaws Article III. Section 12 – Budget		

3) AWARDS AND PRESENTATIONS

a) Judge Willie Lovett Jr. Advancing the Field of Juvenile Law Award	Tony DelCampo Hon. Charles J. Bethel Justice, Supreme Court of Georgia	
b) Chief Justice Harris Hines Outstanding Advocacy for Children in Dependency Award	Tony DelCampo Hon. Charles J. Bethel Justice, Supreme Court of Georgia	
c) Chief Justice Thomas O. Marshall	Tony DelCampo	
Professionalism Awards		
d) Georgia Legal Services Program	Tony DelCampo	
Check Presentation		
e) Presentation of Other Awards.....	Tony DelCampo	
(As listed in the Annual Meeting Program.)		

4) PRESIDENT’S ADDRESS

a) State Bar of Georgia President’s Address.....	Tony DelCampo	
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5) SPECIAL REPORTS

a) Supreme Court of Georgia	Hon. Michael P. Boggs Chief Justice Supreme Court of Georgia	
b) Court of Appeals of Georgia	Hon. Amanda H. Mercier Chief Judge Court of Appeals of Georgia	

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
c) Office of Governor Brian Kemp	Kristyn Long Executive Counsel	
d) Georgia General Assembly		
(1) House Judiciary Committee	Rep. Stan Gunter, Chair	
(2) Senate Judiciary Committee	Sen. Brian Strickland, Chair	

6) INFORMATIONAL REPORTS

a) Young Lawyers Division	Brittanie D. Browning	36
	YLD President, 2023-2024	
b) Memorials.....	Tony DelCampo	
(As listed in Annual Meeting Program.)		

7) ADJOURNMENT

The Board of Governors will meet again at 9:00 a.m. on Saturday, June 8, 2024.



303rd BOARD OF GOVERNORS MEETING

Saturday, June 8, 2024

9:00 a.m. – 12:00 p.m.

The Omni Amelia Island Resort

Amelia Island, Florida

[Zoom Webinar Link](#)

Webinar ID: 868 3872 9793

Passcode: 289851

One tap mobile: +19292056099

Dress: Business Casual

AGENDA

Topics Presenter Page

1) ADMINISTRATION

- a) Welcome and Call to OrderIvy N. Cadle 1
President, 2024-2025
- b) Pledge of AllegianceJeffrey Nail
Sgt. Major, Retired
- c) InvocationJerry N. Cadle
Middle Circuit, Post 2
- d) Recognition of Past Presidents, Judges, andIvy Cadle
Special Guests
- e) Welcome to New Officers & Board Members.....Ivy Cadle..... 17

New Officers

- | | |
|--|---|
| Ivy N. Cadle, President | J. Antonio DelCampo, Immediate Past President |
| Christopher P. Twyman, President-Elect | Kenneth Mitchell Jr., YLD President |
| William C. Gentry, Treasurer | Veronica R. Cox, YLD President-Elect |
| R. Javoyne Hicks, Secretary | Brittanie D. Browning, YLD Immediate Past President |

New Board Members

- Miguel Angel Dominguez, Atlanta Circuit, Post 2
- Lindsey Stephens Macon, Atlanta Circuit, Post 20
- Kevin Charles Patrick, Atlanta Circuit, Post 22
- Edward T. "Eddie" McAfee, Atlanta Circuit, Post 26
- Gillian Brooke Fierer, Atlanta Circuit, Post 38
- Philip Zachary Pritchard, Cherokee Circuit, Post 1
- Charity Reneatha Bridgewater, Clayton Circuit, Post 2
- Elizabeth Dalia Racine, Douglas Circuit
- Maria Christene Mekras Justus, Eastern Circuit, Post 3
- Andrew Jackson Welch III, Flint Circuit, Post 2
- Ryan Welton English, Houston Circuit

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
<ul style="list-style-type: none"> • Thomas Frederick Lindsay, Lookout Mountain Circuit, Post 3 • Stephen Russell Morris, Ocmulgee Circuit, Post 3 • Thua G. Barlay, Rockdale Circuit • Joseph Kenneth Mulholland, South Georgia Circuit, Post 1 • Tedra L. Cannella, Stone Mountain Circuit, Post 8 		
f) Roll Call	R. Javoyne Hicks..... Secretary, 2024-2025	18
g) Future Meetings Schedule.....	Ivy Cadle.....	23
2) PRESIDENT’S REPORT	Ivy Cadle	
a) 2024-2025 Proposed Program of Activities		
3) ACTION		
a) Approval of the Members of the State	Ivy Cadle	
Disciplinary Boards		
State Disciplinary Board		
<u>Southern District</u>		
Pamela F. Everett, Pooler		
Carl R. Varnedoe, Savannah		
Formal Advisory Opinion Board		
(1) Member-at-Large: Mary A. Prebula, Atlanta (2026)		
(2) Member-at-Large: Jeffrey H. Schneider, Atlanta (2026)		
(3) Member-at-Large: Letitia A. McDonald, Atlanta (2026)		
(4) Georgia Association of Criminal Defense Lawyers: Amanda R. Clark Palmer, Atlanta (2026)		
(5) District Attorneys Association of Georgia: Sherry Boston, Decatur (2026)		
(6) Emory University School of Law: Jennifer M. Romig, Atlanta (2026)		
(7) Georgia State University College of Law: Cassady V. Brewer, Atlanta (2026)		
(8) State Disciplinary Board: To Be Announced		
b) Approval of ICJE Board Appointment		
(1) C. Bradford Marsh (2027)		
c) Approval of 2024-2025 Committees (action)		
(1) Standing Committees		
(2) Special Committees		
(3) Program Committees and Boards		
d) Nominations to the Judicial	Ivy Cadle	
Qualifications Commission		
e) Proposed Rules Changes.....	William D. NeSmith..... Deputy General Counsel	40
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(2) Part VIII - Continuing Legal Education	Damon E. Elmore Executive Director	
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g) 2024-2025 State Bar Budget.....	Bill Gentry Ivy Cadle	150

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(1) Authorization for president to secure blanket position bonds for officers and staff.		
(2) Designation of depositories for general operations of the State Bar of Georgia.		
(3) Employment of independent auditing firm to audit the financial records of the State Bar for the fiscal year 2023-2024.		
i) Election Schedule 2024-2025	Ivy Cadle.....	184
j) Executive Committee Election.....	Ivy Cadle	
(Please keep nominations to under 5 minutes. Please keep seconds to under 2 minutes.)		
<u>One-Year Term 2024-2025</u>		
(1) Unexpired term of R. Javoynne Hicks		
<u>Two-Year Term 2024-2026</u>		
(1) Expired term of Jonathan B. Pannell		
(2) Expired term of R. Gary Spencer		
(3) Expired term of Martin E. Valbuena		
k) Georgia Legal Services Program Appointments (action).....	Ivy Cadle.....	185
(1) Seth Bruckner, Atlanta		
(2) Keishan Davis, Tucker		
(3) Laverne Lewis Gaskins, Augusta		
(4) Matthew Howell, Atlanta		
(5) Prof. Ishaq Kundawala, Macon		
(6) Allison White, Atlanta		
l) Chief Justice’s Commission on Professionalism	Ivy Cadle	
Appointments (action)		
(1) Rizza O’Connor (2027)		
m) Executive Director’s Election	Ivy Cadle	

4) INFORMATIONAL REPORTS

a) Executive Director’s Report.....	Damon Elmore	
b) Young Lawyers Division Report	Kenneth Mitchell Jr. YLD President, 2024-2025	
c) Chief Justice’s Commission on Professionalism Report	Karlise Y. Grier	186
	Executive Director, CJCP	
d) Legislative Report	Russell N. Sewell Legislative Consultant	

5) WRITTEN REPORTS

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(1) April 26, 2024		

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(3) Bankruptcy Law Section		
(4) Class Action Law Section		
(5) Construction Law Section		
(6) Consumer Law Section		
(7) Dispute Resolution Section		
(8) E-Discovery & the Use of Technology Law Section		
(9) Employee Benefits Law Section		
(10) Energy Law Section		
(11) Fiduciary Law Section		
(12) Insurance Law Section		
(13) Intellectual Property Law Section		
(14) Privacy & Technology Law Section		
(15) Real Property Law Section		
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6) CLOSING

- a) Old Business..... Ivy Cadle
- b) New Business..... Ivy Cadle
- c) Executive Session..... Ivy Cadle
- d) Remarks / Q&A / Comments / Suggestions Ivy Cadle
- e) Adjournment Ivy Cadle
- f) Pictures (Very Important)
 - Immediately following the meeting, photos will be made of:
 - (1) Headshots for new Board of Governors Members*
 - (2) Headshots for all Returning Board of Governors Members who want updated photos*
 - (3) 2024-2025 Officers and Executive Committee
 - *These photos will be used for the supplemental directory. If you have a headshot that you would like to provide instead, please email it to jenniferm@gabar.org.

JUNE
6-9

Omni Amelia
Island Resort

*Opening Night Festival,
CLE Opportunities,
Presidential Inaugural
Gala, Social Events,
Family Activities,
Law-Related Vendors*

Hotel Cut-off: *May 17*
Registration Cut-off: *May 30*

FERNANDINA BEACH, FLORIDA

2024 STATE BAR OF GEORGIA

ANNUAL MEETING

PHOTO COURTESY OF OMNI AMELIA ISLAND RESORT



FROM THE PRESIDENT



JOIN US AT AMELIA ISLAND!

On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2024 Annual Meeting of the State Bar of Georgia to be held June 6-9, at the Omni Amelia Island Resort in Fernandina Beach, Florida.

I hope you and your family will make plans to join us for a weekend that promises ample opportunity to rest and relax while we as a Bar review and reflect on the achievements and successes of the past year, and look ahead to a year full of opportunities.

It is important to acknowledge what has been accomplished in order to move forward to continue to grow and improve our Bar and the legal profession.

The world-class accommodations of the beautiful Omni Amelia Island Resort will meet every need for an outstanding program,



as well as provide us all with the opportunity for fun, rest and relaxation.

I encourage you to take advantage of the CLE opportunities that have been planned, along with wellness programs, section events, business meetings, alumni gatherings and other social functions. The festivities will begin with Thursday evening's Opening Night Festival featuring the band 30Vice to provide the atmosphere and plenty of activities to keep everyone entertained, and culminate with Saturday night's Presidential Inaugural Gala, where Ivy N. Cadle will be sworn in as the 2024-25 State Bar president.

There will be plenty of time to focus on your family and your well-being while at Amelia Island with the number of recreational opportunities available—including golf, tennis,

circuit training, yoga, biking or simply relaxing with your family and friends in a beautiful setting. Also, be sure to visit with our law-related vendors in the exhibit area, open daily outside the meeting hall.

Thank you again for the honor and privilege of serving as your State Bar president for 2023-24 and for championing the cause of justice for all.

See you at Amelia Island!

A handwritten signature in black ink, appearing to read 'Antonio Delcampo', written over a white, stylized signature line.

HON. J. ANTONIO "TONY" DELCAMPO
President, State Bar of Georgia

OPENING NIGHT FESTIVAL

THURSDAY, JUNE 6 | 6:30 – 9:30 P.M.

The weekend begins with the ultimate outdoor summer party on the Magnolia Garden Terrace (location weather permitting). Join your colleagues, their families and guests for a relaxing, fun-filled evening dedicated to good food, great music and a chance to catch up with old friends and make new ones. Festival activities include spin art, airbrush and glitter tattoos, sandbox creations, hand animals and balloon sculpture, and a gaming truck.

Get your groove on as high-energy dance band 30Vice returns to the Annual Meeting to keep the crowd entertained with songs from a wide variety of musical genres, including pop, R&B, disco, rock, Latin and country!

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



PHOTO COURTESY OF GAME TIME JAX



PHOTO COURTESY OF 30VICE



PHOTO COURTESY BY DANNI JARRELLA, ISLAND RESORT



PHOTO COURTESY OF PORT ANNEAU ISLANDS RESORT

PRESIDENTIAL INAUGURAL GALA

SATURDAY, JUNE 8 | 6 - 11:30 P.M.

The evening will begin with a reception honoring the Supreme Court justices and Court of Appeals judges, followed by the Awards and Inauguration Ceremony where Ivy N. Cadle will be sworn in as the 2024-25 State Bar president. Following the inauguration and the awarding of the Distinguished Service and Employee of the Year awards, dinner will be served buffet style after which you are invited to spend the remainder of your evening dancing to music provided by Yacht Rock Schooner.

DANCE CLUB

All aboard for the smoothest dance party on the high seas! Yacht Rock Schooner specializes in the smooth sounds of the late 70s and early '80s. If you're a big fan of Hall & Oates, Steely Dan, Kenny Loggins and Michael McDonald, bring your dancing shoes and prepare to end your weekend cutting a rug.



PHOTO COURTESY OF YACHT ROCK SCHOONER



PHOTO COURTESY OF YACHT ROCK SCHOONER

SCHEDULE OF EVENTS

THURSDAY, JUNE 6

- 9 a.m. – 7:30 p.m. Registration
- 9 a.m. – 12 p.m. Exhibitor Setup
- 10 – 11:30 a.m. ICLE Board Meeting *(by invitation only)*
- 10 a.m. – 2 p.m. State Disciplinary Board Meeting *(by invitation only)*
 - 1 – 2 p.m. Bench and Bar Committee Meeting
 - 1 – 6 p.m. Legal Exposition Open
- 2 – 5:15 p.m. CLE | Leadership for Lawyers: Ethical Leadership, Personal Purpose and Legal Professionalism—Cornerstones of Legal Excellence
- 2 – 5:15 p.m. CLE | War Stories and Georgia Evidence Update
- 3 – 4 p.m. Budget Hearing
- 5 – 6:30 p.m. Military Legal Assistance Program Committee and Military/Veterans Law Section Meeting
- 6:30 – 9:30 p.m. Opening Night Festival

FRIDAY, JUNE 7

- 7 a.m. – 7 p.m. Registration
- 7 a.m. – 7 p.m. Legal Exposition Open
- 7 – 8 a.m. Circuit Training/HIIT 
- 7 – 8 a.m. YLD/Pro Bono Fun Run 
- 9 a.m. – 12 p.m. Plenary Session: Awards Presentation, Annual Members Meeting and 2023-24 Board of Governors Meeting
- 12 – 2 p.m. Commission on Continuing Lawyer Competency Meeting
- 12 – 2 p.m. Criminal Law Section DUI Lunch & Learn
- 12 – 2 p.m. Judicial Section Lunch
- 12 – 2 p.m. State Disciplinary Review Board Meeting *(by invitation only)*
- 1 – 2 p.m. CLE | What's New in Ethics?
- 1 – 2 p.m. YLD General Session
- 2 – 5 p.m. Board of Bar Examiners Meeting *(by invitation only)*
- 2 – 5 p.m. CLE | 20/20 Vision: Honoring Our History, Shaping the Present and Empowering All

2024 EXHIBITORS

**At time of printing*

ABA Retirement Funds Program

Atlanta Custom Tailors

Elizabeth Gallo Court Reporting

Fastcase

Fee Arbitration Program, State Bar

Georgia Legal Services Program

High School Mock Trial Program, State Bar

Law Practice Management Program, State Bar

Legion Mediation

Member Benefits

PeachCourt

Pearl Insurance

Southern First Bank

Taylor Auction & Realty

The Snowy Owl Group Atlanta—Keller Williams Cityside

University of Georgia School of Law

Zedra Gay & Associates Legal Nurse Consulting Firm

SATURDAY, JUNE 8

- 2:30 – 4:30 p.m. YLD Leadership Academy Alumni Networking Picnic and Service Project
- 3 – 4 p.m. Senior Lawyers Committee Meet and Greet
- 3 – 5 p.m. Member Benefits Committee Meeting
- 4 – 6:30 p.m. General Practice & Trial Law Section Tradition of Excellence Awards and Reception
- 5:30 – 6:30 p.m. Atlanta's John Marshall Law School and Savannah Law School Alumni Reception
- 5:30 – 7 p.m. Emory University School of Law Alumni Reception
- 5:30 – 7 p.m. University of Georgia School of Law Alumni Reception
- 5:30 – 7:30 p.m. Charleston School of Law Alumni and Friends Reception
- 5:30 – 7:30 p.m. Georgia State University College of Law Alumni Reception
- 5:30 – 7:30 p.m. Mercer University Walter F. George School of Law Alumni Reception Honoring Incoming Bar President Ivy N. Cadle
- 6:30 – 7:30 p.m. Construction Law Section and Energy Law Section Mixer
- 7 – 9 p.m. YLD Dinner and Swearing-In Ceremony

- 7 a.m. – 1 p.m. Registration
- 7 – 8 a.m. Beach Yoga 
- 7:30 – 8:30 a.m. New Board Members Breakfast with the President
- 7:30 – 11 a.m. Legal Exposition Open
- 8 – 8:45 a.m. SOLACE Committee Meeting
- 9 a.m. – 12 p.m. 2024-25 Board of Governors Meeting
- 12 – 2 p.m. Annual Diversity of Bars Meeting
- 6 – 11:30 p.m. Reception honoring the Supreme Court Justices and Court of Appeals Judges; Presidential Inaugural Gala: Installation of Ivy N. Cadle; Entertainment: Yacht Rock Schooner

SENIOR LAWYERS COMMITTEE MEET AND GREET Friday, June 7 | 3 – 4 p.m.

Join senior lawyers (age 60 or older) for a meet and greet to discuss issues of particular interest to the senior members of the State Bar of Georgia.

GENERAL PRACTICE & TRIAL LAW SECTION TRADITION OF EXCELLENCE AWARDS AND RECEPTION

Friday, June 7 | 4 – 6:30 p.m.

Each year, the General Practice & Trial Law Section recognizes a plaintiff's attorney, defense attorney, general practitioner and judge who have achieved a career of excellence. Please join the section in celebrating the 2024 recipients, followed by a reception in their honor.

MERCER UNIVERSITY WALTER F. GEORGE SCHOOL OF LAW ALUMNI RECEPTION HONORING INCOMING BAR PRESIDENT IVY N. CADLE

Friday, June 7 | 5:30 – 7:30 p.m.

Join alumni and guests at a reception hosted by Baker Donelson and Mercer University Walter F. George School of Law honoring 2024-25 State Bar of Georgia President Ivy N. Cadle.

The State Bar of Georgia has secured discounts on the following:

-  Beach Rentals | 10%
-  Spa Services | 10%
-  Putt Putt | 20%
-  Self-Parking | \$5 per vehicle, per night
(Current rate is \$20)
-  Valet Parking | \$20 per vehicle, per night
(Current rate is \$35)

Be sure to mention you are with the State Bar of Georgia to receive these special discounts.



CLE SEMINARS

CLE | THURSDAY, JUNE 6

LEADERSHIP FOR LAWYERS: ETHICAL LEADERSHIP, PERSONAL PURPOSE AND LEGAL PROFESSIONALISM—CORNERSTONES OF LEGAL EXCELLENCE

2 – 5:15 P.M. | \$145

☎ 3 CLE hours, including 1.5 ethics hours
and 1.5 professionalism hours

PROGRAM CHAIR

► **Ira Bedzow**, Executive Director, Emory Purpose Project,
Emory University School of Law, Atlanta

SPEAKER

► **Ira Bedzow**

PART 1 | WHAT IS ETHICAL LEADERSHIP AND HOW CAN ETHICAL LEADERS MAKE DECISIONS?

Attendees will become acquainted with what ethical leadership entails and learn three sets of decision-making skills ethical leaders

can apply when faced with organizational challenges, whether they are systems-based or interpersonal. From an organizational perspective, leaders who incorporate these skills into their decision-making will be able to prevent and/or mitigate ethical breaches; they may also alleviate obstacles to workflow and establish professional expectations to create a positive working culture aligned with the firm's mission. The description of ethical skills and their implementation shall be informed by Georgia Rule of Professional Conduct 5.1: Responsibilities of Partners, Managers and Supervisory Lawyers, "A law firm partner as defined in Rule 1.0, and a lawyer who individually or together with other lawyers possesses comparable managerial authority in a law firm, shall make reasonable efforts to ensure that the firm has in effect measures giving reasonable assurance that all lawyers in the firm conform to the Georgia Rules of Professional Conduct."

MODERATOR

► **Ira Bedzow**

PANELISTS

► **Elizabeth L. Fite**, Partner, Kutak Rock LLP, Atlanta
► **Richard D. Freer**, Dean Designate and Charles Howard Candler
Professor of Law, Emory University School of Law, Atlanta
► **Michael D. Golden**, Partner, Arnall Golden Gregory, Atlanta

PART 2 | WHAT DOES A PERSONAL SENSE OF PURPOSE HAVE TO DO WITH LEGAL PROFESSIONALISM?

Legal professionalism is typically conceived of as the expectations for lawyers vis-à-vis their clients, the court and the public good.

These expectations include competence, civility, integrity and commitment to the rule of law and justice. In this panel discussion, participants will explore the importance of aligning personal and organizational purpose with professional responsibilities. Dissecting purpose into its component parts, such as goals, values, beliefs and motivations—as well as personal and interpersonal capabilities to pursue one’s purpose well—panelists will discuss through their own experiences how their personal sense of purpose relates to the shaping of their professional identity and how they lead their respective organizations. The panel discussion shall be informed by the General Purpose of the State Bar of Georgia Professionalism CLE Guidelines, “to create a forum in which lawyers, judges and legal educators can explore the meaning and aspirations of professionalism in contemporary legal practice and reflect upon the fundamental premises of lawyer professionalism.”

HOSTED BY

Emory University School of Law; State Bar of Georgia Institute of Continuing Legal Education

CLE | THURSDAY, JUNE 6

WAR STORIES AND GEORGIA EVIDENCE UPDATE

2 – 5:15 P.M. | \$145

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

PROGRAM CHAIRS

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

SPEAKER

- ▶ **Michael Scott “Mike” Carlson**, Trial and Appellate Attorney; Legal Author, Atlanta

PART 1 | GEORGIA EVIDENCE UPDATE

Litigation, like life, is challenging. Hone your Georgia evidence skills to tackle those challenges with the Georgia Evidence Update.

MODERATOR

- ▶ **Hon. Robert W. “Bobby” Chasteen Jr.**

SPEAKERS

- ▶ **Hon. Kellie Stevens Hill**, Judge, Superior Court, Cobb Judicial Circuit, Marietta
- ▶ **Hon. Benjamin A. “Ben” Land**, Judge, Court of Appeals of Georgia, Columbus
- ▶ **Hon. Robert C. McBurney**, Judge, Superior Court, Atlanta Judicial Circuit, Atlanta
- ▶ **Hon. J. Stephen Schuster**, Senior Judge, Superior Court, Cobb Judicial Circuit, Marietta

PART 2 | WAR STORIES AND THOUGHTS ON A LAWYER’S CREED AND THE ASPIRATIONAL STATEMENT ON PROFESSIONALISM

Learn from the challenges faced by practitioners and judges as told in their “war stories” of skirmishes, battles, wounds and victories experienced personally or witnessed in the lives of clients and litigants.

MODERATOR

- ▶ **David B. Bell**

SPEAKERS

- ▶ **Sarah B. “Sally” Akins**, Senior Neutral, Miles Mediation, Savannah
- ▶ **Jeffrey Y. “Jeff” Lewis**, Partner, Arnall Golden Gregory LLP, Atlanta
- ▶ **Darren S. Penn**, Penn Law LLC, Atlanta
- ▶ **Natalie S. Woodward**, Partner, Warshauer Woodward Atkins, Atlanta

PART 3 | WAR STORIES AND THOUGHTS ON THE RULES OF PROFESSIONAL CONDUCT

The age old stories remain relevant over time, surrounding the practice of law and the ethical and professional considerations that are incumbent upon being a successful lawyer.

HOSTED BY

State Bar of Georgia Bench and Bar Committee; State Bar of Georgia Institute of Continuing Legal Education



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CLE | FRIDAY, JUNE 7

WHAT'S NEW IN ETHICS?

1 – 2 P.M. | NO CHARGE

☉ 1 CLE hour, including 1 ethics hour

Have lunch, get your ethics hour and catch up on recent changes to the Georgia Rules of Professional Conduct, new Formal Advisory Opinions and other hot topics in ethics. Lawyers from the State Bar of Georgia Office of the General Counsel, the Formal Advisory Opinion Board and the Disciplinary Rules Committee will explain the latest changes in this free program offered as a member benefit.

CLE | FRIDAY, JUNE 7

20/20 VISION: HONORING OUR HISTORY, SHAPING THE PRESENT AND EMPOWERING ALL

2 – 5 P.M. | \$145

☉ 3 CLE hours

PROGRAM CHAIRS

- ▶ **Terri N. Gordon**, Assistant Tax Commissioner, DeKalb County, Decatur; Chair, CLE Subcommittee, State Bar of Georgia Committee to Promote Inclusion in the Profession
- ▶ **Hermise Pierre**, Assistant City Attorney, City of Atlanta, Atlanta; Member, State Bar of Georgia Committee to Promote Inclusion in the Profession

This seminar will discuss the founding of the Committee to Promote Inclusion in the Profession 36 years ago with the original

founders and current and former committee chairs. The founders will discuss the purpose of and what they envisioned for the committee, and the former chairs will discuss what efforts they have made to carry on the original founders' visions, consistent with the Bar's scope and purpose.

MODERATOR

- ▶ **Terri N. Gordon**

PANELISTS

- ▶ **Jacqueline Bunn**, Vice Chair, Georgia State Board of Pardons and Paroles, Atlanta; Former Co-Chair, State Bar of Georgia Committee to Promote Inclusion in the Profession
- ▶ **Derrick Alexander Pope**, Founding Managing Director, Arc of Justice Foundation, Decatur; Former Co-Chair, State Bar of Georgia Committee to Promote Inclusion in the Profession

PART 1 | THE COMMITTEE TO PROMOTE INCLUSION IN THE PROFESSION—20 YEARS IN THE MAKING: A RETROSPECTIVE REVIEW

MODERATOR

- ▶ **LQ Barton**, Founder and Principal Attorney, LQ Law, PC, Savannah; Chair, State Bar of Georgia Committee to Promote Inclusion in the Profession

PANELISTS

- ▶ **Marcee L. Campbell Hill**, Senior Staff Attorney, Superior Court, Stone Mountain Judicial Circuit, Decatur; Co-Chair, Commitment to Equality Awards Subcommittee, State Bar of Georgia Committee to Promote Inclusion in the Profession
- ▶ **Kathleen Sullivan Dod**, Staff Attorney, Court of Appeals of Georgia, Atlanta
- ▶ **Ira L. Foster**, Deputy Director and General Counsel, Georgia Legal Services Program, Atlanta; Co-Chair, Roadmap to Law School
- ▶ **Dawn M. Jones**, Founding Partner, The Firm of Dawn M. Jones LLC, Mableton; 2020-21 President, State Bar of Georgia

PART 2 | THE COMMITTEE'S EFFORTS TO INCREASE INCLUSION IN THE PROFESSION

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

MODERATOR

► **R. Gary Spencer**, Senior Counsel, NAACP Legal Defense and Educational Fund, Inc., Atlanta; Vice Chair, State Bar of Georgia Seeking Equal Justice and Addressing Racism & Racial Bias Committee

PANELISTS

► **Rahul Garabadu**, Assistant U.S. Attorney, Northern District of Georgia, Public Integrity and Civil Rights Section, Atlanta
► **Charles S. Johnson III**, Principal, Charles S. Johnson, PC, Atlanta; Former General Counsel, Tuskegee University

PART 3 | HOW CIVIL RIGHTS INCREASE INCLUSION IN THE PROFESSION: A DISCUSSION ON RECENT U.S. SUPREME COURT CASES

HOSTED BY

State Bar of Georgia Committee to Promote Inclusion in the Profession; Georgia Association of Black Women Attorneys



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PHOTO COURTESY OF OHNIA MELIA ISLAND RESORT

YLD GENERAL SESSION
Friday, June 7 | 1 – 2 p.m.

The YLD General Session is open to all members. YLD officers and members of the YLD Executive Council will give reports and share updates on events and projects. The YLD Leadership Academy class of 2024 will receive their graduation plaques.

YLD LEADERSHIP ACADEMY ALUMNI NETWORKING PICNIC AND SERVICE PROJECT
Friday, June 7 | 2:30 – 4:30 p.m.

Don't miss this networking opportunity complete with a DJ and lunch. Meet the newest Leadership Academy class and catch up with other alumni. If you are new to YLD activities, this is your chance to introduce yourself to the 2024-25 YLD officers and learn about getting involved. This event will conclude with a service project packing lunches for the Nassau County Boys and Girls Club. T-shirts will be available for Leadership Academy alumni.

YLD DINNER AND SWEARING-IN CEREMONY
Friday, June 7 | 7 – 9 p.m.

Please join the Young Lawyers Division for its annual dinner and swearing-in ceremony. Following dinner, the YLD will present its outgoing officers and directors with gifts commemorating their service. The awards ceremony will highlight the accomplishments of the YLD's many outstanding members as 2023-24 YLD President Brittanie Browning presents the Awards of Achievement, as well as the 20th Annual YLD Ethics and Professionalism Award and the Ross Adams Award, which honors a past president. The evening culminates with the swearing-in of the 2024-25 officers. Incoming YLD President Kenneth Mitchell Jr. will then highlight his plans for the YLD during the upcoming Bar year. This event is open to all lawyers—members of the YLD and otherwise.

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



PHOTO COURTESY OF OMNI AMELIA ISLAND RESORT

RECREATION & WELLNESS

CIRCUIT TRAINING/HIIT

Friday, June 7 | 7 – 8 a.m.

Circuit training is a form of body conditioning or resistance training using high-intensity interval training. Target strength building and muscular endurance with members of the Attorney Wellness Committee.

YLD/PRO BONO FUN RUN

Friday, June 7 | 7 – 8 a.m.

Begin your day with sunshine and a 2-mile run on Amelia Island. This event is free for all participants. T-shirts will be provided to all finishers—don't forget to sign up. Sponsored by Georgia Capitol Partners.

BEACH YOGA

Saturday, June 8 | 7 – 8 a.m.

Join members of the Attorney Wellness Committee for an all levels flowing yoga practice that is suitable for everyBODY. Connecting breath with intentional movement and mindfulness, you will leave inspired, rejuvenated and refreshed.

TENNIS AND PICKLEBALL

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

GOLF

The Little Sandy Short Course features 10 holes nestled around Red Maple Lake, ranging from 30 to 125 yards, and an 18-hole putting course. Playing through a picturesque lowland oak marsh habitat, the Beau Welling designed Little Sandy provides a traditional, yet fun-focused golf experience for all ages and abilities. The course offers an idyllic setting as nearly all holes are played along Red Maple Lake's water contrasted by sandy native grass areas, dunes and diverse wildlife habitat. Playability and a fun atmosphere are emphasized to cater to families and those new to the game, but the course also offers strategic tests of golf and bold and contoured greens that will challenge more experienced golfers. One notable feature is the 10th hole that plays to an island green presenting a dramatic close to the round, even featuring a "hole-in-one" pin. This is a walking course (no golf carts). To book a tee time, call the Omni Golf Pro Shop at 904-277-5907.

**The Oak Marsh course is currently closed for renovation. Please contact the pro shop to arrange tee times at other 18-hole golf courses available at a negotiated rate exclusively for resort guests.*

SPA

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

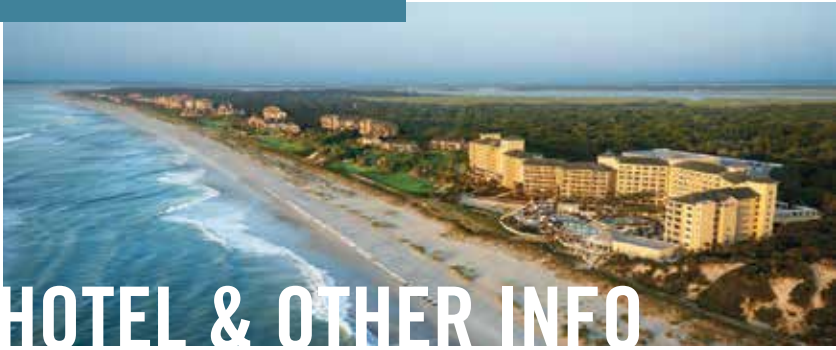


PHOTO COURTESY OF OMNI AMELIA ISLAND RESORT

OMNI AMELIA ISLAND RESORT

39 Beach Lagoon Road
Fernandina Beach, FL 32034
904-261-6161 | Fax 904-321-5046
Cut-off date is Friday, May 17

Omni Amelia Island Resort will be the Bar's host hotel, offering discounted room rates. A block of rooms has been reserved for the meeting. The room rates are \$287 single/double resort view. Ocean view rooms are \$309, up to \$609 for a three-bedroom ocean view villa. Rooms are subject to a \$20 resort fee per night plus 12% sales tax. To make reservations, please call the hotel at 888-261-6161 and mention you are with the State Bar of Georgia to receive the special rate. Or to make reservations online, for the hotel visit bit.ly/amelia_hotel_24, or for the villas visit bit.ly/amelia_villas_24. Reservations must be made by Friday, May 17, as rooms will be on a space and rate availability basis after this date.

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

WHAT TO PACK

Opening Night Festival | Casual Summer Attire
Daytime Meetings and Events | Casual Attire
Plenary Session and Board of Governors Meetings | Business Casual Attire
Young Lawyers Division Dinner | Business Casual Attire
Supreme Court Reception/Inaugural Gala | Cocktail Attire

DINING ON AMELIA ISLAND

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

14 STATE BAR OF GEORGIA

JUST FOR KIDS

KIDS AND TEENS

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

CAMP AMELIA

Ages 4 – 12 years

The resort offers Camp Amelia, with a different theme each day, from 9 a.m. – 1:30 p.m., Monday-Saturday, upon request. \$95 per child, includes lunch. Time can be extended for \$20 per hour, per child. Evening camps are available Friday and Saturday from 5 – 9 p.m., or by request Sunday-Thursday. The camp holds 12 children. Children must be potty trained.

AMELIA ISLAND NANNY, INC.

Infant – 4 years

Babysitting services for ages 4 and under are available through Amelia Island Nanny, Inc. Please call 904-229-5854 or visit www.ameliaislandnanny.com for more information, including rates. You can also email ameliaislandnanny@gmail.com.

AMELIA ISLAND TRANSPORTATION

At Amelia's Wheels, guests can rent Island Hoppers (four- and six-passenger golf carts), bicycles, tag-a-long bikes, baby joggers and baby trailers. Open daily 9 a.m. – 5 p.m., Amelia's Wheels is located conveniently between Falcon's Nest and The Spa & Shops. Call 904-277-5210 for more information and pricing.

2024 ANNUAL MEETING REGISTRATION FORM

Please use this form to register by checking events you plan to attend. Registration is required for all events, including "no charge" functions. Registrations are due May 30. "No charge" functions are limited to two tickets per attendee. One form per registrant. You may also register online at www.gabar.org.

ATTENDEE INFORMATION

(Please print or type and use one form per attendee.)

Bar Number _____

Name _____ Nickname _____

Email _____

Guest 1 Name _____

Guest 2 Name _____

Guest 3 Name _____

Guest 4 Name _____

Phone/Fax _____

Special Dietary Restrictions (in-person only) _____

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

REGISTRATION OPTIONS

Registrations are processed on a first-come, first-served basis. Checks and credit cards (VISA/MC/AMEX) are accepted. Make checks payable to the State Bar of Georgia and mail to: State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations are due May 30.

REFUND/CANCELLATION POLICY

Cancellation of registration must be received in writing no later than May 30. Cancellations will receive a full refund. Absolutely no refunds will be made after May 30. Requests should be mailed to the State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; faxed to 404-527-8717 or emailed to meetings@gabar.org.

PACKAGES

Package for Two (registrant and spouse/guest)

Lawyer _____ \$680 _____ N/A

Full-Time Judge _____ \$580 _____ N/A

Package includes: two Opening Night Festival tickets, two Supreme Court/Court of Appeals Reception tickets, two Presidential Inaugural Gala tickets

Individual Package (registrant)

Lawyer _____ \$340 _____ N/A

Full-Time Judge _____ \$290 _____ N/A

Package includes: one Opening Night Festival ticket, one Supreme Court/Court of Appeals Reception ticket, one Presidential Inaugural Gala ticket

YLD Package (registrant)

YLD Member _____ \$240 _____ N/A

Package includes: one YLD Dinner & Swearing-In Ceremony ticket, one Supreme Court/Court of Appeals Reception ticket, one Presidential Inaugural Gala ticket

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

A LA CARTE EVENTS

Plenary Session/Board of Governors Meeting (Fri.) _____ N/C _____ N/C _____

Board of Governors Meeting (Sat.) _____ N/C _____ N/C _____

Opening Night Festival (Lawyer or Guest) _____ \$150 _____ N/A _____

Opening Night Festival (Judge) _____ \$120 _____ N/A _____

Opening Night Festival (ages 5 and under) _____ N/C _____ N/A _____

Opening Night Festival (ages 6-20) _____ \$60 _____ N/A _____

Please specify age(s) _____

Installation of 2024-25 President and Officers _____ N/A _____ N/C _____

Supreme Court/Court of Appeals Reception/Inaugural Gala (Lawyer or Guest) _____ \$240 _____ N/A _____

Supreme Court/Court of Appeals Reception/Inaugural Gala (Judge) _____ \$200 _____ N/A _____

Supreme Court/Court of Appeals Reception/Inaugural Gala (YLD*) _____ \$150 _____ N/A _____

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

ALUMNI FUNCTIONS

Atlanta's John Marshall Law School _____ In-person Option Qty: _____ Virtual Option Qty: _____

and Savannah Law School Alumni Reception _____ N/C _____ N/A _____

Charleston School of Law Alumni and Friends Reception _____ N/C _____ N/A _____

Emory University School of Law Alumni Reception _____ N/C _____ N/A _____

Georgia State University College of Law Alumni Reception _____ N/C _____ N/A _____

Mercer University Walter F. George School of Law Alumni _____ N/C _____ N/A _____

Reception Honoring Incoming President by N. Cadle _____ N/C _____ N/A _____

University of Georgia School of Law Alumni Reception _____ N/C _____ N/A _____

CLE SEMINARS

20/20 Vision: Honoring Our History, Shaping the Present and Empowering All _____ \$145 _____ N/A _____

Leadership for Lawyers _____ \$145 _____ N/A _____

War Stories & Georgia Evidence Update _____ \$145 _____ N/A _____

What's New in Ethics? _____ N/C _____ N/A _____

COMMITTEE MEETINGS

Bench and Bar _____ N/C _____ N/C _____

Budget Hearing _____ N/C _____ N/C _____

Senior Lawyers _____ N/C _____ N/C _____

SOLACE _____ N/C _____ N/C _____

RECREATION AND WELLNESS

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

Beach Yoga _____ \$35 _____ N/A _____

Circuit Training/HIIT _____ \$35 _____ N/A _____

YLD/Pro Bono Fun Run _____ N/C _____ N/A _____

SECTION FUNCTIONS

Construction Law and Energy Law Mixer _____ \$5 _____ N/A _____

Criminal Law DUI Lunch & Learn _____ \$30 _____ N/A _____

General Practice & Trial Law Ceremony and Reception _____ \$25 _____ N/A _____

Judicial Section Lunch _____ \$50 _____ N/A _____

MLAP Committee and Military/Veterans Law Meeting _____ N/C _____ N/A _____

YLD EVENTS

YLD Dinner and Swearing-In Ceremony _____ \$110 _____ N/A _____

YLD General Session _____ N/C _____ N/A _____

YLD Leadership Academy Alumni Networking Picnic and Service Project _____ \$50 _____ N/A _____

OTHER

Diversity of Bars Annual Meeting _____ N/C _____ N/A _____

GEORGIA LEGAL SERVICES PROGRAM CONTRIBUTION

Please add to my registration payment a voluntary donation to the Georgia Legal Services Program* to support its important work ensuring access to justice for all. _____ (+) \$ _____

PAYMENT INFORMATION

I enclose a check \$ _____

Please bill my Visa MC AMEX \$ _____

Account Number _____ Exp. Date (MM/YY) _____ CSV Code _____

Name (as it appears on card, please print) _____

Signature _____

Credit card and "no charge" registrations may be faxed to 404-527-8717. Return with payment to: State Bar of Georgia Annual Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303-2743, or register online at www.gabar.org.



State Bar
of Georgia



State Bar
of Georgia

2024 Annual Meeting
104 Marietta St. NW, Suite 100
Atlanta, GA 30303-2743

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SPECIAL THANKS

Special thanks to the following corporate sponsor for its support of the State Bar of Georgia!

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Gavel

Meeting Bag sponsored by
PeachCourt

Many thanks to the State Bar Sections and others that have contributed to the success of the 2024 Annual Meeting.

Silver

- ▶ Workers' Compensation Law Section

Bronze

- ▶ Bankruptcy Law Section

Friend

- ▶ Agriculture Law Section
- ▶ Privacy & Technology Law Section

Other

- ▶ Alternative Dispute Resolution Section
- ▶ Bike Law Section
- ▶ Judicial Section
- ▶ Tabs3 Software



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Retiring Executive Committee Members (term ends June 7, 2024)

Sarah Brown "Sally" Akins Ronald Edward Daniels

Retiring Board of Governors Members (term ends June 7, 2024)

		Years of Service
Atlanta Circuit, Post 2	Kent Edward Altom	9
Atlanta Circuit, Post 20	Jennifer Auer Jordan	8
Atlanta Circuit, Post 22	Frank B. Strickland	38
Atlanta Circuit, Post 26	Anthony B. Askew	32
Atlanta Circuit, Post 38	Michael Dickinson Hobbs Jr.	14
Cherokee Circuit, Post 1	Randall H. Davis	17
Clayton Circuit, Post 2	Harold B. Watts	20
Douglas Circuit	Kenneth Brown Crawford	4
Flint Circuit, Post 2	John Philip Webb	22
Houston Circuit	Carl A. Veline Jr.	32
Lookout Mountain Circuit, Post 3	Ralph Lee Van Pelt Jr.	2
Ocmulgee Circuit, Post 3	Christopher Donald Huskins	14
Rockdale Circuit	Daniel Shelton Digby	6
South Georgia Circuit, Post 1	Lawton Chad Heard Jr.	12

2024-2025 Officers (term begins June 8, 2024)

President	Ivy Neal Cadle	Macon
President-elect	Christopher Paul Twyman	Rome
Immediate Past President	J. Antonio "Tony" DelCampo	Atlanta
Treasurer	William C. Gentry	Marietta
Secretary	R. Javoyne Hicks	Stone Mountain
YLD President	Kenneth Mitchell Jr.	Decatur
YLD President-elect	Veronica Rogusky Cox	Atlanta
YLD Immediate Past President	Brittanie Browning	Atlanta

2024-2025 New Board of Governors Members (term begins June 8, 2024)

Atlanta Circuit, Post 2	Miguel Angel Dominguez	Atlanta
Atlanta Circuit, Post 20	Lindsey Stephens Macon	Atlanta
Atlanta Circuit, Post 22	Kevin Charles Patrick	Atlanta
Atlanta Circuit, Post 26	Edward T. "Eddie" McAfee	Atlanta
Atlanta Circuit, Post 38	Gillian Brooke Fierer	Atlanta
Cherokee Circuit, Post 1	Philip Zachary Pritchard	Cartersville
Clayton Circuit, Post 2	Charity Reneatha Bridgewater	Jonesboro
Douglas Circuit	Elizabeth Dalia Racine	Douglasville
Eastern Circuit, Post 3	Maria Christene Mekras Justus	Savannah
Flint Circuit, Post 2	Andrew Jackson Welch III	McDonough
Houston Circuit	Ryan Welton English	Perry
Lookout Mountain Circuit, Post 3	Thomas Frederick Lindsay	Rossville
Ocmulgee Circuit, Post 3	Stephen Russell Morris	Madison
Rockdale Circuit	Thua G. Barlay	Conyers
South Georgia Circuit, Post 1	Joseph Kenneth Mulholland	Bainbridge
Stone Mountain Circuit, Post 8	Tedra L. Cannella	Decatur

Board of Governors Attendance Record

	1-23	3-23	6-23	6-23	10-23	1-24	4-24
	Buckhead/Zoom	Pine Mini/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom	Young Harris/Zoom
Sarah Brown Akins	*	*	*	*	*	*	*
Jonathan Lang Adams	n/a	n/a	n/a	*	*	*	*
Keith E. Adams	*	u	*	*	*	*	*
Mark W. Alexander	*	*	*	*	*	*	*
Kent Edward Altom	*	*	*	*	*	*	*
Anthony B. Askew	*	e	e	e	e	u	u
JaDawnya Cintelle Baker	*	e	*	*	e	u	*
Nina M. Baker	*	*	*	*	*	u	*
Eric A. Ballinger	*	*	*	*	*	*	*
Donna G. Barwick	*	*	u	*	*	*	*
John C. Bell Jr.	n/a	n/a	n/a	*	*	*	*
Tracie R. Benzo	*	*	*	*	u	*	*
N. John Bey	*	*	*	*	u	*	*
James D. Blitch IV	*	*	u	*	u	*	u
Sherry Boston	*	*	*	*	*	*	*
Ashley Mackin Brodie	*	*	*	*	*	*	*
Brittanie Browning	*	*	*	*	*	*	*
Stephanie D. Burton	*	*	*	*	*	*	*
Ivy Neal Cadle	*	*	*	*	*	*	*
Jerry Neal Cadle	*	*	*	*	*	*	*
Stacey McSwine Cameron	n/a	n/a	n/a	*	*	*	*
Richard D. Campbell	*	*	u	*	u	*	*
David L. Cannon	*	*	u	*	u	u	u
Carl S. Cansino	*	*	u	*	u	u	*
Chris M. Carr	*	e	u	*	u	*	*
Vernon L. Chambless	n/a	n/a	n/a	*	e	*	u
Kimberly A. Childs	n/a	n/a	n/a	n/a	*	*	*
Amanda Rourk Clark Palmer	*	*	*	*	*	*	*
Edward R. Collier	*	e	*	*	u	*	u
Daniel Jackson Connell III	n/a	n/a	u	*	*	*	*
Susan P. Coppedge	n/a	n/a	n/a	*	*	*	*
John Craig Cotton	n/a	n/a	n/a	*	e	*	*
Martin L. Cowen III	*	*	*	*	*	*	*
Kenneth B. Crawford	u	*	u	*	u	*	u
Ronald E. Daniels	*	*	*	*	*	*	*
Gerald Davidson Jr.	*	*	*	*	*	*	e
J. Anderson Davis	*	u	*	*	*	*	e
Randall H. Davis	*	*	*	*	*	*	*
William T. Davis	*	u	*	*	*	*	*

To request an excused absence, please email Secretary Bill Gentry (bill@gentrylawfirm.law).

Board of Governors Attendance Record

	1-23	3-23	6-23	6-23	10-23	1-24	4-24
	Buckhead/Zoom	Pine Mt/Zoom	Friday	Saturday	Jekyll Island/Zoom	Buckhead/Zoom	Young Harris/Zoom
	n/a	n/a	Savannah/Zoom	Savannah/Zoom			
Howard Mark Delashmit	*	*	n/a	*	*	*	*
J. Antonio DelCampo	*	*	u	u	*	*	*
Daniel S. Digby	*	*	*	*	*	*	*
George P. Donaldson, III	*	*	u	*	*	*	*
Danny L. Durham	*	*	*	*	*	*	*
Susan E. Edlein	*	*	*	*	*	*	*
Otobong Ukpong "Oto" Ekpo	n/a	n/a	n/a	*	*	*	*
Archibald A. Farrar	*	*	*	*	*	*	*
Amanda Renee Flora	*	*	u	u	*	*	*
Harold Eugene Franklin Jr.	*	*	u	u	*	u	*
Keith E. Gammage	*	*	*	*	*	*	*
William C. Gentry	*	*	*	*	*	*	*
Michael G. Geoffroy	*	*	u	*	u	*	*
Patricia A. Gorham	*	*	*	*	*	e	*
Rebecca Holmes Liles Grist	*	*	*	*	*	*	*
Paul William Hamilton	*	*	*	u	*	*	*
Thomas B. "Britt" Hammond	*	*	*	*	*	*	*
Roger Brent Hatcher Jr.	n/a	n/a	n/a	*	*	*	*
John Haubenreich	*	*	*	*	*	*	*
Patrick H. Head	*	*	*	*	*	*	*
Lawton C. Heard, Jr.	*	*	u	*	*	*	u
Render M. Heard Jr.	*	*	*	*	*	*	*
Amanda Nichole Heath	*	*	*	*	*	*	*
Matthew J. Hennessy	*	*	*	*	*	*	*
Thomas W. Herman	u	*	u	u	u	*	*
R. Javoyne Hicks	*	*	*	*	*	*	*
Kimberly Wilkerson Higginbotham	*	*	*	*	*	*	*
Donna S. Hix	*	*	*	*	*	*	*
Michael D. Hobbs	u	u	*	u	*	*	*
Norbert D. "Bert" Hummel IV	n/a	n/a	n/a	*	*	*	*
Christopher Huskins	*	u	u	u	*	*	*
Stacey K. Hydrick	*	*	*	*	*	*	*
Shukura L. Ingram	*	*	*	*	*	*	*
James T. Irvin	*	e	*	*	*	e	*
Christopher Ross Jackson	*	*	*	*	*	*	*
Charles Michael Johnson	*	*	u	*	u	*	*
Lester B. Johnson, III	*	e	*	*	*	e	u
Shiriki L. Cavitt Jones	*	*	*	*	*	*	*

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Board of Governors Attendance Record

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Jennifer A. Jordan	u	*	u	u	*	u	u
Zahra S. Karimshah	*	*	*	*	*	*	*
John F. Kennedy	u	*	u	u	u	*	*
Barry E. King	*	*	*	*	*	*	*
Judy C. King	*	*	*	*	*	*	*
Catherine Koura	*	e	*	*	*	*	*
Rachel R. Krause	*	*	u	*	*	*	*
Rhonda Bender Kreuziger	n/a	n/a	n/a	*	*	u	u
Edward B. Krugman	*	*	*	*	*	*	e
Jeffrey R. Kuester	*	*	*	e	e	*	*
Anne Templeton LaMalva	*	*	*	*	*	*	*
Rosten Dara Diya "Chimmy" Law	*	*	*	*	*	*	*
Allegra Lawrence-Hardy	*	*	*	*	*	*	*
Nicole C. Leet	*	*	*	*	*	*	*
Katie K. Leonard	*	*	e	e	*	*	*
Dawn Renee Levine	u	*	*	*	*	*	*
Joyce Gist Lewis	*	*	*	*	*	*	*
Lisa Katsuko Liang	*	*	*	*	*	*	*
David S. Lipscomb	*	*	*	*	*	*	*
John R. B. Long	*	*	*	*	*	*	*
Dax Eric Lopez	*	*	*	*	*	u	u
Ronald A. Lowry	*	*	e	e	*	*	*
John Bell Manly	*	*	*	*	*	u	*
Troy Windel Marsh Jr.	n/a	n/a	n/a	*	*	*	*
Hugh J. McCullough	*	*	*	*	u	*	u
Graham Elliott McDonald	*	*	*	*	*	*	*
Leitia A. McDonald	*	*	*	u	u	*	*
Brad J. McFall	*	*	*	*	*	*	u
Michael D. McRae	*	*	*	*	*	u	u
Terry L. Miller	*	*	*	*	*	*	*
Kenneth Mitchell Jr.	n/a	n/a	n/a	*	*	*	*
William J. Monahan	*	*	*	*	*	*	*
Shondeana Crews Morris	e	*	*	*	*	*	*
Katrell Nash	n/a	n/a	n/a	n/a	*	*	e
Laura J. Murphree	*	*	*	*	*	*	*
Paul Wain Painter III	u	*	*	*	u	*	*
Jonathan B. Pannell	*	*	*	*	*	*	*
Joy Renea Parks	*	*	*	*	*	*	*
Kathryn Drew Parrish Bennett	n/a	n/a	n/a	*	*	*	*

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Board of Governors Attendance Record

	1-23	3-23	6-23	6-23	10-23	10-23	1-24	4-24
	Buckhead/Zoom	Pine Mini/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom	Young Harris/Zoom	
Tabitha Edwina Payne	*	*	*	*	*	*	*	*
Brandon Lee Peak	*	*	*	*	u	*	*	*
Edward Piasta	*	*	*	*	u	*	*	e
Kathryn Lauranne Powers	*	u	*	*	u	u	u	u
Michael Prieto	*	*	*	*	*	*	*	*
Jill Pryor	*	*	*	*	*	*	*	*
William M. Ragland	*	*	*	*	*	*	*	*
Tina S. Roddenberry	*	*	*	*	*	*	u	*
Kevin W. Roper	n/a	n/a	n/a	*	*	*	*	*
Joseph Roseborough	*	u	*	u	*	*	*	*
Wesley Charles Ross	*	*	*	*	*	*	*	*
Claudia S. Saari	*	*	*	*	*	*	*	*
Alex Musole Shalishali	u	*	u	u	*	u	*	*
H. Burke Sherwood	*	*	*	*	*	*	*	*
Mitchell McKinley Shook	*	*	*	*	u	*	*	*
Robert H. Smalley, III	*	*	*	*	*	*	*	*
Philip C. Smith	*	*	*	*	*	*	u	*
R. Rucker Smith	*	*	*	*	*	*	*	*
Daniel B. Snipes	*	*	*	*	e	*	*	*
R. Gary Spencer	*	*	*	u	*	*	*	*
H. Craig Stafford	*	u	*	*	*	*	*	*
Lawton E. Stephens	*	*	*	u	e	*	*	*
Donna Coleman Stribling	*	*	*	*	*	*	*	*
Frank B. Strickland	*	u	u	u	*	*	e	*
Joseph C. Sumner, Jr.	*	*	u	*	*	*	*	*
Jason W. Swindle	*	*	u	*	*	u	u	*
Anita W. Thomas	*	u	u	u	*	*	u	*
Stephen Elliot Tillman	*	*	u	*	u	*	*	*
Edward D. Tolley	*	u	u	u	u	*	u	*
Clayton Tomlinson	*	*	u	*	*	*	*	*
Chris P. Twyman	*	*	*	*	*	*	*	*
Martin E. Valbuena	*	*	*	*	*	*	*	*
Ralph L. Van Pelt, Jr.	*	*	*	*	*	e	*	*
Carl A. Veline, Jr.	*	*	*	*	*	*	u	*
J. Henry Walker	*	*	*	*	*	*	*	*
Janice M. Wallace	*	*	*	*	*	*	*	*
Amy Carol Walters	*	*	*	*	*	*	*	*
Harold B. Watts	*	*	*	*	u	*	*	*
John P. Webb	*	*	*	*	*	*	*	*

To request an excused absence, please email Secretary Bill Gentry (bill@gentrylawfirm.law).



State Bar of Georgia

Future Meetings Schedule

Executive Committee

August 21 – 23, 2024	Supreme Court/Executive Committee Joint Meeting Cloudland at McLemore Resort, Rising Fawn, GA
October 3, 2024	Executive Committee Meeting Reception w/Atlanta Bar Association Baker Donelson Offices, Atlanta
December 5-6, 2024	Executive Committee Meeting Lunch w/Local Bar Association Swainsboro, GA (Holiday Inn Vidalia, TBD)
Feb. 20-21, 2025	Executive Committee Meeting Reception w/Local Bar Association Macon, GA (Hotel 45, TBD)
April 25, 2025	Executive Committee Meeting Reception w/Local Bar Association Alpharetta, GA (Avalon, TBD)

Board of Governors

Fall 2024	November 1 - 3, 2024	Jekyll Island Club Resort Jekyll Island, GA
Midyear 2025	January 9 – 11, 2025	JW Marriott Savannah Plant Riverside District Savannah, GA
Spring 2025	March 21 – 22, 2025	Hyatt Place Athens & Classic Center Athens, GA (<i>Contract Pending</i>)
Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

Young Lawyers Division

YLD Executive Committee Meeting	August 9-10, 2024	Lanier Islands Legacy Lodge Buford, GA (<i>Contract Pending</i>)
Fall 2024	November 1 - 3, 2024	Jekyll Island Club Resort Jekyll Island, GA In conjunction with the State Bar Fall Meeting

(Updated 05.09.24)



State Bar of Georgia

Future Meetings Schedule

Midyear 2025	January 9 – 11, 2025	JW Marriott Savannah Plant Riverside District Savannah, GA In conjunction with the State Bar Midyear Meeting
Spring 2025	March 28-30, 2025	Nashville, TN (Location, TBD)
Annual 2025	June 5-8, 2025	Sawgrass Marriott Golf Resort & Spa Ponte Vedra Beach, FL
Annual 2026	June 11-14, 2026	Omni Amelia Island Resort Fernandina Beach, FL

American Bar Association Meetings

Annual 2024	July 31 – August 6, 2024	Chicago, IL
Annual 2025	August 6 – 12, 2025	Toronto, ON

Southern Conference of Bar Presidents Meetings

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

(Updated 05.09.24)

DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, April 20, 2024, 9:00 a.m.
Brasstown Valley Resort and Spa
Young Harris, GA/Zoom Hybrid

The 301st meeting of the Board of Governors of the State Bar of Georgia was held at the date and time shown above. President J. Antonio “Tony” DelCampo presided and called the meeting to order at 9 a.m.

Pledge of Allegiance

William J. Monahan, Out-of-State, Post 2, led the pledge of allegiance.

Invocation

Hon. Joy R. Parks, Enotah Circuit, gave the invocation.

Special Recognition

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

Roll Call

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

Future Meetings Schedule

President Tony DelCampo reviewed the Future Meetings Schedule. President-Elect Ivy Cadle discussed his upcoming meetings. He announced a reimbursement program to help offset costs for Board members in their first two terms based on financial need. He said the Executive Committee will discuss the program further at their meeting on April 26 to work out the logistics.

Minutes of the 300th Meeting of the Board of Governors

Secretary Bill Gentry presented the minutes of the Board of Governors meeting held on January 13, 2024, which were approved as presented by majority vote.

Proposed Changes to the Georgia Rules of Professional Conduct

Deputy General Counsel Bill NeSmith presented the following proposed rules changes.

Rule 4-102. Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct

The title under Contents will be changed to “Preamble and Scope.” The word “Terminology” is being deleted because Terminology and Definitions were moved to Rule 1.0 in November 2011. This is a housekeeping change with no substantive effect.

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

Rule 9.4 Jurisdiction and Reciprocal Discipline

This proposed change requires the State Disciplinary Review Board to file its recommendations for imposing substantially similar discipline with the Clerk of the State Disciplinary Board instead of the Supreme Court of Georgia. The State Disciplinary Board Clerk is required to serve the respondent and file the record in the disciplinary matter with the Supreme Court of Georgia within ten days. The proposed change also requires the State Disciplinary Review Board to file its report and recommendations within 60 days with the State Disciplinary Board Clerk after receiving and considering exceptions from the respondent or the Office of the General Counsel. The State Disciplinary Board Clerk will serve the respondent and file the record in the disciplinary matter with the Supreme Court of Georgia within ten days. These changes create better continuity and organization of the filings in a reciprocal discipline matter.

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

License Fee Approval 2024-2025

After a report from Treasurer Chris Twyman, the Board of Governors, by majority vote, approved active license fees at \$264 (\$4 increase from fiscal year 2023-2024) and inactive license fees at \$130 (\$2 increase from fiscal year 2023-2024) for fiscal year 2024-2025.

Approval of Other Items to Appear on the License Fee Statement

The Board of Governors, by majority vote, approved the following items to appear on the license fee statement:

- 1) Section Dues (\$10 to \$50).
- 2) Clients' Security Fund (\$15 per member per Rule 1-506).
- 3) Professionalism Fee (\$11/year).
- 4) Legislative and Public Education Fund Contribution (\$100 optional contribution).
- 5) Georgia Legal Services Program (\$400 suggested individual contribution/\$100 suggested contribution for young lawyers).

President's Report

President Tony DelCampo began his remarks by thanking everyone for their work on the Board of Governors and thanking Bar staff for their work as well. He gave an update on the current status of the unallocated cash plan, and he said that the projects are either on budget or under budget and going well. He announced that the website redesign is on track to launch on August 1 and that a beta version will be completed by the Annual Meeting. He reminded the Board that General Counsel Paula Frederick is retiring at the end of January 2025. The process of hiring a new general counsel is almost complete, and there should be an announcement in the next couple of weeks.

President DelCampo said every time he is invited to speak at local bars or events, he talks about lawyer wellness and the #UseYourSix campaign through the Lawyer Assistance Program. He reminded everyone that a healthy lawyer is a good lawyer. He encouraged others to talk about it with their groups as well. He said while the judicial pay legislation did not pass this session, the Bar will continue to support the judicial pay raises next year.

Executive Director's Report

Executive Director Damon Elmore echoed his thanks to the Bar staff. He reported that there are no significant challenges currently regarding the Bar Center and that improvements will be continued regarding technology, use, and occupancy. Georgia CASA will be moving in on the 6th floor as a new tenant in August 2024.

Treasurer's Report

Treasurer Chris Twyman reported on the financials of the Bar and said that there were no surprises and that everything was in good financial order. The Board was provided with the January 2024 financial statements for Bar Operations and the Bar Center.

Young Lawyers Division

YLD President Brittanie Browning reported that the Legal Food Frenzy's goal this year is to raise \$1 million for Georgia's food banks. She said food banks need extra resources during the summer because children aren't in school to receive meals. She announced that the 2024 YLD Signature Fundraiser raised \$36,500, with the YLD's Public Interest Internship Program being the beneficiary. She reported on several YLD events in the past few months and multiple events taking place to close out the Bar year.

ACL/Legislative Report

Legislative Consultant Rusty Sewell reported the following on the Bar's 2024 legislative package:

1. Support for the Uniform Commercial Code Modernization Act of 2024 (HB 1240)—Business Law Section. Summary: HB 1240 seeks to update and modernize various statutes in the commercial code relating to commercial transactions to maintain uniformity in the state's statutes governing commercial transactions. It also establishes commercial law for transactions involving digital assets. Status: Signed by Gov. Kemp on May 6.
2. Support for Amendments to Title 53 and Related Code Sections (HB 1218)—Fiduciary Law Section. Summary: HB 1218 relates to general provisions relative to probate and requires that notice be provided to beneficiaries of a testate estate. Status: Did not pass.
3. Support for Judicial Council's Judicial Compensation Reform Proposal (HB 947)—Advisory Committee on Legislation. Summary: HB 947 seeks to increase compensation received by superior court judges and create the Judicial System Compensation Commission. Status: Did not pass.
4. Support for a Proclamation by the Governor Recognizing April 2024 as Legal Professionalism Month—Professionalism Committee. Status: Proclamation issued by Gov. Kemp on Jan. 24.
5. Support for the Judicial Council's Budget Request for FY 2025—Indigent Defense Committee \$900,000 for Increased Funding for the Georgia Appellate Practice and Educational Resource Center. Status: Fully funded for FY 2025.
6. Support for the Judicial Council's Budget Request for FY 2025—Committee to Promote Inclusion in the Profession \$3 Million for Continued Funding for Civil Legal Services Grants for Victims of Domestic Violence. Status: Fully funded for FY 2025.
7. Support for the Judicial Council's Budget Request for FY 2025—Access to Justice Committee \$619,000 for Increased Funding to Provide Civil Legal Services Grants for Medical Legal Partnerships. Status: Funded at \$409,500 for FY 2025.

In other legislative activity of interest to the Bar, SB 73 regarding lawyer advertising passed. Bar leadership will review the legislation to see what, if anything, needs to be done by the Bar. Tort reform was a priority for the governor. SB 426 was passed, which limits a plaintiff's ability to sue motor carriers and their insurers simultaneously. There were also changes to landlord-tenant laws, providing more clarity. The bill regarding

salaries for judges began in a positive light in the House but ran into issues in the Senate. They pointed out there would have to be an amendment to the state's constitution. It has been put on hold.

CLE Rewrite and Rules Change

Executive Director Damon Elmore reported on the proposed changes to the CLE Rules. Based on the Lawyer Competency Task Force Report, the Supreme Court of Georgia asked that the Bar look into a longer compliance period and a reduction of required hours. Bar staff and the Commission on Continuing Lawyer Competency have worked on a draft incorporating those items and took the opportunity to incorporate feedback from the CLE Survey conducted in January 2023. Minimal housekeeping changes were also included.

Summary of the Proposed Changes:

- Moved from an annual CLE requirement to a biennial CLE requirement (every two years).
- The first biennial compliance period begins January 1, 2025, and ends December 31, 2026. All lawyers will have the same CLE deadline of December 31 in every even year (except new lawyers in TILPP).
- Eliminated reference to a grace period. The deadline for the CLE compliance period is December 31 of every even year (2026, 2028, 2030, etc.). If CLE hours are not completed by the compliance deadline, a \$200 late fee will be assessed. However, a notice of lawyers who have not complied or paid the late fee will be forwarded to the Supreme Court of Georgia, per the rules, no sooner than April 30 of every odd year.
- CLE Hours Requirement:
 - 18 hours every two years (maximum of 6 CLE hours can be carried from one compliance period to the next).
 - 3 hours of ethics every two years (no ethics carry-over from one compliance period to the next).
 - 2 hours of professionalism every two years (no professionalism carry-over from one compliance period to the next).
 - 3 trial hours every two years (for trial lawyers) (no trial carry-over from one compliance period to the next).
- Moved all exemptions to one place under Rule 8-104 (d). Previously, the exemptions were spread out in Rule 8-102, Rule 8-104 (c), and under Regulations to Rule 104 (c).
- Age 70 CLE Exemption:
 - Grandfathered exemption for attorneys who reached age 70 before the effective date of the new CLE rules.
 - Attorneys who reach age 70 after the effective date of the new CLE rules will have a biennial requirement of 9 CLE hours (including 3 ethics hours, 2 professionalism hours, and 3 trial hours for trial attorneys).
- Eliminated trial observation as an activity approved for CLE hours.
- Removed the portion of the rules that says, "expenses of Commission members shall not be reimbursed."
- Moved most definitions to the top (Rule 8-102).
- Changed the CLE late fee to \$200 after the compliance deadline (currently, it is \$100) but eliminated the additional CLE late fee of \$150 currently in the regulation.
- TILPP Rules and Regulations were all moved under one rule (new Rule 8-105).
- Changed "sponsor" to "provider" and changed "attorney" to "lawyer" throughout.

A robust and comprehensive discussion with questions and answers occurred. CCLC Chair Thomas Herman was available to help answer questions from the Board members. After much discussion, Executive Director Elmore said he would work on creating an FAQ page that further explains the changes, in addition to items during the discussion, to use during the Board of Governors Annual Meeting and on the website. This will be an action item at the Annual Meeting in June.

New Process for Budget Approval

Chief Financial Officer Ron Turner presented a proposed new process for budget approval. The purpose of the proposed bylaw change is to change the timing of the approval of the annual budget from the Annual Meeting to the Spring Meeting. The advantages of changing the timing for approval would be as follows: (1) the approval of the license fees and the budget in the same meeting, (2) a reduction in committee meetings, (3) cohesion with the timing related to the new evaluation process, and (4) creation of more efficiencies within the Accounting Department. This will be an action item at the Annual Meeting in June.

Chief Justice's Commission on Professionalism Report

Executive Director Karlise Grier thanked Chief Justice Michael Boggs for his leadership of CJCP. She held a moment of silence in honor of Jim Elliot and Avarita Hanson, both leaders of professionalism who have died since January. She said that CJCP held a low-cost CLE, "The Significant Lawyer," with 15 people in person and 149 online. Currently, CJCP is hosting the "Connect with a Colleague Contest," where lawyers are encouraged to have lunch or coffee with another lawyer. Prizes for the contest are being funded by the CLE held in January. She mentioned that Law Day is May 1, but it will be celebrated throughout the month with the theme of "Voices of Democracy."

Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on December 15, 2023, and February 9, 2024.

Law Practice Management Program

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

Office of the General Counsel

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

Institute of Continuing Legal Education Report

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

Media Report

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

Old Business

There was no old business.

New Business

Secretary Bill Gentry discussed the possibility of a Senior Lawyers Division and said there's a strong need for it. The division would be for lawyers 55 and over. Secretary Gentry said that Past President Pat O'Connor appointed him to the Aging Lawyers Task Force, which morphed into the Senior Lawyers Committee. Through those two committees, work was done to focus on succession planning and naming a designated attorney on the dues notice. They created content for the Bar's website to help guide what steps to take when faced with a sudden health crisis. They worked with the Membership Department and Office

of the General Counsel to create a “retired” member status for attorneys who may have a minor Bar complaint against them but would require them to no longer practice law, allowing them to retire with dignity. Secretary Gentry said that he has talked with past and current YLD leaders, and they agree this would provide a great opportunity for mentoring.

Announcements

There were no announcements.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

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

Adjournment

There being no additional business, the meeting was adjourned at 11:21a.

William C. Gentry, Secretary

Approved:

J. Antonio DelCampo, President



MEMORANDUM

To: Membership and Board of Governors
From: Bill NeSmith, Deputy General Counsel
Date: May 7, 2024
Re: Proposed bylaw amendments

Below is an executive summary of the proposed bylaw changes.

Article III Board of Governors. Section 11. Meetings.

The purpose of the proposed change to this bylaw is to require that the Board of Governors hold a Spring meeting each year to align with the proposed revision to Article III Section 12 (below), which requires the Board to adopt the budget at its Spring meeting. The current rules only require that the Board meet three times per year and the membership have at least one meeting at either the Annual or Midyear meeting.

Article III Board of Governors. Section 12. Budget.

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

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

2 a) The Board of Governors shall meet during or immediately after the adjournment of the annual
3 and midyear meetings of the members or on the following day, as the incoming President may
4 direct. There shall be at least ~~three~~ one additional regular meetings of the Board in the spring of
5 each year at such ~~times~~ and ~~places~~ as may be fixed by the Board or its President.

6 (b) Special meetings may be called by the President. Upon the request of 20 members of the Board
7 of Governors, the President or the Executive Director shall give notice of a special meeting not less
8 than 10 nor more than 20 days after such request is received. Each member of the Board shall
9 receive at least 10 days notice by email of each meeting of the Board of Governors, other than a
10 meeting held in conjunction with the annual or midyear meetings.

11 (c) If deemed prudent or necessary, the Board of Governors may conduct any meeting by any
12 electronic means that allows for discussion, debate, and voting.

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11 (c) If deemed prudent or necessary, the Board of Governors may conduct any meeting by any
12 electronic means that allows for discussion, debate, and voting.

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

2 The Board of Governors shall, at its meeting held in conjunction with the ~~annual~~-spring meeting,
3 adopt a budget for the following fiscal year showing the anticipated income and tentative
4 appropriations to cover estimated expenses of the State Bar, which budget the Board shall have
5 authority from time to time to amend. In no event shall the officers have authority to spend
6 money or incur indebtedness except as provided for in the budget fixed by the Board.

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

2 The Board of Governors shall, at its meeting held in conjunction with the spring meeting, adopt a
3 budget for the following fiscal year showing the anticipated income and tentative appropriations
4 to cover estimated expenses of the State Bar, which budget the Board shall have authority from
5 time to time to amend. In no event shall the officers have authority to spend money or incur
6 indebtedness except as provided for in the budget fixed by the Board.



June 7, 2024

Dear Board of Governors,

It is my honor to share my final report as the 77th President of the YLD. The YLD's leaders and members hosted a variety of programs to meet our membership across the state. I am thrilled to share the year in review for the YLD. We did some great things and new programming to reach members around the state.

On August 31 to September 3, the YLD successfully co-hosted the Tropical Summer CLE in Puerto Rico with the Board of Governors. We had esteemed judges including Chief Justice Michael Boggs, Justice Shawn LaGrúa, Court of Appeals Judge Sara Doyle, Judge Alvin Wong, Judge Stacey Hydrick, and Judge Amanda Heath. The other programming included optional excursions including an El Yunque Rainforest Adventure, which consisted of an intense hike that required the optimization of the wellness techniques learned the day before to ask for help and rely on others for support.

The Wellness and Judicial Law Clerk Committee did a hike at High Falls State Park on October 7, 2023. The Women in the Profession Committee held a private showing of Barbie on October 19, 2023.

The YLD Fall Meeting was in Charleston, South Carolina, in November 2023. We had a good showing of first-time attendees which we love to see as new faces get involved in the Bar. Justice Verda M. Colvin joined our members for an intimate fireside chat. Following that program, we had a fun murder mystery dinner for our YLD members. We also offered a CLE focusing on disaster-relief programs and pro bono service opportunities for lawyers to participated in while helping local Georgians.

The National Moot Court Regional Competition was held from November 17-18, 2023. The Litigation Committee hosted Virtual Lunch & Learn CLE Series with five sessions from November to April. Hundreds of individuals attended these sessions which reached across the state.

Mercer AWLS, YLD Women in the Profession Committee and Law School Outreach Committee networked at Mercer University School of Law with law students on November 7, 2023. Advocates for Students with Disabilities virtual CLE Coffee and Conversations About School Choice in Georgia with April Kelly Neal, Esq. November 17, 2023. The Judicial Law Clerk Committee hosted "Welcome to Chambers" CLE on December 8, 2023. The YLD Real Estate Law Committee and Real Property Law Section CLE co-hosted "Foreclosures, Workouts, Bankruptcies... Don't Worry We've Been through This Before!" on January 12, 2024.

On January 12, 2024, in conjunction with the Board of Governors Midyear Meeting, we hosted the 17th Annual YLD Signature Fundraiser benefiting the Public Interest Internship Program. The Public Interest Internship Program is this year's beneficiary to support future public interest attorneys who would otherwise have an unpaid internship. Through the Signature Fundraiser, we raise \$36,500 for PIIP. Thank you to all the attendees and supporters for this worthy cause! Additionally, our service project was collecting socks for MLK Day Beloved Community Service Project with over 800 pairs of socks donated.

The Sports Law Committee hosted "A Night with the Hawks" on February 27, 2024 including an hour of CLE with Scott Wilkinson. This event was so popular that it sold out. Women in the Profession Committee hosted the Power Hour Lunch with Women in the Judiciary CLE at Akerman LLP on March 8, 2024 in honor of International Women's Day.

The Intrastate Moot Court Competition was held at the SBG Headquarters on March 15-16, 2023. Family Law Committee and Inclusion in the Profession Committee virtual Meet and Greet with Hon. Sonja N. Brown on March 26.

We wrapped up the 13th Legal Food Frenzy competition, which ran from April 15-26. The Legal Food Frenzy supports our food banks around the state as they approach the summer months when students that would otherwise receive free or reduced lunch at school, which is no longer available to them over the summer break. I especially thank Ashley Akins and Caroline Scalf for their leading this year's efforts. Since its inception, Georgia's legal community has raised \$5.9 million dollars, which equals more than 23 million meals for our state.

Since the last report, the YLD hosted a CLE at the Spring Meeting focusing on mental health of lawyers and wellness to provide better legal services to our clients. The panel featured Judge Shondeana Morris, Chinny Law, and Jeremy Burnette. We had over fifty attendees for this panel showing the interest in the topic and continued educational opportunities are well received at our meetings. Sports Law Committee hosted its Kickball Game with over 70 people playing or watching the game. We wrapped up the evening with a dinner and lively bingo.

The Community Service Projects Committee hosted the annual Build a Better Georgia Day Habitat for Humanity Builds in Atlanta, Macon, and Savannah on May 4, 2024.

YLD Litigation Committee partnered with the Alternative Dispute Resolutions Section, General Practice and Trial Law Section, JAMS ADR, Miles Mediation, and Henning Mediation and Arbitration for a Meet the Mediators Networking Event at the Bar Headquarters on May 16, 2024.

Our YLD Leadership Academy Class concludes during the Annual Meeting. I thank our Leadership Academy Co-Chairs James Banter, Kindall Browning-Rickle and Samantha Mullis. Our class has 33 members who have met monthly since January. The Leadership Academy had six sessions around the state allowing for networking and professional development.

This year, the YLD hosted the third season of The Good Lawyer. D. Sarah Young hosted most of our episodes (with my special guest hosting appearance with President Hon. J. Antonio "Tony" DelCampo. Other episodes feature me, Bert Hummel, Darrell Sutton, Amy V. Howell, Judge Rizza O'Connor, Justice Andrew A. Pinson, Hon. J. Wade Padgett, Richard E. Harris, Ashley Akins and Caroline Scalf.

YLD COMMITTEES

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

YLD Judicial Law Clerk Committee

Elizabeth "Tate" Crymes, Mallory Fleming and Essie Lazarus, Co-Chairs

The YLD Judicial Law Clerk Committee (JLCC) collaborated with the YLD Women in the Profession Committee to host the Power Hour Lunch with Women in the Judiciary on March 8---a very successful event. The JLCC has hosted many well attended and informative events this year and hopes to continue to host and to collaborate with other committees to host more meaningful events in the future.

YLD Leadership Academy Committee

James Banter, Kindall Browning and Samantha "Sam" Mullis, Co-Chairs

Since the midyear meeting, the 2024 Leadership Academy Class completed their second session with Legislative Day at the Capitol. We had a round robin type CLE with speakers from all branches of government including the Governor's Office, Legislative Counsel, the Attorney General's Office, and lobbyists. After a tour of the Capitol, we had lunch at the Sloppy Floyd building with a candid question and answer session with lawyer-legislator Deborah Silcox. We finished off the day with a tour of the Nathan Deal Judicial Center hearing from four Court of Appeals Judges and Justice Pinson of the Georgia Supreme Court. Justice Pinson was also kind enough to swear in member of our class to the Georgia Supreme Court. It was a jam-packed, great day!

On the weekend of March 16, 2024, the Leadership Academy took on Macon, Georgia for their third session learning about leadership in their local bars. We heard from the Director of Crisis Line and Safe House regarding the cycle of domestic violence and the Pro Bono Coordinator for GLSP regarding volunteering and pro bono opportunities. We will also participate in a service project.

During the Spring Meeting, the Leadership Academy completed their fourth session on attorney wellness. They started off the day with sunrise yoga. There was a CLE on attorney wellness. They kicked butt in kickball!

YLD Public Internship Interest Program (PIIP) Committee

Arthur Bailin and Aimee Sobhani, Co-Chairs

YLD's PIIP Committee is responsible for overseeing the Public Interest Internship Program (PIIP), which provides grants to law student and recent law graduates who have received unpaid, full-time summer internships with a non-profit or government agency in Georgia. This year, enough money was raised to fund two summer grants! The deadline for submitting applications for summer grants was April 1, 2024. We received thirty-four applications from individuals interning with a variety of nonprofit and government agencies in Georgia. Members of the PIIP committee are currently in the process of reviewing grant applications and hope to make final decisions in the next couple of weeks.

YLD Sports Law Committee

Noël Couch and Caleb Ratliff, Co-Chairs

The YLD Sports Law Committee held a panel discussion with Scott Wilkinson with the Atlanta Hawks concerning his day-to-day duties and how he came into the profession on Feb. 27, 2024. CLE was offered. We also hosted a YLD Kickball Game at the 2024 State bar of Georgia Spring Meeting. Members of the YLD competed at Young Harris College as a way of bringing members of the YLD together and enjoyed a fun afternoon of kickball.

YLD Women in the Profession Committee

Cayton Chrisman, Farheen "Lina" Khan and Olivia Mercer, Co-Chairs

The YLD Women in the Profession Committee held an empowering women event which involved networking and a private screening of the Barbie movie at Atlantic Station in Atlanta on 10/19/23. We also held a networking event for Mercer Law students to connect with attorneys and Judges in the area on 11/7/23 at Mercer University and a nearby restaurant. We hosted two events for International Women's Day on 3/8/24 - one was the Power Hour Lunch with women in the Judiciary at Akerman and the other was a social media campaign for YLD members (and other attorneys) to generate positive content about why they decided to become a lawyer and what they love about it. We also have planned a "Networking on the Pitch" where we rented out a section at the Atlanta United game on May 25, 2024. We are so excited for this event! We have also discussed a lunch and learn at Nelson Mullins, but we are still working through the details and dates.

YLD AFFILIATES

The YLD currently has seven recognized active affiliates around the state: Young Lawyers of Augusta, Cobb County Younger Lawyers Division, Columbus YLD, Glynn County YLD, Houston County YLD, Macon YLD and Savannah YLD. The Western Circuit YLD has been inactive for a few years but has expressed an interest in reorganizing.

Macon Pickleball Fundraiser was held Saturday, April 27 from 10:00 AM – 1:00 PM, at Rhythm & Rally. The YLD reserved courts and brought snacks for Macon Pickleball players! A minimum \$20 required donation was collected to benefit the Bibb County Education Foundation to support local Macon education initiatives.

A Southeastern Legal Writing Summit

Florida, Georgia, and Louisiana Young Lawyers' Divisions will collaborate with the YLD's Intellectual Property Committee and Board of Directors to unleash the knowledge of Write.Law. This event will take place on Friday, May 17th at 12:00 (EST) via Zoom to learn legal linguistics in an interactive forum! Write.Law is Ross Guberman's acclaimed legal writing powerhouse that puts on workshops to ignite briefs with Legal Lexicon! This is a one-of-a-kind opportunity to learn practical writing strategies from a writing titan!

YLD MEETINGS

Annual Meeting | June 6-9

Omni Amelia Island Resort

Fernandina Beach, Florida

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

I am honored and humbled to have served as the 77th President of the YLD. I appreciate the ongoing support from the Bar leadership and Board of Governors to make this year a success. I look forward to continuing my service as Immediate Past President.

Sincerely,



Brittanie D. Browning
2023-24 YLD President

Standing Board Policy 1000 (Positions, Articles, Programs, Meetings, Activities of Committees and Sections. Guidelines for the State Bar of Georgia)

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

1. **Mandatory Bar Regulation.** As a mandatory Bar regulated by the Supreme Court of Georgia, our organization operates differently from bar associations with voluntary membership. Our primary focus is on lawyer regulation, discipline, and serving the public, while also supporting our members and volunteers. Therefore, all programs and activities must aim to enhance the administration of justice, advance the practice of law, and improve the quality of legal services provided to the citizens of Georgia.
2. **Guiding Principles.** Our principles are derived from Rule 1-103, which is referred to in Standing Board Policy 100 and further explained in the landmark case *Keller vs. State Bar of California*, 496 U.S. 1 (1990), and related cases. It is essential to note that political or ideological activities are strictly prohibited under our rules, and all programs and events must always have a clear connection to the practice of law.
3. **Evaluation and Review.** As a mandatory Bar, we will continue to evaluate and review all submitted articles for potential publication carefully, considering these guidelines. Recommendations will be provided on the design of programs, activities, and other plans, with strict adherence to these rules. There may be instances where certain materials or activities need to be modified or rejected based on their compliance with our policies.
4. **Adherence to Position.** All planned communications or activities must align with the position outlined in this policy. The ultimate decision regarding the appropriate design rests with the offices of the Executive Director and the General Counsel. However, certain matters may require consideration and approval by the Board of Governors, the Executive Committee, or the Supreme Court of Georgia.

MEMORANDUM

To: Board of Governors
From: Damon Elmore, Executive Director
Date: June 8, 2024
Re: Proposed Rules Changes Rewrite: Part VIII - Continuing Legal Education

In or around June 2023, members of the Bar's executive, finance, OGC, CLE, and ICLE departments began work analyzing select changes to the CLE rules. The work followed general, theoretical discussions with members of the Supreme Court and following a review of the [Georgia Lawyer Competency Task Force Report](#).

Created in March 2021 by former Chief Justice Harold D. Melton, the task force was charged with evaluating the current requirements for admission to the practice law in Georgia and exploring alternatives to the existing regulatory framework. The task force also was instructed to evaluate mechanisms and alternatives for ensuring the competency of experienced lawyers, including current Continuing Legal Education requirements. While the full report impacts current and potential members of the Bar, the CLE rules rewrite was based in particular on Part Five – Mandatory Continuing Legal Education.

As we continued our review, we realized a significant level of empirical data clearly connecting legal education requirements and competence did not exist. On top of that, assessing rates of lawyer discipline may be an ineffective measure, as those cases involve rules violations and not necessarily familiarity with recent updates on the law, legal strategy, civility and professional practice pointers, and debate of our laws in a forum disconnected from the tribunal. All of these being the core of CLE programs.

We did have the results of a [membership survey](#) performed in January 2023. It was designed as a step toward preparing a baseline of data points but also served in our continuing interest in improving our internal CLE programming. 2,326 members responded to our survey and offered candid feedback and thoughts.

Some highlights and data points of the responses include:

- 34% of respondents have been practicing for more than 30 years.
- 54% of the respondents were in the metro-Atlanta area.
- 65% of the respondents are in a firm with 1-10 lawyers.
- 49% of the respondents describe their practice as traditional (firm/litigation)
- 18% describe their practice as corporate (transactions/in-house). The different practice areas varied as much as the respondents.
- 23% of respondents believed 12 hours annually was the right amount. The largest group.
- 58% of the respondents said it was absolutely important to stay current on developments in the law and their practice area (25% responded that it was very important).
- 42% of the respondents prefer online courses.

- 78% of the respondents said they were motivated to participate in CLE activities to fulfill a requirement. To learn about a specific topic received a 64% response (for a question that allowed a selection for all that applied).

With this as the backdrop, work began on several things to enhance and update the rules. That included: consideration of an expanded compliance period; emphasizing updates to Georgia's law; placing on emphasis on legal ethics; placing an emphasis on the member's particular practice area; and easing the burden on lawyers overall. Through the work, it was determined that many of those ideals were easy to address. Others were not practical or in the best interest of the members.

While this work was occurring, through a series of at least six full-day work sessions, the aforementioned rules rewrite work team incorporated those priorities into a revised rule, as well as worked to clean up or make concise other parts of the CLE rules and regulations that are promulgated by the Commission on Continuing Lawyer Competency. Below are the highlights of those changes:

- Moved from an annual CLE requirement to a biennial CLE requirement (every two years).
- The first biennial compliance period begins January 1, 2025, and ends December 31, 2026. All lawyers will have the same CLE deadline of December 31 in every even year (except new lawyers in TLPP).
- Eliminated reference to a grace period. The deadline for the CLE compliance period is December 31 of every even year (2026, 2028, 2030, etc.). If CLE hours are not completed by the compliance deadline, a \$200 late fee will be assessed. However, a notice of lawyers who have not complied or paid the late fee will be forwarded to the Supreme Court of Georgia, per the rules, no sooner than April 30 of every odd year.
- CLE Hours Requirement:
 - 18 hours every two years (maximum of 6 CLE hours can be carried from one compliance period to the next).
 - 3 hours of ethics every two years (no ethics carry-over from one compliance period to the next).
 - 2 hours of professionalism every two years (no professionalism carry-over from one compliance period to the next).
 - 3 trial hours every two years (for trial lawyers) (no trial carry-over from one compliance period to the next).
- Moved all exemptions to one place under Rule 8-104 (d). Previously, the exemptions were spread out in Rule 8-102, Rule 8-104 (c), and under Regulations to Rule 104 (c).
- Age 70 CLE Exemption:
 - Grandfathered exemption for attorneys who reached age 70 before the effective date of the new CLE rules.
 - Attorneys who reach age 70 after the effective date of the new CLE rules will have a biennial requirement of 9 CLE hours (including 3 ethics hours, 2 professionalism hours, and 3 trial hours for trial attorneys).
- Eliminated trial observation as an activity approved for CLE hours.

- Removed the portion of the rules that says, “expenses of Commission members shall not be reimbursed.”
- Moved most definitions to the top (Rule 8-102).
- Changed the CLE late fee to \$200 after the compliance deadline (currently, it is \$100) but eliminated the additional CLE late fee of \$150 currently in the regulation.
- TILPP Rules and Regulations were all moved under one rule (new Rule 8-105).
- Changed “sponsor” to “provider” and changed “attorney” to “lawyer” throughout.

At the 2024 Spring Meeting, a robust and comprehensive discussion with questions and answers occurred. Below, you will find answers to some of the more pressing questions:

Q: How is it determined if someone should complete trial hours, and how will trial CLE be enforced?

A: Trial CLE hours are suggested for any lawyer who participates in the advocacy of a client in front of any court or tribunal which has adjudicative powers. Unlike the 18-hour total CLE requirement, the 3-hour ethics requirement, and the 2-hour professionalism requirement, the trial hour requirement will not be considered when tracking a lawyer’s CLE compliance.

Q: Has the committee considered CLE credits for law school professors? Why do panelists/speakers at CLEs get credit but not those who teach law school classes?

A: No change was made to the teaching regulation stating that lawyers may earn CLE credit for non-paid teaching in an approved continuing legal education activity. Since law professors are paid for their teaching, CLE hours are not awarded for their paid teaching activities. The CCLC reviewed this regulation in 1984, 1986, 1987, 1989, 2017 and 2023. Each time the regulation was examined, the CCLC elected not to change the wording of the regulation.

Q: How will changes in Georgia’s CLE rules affect a lawyer’s ability to comply with the CLE requirements of other states?

A: Georgia lawyers can access a listing of their CLE hours attended for any time period they choose to send to other states to satisfy the CLE requirement for that particular state. CLE compliance periods and compliance deadlines for all states vary widely.

Q: How will the changes in the CLE rules affect judges’ ICJE requirements?

A: The ICJE courses that lawyers attend to meet their judge requirements count toward their CLE requirements. While the judges’ ICJE hours requirement might not change, ICJE hours can be used to satisfy CLE hours requirements, so it will not be an additional burden for judges to complete their CLE requirements. Please note that judges prohibited by law, statute, or ordinance from engaging in the practice of law are exempt from CLE requirements.

Part VIII — Continuing Legal Education

1 ~~CHAPTER 1 MINIMUM REQUIREMENTS FOR CONTINUING LEGAL EDUCATION~~

2 **Rule 8-101. Purpose.**

3 It is of utmost importance to members of the Bar and to the public that ~~attorneys~~lawyers maintain
4 their professional competence throughout their active practice of law. To that end, these rules
5 establish the minimum requirements for continuing legal education.

6 **Rule 8-102. ~~Definition~~Definitions.**

7 (a) “Accredited ~~sponsor~~provider” shall mean an organization whose entire continuing legal
8 education program has been accredited by the Commission on Continuing Lawyer Competency.

9 A specific, individual continuing legal education activity presented by such a ~~sponsor~~provider
10 constitutes an approved legal education activity.

11 (b) “Active member” shall include any person who is licensed to practice law in the State of
12 Georgia and who is an active member of the State Bar of Georgia, ~~but shall not include the~~
13 ~~Governor, Lieutenant Governor, Speaker of the House of Representatives, other Constitutional~~
14 ~~Executive Officers elected statewide, members of the Georgia Senate and the Georgia House of~~
15 ~~Representatives, United States Senators and Representatives, and shall not include judges who~~
16 ~~are prohibited by law, statute, or ordinance from engaging in the practice of law.~~

17 (c) “Biennial Compliance Period” means every two years. All active, non-exempt members
18 (except those members in the Transition Into Law Practice Program) have the same CLE
19 deadline of December 31 in every even year. The first biennial compliance period begins January
20 1, 2025, and ends December 31, 2026.

21 (d) “Commission” shall mean the Commission on Continuing Lawyer Competency (CCLC).

22 (e) “Compliance Period” shall be a biennial time frame (every two years).

23 (f) “Inactive member” shall mean a member of the State Bar who is on inactive status.

24 (g) “Legal ethics” refers to the mandatory standards set by the Georgia Rules of Professional
25 Conduct and other related guiding principles. Ethics programming instructs lawyers on
26 requirements of the rules, provides lawyers with resources to avoid violations and helps lawyers
27 understand how the rules protect the public.

28 (h) “Mentor” is a person who mentors another person in the Transition Into Law Practice
29 Program.

30 (i) A “newly admitted active member” is one who becomes an active member of the State Bar of
31 Georgia for the first time.

32 (j) “Professionalism.” The professionalism CLE requirement is distinct from, and in addition to,
33 the legal ethics CLE requirement. The professionalism requirement is satisfied by attending an
34 activity meeting the Chief Justice’s Commission on Professionalism current professionalism
35 CLE guidelines (cjcpga.org/professionalism-cle-guidelines). Legal ethics sets forth the minimal
36 standards of professional conduct required of a lawyer; professionalism encompasses what is
37 more broadly expected of lawyers to serve both client and public good. Professionalism refers to
38 the intersecting values of competence, civility, integrity, and commitment to the rule of law,

39 justice, and the public good. The general goal of the professionalism CLE requirement is to
40 create a forum in which lawyers, judges, and legal educators can explore and reflect upon the
41 meaning and goals of professionalism in contemporary legal practice. The professionalism CLE
42 sessions should encourage lawyers toward conduct that preserves and strengthens the dignity,
43 honor, and integrity of the legal profession. Professionalism CLE includes, but is not limited to,
44 courses on the duties of lawyers to the systems of justice, courts, public, clients, other lawyers,
45 and the profession; the roles of lawyers as advocates, counselors, negotiators, problem solvers,
46 and consensus builders; various forms of dispute resolution; pro bono service; the concept of a
47 profession; history of the legal profession; comparison of the legal profession in different
48 nations' systems of advocacy; and jurisprudence or philosophy of law.

49 (k) "Supreme Court" shall mean the Supreme Court of Georgia.

50 (l) "Year" shall mean the calendar year.

51 **Rule 8-103. Commission on Continuing Lawyer Competency.**

52 (A) Membership, Appointment and Terms:

53 There is established a permanent commission of the State Bar of Georgia known as the
54 Commission on Continuing Lawyer Competency. The Commission shall consist of ~~sixteen (16)~~
55 members, six ~~(6)~~ of whom shall be appointed by the Supreme Court of Georgia and six ~~(6)~~ by the
56 Board of Governors of the State Bar of Georgia, one ~~(1)~~ shall be designated by the Executive
57 Committee of the State Bar of Georgia, one ~~(1)~~ shall be the chair of the Board of ~~Trustees of the~~
58 Institute of Continuing Legal Education ~~in of the State Bar of~~ Georgia or ~~his or her~~ their designee,
59 one ~~(1)~~ shall be designated by the Chief Justice's Commission on Professionalism, and one ~~(1)~~

60 shall be designated by the President of the Young Lawyers Division of the State Bar of Georgia.

61 Members shall be ~~members~~an active member in good standing of the State Bar of Georgia.

62 Members of the Commission appointed by the Supreme Court of Georgia and by the Board of

63 Governors of the State Bar shall be appointed for staggered three ~~(3)~~-year terms and shall serve

64 until their successors are appointed,~~except that the initial appointed members of the Commission~~

65 ~~shall consist of four (4) members appointed for a term of one (1) year, four (4) members~~

66 ~~appointed for a term of two (2) years, and four (4) members appointed for a term of three (3)~~

67 ~~years. The appointed members of the initial Commission shall be appointed half by the Supreme~~

68 ~~Court and half by the Board of Governors of the State Bar of Georgia.~~ No member appointed by

69 the Supreme Court or the Board of Governors may serve more than two ~~(2)~~ consecutive terms as

70 a member of the Commission, and no such member may be reappointed otherwise to the

71 Commission until ~~he or she has~~they have been inactive as a Commission member for three ~~(3)~~

72 consecutive years. Members of the Commission designated by the Executive Committee, the

73 chair of the Board of ~~Trustees of~~ the Institute of Continuing Legal Education of the State Bar of

74 Georgia, the Chief Justice's Commission on Professionalism, and the President of the Young

75 Lawyers Division shall each serve for a term of one ~~(1)~~ year. No person so designated to the

76 Commission may serve more than three ~~(3)~~ consecutive terms as a member of the Commission,

77 and no such member may be redesignated otherwise to the Commission until ~~he or she has~~they

78 have been inactive as a Commission member for three ~~(3)~~ consecutive years.

79 ~~The~~Each year the Commission shall designate ~~each year~~ one of its members to serve as

80 Chairperson. The Executive Director of the State Bar of Georgia, the ~~Executive~~ Director of the

81 Institute of Continuing Legal Education of the State Bar of Georgia, the Executive Director of

82 the Chief Justice's Commission on Professionalism, and the ~~Executive~~ Director of the

83 Commission shall serve as ~~ex-officio liaison~~ members of the Commission, ~~but shall have no and~~
84 ~~cannot~~ vote, ~~or count toward quorum~~. The ~~Executive~~ Director of the Commission shall serve as
85 Secretary of the Commission.

86 **CCLC Regulations 8-103(a)**

87 (1) **Quorum.** Eight voting members shall constitute a quorum of the CCLC.

88 (2) **Chair.** The Chair of the CCLC shall be elected by majority vote during the
89 first meeting of CCLC in each calendar year.

90 (3) **Vice Chair.** The CCLC shall elect a Vice Chair by majority vote during the
91 first meeting of the CCLC in each calendar year.

92 (4) **Executive Committee.** The Executive Committee of the CCLC shall be
93 comprised of the Chairperson, Vice Chairperson, and a voting member to be
94 appointed by the Chairperson. Its purpose is to conduct all necessary business of
95 the CCLC that may arise between meetings of the full Commission. In such
96 matters it shall have complete authority to act for the CCLC.

97 ~~(5) **Standards of the Profession Committee.** The Chair of the CCLC shall appoint a chair of the~~
98 ~~Standards of the Profession Committee which shall devise and recommend policy to the~~
99 ~~Commission for the operation of the Transition Into Law Practice Program. The Standards of~~
100 ~~the Profession Committee shall be composed of the designee of the Executive Committee of the~~
101 ~~State Bar of Georgia, the chair of the Board of Trustees of the Institute of Continuing Legal~~
102 ~~Education in Georgia or his or her designee, the designee of the Chief Justice's Commission on~~
103 ~~Professionalism, the designee of the President of the Young Lawyers Division of the State Bar of~~
104 ~~Georgia, and any other member of the State Bar of Georgia appointed to the Standards of the~~
105 ~~Profession Committee by the Chairperson of the Commission. In addition, the Standards of the~~

106 ~~Profession Committee of the Commission shall initially be composed of the members of the~~
107 ~~Standards of the Profession Committee of the State Bar of Georgia, who shall serve at the~~
108 ~~pleasure of the Chair of the Commission.~~

109 ~~(6) Other Committees. The Chairperson may appoint from time to time any committees deemed~~
110 ~~advisable.~~

111 ~~(7)(5) Other Committees. The Chairperson may create from time to time any~~
112 ~~committees deemed advisable.~~

113 (6) Vacancy. A vacancy on the CCLC, in its officers, or on its committees,
114 occurring for whatever reason, shall be filled as soon as practical in the same
115 manner as the original holder of the position was selected.

116 ~~(Bb)~~ Powers and Duties of the Board:

117 (1) The Commission shall have general supervisory authority to administer these Rules.

118 (2) The Commission shall have specific duties and responsibilities:

119 ~~(a)~~ To approve all or portions of individual courses and programs of a
120 ~~sponsor~~provider which satisfy the educational requirements of Rule 8-~~106~~104;

121 ~~(b)~~ii) To determine the number of credit hours allowed for each course or educational
122 activity;

123 ~~(e)~~iii) To encourage courses and programs by established organizations, whether
124 offered within or without the State;

125 ~~(d)~~iv) To ~~educate~~support educating the public about the legal profession;

126 ~~(e)~~ To adopt ~~rules and~~ regulations ~~not inconsistent~~consistent with these Rules;

127 (fvi) To establish an office or offices and to employ such persons as the Commission
128 deems necessary for the proper administration of these Rules and to delegate to them
129 appropriate authority, subject to the review of the Commission;

130 (gvii) To report at least annually to the State Bar and to the Supreme Court the
131 activities and recommendations of the Commission and the effectiveness of the
132 enforcement of these Rules; and

133 (~~h~~viii) To report promptly to the Supreme Court any violation of these Rules.

134 **CCLC Regulations 8-103(b)**

135 (1) Appeals. *The CCLC is the final authority on all matters entrusted to it under*
136 *these rules. Therefore, any decision made by a committee of the CCLC pursuant*
137 *to a delegation of authority may be appealed to the full CCLC. A decision made*
138 *by the staff of the CCLC pursuant to a delegation of authority may also be*
139 *reviewed by the full CCLC, but should first be appealed to the Committee of the*
140 *CCLC having jurisdiction on the subject involved. All appeals shall be in writing.*
141 *The CCLC has the discretion to, but is not obligated to, grant a hearing in*
142 *connection with any appeal.*

143 (2) Amendments. *The CCLC may on its own motion, or on the motion of any*
144 *interested party, amend, delete, or add to the foregoing Regulations. All motions*
145 *in this regard should ~~(1) be typed, (2)~~ describe the amendment, ~~(3)~~ explain the*
146 *reasons for the amendment, and ~~(4)~~ include a draft of the suggested new*
147 *regulation.*

148 (3) All parties are ~~welcomed~~welcome to appear before the Commission in writing.
149 *If the Commission determines that further information is needed, the parties may*

150 *be invited to present their position or appeal in person or by telephone conference*
151 *call.*

152 ~~(c)~~ Finances:

153 (1) Purpose. The Commission should be adequately funded to enable it to perform its
154 duties in a financially independent manner.

155 (2) Sources. Costs of administration of the Commission shall be derived from charges to
156 members of the State Bar for continuing legal education activities.

157 ~~(a) Sponsors~~ Providers of CLE programs to be held within the State of Georgia
158 shall, as a condition of accreditation, agree to remit a list of Georgia attendees and to
159 pay a fee for each active State Bar member who attends the program. This
160 ~~sponsor's~~ provider's fee shall be based on each day of attendance, with a
161 proportional fee for programs lasting less than a whole day. The rate shall be set by
162 the Commission.

163 ~~(b)~~ (ii) The Commission shall fix a reasonably comparable fee to be paid by individual
164 ~~attorneys~~ lawyers who either (a) attend approved CLE programs outside the State of
165 Georgia or (b) attend un-approved CLE programs within the State of Georgia that
166 would have been approved for credit except for the failure of the ~~sponsor~~ provider to
167 pay the fee described in the preceding paragraph. ~~Such fee shall accompany the~~
168 ~~attorney's annual report.~~

169 (3) Uses. Funds may be expended for the proper administration of the Commission.
170 However, the members of the Commission shall serve on a voluntary basis without
171 ~~expense reimbursement or~~ compensation.

172 **CCLC Regulations 8-103(c)**

173 (1) ~~Sponsor~~**Provider Fee**. The ~~sponsor~~provider fee, a charge paid directly by the
174 ~~sponsor~~provider, is required for all approved programs held within Georgia and
175 for distance learning programs attended by Georgia ~~attorneys~~lawyers. It is
176 optional for approved programs held elsewhere. ~~Sponsors~~Providers shall remit
177 the fee, together with a list showing the names and Georgia Bar membership
178 numbers of all Georgia attendees, within ~~thirty (30)~~ days after the program is
179 held. ~~For courses held after June 30, 2019, the~~The fee is set at \$4.00 per
180 approved CLE hour per active State Bar of Georgia member in attendance. It is
181 computed as shown in the following example:

	Example	-
Georgia per hour per attendee CLE fee	\$4	
Multiplied by total approved CLE hours	x 3	
Multiplied by number of Georgia lawyer attendees	<u>x 10</u>	
Equals the total provider fee due	\$120	

185 (2) **Attendee Fee**. The attendee fee is paid by the Georgia ~~attorney~~lawyer who
186 requests credit for a program for which no ~~sponsor~~provider fee was paid.
187 ~~Attorneys should~~Members will be billed for their attendee fee on their online CLE
188 transcript. Members must remit the fee for courses taken in the current year, by
189 March 31 of the following year. For courses held after June 30, 2019, thetheir fee
190 on or before the compliance period deadline. The fee is set at \$4.00 per approved

191 CLE hour for which the ~~attorney~~lawyer claims credit. ~~†The fee~~ is computed as
192 shown in the following example:

	<i>Example</i>
Georgia per hour CLE fee	\$4
Multiplied by hours taken by attendee	<u>x 3</u>
Equals the total attendee fee due	\$12

195 (3) **Fee Review.** The Commission will review the level of the fee at least annually
196 and ~~adjust it as necessary to maintain adequate finances for prudent~~shall operate
197 ~~in a manner consistent with the financial~~ operation of the ~~Commission in a non-~~
198 ~~profit manner.~~State Bar of Georgia.

199 (4) **Uniform Application.** The fee shall be applied uniformly without exceptions
200 or other preferential treatment for any ~~sponsor~~provider or attendee.

201 (5) **Professionalism Fee.** All active members of the State Bar of Georgia
202 currently are assessed ~~an~~ \$11 surcharge annually on their dues notice. The
203 surcharge is determined each year by the Chief Justice's Commission on
204 Professionalism. This surcharge will allow for unlimited professionalism courses
205 taken during that calendar year for CLE credit. The CCLC is responsible for
206 entering all CLE credit including professionalism.

207 **Rule 8-104. Education Requirements and Exemptions.**

208 (Aa) Minimum Continuing Legal Education Requirement.

209 Each active member shall complete a minimum of ~~twelve (12)~~18 hours of ~~actual~~ instruction in an
210 approved continuing legal education activity during each ~~year~~-biennial compliance period (every
211 two years). If a member completes more than ~~twelve (12)~~18 hours in a ~~year, the excess credit~~
212 ~~may~~compliance period, a maximum of six hours can be carried ~~forward and applied~~ to the
213 ~~education requirement~~next biennial compliance period. Any active member reaching the age of
214 70 during a compliance period shall thereafter be responsible for nine hours during each biennial
215 compliance period, including three ethics, two professionalism and three trial hours if you meet
216 the ~~succeeding year only~~criteria of Rule 8-104(c). Members should choose CLE programs in
217 their practice area(s) or in an area that will benefit their practice and clients.

218 ~~(B)~~ Basic Legal Skills Requirement.

219 (1) Each active member, except those participating in the Georgia Transition Into Law
220 Practice Program, shall complete a minimum of three hours of continuing legal education
221 during each compliance period in the area of legal ethics. These hours are to be included
222 in, and not in addition to, the 18-hour biennial requirement. Ethics hours are not carried
223 forward from one compliance period to the next compliance period.

224 (2) Each active member, except those participating in the Georgia Transition Into Law
225 Practice Program, shall complete a minimum of two hours of continuing legal education
226 during each compliance period in an activity meeting the Professionalism CLE Guidelines
227 of the Chief Justice's Commission on Professionalism. These hours are to be included in,
228 and not in addition to, the 18-hour requirement. Professionalism hours are not carried
229 forward from one compliance period to the next compliance period.

230 (c) Requirements for Participation in Litigation.

231 During the compliance period, every active member who appears in a state, county, municipal, or
232 federal court, or any other tribunal should complete a minimum of three hours of continuing
233 legal education focused on trial practice. A trial practice CLE activity is one exclusively limited
234 to one or more of the following subjects: evidence, civil practice and procedure, criminal practice
235 and procedure, legal ethics and professionalism in litigation, or trial advocacy. These hours are to
236 be included in, and not in addition to, the 18-hour biennial CLE requirement. Trial CLE hours
237 are not carried forward from one compliance period to the next compliance period.

238 **CCLC Regulations 8-104(c)**

239 **Trial CLE**

240 (1) Appearing in court means a lawyer participates in the advocacy of a client in
241 front of any court or tribunal which has adjudicative powers.

242 (2) A trial CLE hour must be (a) clearly segregated and identified (b) a minimum
243 of one hour in length, and (c) limited to one or more of the five listed subjects to
244 receive trial CLE credit. A seminar that includes one or more of the trial practice
245 subjects stated in the Rule may be included in the context of a particular field of
246 trial practice, such as medical malpractice, personal injury defense, criminal
247 cases, construction law, etc.

248 (3) Trial hours for lawyers appearing in any court or tribunal with adjudicative
249 powers are suggested, but not required. However, all lawyers are reminded of
250 their duties under Rule 1.1 Competence, of the Georgia Rules of Professional
251 Conduct.

252 (4) CLE transcripts will reflect trial CLE in addition to legal ethics,
253 professionalism, and total CLE hours.

254 (d) Exemptions.

255 (1) An inactive member shall be exempt from the continuing legal education and the
256 reporting requirements of this Rule.

257 (2) The Commission has the authority to grant an exemption to an active member from
258 the continuing legal education requirements outlined in this Rule. Such an exemption
259 may not exceed the current two-year compliance period. Any additional exemptions must
260 be requested in each subsequent compliance period. The Commission will grant this
261 exemption only if it finds special circumstances unique to the member that result in
262 undue hardship.

263 (3) Any active member having reached the age of 70 prior to [EFFECTIVE DATE],
264 remains exempt from the continuing legal education requirements of this Rule, including
265 the reporting requirements, unless the member notifies the Commission in writing that
266 the member wishes to continue to be covered by the continuing legal education
267 requirements of this Rule.

268 (4) Any active member who lives outside of Georgia and does not engage in legal
269 practice within Georgia or represent Georgia clients during the compliance period will be
270 exempt from fulfilling their Continuing Legal Education requirement. This exemption
271 can be claimed by affirming their status on their online CLE transcript.

272 (5) Active members admitted to another mandatory CLE state and not residing in
273 Georgia, may satisfy all Georgia requirements by (a) meeting the CLE requirements of
274 the resident state, (b) affirming each compliance period on their online CLE transcript,
275 and (c) paying the Georgia CLE fees normally paid by active members residing in
276 Georgia.

277 (6) Any active member of the Board of Bar Examiners shall be exempt from the
278 continuing legal education but not the reporting requirement of this Rule.

279 (7) Active Military Duty. Active members serving on active duty with the United States
280 Armed Forces shall be exempt from the continuing legal education but not the reporting
281 requirement of this Rule.

282 (8) Judges. Judges prohibited by law, statute or ordinance from engaging in the practice
283 of law shall be exempt from the continuing legal education but not the reporting
284 requirement of this Rule.

285 (9) Constitutional Executive Officers elected statewide. The Governor, Lieutenant
286 Governor, Speaker of the House of Representatives, other members of the Georgia Senate
287 and the Georgia House of Representatives, United States Senators and Representatives
288 shall be exempt from the continuing legal education but not the reporting requirements of
289 this Rule.

290 **CCLC Regulations 8-104(d)**

291 (1) Inactive. To be fully exempt, the member must be inactive during the entire
292 compliance period. An active lawyer who changes to inactive status does not have
293 to complete the CLE requirement. If the lawyer changes back from inactive status
294 to active status, the lawyer must complete any CLE hours past due from the
295 previous compliance period. An inactive lawyer who changes to active status must
296 also comply with the full 18 CLE hour requirement of the current compliance
297 period.

298 (2) Undue Hardship. Requests for undue hardship exemptions on disability or

299 other grounds may be granted. The CCLC shall review and approve or disapprove
300 such requests on an individual basis.

301 **Rule 8-105. Transition Into Law Practice Program (TILPP) Requirements.**

302 **(a) Basic Legal Skills Requirement for newly admitted active members.**

303 (1) Except as set out in subsections (ai) and (bij) below, any newly admitted active
304 member ~~admitted after June 30, 2005,~~ must complete in the year of ~~his or her~~their
305 admission or in the next calendar year the State Bar of Georgia Transition Into Law
306 Practice Program, ~~and such completion.~~ Completion of the Transition Into Law Practice
307 Program shall satisfy the mandatory continuing legal education requirements for such
308 newly admitted active member for both the year of admission and the next succeeding
309 year.

310 (ai) Any newly admitted active member, who has practiced law in another United
311 States jurisdiction other than Georgia for two or more years immediately prior to
312 admission to practice in this state, may be exempted from completing the Transition
313 Into Law Practice Program upon the submission, within three months of admission,
314 of ~~an affidavit~~written notice to the Commission on Continuing Lawyer Competency.
315 The ~~affidavit~~written notice shall provide the date or dates of admission in every
316 other state in which the member is admitted to practice and a declaration that the
317 newly admitted member has been actively engaged in the practice of law for two or
318 more years immediately prior to admission in this state. Upon submission of a

319 satisfactory ~~affidavit~~written notice, the newly admitted active member shall be
320 required to complete the ~~annual twelve hours of instruction in approved continuing~~
321 ~~legal education activity beginning at the start of the first full calendar year after the~~
322 ~~date of admission~~biennial CLE requirement. Any newly admitted active member,
323 who has practiced law in another ~~United State~~ jurisdiction other than Georgia for
324 two or more years immediately prior to admission to practice in this state and who
325 does not timely file the required ~~affidavit~~written notice, shall be required to
326 complete the Transition Into Law Practice Program as set out above.
327 ~~(b)(ii)~~ Any newly admitted active member, who is a judicial law clerk or who begins
328 a clerkship within three months of admission, shall not be subject to the requirement
329 of completing the Transition Into Law Practice Program during the period of the
330 judicial clerkship. Within thirty days of admission to the State Bar or within thirty
331 days of the beginning of the clerkship if said clerkship begins within three months
332 after admission, the member shall provide written notice to the Commission on
333 Continuing Lawyer Competency of the date of entry into the clerkship position.
334 Judicial law clerks are required to complete the ~~annual twelve hours~~biennial CLE
335 requirement of regular instruction in approved continuing legal education courses
336 ~~beginning at the start of the first full calendar year after the date of admission.~~
337 Within ~~thirty~~30 days of the completion of the clerkship, the member shall provide
338 written notice to the Commission on Continuing Lawyer Competency of the date of
339 such completion. The member must complete, in the year the clerkship was
340 concluded, or the next calendar year, the Georgia Transition Into Law Practice
341 Program. Such completion of the Transition Into Law Practice Program shall satisfy

342 the mandatory continuing legal education requirements for such member for both the
343 year of completion of the clerkship and the next succeeding calendar year.

344 ~~(2) Each active member, except those participating in the Georgia Transition Into Law
345 Practice Program, shall complete a minimum of one (1) hour of continuing legal education
346 during each year in the area of ethics. This hour is to be included in, and not in addition to,
347 the twelve hour (12) requirement. If a member completes more than one (1) hour in ethics
348 during the calendar year, the excess ethics credit may be carried forward up to a maximum
349 of two (2) hours and applied to the ethics requirement for succeeding years.~~

350 ~~(3) Each active member, except those participating in the Georgia Transition Into Law
351 Practice Program, shall complete a minimum of one (1) hour of continuing legal education
352 during each year in an activity of any sponsor approved by the Chief Justice's Commission
353 on Professionalism in the area of professionalism. This hour is to be included in, and not in
354 addition to, the twelve hour (12) requirement. If a member completes more than one (1)
355 hour in professionalism during the calendar year, the excess professionalism credit may be
356 carried forward up to a maximum of two (2) hours and applied to the professionalism
357 requirement for succeeding years.~~

358 ~~(4) Confidentiality of Proceedings.~~

359 ~~(a) The confidentiality of all inquiries to, decisions of, and proceedings by the
360 Transition Into Law Practice Program shall be respected. No disclosure of said
361 inquiries, decisions and proceedings shall be made in the absence of the agreement
362 of all participating.~~

363 ~~(b)(2) Confidentiality of Proceedings.~~

364 (i) All records of the Transition Into Law Practice Program are confidential. No
365 disclosure shall be made without a waiver in writing by all parties.

366 (ii) Except as expressly permitted by these rules, no person connected with the
367 Transitions Into ~~law~~Law Practice Program operated under ~~the auspices of the~~
368 ~~Standards of the Profession Committee of~~ the Commission on Continuing Lawyer
369 Competency shall disclose any information concerning or comments on any
370 proceeding under these ~~rules~~Rules.

371 (eiii) The Transition Into Law Practice Program operated under the ~~auspices of the~~
372 ~~Standards of the Profession Committee of the~~ Commission on Continuing Lawyer
373 Competency may reveal private records when ~~require~~required by law, court rule, or
374 court order.

375 (div) Any records maintained by the Transition Into Law Practice Program operated
376 under ~~the auspices of the Standards of the Profession Committee of~~ the Commission
377 on Continuing Lawyer Competency, as provided herein, shall be available to
378 Counsel for the State Bar only in the event the State Bar or any department thereof
379 receives a discovery request or properly executed subpoena requesting such records.

380 **CCLC Regulations 8-105(a)**

381 (1)-Definitions

382 (a) A “newly admitted active member” is one who becomes an active
383 member of the State Bar of Georgia for the first time.

384 (b) Transition Into Law Practice Program. “Transition Into Law Practice
385 Program” is a program ~~organized and defined by the Standards of the~~

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~~Profession Committee~~ of the Commission on Continuing Lawyer
Competency. Currently, the Transition Into Law Practice Program consists
of ~~two~~three components:

(i) Attendance at the ~~Enhanced Bridge the Gap program, or the~~
~~Fundamentals of Law Practice program~~Beginning Lawyers
Program of the Institute of Continuing Legal Education of the
State Bar of Georgia, or a comparable program approved by the
Commission on Continuing Lawyer Competency; ~~and~~

(ii) Completion of an additional 6-hours of CLE programming of
the lawyer's choosing in the lawyer's practice area.

(iii) Completion of a Mentoring Plan of Activities and Experiences.

(c) Beginning Lawyers Program is a six-hour continuing legal education
program of the Transition Into Law Practice Program that is delivered by
the Institute of Continuing Legal Education ~~in large group settings.~~

~~Enhanced Bridge the Gap consists of two consecutive days of course work~~
~~that inform and facilitate further discussion in the mentoring context~~of the
State Bar of Georgia either in a group setting or in a distance learning
format. New lawyers employed as prosecutors and public defenders who
attend approved programming are not required to attend the Beginning
Lawyers Program.

408 *(e) Fundamentals of Law Practice. "Fundamentals of Law Practice" is the continuing legal*
409 *education program of the Transition Into Law Practice Program that is delivered by the Institute*
410 *of Continuing Legal Education in small group settings to foster close interaction between newly*
411 *admitted active lawyers and instructors. Fundamentals of Law Practice consists of two*
412 *consecutive days of course work that inform and facilitate further discussion in the mentoring*
413 *context.*

414 *(d) Mentoring Plan of Activities and Experiences. The "Mentoring Plan of*
415 *Activities and Experiences" is the plan that structures and guides the*
416 *mentoring component of the Transition Into Law Practice Program. The*
417 *Plan shall be submitted to the Program in the year of admission or early*
418 *in the next calendar year by the newly admitted active member and his or*
419 *her mentor. The Plan must be completed in the year of admission or the*
420 *next calendar year.*

421 *(2) Transition Application. Except as set out in Sections (B)(1)(a) and (B)(1)(b) above, the*
422 *Transition Into Law Practice Program shall be required of all newly admitted active members*
423 *admitted after June 30, 2005. The ICLE Bridge the Gap program shall be required of all newly*
424 *admitted active members who are admitted prior to July 1, 2005.*

425 *(3) Legal Ethics. Legal ethics refers to the mandatory standards set by the Georgia Rules of*
426 *Professional Conduct. Ethics programming instructs attorneys on requirements of the rules,*
427 *provides attorneys with resources to avoid violations and helps attorneys understand how the*
428 *rules protect the public.*

429 *(4) Professionalism. The professionalism CLE requirement is distinct from, and in addition to,*
430 *the ethics CLE requirement. The one-hour professionalism requirement is satisfied only by*

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attending an activity of any sponsor approved by the Chief Justice's Commission on Professionalism in the area of professionalism. Professionalism CLE includes, but is not limited to, courses on (a) the duties of lawyers to the systems of justice, courts, public, clients, other lawyers, and the profession, (b) the roles of lawyers as advocates, counselors, negotiators, problem solvers, and consensus builders, (c) various forms of dispute resolution, (d) pro bono service, (e) the concept of a profession, (f) history of the legal profession, (g) comparison of the legal profession in different nations' systems of advocacy, and (h) jurisprudence or philosophy of law.

~~(5) Deadlines.~~ The normal MCLE deadlines (December 31 and approved deficiency plan extensions) are applicable to the Transition Into Law Practice Program.

~~(6)(2) Approval of Mentors; Minimum Qualifications.~~

~~Minimum Qualifications for Mentors.~~ A volunteer mentor shall meet the following

Minimum Qualifications:

(a) ~~(i)~~ Active Status. Be an active member of the State Bar of Georgia, in good standing; and,

~~(ii)(b)~~ 5 Years of Practice. Have been admitted to the practice of law in Georgia for not less than five years; and,

~~(iii)(c)~~ Professional Reputation. Maintain a professional reputation in his or her local legal community for competence, ethical and professional conduct; and,

~~(iv)(d)~~ Disciplinary Action. Never have received the sanction of disbarment or suspension from the practice of law in any jurisdiction, nor have voluntarily surrendered his or her license to practice law for the

454 *purpose of disposing with a pending disciplinary proceeding in any*
455 *jurisdiction. During the ~~ten~~(10) years preceding the nomination as*
456 *mentor, the prospective mentor shall not have been otherwise sanctioned*
457 *by the pertinent entity governing the admission and practice of law in any*
458 *jurisdiction. The term “sanctioned” means subjected to disciplinary*
459 *action. (For example, in Georgia, “sanctioned” currently means any of*
460 *the levels of discipline whether public or confidential listed in State Bar of*
461 *Georgia Rule 4-102(b) (i.e., Disbarment; Suspension; Public Reprimand;*
462 *State Disciplinary Review Board Reprimand; State Disciplinary Board*
463 *Reprimand; Formal Admonition); ~~Rule 8-107 (C) (i.e., Administrative~~*
464 *Suspension for deficiency in continuing legal education hours); or State*
465 *Bar Bylaws Article I, Section 4, Item 2 (i.e., Failure to Register with State*
466 *Bar of Georgia within one year upon eligibility)). Nominations of*
467 *individuals having formal complaint-(s) pending before the Supreme Court*
468 *of Georgia will be deferred until the final disposition of the formal*
469 *complaint-(s); and,*
470 *~~(e)~~ Court-ordered Disciplinary Action. During the ~~ten~~(10) years*
471 *preceding the nomination as mentor, the prospective mentor shall not have*
472 *been the subject of a written order issued by a court of competent*
473 *jurisdiction that prohibits or otherwise limits the prospective mentor from*
474 *practicing before that court or class of courts. A directive, request or order*
475 *by a judge of a court requesting or directing that ~~an attorney~~a lawyer*
476 *employed by an agency of government or a legal aid organization who is*

477 assigned to handle cases before that judge be transferred or reassigned to
478 other duties or another courtroom does not constitute court-ordered
479 disciplinary action under this part. A prospective mentor who is or has
480 within the preceding ~~ten~~(10) years been the subject of such a written
481 order may petition the Commission on Continuing Lawyer Competency
482 (the "Commission") for a waiver of this requirement. After review of the
483 facts and circumstances which led to the entry of such order, the
484 Commission may, upon good cause shown, grant such waiver if the
485 prospective mentor is otherwise qualified to be a mentor.

486 ~~(7) Status. While CLE and TILPP mentoring activities may be completed while on inactive~~
487 ~~status, TILPP completion certification will be issued only after a member changes to active~~
488 ~~status.~~

489 ~~(C) Exemptions:~~

490 ~~(1) An inactive member shall be exempt from the continuing legal education and the reporting~~
491 ~~requirements of this Rule.~~

492 ~~(2) The Commission may exempt an active member from the continuing legal education, but not~~
493 ~~the reporting, requirements of this rule for a period of not more than one (1) year upon a finding~~
494 ~~by the Commission of special circumstances unique to that member constituting undue hardship.~~

495 ~~(3) Any active member over the age of seventy (70) shall be exempt from the continuing legal~~
496 ~~education requirements of this rule, including the reporting requirements, unless the member~~
497 ~~notifies the Commission in writing that the member wishes to continue to be covered by the~~
498 ~~continuing legal education requirements of this rule.~~

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~~(4) Any active member residing outside of Georgia who neither practices in Georgia nor represents Georgia clients shall be exempt, upon written application to the Commission, from the continuing legal education, but not the reporting, requirements of this rule during the year for which the written application is made. This application shall be filed with the annual report.~~

~~(5) Any active member of the Board of Bar Examiners shall be exempt from the continuing legal education but not the reporting requirement of this Rule.~~

Regulations

~~(1) **Inactive.** To be fully exempt, the member must be inactive during the entire year. An active attorney who changes to inactive status is not exempt during the year in which the status change occurs. An inactive attorney who changes to active status must comply with the full 12 CLE hour requirement.~~

~~(2) **Undue Hardship.** Requests for undue hardship exemptions on physical disability or other grounds may be granted. The CCLC shall review and approve or disapprove such requests on an individual basis.~~

~~(3) **Active Non-Resident.** Active non-Georgia members residing in other mandatory CLE states may satisfy all Georgia requirements by (1) meeting the CLE requirements of the resident state, (2) so reporting annually on their Georgia MCLE Annual Report, and (3) paying the Georgia CLE, professionalism, and late fees normally paid by active members residing in Georgia.~~

~~(4) **Active Military Duty.** Active members serving on active duty with the United States Armed Forces shall be exempt from the continuing legal education but not the reporting requirement of this Rule.~~

~~(D**b**) Requirements for Participation in Litigation for newly admitted active members.~~

522 ~~(1)~~ Prior to appearing as sole or lead counsel in the Superior or State Courts of Georgia in any
523 contested civil case or in the trial of a criminal case, ~~any participant~~ all participants in the
524 Transition Into Law Practice Program ~~admitted to practice after June 30, 2005~~, shall complete
525 the mandatory Advocacy Experiences of the Transition Into Law Practice Program ~~set forth in~~
526 ~~Regulation (5) hereunder~~. The mandatory Advocacy Experiences shall be completed as part of
527 the Mentoring Plan of Activities and Experiences, except that up to three ~~(3)~~ of the five ~~(5)~~
528 mandatory Advocacy Experiences may be obtained after completion of 60% of the credit hours
529 required for law school graduation and prior to admission to practice. At least two ~~(2)~~ of the
530 mandatory Advocacy Experiences must be completed as part of the Mentoring Plan of Activities
531 and Experiences.

532 ~~(2) Each active member who appears as sole or lead counsel in the Superior or State Courts of~~
533 ~~Georgia in any contested civil case or in the trial of a criminal case in 1990 or in any subsequent~~
534 ~~calendar year, shall complete for such year a minimum of three (3) hours of continuing legal~~
535 ~~education activity in the area of trial practice. A trial practice CLE activity is one exclusively~~
536 ~~limited to one or more of the following subjects: evidence, civil practice and procedure, criminal~~
537 ~~practice and procedure, ethics and professionalism in litigation, or trial advocacy. These hours~~
538 ~~are to be included in, and not in addition to, the 12-hour (twelve) requirement. If a member~~
539 ~~completes more than three (3) trial practice hours, the excess trial practice credit may be carried~~
540 ~~forward and applied to the trial practice requirement for the succeeding year only.~~

541 **Regulations**

542 ***Trial MCLE***

543 ~~(1) Lead Counsel is defined as the attorney who has primary responsibility for making all~~
544 ~~professional decisions in the handling of the case.~~

545 *(2) The trial MCLE rule applies to all members who appear as sole or lead counsel in the*
546 *Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case.*
547 *As a segment of the 12-hour (twelve) total MCLE requirement, the MCLE exemptions are*
548 *applicable to the trial MCLE rule. Likewise, the normal MCLE deadlines (December 31st and*
549 *approved deficiency plan extensions) are applicable to the trial MCLE rule.*

550 *(3) Due to the “exclusively limited” requirement, trial CLE must be (a) clearly segregated and*
551 *identified (b) a minimum of one (1) hour in length, and (c) limited to one or more of the five (5)*
552 *listed subjects in order to receive trial CLE credit. The “exclusively limited” requirement does*
553 *not prohibit credit for a seminar that deals with one or more of the subjects stated in the Rule in*
554 *the context of a particular field of trial practice, such as medical malpractice, personal injury*
555 *defense, criminal cases, construction law, etc.*

556 *(4) MCLE transcripts will reflect trial CLE in addition to ethics and total CLE. However, the*
557 *certification of compliance is made by the members when they make the court appearance*
558 *described in the Rules. The sanctions for false certification or other non-compliance lie with the*
559 *Court in which the lawyer appeared and with the State Disciplinary Board of the State Bar of*
560 *Georgia. If the Commission receives allegations or evidence of a false certification or other non-*
561 *compliance, a report thereof shall be forwarded to the State Disciplinary Board for any action it*
562 *deems necessary.*

563 **~~(5) CCLC Regulations 8-105(b)~~**

564 *For participants in the Transition Into Law Practice Program who wish to appear*
565 *as sole or lead counsel in the Superior or State Courts of Georgia in any*
566 *contested civil case or in the trial of a criminal case, the mentors and beginning*

567 lawyers shall devise five ~~(5)~~ mandatory Advocacy Experiences tailored to the
568 practices of the beginning lawyers. The following are examples:

569 ~~†(a)~~ An actual or simulated deposition of a witness or adverse party in a
570 civil action~~;~~

571 ~~†(b)~~ An actual or simulated jury trial in a civil or criminal case in either
572 a state or federal court~~;~~

573 ~~†(c)~~ An actual or simulated nonjury trial or evidentiary hearing in a
574 state or federal court~~;~~

575 ~~†(d)~~ An actual or webcast of an appellate argument in the Supreme Court
576 of Georgia, the Court of Appeals of Georgia, or a United States Circuit
577 Court of Appeals~~; and~~

578 ~~†(e)~~ An actual or simulated mediation.

579 Other advocacy experiences may be selected by Mentors to comply with Rule 8-
580 ~~104(D)105(b)~~.

581 **Rule 8-~~105~~106. Annual Report.**

582 ~~The~~At the end of each compliance period the Commission shall provide ~~at the end of each year~~
583 ~~to~~ all non-exempt active members an Annual Report of their CLE record in such form as the
584 Commission shall prescribe.

585 A member whose record contains credit for unearned hours shall report corrections ~~on or~~
586 ~~before January 31st~~within 30 days following the end of the compliance period. A member

587 whose record fails to include credit for earned hours ~~may~~must report corrections ~~on or~~
588 ~~before January 31st~~within 30 days following the end of the compliance period.

589 **Rule 8-~~106~~107. Hours and Accreditation.**

590 (Aa) Hours. The Commission shall designate the number of hours to be earned by participation,
591 including, but not limited to, teaching in continuing legal education activities approved by the
592 Commission.

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594 **Regulations**

595 ~~(1) Computation Formula. CLE hours shall be computed by the following formula:~~

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597 **CCLC Regulations 8-107(a)**

598 ~~(1) Computation Formula. CLE hours shall be computed by the following~~
599 ~~formula:~~

$$\frac{\text{Sum of total minutes}}{\text{of actual instruction}} = \text{CLE hours (round down to nearest half hour)}$$

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600 (2) **Actual Instruction.** Only legal education shall be included in computing the
601 total hours of actual instruction. The following shall not be included: (a)
602 introductory remarks, (b) breaks, (c) business meetings, (d) questions and answer
603 sessions at a ratio in excess of 10 minutes per CLE hour, (e) programs of less
604 than 60 minutes in length.

605 (3) **Teaching.** For their contribution to the legal profession, ~~attorneys~~lawyers
606 may earn credit for non-paid teaching in an approved continuing legal education
607 activity. Presentations accompanied by thorough, high quality, readable, and
608 carefully prepared written materials will qualify for CLE credit on the basis of
609 three ~~(3)~~ credits for each hour of presentation. Repeat presentations qualify for
610 one-half of the credits available for the initial presentation. A speaker may elect
611 to split the teaching credit with another ~~attorney~~lawyer who, under the speaker's
612 supervision, prepares the written materials. If the intended speaker prepares the
613 written materials and cannot speak due to health problems, emergency or
614 required court appearance, the teaching credit will be split between the speaker
615 and the substituted speaker at the request of either. Should neither make such
616 request, the credit will be given to the actual speaker.

617 (4) **Author.** The CCLC may award up to a maximum of ~~(6)~~six hours of CLE credit
618 for the authoring of legal articles upon the written certification by the
619 ~~attorney~~lawyer to the CCLC of (a) the amount of time expended in researching
620 and writing the article and (b) the submission of a copy thereof to the CCLC for
621 review, provided that ~~(1)~~ the article or treatise's content and quality are
622 consistent with the purposes of CLE; ~~(2)~~ it is published in a recognized
623 publication which is primarily directed at lawyers; and ~~(3)~~ the project was not
624 done in the ordinary course of the practice of law, the performance of judicial
625 duties, or other regular employment. If co-authors are involved, the credit may be
626 divided on the basis of each ~~attorney's~~lawyer's contribution. ~~An attorney~~A lawyer
627 requesting author credit shall pay the normal attendee fee.

628 (5) **Organizer.** *The chairperson who organizes an approved CLE activity and who*
629 *does not make a formal oral presentation therein shall qualify for CLE credit as if*
630 *he or she had made a one-hour presentation. If co-chairpersons are involved, the*
631 *credit shall be divided on the basis of each ~~attorneys'~~ lawyers' contribution. ~~An~~*
632 *~~attorney~~ A lawyer requesting this type of credit should pay, or arrange for the*
633 *~~sponsor~~ provider to pay, the normal attendee fee.*

634 ~~(6) **Lawyer Wellness.** Wellness and mental health issues, including stress, anxiety, substance~~
635 ~~abuse~~ (b) Accreditation Standards. The Commission shall approve continuing legal education
636 activities consistent with the following standards:

- 637 (1) Activities shall have significant intellectual or practical content, and the primary
638 objective shall be to increase the participant's professional competence as a lawyer;
639 (2) Activities shall constitute an organized program of learning dealing with matters
640 directly related to the practice of law, professional responsibility or ethical obligations of
641 lawyers;
642 (3) Credit may be given for continuing legal education activities where (a) live
643 instruction is used or (b) by using distance learning programs that meet interactive,
644 technical and accreditation standards set forth by the Commission.
645 (4) Continuing legal education materials are to be prepared, and activities conducted, by
646 an individual or group qualified by practical or academic experience;
647 (5) Thorough, high quality, and carefully prepared written materials should be distributed
648 to all attendees at or before the time the course is presented. It is recognized that written
649 materials are not suitable or readily available for some types of subjects; the absence of
650 written materials for distribution, should, however, be the exception and not the rule (See

651 CCLC Regulation 8-107(b)(10);

652 (6) The Commission will review requests from CLE providers for accredited provider
653 status. Any provider desiring to be approved for accredited provider status must file an
654 application with the Commission with such program material and information as the
655 Commission may require;

656 (7) Any accredited provider must keep and maintain attendance records of each
657 continuing legal education program sponsored by it, which shall be furnished to the
658 Commission upon its request.

659 **CCLC Regulations 8-107(b)**

660 *(1) Continuing Legal Education. The CCLC shall determine those matters which*
661 *directly relate to the practice of law so as to be eligible for CLE credit. They shall*
662 *constitute an organized program of learning dealing with matters directly related*
663 *to the practice of law, professional responsibility, or ethical obligations of*
664 *lawyers.*

665 *(2) Law School Courses. Courses offered by an ABA accredited law school shall*
666 *receive credit on the basis of one-half hour of CLE credit for each 60 minutes of*
667 *actual instruction. Success on an examination is not required for credit and the*
668 *course may be attended on an audit (not for academic credit) basis. No credit is*
669 *available for law school courses attended prior to becoming an active member of*
670 *the State Bar of Georgia. Law courses in schools other than law schools will not*
671 *qualify.*

672 (3) Bar Review/Refresher Course. Courses designed to review or refresh recent
673 law school graduates or other lawyers in preparation for any bar exam shall not
674 be approved for CLE credit.

675 (4) Approval. CLE activities may be approved upon the written application of
676 providers on an individual program basis, providers on an accredited provider
677 basis, or lawyers on an individual program basis. In addition, the CCLC may
678 approve both CLE activities and accredited providers on its own motion, on
679 either an individual program or accredited provider basis. All applications for
680 CLE course approval shall:

681 (a) Be submitted at least 30 days, and preferably longer, in advance of the
682 course, although the CCLC may grant retroactive approval;

683 (b) Be submitted through the provider portal for CLE providers or on
684 forms furnished by the CCLC on the website for individual lawyers to
685 submit by email;

686 (c) Contain all information requested on the form;

687 (d) Be accompanied by a course outline or brochure that describes the
688 course content, identifies the teachers, lists the time devoted to each topic,
689 and shows each date and location at which the program will be offered;

690 (e) Include a detailed calculation of the total CLE hours, legal ethics
691 hours, professionalism hours, and trial hours.

692 In addition to the foregoing, providers shall within 30 days after the course is
693 concluded:

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(a) Submit the name and Bar number of the attendees using the provider portal:

(b) Remit to the CCLC the appropriate provider fee.

Providers who have advance approval for courses may include in their course descriptions information that this course has been approved by the Commission on Continuing Lawyer Competency of the State Bar of Georgia for mandatory continuing legal education credit.

Providers not having advance approval shall make no representation concerning the approval of a course for CLE credit by the CCLC.

The CCLC will send a notice of its decision on all CLE activity approval requests within 60 days of their receipt. Approval thereof will be deemed if the notice is not timely sent. This automatic approval will not be granted if the provider contributes to the delay by failing to provide the complete information requested by the CCLC, or if the CCLC timely notifies the provider that the matter has been tabled and the reason therefore.

(5) Approval of Accredited Providers. CCLC may, at its sole discretion, approve the accredited providers. Accredited providers shall

(a) Complete such application as the CCLC requires:

(b) Comply with all the CLE rules and regulations, including any amendments thereto;

(c) Upon request by the CCLC, submit, through the online provider portal, all future CLE activities for confirmation of the approved total number of CLE hours, legal ethics hours, trial hours and professionalism hours;

717 (d) Conduct all CLE activities substantially as advertised and represented
718 to the CCLC;

719 (e) Furnish to the CCLC, within 30 days after each CLE activity, through
720 the online provider portal the following:

721 (i) A list of the name and State Bar membership number of each
722 Georgia attendee; and

723 (ii) The required provider fee for the CLE activity;

724 (f) Allow in-person observation of all CLE activities by the Justices of the
725 Supreme Court, officers of the State Bar of Georgia, members of the
726 Overview Committee, members of the CCLC and the CCLC staff;

727 (g) Comply with any and all requirements or representations which may
728 be contained in any form required by the CCLC for the confirmation of the
729 number of approved hours, and

730 (h) Submit such other forms as the CCLC may from time to time require,
731 and reply to any and all inquiries from the CCLC.

732 (6) Restrictions on Accredited Providers. Accredited providers shall not use any
733 name which may cause confusion with the State Bar or any of its entities or with
734 the Commission on Continuing Lawyer Competency, or with the Institute of
735 Continuing Education of the State Bar of Georgia. At the sole discretion of the
736 CCLC, an accredited provider may be required to place a disclaimer upon any
737 communication with members of the State Bar which disclaims the accredited

738 provider from any connection with the State Bar or CCLC. Such disclaimer, if
739 required, shall be approved by the CCLC.

740 (7) **Revocation of Accredited Provider Status.** The CCLC may, with or without
741 cause, at its sole discretion, revoke the accredited provider status of any CLE
742 provider.

743 (8) **In-House CLE.** The Commission recognizes that law firms, corporate legal
744 departments and similar entities, either alone or in conjunction with each other,
745 will develop and present In-House continuing legal education activities to assist
746 their member lawyers in maintaining their professional competence. The
747 Commission further recognizes that these In-House CLE activities often are
748 designed to address matters most relevant to a firm's own lawyers.

749 These In-House CLE activities may be approved for credit under these
750 Rules and Regulations when meeting the following additional conditions:

751 (a) All In-House CLE activities shall be designed specifically as an
752 organized program of learning.

753 (b) All In-House CLE activities must be open to observation by members
754 of the CCLC and its staff;

755 (c) Experienced lawyers must substantially contribute to the development
756 and presentation of all In-House CLE activities;

757 (d) In-House CLE activities must be scheduled at a time and location so as
758 to be free of interruptions from telephone calls and other office matters.

759 (e) Lawyers can earn all or any portion of their CLE requirement through
760 approved In-House CLE activities.

761 (9) Facilities. Providers ordinarily must provide a facility with adequate lighting
762 and temperature-controlled ventilation. For a non-clinical CLE activity, the
763 facility should be set up in classroom or similar style to provide a writing surface
764 for each pre-registered attendee, to provide a minimum of two linear feet of table
765 space per chair and should provide sufficient space behind the chairs in each row
766 to permit easy access and exit to each seat. Crowding in the facility detracts from
767 the learning process and will not be permitted.

768 (10) Written Materials. Qualifying written materials should specifically address
769 each of the topics of the seminar. These materials must be prepared by the
770 speaker (or someone acting under his or her direct supervision) and shall be
771 distributed to all attendees at or before the time the seminar is held. There are
772 essentially three rationales for these requirements. First, they ensure speaker
773 organization and preparation. Second, they alleviate the need for attendees to
774 take notes and allow them to concentrate on the oral presentations. Finally, they
775 provide a valuable reference tool for the attendees after they leave the seminar.
776 Examples of written materials which alone would not qualify include, but are not
777 limited to, the following: (1) topical outlines; (2) topical outlines with case
778 citations; (3) copies of statutes or cases (unless accompanied by qualifying
779 explanatory text); (4) copies of leases, contracts, wills and other legal instruments
780 (unless accompanied by qualifying explanatory text).

781 The quality of oral presentations and the overall educational value of the seminar
782 will not excuse the written materials accreditation requirement.

783 It is recognized that on rare occasions, or for unique topics, preparation of
784 written materials may not be possible or appropriate. Thus, for example, where
785 the particular law which is the topic of a seminar changes dramatically
786 immediately before the seminar is given, the prepared materials may be rendered
787 obsolete. Likewise, written materials may not always be suitable for a clinical
788 program on oral advocacy. In these exceptional circumstances, the requirements
789 of this regulation may not apply. If there is any question as to whether written
790 materials are required for a given topic, the **provider is advised to contact the**
791 **Commission in advance of the seminar.**

792 **(11) Provider Records.** In addition to the required attendance records, providers
793 are encouraged, though not required, to solicit written evaluations of each
794 sponsored program from its attendees and to maintain for at least two years after
795 the program all such evaluations received, both for the provider's benefit and for
796 furnishing to the Commission upon its request. A provider's policy either to solicit
797 and maintain such evaluations or not to do so may be considered by the
798 Commission as a factor bearing on the provider's accreditation.

799 **(12) Primary Objective Test.** The primary objective of CLE shall be to increase
800 the attendee's professional competence as a lawyer. Worthwhile professional
801 activities which have other primary objectives are encouraged, but do not meet
802 the accreditation standards for CLE credit. Bar meetings, service on committees,
803 jury duty, and client development or marketing seminars are examples of
804 activities which do not meet the primary objective test.

805 (13) ADR CLE. CLE activities which train lawyers in the generally accepted
806 processes of alternative dispute resolution are consistent with Accreditation
807 Standards 1 and 2 where such programs meet the other criteria set forth herein.

808 (14) Practice Management CLE. (CLE activities relating to the development and
809 management of a law practice including client relations) Practice Management
810 CLE includes, but is not limited to, those activities which (1) teach lawyers how to
811 organize and manage their law practices so as to promote the efficient,
812 economical and competent delivery of legal services; and (2) teach lawyers how
813 to create and maintain good client relations consistent with existing ethical and
814 professional guidelines so as to eliminate malpractice claims and bar grievances
815 while improving service to the client and the public image of the profession.
816 Practice Management CLE is consistent with Accreditation Standards 1 and 2
817 where such programs meet the other criteria set forth herein.

818 (15) Lawyer Wellness. Wellness and mental health issues, including stress,
819 anxiety, substance use, depression and suicide, materially affect lawyers'
820 competency to practice law and their lives. CLE credit as required under Rule 8-
821 104(Aa) is available for seminars on these and similar quality of life and law
822 practice topics. To receive CLE credit these wellness topics must be discussed in
823 the context of the legal profession and the effects on the quality of the legal
824 services the lawyer is able to provide. Presentations approved may include stress
825 management in the context of work/life balance in the practice of law, signs of
826 substance abuse or mental health issues in oneself or a colleague within the legal
827 community, lawyer assistance programs and other topics that are focused on the

828 *impact of substance abuse, mental health issues or stress management on lawyers*
829 *and judges. CLE credit will not be given to presentations which solely focus on*
830 *personal stress reduction techniques such as breathing exercises, meditation and*
831 *yoga. In addition, professionalism CLE credit is available when these topics are*
832 *presented in a professionalism program approved by meet the Chief Justice's*
833 *Commission on Professionalism- current professionalism CLE guidelines*
834 *(cjcpga.org/professionalism-cle-guidelines).*

835 **(7) Trial Observation.** Every trial encompasses many aspects of the practice of law that are
836 consistently taught in both law school and continuing legal education seminars. Observing how
837 this education is applied into actual practice in the form of a current trial is, in and of itself, very
838 educational. Its importance in achieving competency as a lawyer cannot be emphasized enough.
839 To encourage this, CLE credit for observing trials is available under the following guidelines
840 a. Jury trials, bench trials, motion hearings and appellate court arguments in any Federal or State
841 court are eligible. Administrative hearings, trials and probate court, and mediations/arbitrations
842 are also eligible.
843 b. Proceedings in magistrate court and pro se matters are not eligible.
844 c. Credit is not available for trials in which the member takes an active role in the trial or any
845 phase thereof.
846 d. The credit shall be treated as In-House and subject to the limitations of Regulation 8e under
847 Rule 8-106 (B).
848 e. The credit is not eligible for ethics or professionalism CLE.
849 f. The credit is self-reported to the CCLC and must include:

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- member's name and bar number
- the name of the court, parties, date of trial and type of trial
- the credit applicable (actual time rounded to nearest half hour)
- the administrative fee required by Rule 8-103(C)(2) (currently \$4 per credit hour)

~~(B) Accreditation Standards: (1) The Commission shall approve continuing legal education activities consistent with the following standards:~~

- ~~(1) They shall have significant intellectual or practical content, and the primary objective shall be to increase the participant's professional competence as a lawyer;~~
- ~~(2) They shall constitute an organized program of learning dealing with matters directly related to the practice of law, professional responsibility or ethical obligations of lawyers;~~
- ~~(3) Credit may be given for continuing legal education activities where (a) live instruction is used or (b) mechanically or electronically recorded or reproduced material is used if a qualified instructor is available to comment and answer questions;~~
- ~~(4) Continuing legal education materials are to be prepared, and activities conducted, by an individual or group qualified by practical or academic experience in a setting physically suitable to the educational activity of the program;~~
- ~~(5) Thorough, high quality, and carefully prepared written materials should be distributed to all attendees at or before the time the course is presented. It is recognized that written materials are~~

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~~not suitable or readily available for some types of subjects; the absence of written materials for distribution, should, however, be the exception and not the rule;~~

~~(6) The Commission may issue from time to time a list of approved accredited sponsors deemed by it to meet the requirements set forth in this Rule. Any other sponsor desiring to be approved for accredited sponsor status must file an application with the Commission with such program material and information as the Commission may require;~~

~~(7) Any accredited sponsor must keep and maintain attendance records of each continuing legal education program sponsored by it, which shall be furnished to the Commission upon its request.~~

Regulations

~~*(1) Continuing Legal Education. The CCLC shall determine those matters which directly relate to the practice of law so as to be eligible for CLE credit. They shall constitute an organized program of learning dealing with matters directly related to the practice of law, professional responsibility, or ethical obligations of lawyers.*~~

~~*(2) Law School Courses. Courses offered by an ABA accredited law school shall receive credit on the basis of one half (1/2) hour of CLE credit for each 60 minutes of actual instruction. No more than twenty four (24) CLE hours in any calendar year may be earned by law school courses. Success on an examination is not required for credit and the course may be attended on an audit (not for academic credit) basis. No credit is available for law school courses attended*~~

894 ~~prior to becoming an active member of the State Bar of Georgia. Law courses in~~
895 ~~schools other than law schools will not qualify.~~

896 ~~(3) Bar Review/Refresher Course. Courses designed to review or refresh recent law school~~
897 ~~graduates or other attorneys in preparation for any bar exam shall not be approved for CLE~~
898 ~~credit.~~

899 ~~(4) Approval. CLE activities may be approved upon the written application of~~
900 ~~sponsors on an individual program basis, sponsors on an accredited sponsor basis,~~
901 ~~or attorneys on an individual program basis. In addition, the CCLC may approve~~
902 ~~both CLE activities and accredited sponsors on its own motion, on either an~~
903 ~~individual program or accredited sponsor basis. All applications for CLE course~~
904 ~~approval shall:~~

905 ~~a. Be submitted at least thirty (30) days, and preferably longer, in advance of the course,~~
906 ~~although the CCLC may grant retroactive approval;~~

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908 ~~b. Be submitted on forms furnished by the CCLC;~~

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910 ~~c. Contain all information requested on the form;~~

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912 ~~d. Be accompanied by a course outline or brochure that describes the course content, identifies~~
913 ~~the teachers, lists the time devoted to each topic, and shows each date and location at which the~~
914 ~~program will be offered;~~

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916 ~~e. Include a detailed calculation of the total CLE hours and of the ethics hours.~~

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In addition to the foregoing, sponsors shall within thirty (30) days after the course is concluded:

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a. Furnish to the CCLC a list in alphabetical order of the name and State Bar number of each

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Georgia attendee;

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b. Remit to the CCLC the appropriate sponsor fee. Sponsors who have advance approval for

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courses may include in their brochures or other course descriptions the information contained in

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the following illustration:

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This course (or seminar, etc.) has been approved by the Commission on Continuing Lawyer

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Competency of the State Bar of Georgia for mandatory continuing legal education credit in the

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amount of _____ hours, of which _____ hours will also apply in the area of ethics. The reporting

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of your attendance at this course will be done for you by (name of sponsor). To assure proper

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credit, please be sure to furnish us with your correct Georgia Bar number. (If applicable: The

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administrative fee for this course will be paid for you by (name of sponsor) directly to the

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Commission.)

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Sponsors not having advance approval shall make no representation concerning the approval of a

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course for CLE credit by the CCLC.

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The CCLC will mail a notice of its decision on all CLE activity approval requests within ninety

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days of their receipt. Approval thereof will be deemed if the notice is not timely mailed. This

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automatic approval will not operate if the sponsor contributes to the delay by failing to provide

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the complete information requested by the CCLC, or if the CCLC timely notifies the sponsor that

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the matter has been tabled and the reason therefore.

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~~(5) Approval of Accredited Sponsors. CCLC may, at its sole discretion, approve the accredited sponsors. Accredited sponsors shall~~

- ~~a. Complete such application as the CCLC requires;~~
- ~~b. Comply with all the CLE rules and regulations, including any amendments thereto;~~
- ~~c. Upon request by the CCLC, submit, on forms to be furnished by the CCLC, all future CLE activities for confirmation of the approved total number of CLE hours, ethics hours, trial hours and professionalism hours~~
- ~~d. Conduct all CLE activities substantially as advertised and represented to the CCLC;~~
- ~~e. Furnish to the CCLC, within 30 days after each CLE activity, the following:
 - ~~i. A list of the name and State Bar membership number of each Georgia attendee; and~~
 - ~~ii. The required sponsor fee for the CLE activity;~~~~
- ~~f. Allow in-person observation of all CLE activities by the Justices of the Supreme Court, officers of the State Bar of Georgia, members of the Overview Committee, members of the CCLC and the CCLC staff;~~
- ~~g. Comply with any and all requirements or representations which may be contained in any form required by the CCLC for the confirmation of the number of approved hours, and~~
- ~~h. Submit such other forms as the CCLC may from time to time require, and reply to any and all inquiries from the CCLC.~~

~~(6) Restrictions on Accredited Sponsors. Accredited sponsors shall not use any name which may cause confusion with the State Bar or any of its entities or with the Commission on Continuing Lawyer Competency, or with ICLE in Georgia. At the sole discretion of the CCLC,~~

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an accredited sponsor may be required to place a disclaimer upon any communication with members of the State Bar which disclaims the accredited sponsor from any connection with the State Bar or CCLC. ~~Such disclaimer, if required, shall be approved by the CCLC. An accredited sponsor shall not link to any web page on the State Bar of Georgia without the written approval of the State Bar of Georgia and subject to any requirements and restriction that may be placed upon such approval.~~

~~(7) **Revocation of Accredited Sponsor Status.** The CCLC may, with or without cause, at its sole discretion, revoke the accredited sponsor status of any CLE provider.~~

~~(8) **In-House CLE.** The Commission recognizes that law firms, corporate legal departments and similar entities, either alone or in conjunction with each other, will develop and present In-House continuing legal education activities to assist their member attorneys in maintaining their professional competence. The Commission further recognizes that these In-House CLE activities often are designed to address matters most relevant to a firm's own attorneys.~~

~~These In-House CLE activities may be approved for credit under these Rules and Regulations plus the following additional conditions:~~

~~a. All In-House CLE activities shall be designed specifically as an organized program of learning.~~

~~b. All In-House CLE activities must be open to observation by members of the CCLC and its staff;~~

~~c. Experienced attorneys must substantially contribute to the development and presentation of all~~

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In House CLE activities;

d. In House CLE activities must be scheduled at a time and location so as to be free of interruptions from telephone calls and other office matters.

~~e. Attorneys can earn all or any portion of their CLE requirement through approved In House CLE activities.~~

~~(9) Facilities. Sponsors ordinarily must provide a facility with adequate lighting, temperature controlled ventilation, and a designated non-smoking area. For a non-clinical CLE activity, the facility should be set up in classroom or similar style to provide a writing surface for each pre-registered attendee, to provide a minimum of two linear feet of table space per chair, and should provide sufficient space behind the chairs in each row to permit easy access and exit to each seat.~~

~~Crowding in the facility detracts from the learning process and will not be permitted.~~

~~(10) Written Materials. Qualifying written materials shall specifically address each of the topics of the seminar. These materials must be prepared by the speaker (or someone acting under his or her direct supervision) and shall be distributed to all attendees at or before the time the seminar is held. There are essentially three rationales for these requirements. First, they ensure speaker organization and preparation. Second, they alleviate the need for attendees to take notes and allow them to concentrate on the oral presentations. Finally, they provide a valuable reference tool for the attendees after they leave the seminar.~~

1005 Examples of written materials which alone would not qualify include, but are not limited to, the
1006 following: (1) topical outlines; (2) topical outlines with case citations; (3) copies of statutes or
1007 cases; (4) copies of leases, contracts, wills and other legal instruments (unless accompanied by
1008 qualifying explanatory text); (5) hornbooks (unless speaker prepared and on point); (6)
1009 casebooks; (7) subsequently prepared transcripts.

1010 ~~The quality of oral presentations and the overall educational value of the seminar~~
1011 ~~will not excuse the written materials accreditation requirement.~~

1012 ~~It is recognized that on rare occasions, or for unique topics, preparation of written materials~~
1013 ~~may not be possible or appropriate. Thus, for example, where the particular law which is the~~
1014 ~~topic of a seminar changes dramatically immediately before the seminar is given, the prepared~~
1015 ~~materials may be rendered obsolete. Likewise, written materials may not always be suitable for a~~
1016 ~~clinical program on oral advocacy. In these exceptional circumstances, the requirements of this~~
1017 ~~regulation may not apply. If there is any question as to whether written materials are required~~
1018 ~~for a given topic, the sponsor is advised to contact the Commission in advance of the seminar.~~

1019 **(11) Sponsor Records.** In addition to the required attendance records, sponsors are encouraged,
1020 though not required, to solicit written evaluations of each sponsored program from its attendees
1021 and to maintain for at least two years after the program all such evaluations received, both for the
1022 sponsor's benefit and for furnishing to the Commission upon its request. A sponsor's policy
1023 either to solicit and maintain such evaluations or not to do so may be considered by the
1024 Commission as a factor bearing on the sponsor's accreditation.

1025 ~~(12) Primary Objective Test. The primary objective of CLE shall be to increase~~
1026 ~~the attendee's professional competence as a lawyer. Worthwhile professional~~
1027 ~~activities which have other primary objectives are encouraged, but do not meet~~

1028 ~~the accreditation standards for CLE credit. Bar meetings, service on committees,~~
1029 ~~jury duty, and client development or marketing seminars are examples of~~
1030 ~~activities which do not meet the primary objective test.~~

1031 ~~(13) ADR CLE. CLE activities which train attorneys in the generally accepted processes of~~
1032 ~~alternative dispute resolution are consistent with Accreditation Standards 1 and 2 where such~~
1033 ~~programs meet the other criteria set forth herein~~

1034 ~~(14) Practice Management CLE. (CLE activities relating to the development and~~
1035 ~~management of a law practice including client relations) Practice Management~~
1036 ~~CLE includes, but is not limited to, those activities which (1) teach lawyers how to~~
1037 ~~organize and manage their law practices so as to promote the efficient,~~
1038 ~~economical and competent delivery of legal services; and (2) teach lawyers how~~
1039 ~~to create and maintain good client relations consistent with existing ethical and~~
1040 ~~professional guidelines so as to eliminate malpractice claims and bar grievances~~
1041 ~~while improving service to the client and the public image of the profession.~~
1042 ~~Practice Management CLE is consistent with Accreditation Standards 1 and 2~~
1043 ~~where such programs meet the other criteria set forth herein.~~

1044 **(15) Distance Learning CLE.** In addition to traditional approved continuing
1045 legal education activities attended live and in-person by groups of
1046 attorneys~~lawyers~~, distance learning delivery formats are acceptable provided they
1047 are designed specifically as organized programs of learning and meet the other
1048 accreditation standards set out in these Rules and Regulations. Examples of
1049 qualifying distance learning formats include: live CLE activities presented via
1050 video or audio replays of live CLE activities; computer-based CLE activities, on

1051 demand CLE programs, teleconference CLE programs and live CLE
1052 webcasts/webinars. ~~Attorneys~~Lawyers can earn all or any portion of their CLE
1053 requirement through Distance Learning CLE programs.

1054 ~~(4617)~~ **Interactivity Requirement for Approval of Distance Learning CLE.**
1055 ~~(Effective January 2022)~~ CLE ~~sponsors~~providers are reminded that CCLC
1056 emphasizes the importance of engagement in distance learning programming. The
1057 CCLC recognizes high levels of interaction that can be achieved through
1058 ubiquitous video streaming services and encourages the use of these technologies
1059 to maximum the educational experience.

1060 Courses must provide mechanisms to ensure interactivity and permit the
1061 attendee to interact with the presenter, other attendees or with the educational
1062 software itself based on responses by the participant. The following methods are
1063 provided as examples of course monitoring: Periodic Quizzing, Response
1064 Tracking, Web Logs, Video Monitoring, Time Recorders, Live Chat, Final
1065 Tests, User Navigation Monitoring and User Prompts.

1066 ~~The~~Due to changes in technology, the CCLC ~~does~~is not undertake the
1067 ~~indeterminate task of~~ issuing a precise ~~definitions~~definition of interactivity.
1068 Specific implementation of all of the above is not required, but incorporation of
1069 technology to ensure a positive and interactive educational experience is
1070 required.

1071 ~~CLE Sponsors should provide high quality written instructional materials. These materials may~~
1072 ~~be available for download or otherwise furnished so attendees will have the ability to refer to~~
1073 ~~such material during and subsequent to the program.~~

1074 **Rule 8-~~107. Grace~~108. Compliance Period and Noncompliance.**

1075 **(A) ~~Grace~~(a) Compliance Period**

1076 (1) Members ~~who are deficient in~~must complete their CLE requirement, fees, or other
1077 requirements ~~at~~by the end of ~~a calendar year are entitled to an automatic grace~~the
1078 biennial compliance period ~~until March 31st of the succeeding year to make up their~~
1079 ~~deficiency. This does not change the requirement that~~. The compliance period deadline
1080 date is the same for all members ~~file their annual report by January 31st.~~ The CLE
1081 compliance period and deadline date are listed on the State Bar of Georgia's website and
1082 are also shown on each members' online CLE transcript.

1083 (2) Members who remain deficient ~~on April 1st~~following the end of the ~~succeeding~~
1084 ~~year~~compliance period shall pay a CLE late ~~CLE~~-fee in an amount to be set by the
1085 Commission.

1086 **(B) ~~b~~(b) Noncompliance**

1087 (1) Notice. Members who remain deficient in their CLE, ~~annual report filing~~, fees, or
1088 other requirements ~~on April 1st~~at the end of the ~~succeeding year~~compliance period are in
1089 noncompliance. The Commission shall so notify the members by ~~first class mail~~email to
1090 the member's current email address contained in the membership records of the State Bar
1091 of Georgia. Service or actual receipt is not a prerequisite to actions authorized by these
1092 Rules.

1093 (2) Hearing. Members may contest their noncompliance by requesting a hearing before the
1094 Commission. The request should be in writing, contain the reasons for their contest, and be

1095 made within 60 days of the date of the notice of noncompliance ~~mailed~~sent by the
1096 Commission. The Commission shall hear the matter at its next meeting. No action will be
1097 taken while hearings are pending. All decisions by the Commission are final.

1098 (3) Report. The Commission shall report to the Supreme Court of Georgia those members
1099 who remain in noncompliance after the time to request hearings has expired or any
1100 requested hearings have been held.

1101 (4) Supreme Court of Georgia Action. Upon receipt from the Commission of a report of
1102 noncompliance, the Supreme Court of Georgia shall enter an order it deems appropriate
1103 including an allowance of additional time for compliance or summary suspension from the
1104 practice of law until further order of the Court.

1105 **CCLC Regulation 8-108(a)**

1106 (1) **CLE Late CLE Fee: An attorney** ~~A lawyer~~ who does not complete the
1107 ~~annual, minimum~~ CLE requirement ~~until after March 31st~~ by the end of the
1108 ~~following year~~ compliance period shall pay a ~~\$100~~ \$200 CLE late ~~CLE~~ fee. This
1109 ~~late fee shall be due April 1st. Thereafter, if the attorney's CLE deficiency is not~~
1110 ~~corrected by September 30th~~ 30 days following the end of the same year, or if the
1111 \$100 late CLE fee remains unpaid on that September 30th, an additional \$150
1112 late fee shall be due immediately compliance period.

1113 **Rule 8-~~108~~109.** Reinstatement.

1114 An active member suspended under the provisions of these rules may be reinstated by the Court
1115 upon motion of the Commission and upon a showing that the delinquency has been corrected and
1116 payment to the Commission of a ~~uniform~~ reinstatement fee fixed by the Commission.

1117 **CCLC Regulations Rule 8-109**

1118 (1) ~~(1)~~ **Reinstatement Fee.** ~~The uniform~~ reinstatement fee is \$500 for a member's
1119 first reinstatement, \$1,000 for a second reinstatement by the same member,
1120 and \$2,000 for all subsequent reinstatements by the same member. This fee
1121 must accompany the reinstatement motion. It shall not be waived and is non-
1122 refundable ~~in the event if~~ reinstatement is not granted.

1123 (2) ~~(2)~~ **Policy.** Reinstatement will be granted only upon a showing that the
1124 member has attended sufficient approved CLE activity to make-up the
1125 deficiencies causing the suspension and all deficiencies in subsequent
1126 ~~years compliance periods.~~ Also, the member's progress toward meeting
1127 ~~MCLE~~ requirements in the ~~calendar year~~ current compliance period in
1128 which the reinstatement is requested will be included as information in the
1129 CCLC's motion to the Supreme Court.

1130 (3) ~~(3)~~ **Motion.** The motion for reinstatement shall list the CLE activities by
1131 course number, ~~sponsor~~ provider, location, dates and hours. It shall be
1132 accompanied by proof of attendance, any attendee fee that may be due, and
1133 the reinstatement fee.

1134 (4) **CCLC Action.** If the suspended member is found to be in compliance, the
1135 CCLC will file a motion with the Supreme Court of Georgia setting forth the
1136 facts along with its recommendation which may or may not be that

1137 *reinstatement be granted. The Supreme Court will make the final decision on*
1138 *reinstatement. If the suspended member is found to not be in compliance, the*
1139 *CCLC will inform ~~him~~them of the curative actions necessary to cure ~~his~~their*
1140 *deficiencies.*

1141 **Rule 8-~~109~~110. Confidentiality.**

1142 Records of the Commission are not confidential.

1143 **Rule 8-~~110~~111. Immunity.**

1144 The State Bar, ~~its employees, the Standards of the Profession Committee members and~~
1145 ~~advisory~~Georgia, the Commission on Continuing Lawyer Competency, ~~its employees, members~~
1146 ~~and advisory~~, the Chief Justice's Commission on Professionalism, ~~his~~their employees, board of
1147 directors, members, and advisorsliaisons, shall be absolutely immune from civil liability ~~of all~~
1148 ~~acts~~ in the courseperformance of their official duties.

1149 **Rule 8-112. Foreign Law Consultants.**

1150 Foreign law consultant members of the State Bar of Georgia shall be subject to and shall comply
1151 with the provisions of this Part VIII in the same manner and to the extent as active members of
1152 the State Bar of Georgia.

1153

Part VIII – Continuing Legal Education

1 **Rule 8-101. Purpose.**

2 It is of utmost importance to members of the Bar and to the public that lawyers maintain their
3 professional competence throughout their active practice of law. To that end, these rules
4 establish the minimum requirements for continuing legal education.

5 **Rule 8-102. Definitions.**

6 (a) “Accredited provider” shall mean an organization whose entire continuing legal education
7 program has been accredited by the Commission on Continuing Lawyer Competency. A specific,
8 individual continuing legal education activity presented by such a provider constitutes an
9 approved legal education activity.

10 (b) “Active member” shall include any person who is licensed to practice law in the State of
11 Georgia and who is an active member of the State Bar of Georgia.

12 (c) “Biennial Compliance Period” means every two years. All active, non-exempt members
13 (except those members in the Transition Into Law Practice Program) have the same CLE
14 deadline of December 31 in every even year. The first biennial compliance period begins January
15 1, 2025, and ends December 31, 2026.

16 (d) “Commission” shall mean the Commission on Continuing Lawyer Competency (CCLC).

17 (e) “Compliance Period” shall be a biennial time frame (every two years).

- 18 (f) “Inactive member” shall mean a member of the State Bar who is on inactive status.
- 19 (g) “Legal ethics” refers to the mandatory standards set by the Georgia Rules of Professional
20 Conduct and other related guiding principles. Ethics programming instructs lawyers on
21 requirements of the rules, provides lawyers with resources to avoid violations and helps lawyers
22 understand how the rules protect the public.
- 23 (h) “Mentor” is a person who mentors another person in the Transition Into Law Practice
24 Program.
- 25 (i) A “newly admitted active member” is one who becomes an active member of the State Bar of
26 Georgia for the first time.
- 27 (j) “Professionalism.” The professionalism CLE requirement is distinct from, and in addition to,
28 the legal ethics CLE requirement. The professionalism requirement is satisfied by attending an
29 activity meeting the Chief Justice’s Commission on Professionalism current professionalism
30 CLE guidelines (cjcpga.org/professionalism-cle-guidelines). Legal ethics sets forth the minimal
31 standards of professional conduct required of a lawyer; professionalism encompasses what is
32 more broadly expected of lawyers to serve both client and public good. Professionalism refers to
33 the intersecting values of competence, civility, integrity, and commitment to the rule of law,
34 justice, and the public good. The general goal of the professionalism CLE requirement is to
35 create a forum in which lawyers, judges, and legal educators can explore and reflect upon the
36 meaning and goals of professionalism in contemporary legal practice. The professionalism CLE
37 sessions should encourage lawyers toward conduct that preserves and strengthens the dignity,
38 honor, and integrity of the legal profession. Professionalism CLE includes, but is not limited to,
39 courses on the duties of lawyers to the systems of justice, courts, public, clients, other lawyers,

40 and the profession; the roles of lawyers as advocates, counselors, negotiators, problem solvers,
41 and consensus builders; various forms of dispute resolution; pro bono service; the concept of a
42 profession; history of the legal profession; comparison of the legal profession in different
43 nations' systems of advocacy; and jurisprudence or philosophy of law.

44 (k) "Supreme Court" shall mean the Supreme Court of Georgia.

45 (l) "Year" shall mean the calendar year.

46 **Rule 8-103. Commission on Continuing Lawyer Competency.**

47 (a) Membership, Appointment and Terms:

48 There is established a permanent commission of the State Bar of Georgia known as the
49 Commission on Continuing Lawyer Competency. The Commission shall consist of 16 members,
50 six of whom shall be appointed by the Supreme Court of Georgia and six by the Board of
51 Governors of the State Bar of Georgia, one shall be designated by the Executive Committee of
52 the State Bar of Georgia, one shall be the chair of the Board of the Institute of Continuing Legal
53 Education of the State Bar of Georgia or their designee, one shall be designated by the Chief
54 Justice's Commission on Professionalism, and one shall be designated by the President of the
55 Young Lawyers Division of the State Bar of Georgia. Members shall be an active member in
56 good standing of the State Bar of Georgia. Members of the Commission appointed by the
57 Supreme Court of Georgia and by the Board of Governors of the State Bar shall be appointed for
58 staggered three-year terms and shall serve until their successors are appointed. No member
59 appointed by the Supreme Court or the Board of Governors may serve more than two
60 consecutive terms as a member of the Commission, and no such member may be reappointed

61 otherwise to the Commission until they have been inactive as a Commission member for three
62 consecutive years. Members of the Commission designated by the Executive Committee, the
63 chair of the Board of the Institute of Continuing Legal Education of the State Bar of Georgia, the
64 Chief Justice’s Commission on Professionalism, and the President of the Young Lawyers
65 Division shall each serve for a term of one year. No person so designated to the Commission
66 may serve more than three consecutive terms as a member of the Commission, and no such
67 member may be redesignated otherwise to the Commission until they have been inactive as a
68 Commission member for three consecutive years.

69 Each year the Commission shall designate one of its members to serve as Chairperson.
70 The Executive Director of the State Bar of Georgia, the Director of the Institute of Continuing
71 Legal Education of the State Bar of Georgia, the Executive Director of the Chief Justice’s
72 Commission on Professionalism, and the Director of the Commission shall serve as liaison
73 members of the Commission and cannot vote or count toward quorum. The Director of the
74 Commission shall serve as Secretary of the Commission.

75 ***CCLC Regulations 8-103(a)***

76 *(1) **Quorum.** Eight voting members shall constitute a quorum of the CCLC.*

77 *(2) **Chair.** The Chair of the CCLC shall be elected by majority vote during the*
78 *first meeting of CCLC in each calendar year.*

79 *(3) **Vice Chair.** The CCLC shall elect a Vice Chair by majority vote during the*
80 *first meeting of the CCLC in each calendar year.*

81 *(4) **Executive Committee.** The Executive Committee of the CCLC shall be*
82 *comprised of the Chairperson, Vice Chairperson, and a voting member to be*
83 *appointed by the Chairperson. Its purpose is to conduct all necessary business of*

84 *the CCLC that may arise between meetings of the full Commission. In such*
85 *matters it shall have complete authority to act for the CCLC.*

86 *(5) **Other Committees.** The Chairperson may create from time to time any*
87 *committees deemed advisable.*

88 *(6) **Vacancy.** A vacancy on the CCLC, in its officers, or on its committees,*
89 *occurring for whatever reason, shall be filled as soon as practical in the same*
90 *manner as the original holder of the position was selected.*

91 (b) Powers and Duties of the Board:

92 (1) The Commission shall have general supervisory authority to administer these Rules.

93 (2) The Commission shall have specific duties and responsibilities:

94 (i) To approve all or portions of individual courses and programs of a provider
95 which satisfy the educational requirements of Rule 8-104;

96 (ii) To determine the number of credit hours allowed for each course or educational
97 activity;

98 (iii) To encourage courses and programs by established organizations, whether
99 offered within or without the State;

100 (iv) To support educating the public about the legal profession;

101 (v) To adopt regulations consistent with these Rules;

102 (vi) To establish an office or offices and to employ such persons as the Commission
103 deems necessary for the proper administration of these Rules and to delegate to them
104 appropriate authority, subject to the review of the Commission;

105 (vii) To report at least annually to the State Bar and to the Supreme Court the
106 activities and recommendations of the Commission and the effectiveness of the
107 enforcement of these Rules; and

108 (viii) To report promptly to the Supreme Court any violation of these Rules.

109 ***CCLC Regulations 8-103(b)***

110 *(1) Appeals. The CCLC is the final authority on all matters entrusted to it under*
111 *these rules. Therefore, any decision made by a committee of the CCLC pursuant*
112 *to a delegation of authority may be appealed to the full CCLC. A decision made*
113 *by the staff of the CCLC pursuant to a delegation of authority may also be*
114 *reviewed by the full CCLC but should first be appealed to the Committee of the*
115 *CCLC having jurisdiction on the subject involved. All appeals shall be in writing.*
116 *The CCLC has the discretion to, but is not obligated to, grant a hearing in*
117 *connection with any appeal.*

118 *(2) Amendments. The CCLC may on its own motion, or on the motion of any*
119 *interested party, amend, delete, or add to the foregoing Regulations. All motions*
120 *in this regard should describe the amendment, explain the reasons for the*
121 *amendment, and include a draft of the suggested new regulation.*

122 *(3) All parties are welcome to appear before the Commission in writing. If the*
123 *Commission determines that further information is needed, the parties may be*
124 *invited to present their position or appeal in person or by telephone conference*
125 *call.*

126 (c) Finances:

127 (1) Purpose. The Commission should be adequately funded to enable it to perform its
128 duties in a financially independent manner.

129 (2) Sources. Costs of administration of the Commission shall be derived from charges to
130 members of the State Bar for continuing legal education activities.

131 (i) Providers of CLE programs to be held within the State of Georgia shall, as a
132 condition of accreditation, agree to remit a list of Georgia attendees and to pay a fee
133 for each active State Bar member who attends the program. This provider's fee shall
134 be based on each day of attendance, with a proportional fee for programs lasting less
135 than a whole day. The rate shall be set by the Commission.

136 (ii) The Commission shall fix a reasonably comparable fee to be paid by individual
137 lawyers who either (a) attend approved CLE programs outside the State of Georgia
138 or (b) attend un-approved CLE programs within the State of Georgia that would
139 have been approved for credit except for the failure of the provider to pay the fee
140 described in the preceding paragraph.

141 (3) Uses. Funds may be expended for the proper administration of the Commission.
142 However, the members of the Commission shall serve on a voluntary basis without
143 compensation.

144 ***CCLC Regulations 8-103(c)***

145 *(1) Provider Fee. The provider fee, a charge paid directly by the provider, is*
146 *required for all approved programs held within Georgia and for distance*
147 *learning programs attended by Georgia lawyers. It is optional for approved*
148 *programs held elsewhere. Providers shall remit the fee, together with a list*

149 showing the names and Georgia Bar membership numbers of all Georgia
150 attendees, within 30 days after the program is held. The fee is set at \$4 per
151 approved CLE hour per active State Bar of Georgia member in attendance. It is
152 computed as shown in the following example.

Example

Georgia per hour per attendee CLE fee	\$4
Multiplied by total approved CLE hours	x 3
Multiplied by number of Georgia lawyer attendees	<u>x 10</u>
Equals the total provider fee due	\$120

156 (2) **Attendee Fee.** The attendee fee is paid by the Georgia lawyer who requests
157 credit for a program for which no provider fee was paid. Members will be billed
158 for their attendee fee on their online CLE transcript. Members must remit their
159 fee on or before the compliance period deadline. The fee is set at \$4 per approved
160 CLE hour for which the lawyer claims credit. The fee is computed as shown in the
161 following example.

Example

Georgia per hour CLE fee	\$4
Multiplied by hours taken by attendee	<u>x 3</u>
Equals the total attendee fee due	\$12

164 (3) **Fee Review.** *The Commission will review the level of the fee at least annually*
165 *and shall operate in a manner consistent with the financial operation of the State*
166 *Bar of Georgia.*

167 (4) **Uniform Application.** *The fee shall be applied uniformly without exceptions*
168 *or other preferential treatment for any provider or attendee.*

169 (5) **Professionalism Fee.** *All active members of the State Bar of Georgia*
170 *currently are assessed an \$11 surcharge annually on their dues notice. The*
171 *surcharge is determined each year by the Chief Justice's Commission on*
172 *Professionalism. This surcharge will allow for unlimited professionalism courses*
173 *taken during that calendar year for CLE credit. The CCLC is responsible for*
174 *entering all CLE credit including professionalism.*

175 **Rule 8-104. Education Requirements and Exemptions.**

176 (a) Minimum Continuing Legal Education Requirement.

177 Each active member shall complete a minimum of 18 hours of instruction in an approved
178 continuing legal education activity during each biennial compliance period (every two years). If
179 a member completes more than 18 hours in a compliance period, a maximum of six hours can be
180 carried to the next biennial compliance period. Any active member reaching the age of 70 during
181 a compliance period shall thereafter be responsible for nine hours during each biennial
182 compliance period, including three ethics, two professionalism and three trial hours if you meet

183 the criteria of Rule 8-104(c). Members should choose CLE programs in their practice area(s) or
184 in an area that will benefit their practice and clients.

185 (b) Basic Legal Skills Requirement.

186 (1) Each active member, except those participating in the Georgia Transition Into Law
187 Practice Program, shall complete a minimum of three hours of continuing legal education
188 during each compliance period in the area of legal ethics. These hours are to be included
189 in, and not in addition to, the 18-hour biennial requirement. Ethics hours are not carried
190 forward from one compliance period to the next compliance period.

191 (2) Each active member, except those participating in the Georgia Transition Into Law
192 Practice Program, shall complete a minimum of two hours of continuing legal education
193 during each compliance period in an activity meeting the Professionalism CLE Guidelines
194 of the Chief Justice's Commission on Professionalism. These hours are to be included in,
195 and not in addition to, the 18-hour requirement. Professionalism hours are not carried
196 forward from one compliance period to the next compliance period.

197 (c) Requirements for Participation in Litigation.

198 During the compliance period, every active member who appears in a state, county, municipal, or
199 federal court, or any other tribunal should complete a minimum of three hours of continuing
200 legal education focused on trial practice. A trial practice CLE activity is one exclusively limited
201 to one or more of the following subjects: evidence, civil practice and procedure, criminal practice
202 and procedure, legal ethics and professionalism in litigation, or trial advocacy. These hours are to
203 be included in, and not in addition to, the 18-hour biennial CLE requirement. Trial CLE hours
204 are not carried forward from one compliance period to the next compliance period.

206 ***Trial CLE***

207 *(1) Appearing in court means a lawyer participates in the advocacy of a client in*
208 *front of any court or tribunal which has adjudicative powers.*

209 *(2) A trial CLE hour must be (a) clearly segregated and identified (b) a minimum*
210 *of one hour in length, and (c) limited to one or more of the five listed subjects to*
211 *receive trial CLE credit. A seminar that includes one or more of the trial practice*
212 *subjects stated in the Rule may be included in the context of a particular field of*
213 *trial practice, such as medical malpractice, personal injury defense, criminal*
214 *cases, construction law, etc.*

215 *(3) Trial hours for lawyers appearing in any court or tribunal with adjudicative*
216 *powers are suggested, but not required. However, all lawyers are reminded of*
217 *their duties under Rule 1.1 Competence, of the Georgia Rules of Professional*
218 *Conduct.*

219 *(4) CLE transcripts will reflect trial CLE in addition to legal ethics,*
220 *professionalism, and total CLE hours.*

221 **(d) Exemptions.**

222 *(1) An inactive member shall be exempt from the continuing legal education and the*
223 *reporting requirements of this Rule.*

224 *(2) The Commission has the authority to grant an exemption to an active member from*
225 *the continuing legal education requirements outlined in this Rule. Such an exemption*
226 *may not exceed the current two-year compliance period. Any additional exemptions must*
227 *be requested in each subsequent compliance period. The Commission will grant this*

228 exemption only if it finds special circumstances unique to the member that result in
229 undue hardship.

230 (3) Any active member having reached the age of 70 prior to [EFFECTIVE DATE],
231 remains exempt from the continuing legal education requirements of this Rule, including
232 the reporting requirements, unless the member notifies the Commission in writing that
233 the member wishes to continue to be covered by the continuing legal education
234 requirements of this Rule.

235 (4) Any active member who lives outside of Georgia and does not engage in legal
236 practice within Georgia or represent Georgia clients during the compliance period will be
237 exempt from fulfilling their Continuing Legal Education requirement. This exemption
238 can be claimed by affirming their status on their online CLE transcript.

239 (5) Active members admitted to another mandatory CLE state and not residing in
240 Georgia, may satisfy all Georgia requirements by (a) meeting the CLE requirements of
241 the resident state, (b) affirming each compliance period on their online CLE transcript,
242 and (c) paying the Georgia CLE fees normally paid by active members residing in
243 Georgia.

244 (6) Any active member of the Board of Bar Examiners shall be exempt from the
245 continuing legal education but not the reporting requirement of this Rule.

246 (7) Active Military Duty. Active members serving on active duty with the United States
247 Armed Forces shall be exempt from the continuing legal education but not the reporting
248 requirement of this Rule.

249 (8) Judges. Judges prohibited by law, statute or ordinance from engaging in the practice
250 of law shall be exempt from the continuing legal education but not the reporting
251 requirement of this Rule.

252 (9) Constitutional Executive Officers elected statewide. The Governor, Lieutenant
253 Governor, Speaker of the House of Representatives, other members of the Georgia Senate
254 and the Georgia House of Representatives, United States Senators and Representatives
255 shall be exempt from the continuing legal education but not the reporting requirements of
256 this Rule.

257 ***CCLC Regulations 8-104(d)***

258 *(1) Inactive. To be fully exempt, the member must be inactive during the entire*
259 *compliance period. An active lawyer who changes to inactive status does not have*
260 *to complete the CLE requirement. If the lawyer changes back from inactive status*
261 *to active status, the lawyer must complete any CLE hours past due from the*
262 *previous compliance period. An inactive lawyer who changes to active status must*
263 *also comply with the full 18 CLE hour requirement of the current compliance*
264 *period.*

265 *(2) Undue Hardship. Requests for undue hardship exemptions on disability or*
266 *other grounds may be granted. The CCLC shall review and approve or disapprove*
267 *such requests on an individual basis.*

268 **Rule 8-105. Transition Into Law Practice Program (TILPP) Requirements.**

269 (a) Basic Legal Skills Requirement for newly admitted active members.

270 (1) Except as set out in subsections (i) and (ii) below, any newly admitted active member
271 must complete in the year of their admission or in the next calendar year the State Bar of
272 Georgia Transition Into Law Practice Program. Completion of the Transition Into Law
273 Practice Program shall satisfy the mandatory continuing legal education requirements for
274 such newly admitted active member for both the year of admission and the next
275 succeeding year.

276 (i) Any newly admitted active member, who has practiced law in another United
277 States jurisdiction other than Georgia for two or more years immediately prior to
278 admission to practice in this state, may be exempted from completing the Transition
279 Into Law Practice Program upon the submission, within three months of admission,
280 of written notice to the Commission on Continuing Lawyer Competency. The
281 written notice shall provide the date or dates of admission in every other state in
282 which the member is admitted to practice and a declaration that the newly admitted
283 member has been actively engaged in the practice of law for two or more years
284 immediately prior to admission in this state. Upon submission of a satisfactory
285 written notice, the newly admitted active member shall be required to complete the
286 biennial CLE requirement. Any newly admitted active member, who has practiced
287 law in another jurisdiction other than Georgia for two or more years immediately
288 prior to admission to practice in this state and who does not timely file the required
289 written notice, shall be required to complete the Transition Into Law Practice
290 Program as set out above.(ii) Any newly admitted active member, who is a judicial
291 law clerk or who begins a clerkship within three months of admission, shall not be
292 subject to the requirement of completing the Transition Into Law Practice Program

293 during the period of the judicial clerkship. Within thirty days of admission to the
294 State Bar or within thirty days of the beginning of the clerkship if said clerkship
295 begins within three months after admission, the member shall provide written notice
296 to the Commission on Continuing Lawyer Competency of the date of entry into the
297 clerkship position. Judicial law clerks are required to complete the biennial CLE
298 requirement of regular instruction in approved continuing legal education courses.
299 Within 30 days of the completion of the clerkship, the member shall provide written
300 notice to the Commission on Continuing Lawyer Competency of the date of such
301 completion. The member must complete, in the year the clerkship was concluded, or
302 the next calendar year, the Georgia Transition Into Law Practice Program. Such
303 completion of the Transition Into Law Practice Program shall satisfy the mandatory
304 continuing legal education requirements for such member for both the year of
305 completion of the clerkship and the next succeeding calendar year.

306 (2) Confidentiality of Proceedings.

307 (i) All records of the Transition Into Law Practice Program are confidential. No
308 disclosure shall be made without a waiver in writing by all parties.

309 (ii) Except as expressly permitted by these rules, no person connected with the
310 Transitions Into Law Practice Program operated under the Commission on
311 Continuing Lawyer Competency shall disclose any information concerning or
312 comments on any proceeding under these Rules.

313 (iii) The Transition Into Law Practice Program operated under the Commission on
314 Continuing Lawyer Competency may reveal private records when required by law,
315 court rule, or court order.

316 (iv) Any records maintained by the Transition Into Law Practice Program operated
317 under the Commission on Continuing Lawyer Competency, as provided herein, shall
318 be available to Counsel for the State Bar only in the event the State Bar or any
319 department thereof receives a discovery request or properly executed subpoena
320 requesting such records.

321 ***CCLC Regulations 8-105(a)***

322 (1) *Definitions(a) A “newly admitted active member” is one who becomes*
323 *an active member of the State Bar of Georgia for the first time.*

324 (b) *Transition Into Law Practice Program. “Transition Into Law Practice*
325 *Program” is a program of the Commission on Continuing Lawyer*
326 *Competency. Currently, the Transition Into Law Practice Program consists*
327 *of three components:*

328 (i) *Attendance at the Beginning Lawyers Program of the Institute*
329 *of Continuing Legal Education of the State Bar of Georgia, or a*
330 *comparable program approved by the Commission on Continuing*
331 *Lawyer Competency.*

332 (ii) *Completion of an additional 6-hours of CLE programming of*
333 *the lawyer’s choosing in the lawyer’s practice area.*

334 (iii) *Completion of a Mentoring Plan of Activities and Experiences.*

335 (c) *Beginning Lawyers Program* is a six-hour continuing legal education
336 program of the *Transition Into Law Practice Program* that is delivered by
337 the *Institute of Continuing Legal Education of the State Bar of Georgia*
338 either in a group setting or in a distance learning format. New lawyers
339 employed as prosecutors and public defenders who attend approved
340 programming are not required to attend the *Beginning Lawyers Program*.
341 (d) *Mentoring Plan of Activities and Experiences*. The “*Mentoring Plan of*
342 *Activities and Experiences*” is the plan that structures and guides the
343 mentoring component of the *Transition Into Law Practice Program*. The
344 Plan shall be submitted to the Program in the year of admission or early
345 in the next calendar year by the newly admitted active member and his or
346 her mentor. The Plan must be completed in the year of admission or the
347 next calendar year.

348 (2) ***Approval of Mentors; Minimum Qualifications.***

349 *A volunteer mentor shall meet the following Minimum Qualifications:*

350 (a) *Active Status.* Be an active member of the State Bar of Georgia, in
351 good standing; and,

352 (b) *5 Years of Practice.* Have been admitted to the practice of law in
353 Georgia for not less than five years; and,

354 (c) *Professional Reputation.* Maintain a professional reputation in his or
355 her local legal community for competence, ethical and professional
356 conduct; and,

357 (d) *Disciplinary Action.* Never have received the sanction of disbarment or
358 suspension from the practice of law in any jurisdiction, nor have
359 voluntarily surrendered his or her license to practice law for the purpose
360 of disposing with a pending disciplinary proceeding in any jurisdiction.
361 During the 10 years preceding the nomination as mentor, the prospective
362 mentor shall not have been otherwise sanctioned by the pertinent entity
363 governing the admission and practice of law in any jurisdiction. The term
364 “sanctioned” means subjected to disciplinary action. (For example, in
365 Georgia, “sanctioned” currently means any of the levels of discipline
366 whether public or confidential listed in State Bar of Georgia Rule 4-102(b)
367 (i.e., Disbarment; Suspension; Public Reprimand; State Disciplinary
368 Review Board Reprimand; State Disciplinary Board Reprimand; Formal
369 Admonition); Administrative Suspension for deficiency in continuing legal
370 education hours; or State Bar Bylaws Article I, Section 4, Item 2 (i.e.,
371 Failure to Register with State Bar of Georgia within one year upon
372 eligibility)). Nominations of individuals having formal complaint(s)
373 pending before the Supreme Court of Georgia will be deferred until the
374 final disposition of the formal complaint(s); and,

375 (e) *Court-ordered Disciplinary Action.* During the 10 years preceding the
376 nomination as mentor, the prospective mentor shall not have been the
377 subject of a written order issued by a court of competent jurisdiction that
378 prohibits or otherwise limits the prospective mentor from practicing before
379 that court or class of courts. A directive, request or order by a judge of a

380 *court requesting or directing that a lawyer employed by an agency of*
381 *government or a legal aid organization who is assigned to handle cases*
382 *before that judge be transferred or reassigned to other duties or another*
383 *courtroom does not constitute court-ordered disciplinary action under this*
384 *part. A prospective mentor who is or has within the preceding 10 years*
385 *been the subject of such a written order may petition the Commission on*
386 *Continuing Lawyer Competency (the "Commission") for a waiver of this*
387 *requirement. After review of the facts and circumstances which led to the*
388 *entry of such order, the Commission may, upon good cause shown, grant*
389 *such waiver if the prospective mentor is otherwise qualified to be a*
390 *mentor.*

391 (b) Requirements for Participation in Litigation for newly admitted active members.
392 Prior to appearing as sole or lead counsel in the Superior or State Courts of Georgia in any
393 contested civil case or in the trial of a criminal case, all participants in the Transition Into Law
394 Practice Program shall complete the mandatory Advocacy Experiences of the Transition Into
395 Law Practice Program. The mandatory Advocacy Experiences shall be completed as part of the
396 Mentoring Plan of Activities and Experiences, except that up to three of the five mandatory
397 Advocacy Experiences may be obtained after completion of 60% of the credit hours required for
398 law school graduation and prior to admission to practice. At least two of the mandatory
399 Advocacy Experiences must be completed as part of the Mentoring Plan of Activities and
400 Experiences.

401 ***CCLC Regulations 8-105(b)***

402 *For participants in the Transition Into Law Practice Program who wish to appear*
403 *as sole or lead counsel in the Superior or State Courts of Georgia in any*
404 *contested civil case or in the trial of a criminal case, the mentors and beginning*
405 *lawyers shall devise five mandatory Advocacy Experiences tailored to the*
406 *practices of the beginning lawyers. The following are examples:*

407 *(a) An actual or simulated deposition of a witness or adverse party in a*
408 *civil action.*

409 *(b) An actual or simulated jury trial in a civil or criminal case in either a*
410 *state or federal court.*

411 *(c) An actual or simulated nonjury trial or evidentiary hearing in a state*
412 *or federal court.*

413 *(d) An actual or webcast of an appellate argument in the Supreme Court of*
414 *Georgia, the Court of Appeals of Georgia, or a United States Circuit*
415 *Court of Appeals.*

416 *(e) An actual or simulated mediation.*

417 *Other advocacy experiences may be selected by Mentors to comply with Rule 8-*
418 *105(b).*

419 **Rule 8-106. Annual Report.**

420 At the end of each compliance period the Commission shall provide all non-exempt active
421 members an Annual Report of their CLE record in such form as the Commission shall prescribe.

422 A member whose record contains credit for unearned hours shall report corrections within 30
423 days following the end of the compliance period. A member whose record fails to include credit
424 for earned hours must report corrections within 30 days following the end of the compliance
425 period.

426 **Rule 8-107. Hours and Accreditation.**

427 (a) Hours. The Commission shall designate the number of hours to be earned by participation,
428 including, but not limited to, teaching in continuing legal education activities approved by the
429 Commission.

430 ***CCLC Regulations 8-107(a)***

431 (1) ***Computation Formula.*** *CLE hours shall be computed by the following*
432 *formula:*

$$\frac{\text{Sum of total minutes of actual instruction}}{60} = \text{CLE hours (round down to nearest half hour)}$$

433 (2) ***Actual Instruction.*** *Only legal education shall be included in computing the*
434 *total hours of actual instruction. The following shall not be included: (a)*
435 *introductory remarks, (b) breaks, (c) business meetings, (d) questions and answer*
436 *sessions at a ratio in excess of 10 minutes per CLE hour, (e) programs of less*
437 *than 60 minutes in length.*

438 (3) ***Teaching.*** *For their contribution to the legal profession, lawyers may earn*
439 *credit for non-paid teaching in an approved continuing legal education activity.*

440 *Presentations accompanied by thorough, high quality, readable, and carefully*
441 *prepared written materials will qualify for CLE credit on the basis of three credits*
442 *for each hour of presentation. Repeat presentations qualify for one-half of the*
443 *credits available for the initial presentation. A speaker may elect to split the*
444 *teaching credit with another lawyer who, under the speaker's supervision,*
445 *prepares the written materials. If the intended speaker prepares the written*
446 *materials and cannot speak due to health problems, emergency or required court*
447 *appearance, the teaching credit will be split between the speaker and the*
448 *substituted speaker at the request of either. Should neither make such request, the*
449 *credit will be given to the actual speaker.*

450 *(4) **Author.** The CCLC may award up to a maximum of six hours of CLE credit*
451 *for the authoring of legal articles upon the written certification by the lawyer to*
452 *the CCLC of (a) the amount of time expended in researching and writing the*
453 *article and (b) the submission of a copy thereof to the CCLC for review, provided*
454 *that the article or treatise's content and quality are consistent with the purposes*
455 *of CLE; it is published in a recognized publication which is primarily directed at*
456 *lawyers; and the project was not done in the ordinary course of the practice of*
457 *law, the performance of judicial duties, or other regular employment. If co-*
458 *authors are involved, the credit may be divided on the basis of each lawyer's*
459 *contribution. A lawyer requesting author credit shall pay the normal attendee fee.*

460 *(5) **Organizer.** The chairperson who organizes an approved CLE activity and who*
461 *does not make a formal oral presentation therein shall qualify for CLE credit as if*
462 *he or she had made a one-hour presentation. If co-chairpersons are involved, the*

463 *credit shall be divided on the basis of each lawyers' contribution. A lawyer*
464 *requesting this type of credit should pay, or arrange for the provider to pay, the*
465 *normal attendee fee.*

466 (b) Accreditation Standards. The Commission shall approve continuing legal education activities
467 consistent with the following standards:

468 (1) Activities shall have significant intellectual or practical content, and the primary
469 objective shall be to increase the participant's professional competence as a lawyer;

470 (2) Activities shall constitute an organized program of learning dealing with matters
471 directly related to the practice of law, professional responsibility or ethical obligations of
472 lawyers;

473 (3) Credit may be given for continuing legal education activities where (a) live
474 instruction is used or (b) by using distance learning programs that meet interactive,
475 technical and accreditation standards set forth by the Commission.

476 (4) Continuing legal education materials are to be prepared, and activities conducted, by
477 an individual or group qualified by practical or academic experience;

478 (5) Thorough, high quality, and carefully prepared written materials should be distributed
479 to all attendees at or before the time the course is presented. It is recognized that written
480 materials are not suitable or readily available for some types of subjects; the absence of
481 written materials for distribution, should, however, be the exception and not the rule (See
482 CCLC Regulation 8-107(b)(10));

483 (6) The Commission will review requests from CLE providers for accredited provider
484 status. Any provider desiring to be approved for accredited provider status must file an
485 application with the Commission with such program material and information as the

486 Commission may require;
487 (7) Any accredited provider must keep and maintain attendance records of each
488 continuing legal education program sponsored by it, which shall be furnished to the
489 Commission upon its request.

490 ***CCLC Regulations 8-107(b)***

491 *(1) Continuing Legal Education. The CCLC shall determine those matters which*
492 *directly relate to the practice of law so as to be eligible for CLE credit. They shall*
493 *constitute an organized program of learning dealing with matters directly related*
494 *to the practice of law, professional responsibility, or ethical obligations of*
495 *lawyers.*

496 *(2) Law School Courses. Courses offered by an ABA accredited law school shall*
497 *receive credit on the basis of one-half hour of CLE credit for each 60 minutes of*
498 *actual instruction. Success on an examination is not required for credit and the*
499 *course may be attended on an audit (not for academic credit) basis. No credit is*
500 *available for law school courses attended prior to becoming an active member of*
501 *the State Bar of Georgia. Law courses in schools other than law schools will not*
502 *qualify.*

503 *(3) Bar Review/Refresher Course. Courses designed to review or refresh recent*
504 *law school graduates or other lawyers in preparation for any bar exam shall not*
505 *be approved for CLE credit.*

506 *(4) Approval. CLE activities may be approved upon the written application of*
507 *providers on an individual program basis, providers on an accredited provider*
508 *basis, or lawyers on an individual program basis. In addition, the CCLC may*

509 *approve both CLE activities and accredited providers on its own motion, on*
510 *either an individual program or accredited provider basis. All applications for*
511 *CLE course approval shall:*

512 *(a) Be submitted at least 30 days, and preferably longer, in advance of the*
513 *course, although the CCLC may grant retroactive approval;*

514 *(b) Be submitted through the provider portal for CLE providers or on*
515 *forms furnished by the CCLC on the website for individual lawyers to*
516 *submit by email;*

517 *(c) Contain all information requested on the form;*

518 *(d) Be accompanied by a course outline or brochure that describes the*
519 *course content, identifies the teachers, lists the time devoted to each topic,*
520 *and shows each date and location at which the program will be offered;*

521 *(e) Include a detailed calculation of the total CLE hours, legal ethics*
522 *hours, professionalism hours, and trial hours.*

523 *In addition to the foregoing, providers shall within 30 days after the course is*
524 *concluded:*

525 *(a) Submit the name and Bar number of the attendees using the provider*
526 *portal;*

527 *(b) Remit to the CCLC the appropriate provider fee.*

528 *Providers who have advance approval for courses may include in their*
529 *course descriptions information that this course has been approved by the*
530 *Commission on Continuing Lawyer Competency of the State Bar of Georgia for*
531 *mandatory continuing legal education credit.*

532 *Providers not having advance approval shall make no representation*
533 *concerning the approval of a course for CLE credit by the CCLC.*

534 *The CCLC will send a notice of its decision on all CLE activity approval*
535 *requests within 60 days of their receipt. Approval thereof will be deemed if the*
536 *notice is not timely sent. This automatic approval will not be granted if the*
537 *provider contributes to the delay by failing to provide the complete information*
538 *requested by the CCLC, or if the CCLC timely notifies the provider that the*
539 *matter has been tabled and the reason therefore.*

540 **(5) Approval of Accredited Providers.** *CCLC may, at its sole discretion, approve*
541 *the accredited providers. Accredited providers shall*

542 *(a) Complete such application as the CCLC requires;*

543 *(b) Comply with all the CLE rules and regulations, including any*
544 *amendments thereto;*

545 *(c) Upon request by the CCLC, submit, through the online provider portal,*
546 *all future CLE activities for confirmation of the approved total number of*
547 *CLE hours, legal ethics hours, trial hours and professionalism hours;*

548 *(d) Conduct all CLE activities substantially as advertised and represented*
549 *to the CCLC;*

550 *(e) Furnish to the CCLC, within 30 days after each CLE activity, through*
551 *the online provider portal the following:*

552 *(i) A list of the name and State Bar membership number of each*
553 *Georgia attendee; and*

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(ii) The required provider fee for the CLE activity;

(f) Allow in-person observation of all CLE activities by the Justices of the Supreme Court, officers of the State Bar of Georgia, members of the Overview Committee, members of the CCLC and the CCLC staff;

(g) Comply with any and all requirements or representations which may be contained in any form required by the CCLC for the confirmation of the number of approved hours, and

(h) Submit such other forms as the CCLC may from time to time require, and reply to any and all inquiries from the CCLC.

*(6) **Restrictions on Accredited Providers.** Accredited providers shall not use any name which may cause confusion with the State Bar or any of its entities or with the Commission on Continuing Lawyer Competency, or with the Institute of Continuing Education of the State Bar of Georgia. At the sole discretion of the CCLC, an accredited provider may be required to place a disclaimer upon any communication with members of the State Bar which disclaims the accredited provider from any connection with the State Bar or CCLC. Such disclaimer, if required, shall be approved by the CCLC.*

*(7) **Revocation of Accredited Provider Status.** The CCLC may, with or without cause, at its sole discretion, revoke the accredited provider status of any CLE provider.*

*(8) **In-House CLE.** The Commission recognizes that law firms, corporate legal departments and similar entities, either alone or in conjunction with each other,*

576 will develop and present In-House continuing legal education activities to assist
577 their member lawyers in maintaining their professional competence. The
578 Commission further recognizes that these In-House CLE activities often are
579 designed to address matters most relevant to a firm's own lawyers.

580 These In-House CLE activities may be approved for credit under these
581 Rules and Regulations when meeting the following additional conditions:

582 (a) All In-House CLE activities shall be designed specifically as an
583 organized program of learning.

584 (b) All In-House CLE activities must be open to observation by members
585 of the CCLC and its staff;

586 (c) Experienced lawyers must substantially contribute to the development
587 and presentation of all In-House CLE activities;

588 (d) In-House CLE activities must be scheduled at a time and location so as
589 to be free of interruptions from telephone calls and other office matters.

590 (e) Lawyers can earn all or any portion of their CLE requirement through
591 approved In-House CLE activities.

592 (9) **Facilities.** Providers ordinarily must provide a facility with adequate lighting
593 and temperature-controlled ventilation. For a non-clinical CLE activity, the
594 facility should be set up in classroom or similar style to provide a writing surface
595 for each pre-registered attendee, to provide a minimum of two linear feet of table
596 space per chair and should provide sufficient space behind the chairs in each row
597 to permit easy access and exit to each seat. Crowding in the facility detracts from
598 the learning process and will not be permitted.

599 (10) **Written Materials.** *Qualifying written materials should specifically address*
600 *each of the topics of the seminar. These materials must be prepared by the*
601 *speaker (or someone acting under his or her direct supervision) and shall be*
602 *distributed to all attendees at or before the time the seminar is held. There are*
603 *essentially three rationales for these requirements. First, they ensure speaker*
604 *organization and preparation. Second, they alleviate the need for attendees to*
605 *take notes and allow them to concentrate on the oral presentations. Finally, they*
606 *provide a valuable reference tool for the attendees after they leave the seminar.*
607 *Examples of written materials which alone would not qualify include, but are not*
608 *limited to, the following: (1) topical outlines; (2) topical outlines with case*
609 *citations; (3) copies of statutes or cases (unless accompanied by qualifying*
610 *explanatory text); (4) copies of leases, contracts, wills and other legal instruments*
611 *(unless accompanied by qualifying explanatory text).*

612 *The quality of oral presentations and the overall educational value of the seminar*
613 *will not excuse the written materials accreditation requirement.*

614 *It is recognized that on rare occasions, or for unique topics, preparation of*
615 *written materials may not be possible or appropriate. Thus, for example, where*
616 *the particular law which is the topic of a seminar changes dramatically*
617 *immediately before the seminar is given, the prepared materials may be rendered*
618 *obsolete. Likewise, written materials may not always be suitable for a clinical*
619 *program on oral advocacy. In these exceptional circumstances, the requirements*
620 *of this regulation may not apply. If there is any question as to whether written*

621 *materials are required for a given topic, the provider is advised to contact the*
622 *Commission in advance of the seminar.*

623 *(11) **Provider Records.** In addition to the required attendance records, providers*
624 *are encouraged, though not required, to solicit written evaluations of each*
625 *sponsored program from its attendees and to maintain for at least two years after*
626 *the program all such evaluations received, both for the provider's benefit and for*
627 *furnishing to the Commission upon its request. A provider's policy either to solicit*
628 *and maintain such evaluations or not to do so may be considered by the*
629 *Commission as a factor bearing on the provider's accreditation.*

630 *(12) **Primary Objective Test.** The primary objective of CLE shall be to increase*
631 *the attendee's professional competence as a lawyer. Worthwhile professional*
632 *activities which have other primary objectives are encouraged, but do not meet*
633 *the accreditation standards for CLE credit. Bar meetings, service on committees,*
634 *jury duty, and client development or marketing seminars are examples of*
635 *activities which do not meet the primary objective test.*

636 *(13) **ADR CLE.** CLE activities which train lawyers in the generally accepted*
637 *processes of alternative dispute resolution are consistent with Accreditation*
638 *Standards 1 and 2 where such programs meet the other criteria set forth herein.*

639 *(14) **Practice Management CLE.** (CLE activities relating to the development and*
640 *management of a law practice including client relations) Practice Management*
641 *CLE includes, but is not limited to, those activities which (1) teach lawyers how to*
642 *organize and manage their law practices so as to promote the efficient,*
643 *economical and competent delivery of legal services; and (2) teach lawyers how*

644 *to create and maintain good client relations consistent with existing ethical and*
645 *professional guidelines so as to eliminate malpractice claims and bar grievances*
646 *while improving service to the client and the public image of the profession.*
647 *Practice Management CLE is consistent with Accreditation Standards 1 and 2*
648 *where such programs meet the other criteria set forth herein.*

649 *(15) **Lawyer Wellness.** Wellness and mental health issues, including stress,*
650 *anxiety, substance use, depression and suicide, materially affect lawyers’*
651 *competency to practice law and their lives. CLE credit as required under Rule 8-*
652 *104(a) is available for seminars on these and similar quality of life and law*
653 *practice topics. To receive CLE credit these wellness topics must be discussed in*
654 *the context of the legal profession and the effects on the quality of the legal*
655 *services the lawyer is able to provide. Presentations approved may include stress*
656 *management in the context of work/life balance in the practice of law, signs of*
657 *substance abuse or mental health issues in oneself or a colleague within the legal*
658 *community, lawyer assistance programs and other topics that are focused on the*
659 *impact of substance abuse, mental health issues or stress management on lawyers*
660 *and judges. CLE credit will not be given to presentations which solely focus on*
661 *personal stress reduction techniques such as breathing exercises, meditation and*
662 *yoga. In addition, professionalism CLE credit is available when these topics meet*
663 *the Chief Justice’s Commission on Professionalism current professionalism CLE*
664 *guidelines (cjcpga.org/professionalism-cle-guidelines).*

665 *(16) **Distance Learning CLE.** In addition to traditional approved continuing*
666 *legal education activities attended live and in-person by groups of lawyers,*

667 *distance learning delivery formats are acceptable provided they are designed*
668 *specifically as organized programs of learning and meet the other accreditation*
669 *standards set out in these Rules and Regulations. Examples of qualifying distance*
670 *learning formats include: live CLE activities presented via video or audio replays*
671 *of live CLE activities; computer-based CLE activities, on demand CLE programs,*
672 *teleconference CLE programs and live CLE webcasts/webinars. Lawyers can*
673 *earn all or any portion of their CLE requirement through Distance Learning CLE*
674 *programs.*

675 ***(17) Interactivity Requirement for Approval of Distance Learning CLE.*** *CLE*
676 *providers are reminded that CCLC emphasizes the importance of engagement in*
677 *distance learning programming. The CCLC recognizes high levels of interaction*
678 *that can be achieved through ubiquitous video streaming services and encourages*
679 *the use of these technologies to maximum the educational experience.*

680 *Courses must provide mechanisms to ensure interactivity and permit the*
681 *attendee to interact with the presenter, other attendees or with the educational*
682 *software itself based on responses by the participant. The following methods are*
683 *provided as examples of course monitoring: Periodic Quizzing, Response*
684 *Tracking, Web Logs, Video Monitoring, Time Recorders, Live Chat, Final*
685 *Tests, User Navigation Monitoring and User Prompts.*

686 *Due to changes in technology, the CCLC is not issuing a precise definition*
687 *of interactivity. Specific implementation of all of the above is not required, but*
688 *incorporation of technology to ensure a positive and interactive educational*
689 *experience is required.*

690 **Rule 8-108. Compliance Period and Noncompliance.**

691 (a) Compliance Period

692 (1) Members must complete their CLE requirement, fees, or other requirements by the end
693 of the biennial compliance period. The compliance period deadline date is the same for all
694 members. The CLE compliance period and deadline date are listed on the State Bar of
695 Georgia's website and are also shown on each members' online CLE transcript.

696 (2) Members who remain deficient following the end of the compliance period shall pay a
697 CLE late fee in an amount to be set by the Commission.

698 (b) Noncompliance

699 (1) Notice. Members who remain deficient in their CLE, fees, or other requirements at the
700 end of the compliance period are in noncompliance. The Commission shall so notify the
701 members by email to the member's current email address contained in the membership
702 records of the State Bar of Georgia. Service or actual receipt is not a prerequisite to actions
703 authorized by these Rules.

704 (2) Hearing. Members may contest their noncompliance by requesting a hearing before the
705 Commission. The request should be in writing, contain the reasons for their contest, and be
706 made within 60 days of the date of the notice of noncompliance sent by the Commission.
707 The Commission shall hear the matter at its next meeting. No action will be taken while
708 hearings are pending. All decisions by the Commission are final.

709 (3) Report. The Commission shall report to the Supreme Court of Georgia those members
710 who remain in noncompliance after the time to request hearings has expired or any
711 requested hearings have been held.

712 (4) Supreme Court of Georgia Action. Upon receipt from the Commission of a report of
713 noncompliance, the Supreme Court of Georgia shall enter an order it deems appropriate
714 including an allowance of additional time for compliance or summary suspension from the
715 practice of law until further order of the Court.

716 ***CCLC Regulation 8-108(a)***

717 (1) ***CLE Late Fee:*** *A lawyer who does not complete the CLE requirement by the*
718 *end of the compliance period shall pay a \$200 CLE late fee. This late fee shall be*
719 *due 30 days following the end of the compliance period.*

720 **Rule 8-109. Reinstatement.**

721 An active member suspended under the provisions of these rules may be reinstated by the Court
722 upon motion of the Commission and upon a showing that the delinquency has been corrected and
723 payment to the Commission of a reinstatement fee fixed by the Commission.

724 ***CCLC Regulations Rule 8-109***

725 (1) ***Reinstatement Fee.*** *The reinstatement fee is \$500 for a member's first*
726 *reinstatement, \$1,000 for a second reinstatement by the same member, and*
727 *\$2,000 for all subsequent reinstatements by the same member. This fee must*
728 *accompany the reinstatement motion. It shall not be waived and is non-*
729 *refundable if reinstatement is not granted.*

730 (2) **Policy.** Reinstatement will be granted only upon a showing that the member
731 has attended sufficient approved CLE activity to make-up the deficiencies
732 causing the suspension and all deficiencies in subsequent compliance periods.
733 Also, the member's progress toward meeting CLE requirements in the current
734 compliance period in which the reinstatement is requested will be included as
735 information in the CCLC's motion to the Supreme Court.

736 (3) **Motion.** The motion for reinstatement shall list the CLE activities by course
737 number, provider, location, dates and hours. It shall be accompanied by proof
738 of attendance, any attendee fee that may be due, and the reinstatement fee.

739 (4) **CCLC Action.** If the suspended member is found to be in compliance, the
740 CCLC will file a motion with the Supreme Court of Georgia setting forth the
741 facts along with its recommendation which may or may not be that
742 reinstatement be granted. The Supreme Court will make the final decision on
743 reinstatement. If the suspended member is found to not be in compliance, the
744 CCLC will inform them of the curative actions necessary to cure their
745 deficiencies.

746 **Rule 8-110. Confidentiality.**

747 Records of the Commission are not confidential.

748 **Rule 8-111. Immunity.**

749 The State Bar of Georgia, the Commission on Continuing Lawyer Competency, the Chief
750 Justice's Commission on Professionalism, their employees, board of directors, members, and
751 liaisons, shall be absolutely immune from civil liability in the performance of their official
752 duties.

753 **Rule 8-112. Foreign Law Consultants.**

754 Foreign law consultant members of the State Bar of Georgia shall be subject to and shall comply with the
755 provisions of this Part VIII in the same manner and to the extent as active members of the State Bar of
756 Georgia.



State Bar of Georgia

To: Bar Officers
Finance Committee

From: Ron Turner

Date: May 1, 2024 *rw*

Re: March 2024 Financial Statements-Bar Operations and Bar Center

Attached please find the March 2024 financial statements. These financial statements are presented at a summary level for clarity and to convey overall trends. Full departmental detail is attached at year-end (6/30) and upon request.

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

New and revised items are highlighted in bold.

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

Administration

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

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

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

Office of General Counsel

Investigator travel is over budget by **\$1,868** primarily because one additional investigator attended a conference than what was originally budgeted for.

Office of General Counsel (Continued)

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

Computer software is in excess of the budget by \$2,805 primarily due to the following: (1) more individuals obtained an Adobe license in the current year than what was budgeted for and (2) there was a substantial increase in the price per license of approximately 40%. This substantial price increase was not anticipated at the time of budget preparation.

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

Communications

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

The Bar has incurred **\$130,167** in charges associated with the redesign of the Bar's website. A budgeted amount was intentionally not included in the operating budget of the Bar as monies from unallocated cash will be used to fund this expenditure. Currently, it is anticipated that the new website will be operational in the summer of 2024.

Savannah

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

Tifton

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

Supreme Court Meetings

Costs associated with the Supreme Court meetings line item have exceeded the budget by approximately \$16,500 primarily due to following unanticipated costs: (1) the hotel room costs were significantly more expensive per night in the current fiscal year as compared to prior fiscal years and what was anticipated when the budget was prepared; (2) two nights per person for the hotel were incurred in the current year where in the budget and in prior year's normally one night per person was incurred (3) because two nights were incurred, there were also two group dinners incurred instead of one group dinner and (4) costs were incurred at the Fall Board of Governors meeting wherein the prior year the Fall BOG meeting was virtual only. As such, for budget purposes it was anticipated that the Fall 2023 BOG would also be Zoom only, however that was not the case.

Membership Database Project

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

Sections

Supplies for sections are in excess of the budget by approximately \$1,600 primarily due to the following reasons: (1) purchase of a canopy tent in the amount of approximately \$300. This tent will be used for outside events and was not originally included in the budget and (2) purchase of name badge holders, sign holders for QR codes, badge stock, and additional signs. The costs of these items have increased and Sections are also doing more programs.

Conference Center

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

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

Other Bar Center Operations

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

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

The Bar incurred unbudgeted building rehab costs of \$159,100. The majority of these costs were incurred as a result of the following: (1) payment of approximately \$44,000 associated with work being performed on the doors to the front lobby. This work will improve handicap access to the building. (2) approximately \$19,500 in costs paid for work to be done on electrical panels in order to prepare of the replacement of these panels in 2024-2025 (3) approximately \$39,300 for a partial payment for the new front end building management system (4) approximately **\$22,400** for lease buildout for a tenant occupying space on the 6th floor later this year **and (5) \$28,600 in costs associated with water damage.** The resources in unallocated cash are being used to fund these costs.

Rental

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

Repairs and maintenance costs associated with plumbing have exceeded the budget by **\$5,081** due to costs incurred of \$9,923 associated with the replacement of cast iron pipes in a part of the building. These pipes rusted and broke. The cost of this repair was not budgeted.

Repairs and maintenance costs other for general building are over budget by approximately \$1,400 primarily due to the installation of a new floor closer for a door at a cost of approximately \$1,700. This repair was not budgeted for.

Parking

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

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately **\$170,700**. 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

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2024

	Year Ending	Year To Date		% of Budget	Year Ending
	06/30/2023	March 31, 2024	Actual		06/30/2024
	Actual				Annual Budget
Total Bar Center Operations Revenue	2,972,797	1,988,965		75.77 %	2,638,200
Total Bar Center Operations Expenses	2,601,174	2,237,100		83.33 %	2,684,753
Total Bar Center Operations Net Gain (Loss)	\$ 371,623 \$	(238,135)		511.54 % \$	(46,553)
Combined Revenue	20,887,255	19,149,837		93.74 %	20,428,393
Combined Expenses	18,830,364	14,977,691		71.19 %	21,039,054
Total Combined Net Income (Loss)	\$ 2,056,891 \$	4,172,146		(683.22) % \$	(610,661)

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

State Bar of Georgia
Total Bar Center Operations
Revenues and Expenditures - Executive Summary
For the Year To Date Period Ending March 31, 2024

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts							
Bar Center Assessments	0	0.00 %	0	0.00 %	200	200	165
Gain/Loss Investment Interest Allocation	76,864	0.00 %	241,677	0.00 %	0	(241,677)	55,035
CCLC Contributions to Bar Center	0	0.00 %	500,000	38.46 %	1,300,000	800,000	1,400,630
Interest and Dividend Income	35,044	35.76 %	95,194	97.14 %	98,000	2,806	115,247
Bar Center Income and Cash Receipts	\$ 111,908	8.00 %	\$ 836,871	59.85 %	\$ 1,398,200	\$ 561,329	\$ 1,571,077
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	3,111	9.72 %	14,207	44.40 %	32,000	17,793	15,712
Investment Service Fees	6,461	29.37 %	17,537	79.71 %	22,000	4,463	26,697
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	850
Museum and 1st Floor Exhibit	0	0.00 %	6,453	129.07 %	5,000	(1,453)	0
Audio Video, Furniture and Equipment	0	0.00 %	219,552	6,272.91 %	3,500	(216,052)	18,990
Building Rehabilitation	38,998	0.00 %	159,130	0.00 %	0	(159,130)	47,347
2nd Floor Buildout	0	0.00 %	0	0.00 %	0	0	30,025
Bar Center Expenses and Cash Disbursements	48,570	77.71 %	416,879	667.01 %	62,500	(354,379)	139,621
Bar Center Combined Net Cash Flow	\$ 63,338	4.74 %	\$ 419,992	31.44 %	\$ 1,335,700	\$ 915,708	\$ 1,431,456
Conference Center Income and Expenses							
Room Rentals and Various Charges	1,963	19.63 %	11,447	114.47 %	10,000	(1,447)	12,683
Conference Center Operating Expenses	44,920	9.20 %	361,337	74.00 %	488,316	126,979	444,934
Conference Center Combined Net Cash Flow	\$ (42,957)	8.98 %	\$ (349,890)	73.15 %	\$ (478,316)	\$ (128,426)	\$ (432,251)
Rental Income and Expenses							
Rental Income	76,988	8.37 %	694,531	75.49 %	920,000	225,469	919,520
Building Operating Expenses	116,514	6.39 %	1,240,275	67.99 %	1,824,302	584,027	1,683,844
Rental Combined Net Cash Flow	\$ (39,525)	4.37 %	\$ (545,744)	60.35 %	\$ (904,302)	\$ (358,556)	\$ (764,324)
Parking Income and Expenses							
Parking Income	55,815	18.00 %	456,116	147.13 %	310,000	(146,116)	469,518
Parking Deck Operating Expenses	24,626	7.95 %	218,609	70.60 %	309,635	91,026	332,775
Parking Combined Net Cash Flow	\$ 31,189	8,545.05 %	\$ 237,507	65,070.42 %	\$ 365	\$ (237,142)	\$ 136,743
Total Bar Center Operations Net Gain (Loss)	\$ 12,045	(25.87) %	\$ (238,135)	511.54 %	\$ (46,553)	\$ 191,582	\$ 371,623

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

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 10,942,486	\$ 10,904,400	100.35 %	\$ 10,798,285
Dues - Inactive	1,061,207	1,032,200	102.81 %	1,085,384
Dues - Provisional	14,690	29,250	50.22 %	18,524
Dues - Misc. Types	3,498	3,020	115.83 %	2,479
Dues - Late Fees	247,289	255,300	96.86 %	258,700
Total Dues & Licenses	12,269,170	12,224,170	100.37 %	12,163,372
Program Registration Income	3,970,397	4,750,000	83.59 %	4,882,064
Section Expense Reimbursement	301,039	300,973	100.02 %	301,403
CSF Expense Reimbursement	54,750	73,000	75.00 %	73,000
Advertising and Sales	35,003	27,150	128.92 %	48,045
Membership Income	58,016	71,500	81.14 %	82,506
Pro Hac Vice	347,275	420,000	82.68 %	429,175
Pro Hac Vice Contra	(282,500)	(327,600)	86.23 %	(337,500)
Credit Card Processing Fees	39,525	105,000	37.64 %	119,502
Interest Income	358,438	140,000	256.03 %	(33,332)
Miscellaneous Revenues	(241)	6,000	(4.01) %	186,223
Total Revenues	17,150,872	17,790,193	96.41 %	17,914,458
Expenses				
Administration	1,962,992	2,778,073	70.66 %	2,600,791
General Counsel	3,473,955	4,864,802	71.41 %	4,484,235
Communications	810,056	979,185	82.73 %	946,247
Lawyer's Assistance Program	125,000	125,000	100.00 %	125,000
Fee Arbitration	428,083	597,465	71.65 %	531,755
Law Practice Management	344,848	501,979	68.70 %	447,850
Sections	224,362	301,039	74.53 %	249,355
Savannah Office	225,535	293,152	76.93 %	309,323
Tifton Office	120,400	169,011	71.24 %	146,352
Young Lawyers	282,543	446,807	63.24 %	360,884
Unauthorized Practice of Law	696,827	943,024	73.89 %	878,889
Law Related Education	312,685	442,118	70.72 %	386,937
High School Mock Trial	107,893	192,392	56.08 %	161,081
ICLE	2,904,838	4,150,477	69.99 %	3,493,090

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

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	159,162	212,216	75.00 %	212,216
Fastcase	297,471	297,000	100.16 %	281,419
Officers' Expenses	38,915	101,470	38.35 %	43,726
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	340,522	903,925	37.67 %	648,423
Unallocated Services	(170,662)	0	0.00 %	(133,549)
Total Expenses	12,740,590	18,354,301	69.41 %	16,229,190
Net Income	\$ 4,410,282	\$ (564,108)	(71.82) %	\$ 1,685,268

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

Created on 04/29/2024
State Bar of Georgia

State Bar of Georgia
Supporting Schedule of Other Expenses - YTD
For the Year To Date Period Ending March 31, 2024

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Other Expenses				
BOG and Member Meetings	\$ 147,817	\$ 556,000	26.59 %	\$ 400,237
Supreme Court Meetings	56,537	40,000	141.34 %	46,661
Executive Committee Meetings	3,193	50,000	6.39 %	33,891
State Disciplinary Board Lawyers	22,500	34,000	66.18 %	30,000
Electronic Ballots	11,865	19,000	62.45 %	23,411
Dues Notice	5,661	42,825	13.22 %	34,806
Letters of Good Standing	1,419	2,300	61.70 %	2,210
Bar Membership Cards	7,938	8,800	90.21 %	10,671
50 Year Certificates	4,616	6,500	71.01 %	3,823
Membership Database Project	17,651	0	0.00 %	0
State Bar Committees	4,427	25,000	17.71 %	18,705
Georgia Diversity Program	10,000	10,000	100.00 %	10,000
ABA Delegate Breakfast	2,116	2,500	84.65 %	2,134
1st Floor Painting	0	5,500	0.00 %	2,600
Commitment to Equality Awards	2,500	2,500	100.00 %	2,500
Bond Premium Amortization	19,223	67,500	28.48 %	9,749
Investment Service Fees	22,457	29,000	77.44 %	14,525
Access to Justice/Pro Bono	602	2,500	24.06 %	2,500
Total Other Expenses	\$ 340,522	\$ 903,925	37.67 %	\$ 648,423

State Bar of Georgia
 Status and Use of Cash and Investments
 For the Current Period Ending March 31, 2024

Cash and Investments - Bar	\$ 37,222,681
Less:	
Georgia Bar Foundation Cash Included in Above Amount	(878)
CCLC Cash and Investments Included in Above Amount	<u>(5,727,134)</u>
Net Cash Available for State Bar	<u>31,494,670</u>
Use of Cash:	
Less:	
Board Designated - See Separate Schedule Attached	(9,113,056)
Donor Temporarily Restricted - See Separate Schedule Attached	<u>(3,098,654)</u>
Total Board Designated and Temporarily Restricted	<u>(12,211,710)</u>
Other - Cash Allocated:	
Collection of Outstanding Accounts Receivable	129,889
Payment of Accounts Payable	(145,531)
Payment of Accrued Vacation	(575,166)
Deferred Income	(83,205)
Payment of Credit Card Bill	(155,593)
Payment of Accrued Salary	(513,091)
Payment of Accrued Taxes	(39,252)
Payment of Other Accrued Expenses (primarily pension)	(493,458)
Payment to Client Security Fund	(2,924,825)
Operational Expenses for Remaining Bar Year	(5,307,339)
Additional Revenue for Bar Operations (Excluding Bar Center)	639,321
Net Amount to be paid to Related Entities	<u>(450,167)</u>
Total Other - Cash Allocated	<u>(9,918,417)</u>
Estimated Cash and Investments - June 30, 2024 - Bar	<u><u>9,364,543</u></u>
Cash and Investments - Bar Center	139,202
Other Cash Allocated - Bar Center:	
Collection of Outstanding Accounts Receivable	108,109
Payment of Accounts Payable	(12,040)
Payment of Other Accrued Expenses	(12,442)
Additional Expenses for Bar Center Operations	<u>(147,327)</u>
Total Other - Cash Allocated - Bar Center	<u>(163,700)</u>
Estimated Cash and Investments June 30, 2024 - Bar Center	<u><u>(24,498)</u></u>
Total Estimated Cash Balance at June 30, 2024	\$ 9,340,025

Note: The above schedule reflects the status of cash and investments as of the month end indicated above. There are no other State Bar funds or investments held in any institution that are not included on this schedule. Also included in the above are the following assumptions: (1) Actual expenses for 2023 - 2024 would be 97.5% of budget. This is for Bar operations only and not Bar Center. (2) Additional revenue for Bar operations is based upon the assumption of achieving additional revenue through June 30, 2024 to equal 100% of the total budgeted revenue. (3) Bar Center would contribute additional cash flow or pay additional expenses through June 30, 2024 to equal their budget.

State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Year To Date Period Ending March 31, 2024

	June 30, 2021	June 30, 2022	June 30, 2023	March 31, 2024
Board Designated				
Board Designated - General Operations - Bar	2,750,000	2,750,000	2,750,000	2,750,000
Board Designated - General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	119,399
Board Designated - Sections	3,431,439	3,677,156	3,664,312	4,164,761
YLD Meetings	116,852	88,929	77,999	78,896
Total Board-Designated excludes ICLE	\$ 8,598,291	\$ 8,816,085	\$ 8,792,311	\$ 9,113,056
Donor Temporarily Restricted				
Legislative	1,350,873	1,503,629	1,806,483	2,511,381
Law Related Education/Marshall fund	231,160	212,684	207,599	191,689
High School Mock Trial	15,482	18,617	15,299	18,479
Basics Program	119,460	115,094	116,951	121,272
Younger Lawyers	115,020	87,006	87,199	152,725
Lawyers Assistance	34,650	33,188	31,863	33,040
Georgia Diversity Program	55,807	46,528	13,555	10,717
Bar Media Conference	21,834	13,037	3,115	1,514
Justice Hunstein's Portrait	25,651	0	0	0
Law Day	6,516	6,266	6,212	6,441
Access to Justice	1,492	1,435	3,175	25,834
Promote Inclusion	13,285	8,842	8,701	9,487
State Bar of Georgia Foundation	3,134	0	0	0
Military Vet Pro Bono	14,807	14,240	14,481	15,015
Justice Portraits	0	1,006	1,022	1,060
Total Donor Temporarily Restricted	\$ 2,009,171	\$ 2,061,572	\$ 2,315,655	\$ 3,098,654
Net Board Designated and Donor Temporarily Restricted	\$ 10,607,462	\$ 10,877,657	\$ 11,107,967	\$ 12,211,710

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through March 31, 2024

Dues	2023-24 Dues Season	2022-23 Dues Season	2021-22 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	<u>49,695</u>	<u>49,400</u>	<u>48,965</u>
Active - Number Paid	42,632	42,018	41,572
Inactive - Number Paid	<u>8,237</u>	<u>8,341</u>	<u>8,558</u>
Total Number of Members With Dues Paid	<u>50,869</u>	<u>50,359</u>	<u>50,130</u>
Percent of Total Members With Dues Paid	<u>102.4%</u>	<u>101.9%</u>	<u>102.4%</u>
Number of Members Who Made A Contribution	<u>9,091</u>	<u>8,482</u>	<u>8,148</u>
Percent of Members Who Made A Contribution	<u>17.9%</u>	<u>16.8%</u>	<u>16.3%</u>
Total Contribution Amount	<u>\$ 862,990</u>	<u>\$ 803,415</u>	<u>\$ 760,350</u>
Average Amount Paid	<u>\$ 95</u>	<u>\$ 95</u>	<u>\$ 93</u>

Legislative Contribution Amounts by Dues Year

2023 - 2024	<u>\$ 862,990</u>
2022 - 2023	<u>\$ 803,415</u>
2021 - 2022	<u>\$ 760,350</u>
2020 - 2021	<u>\$ 766,123</u>
2019 - 2020	<u>\$ 322,708</u>
2018 - 2019	<u>\$ 494,906</u>
2017 - 2018	<u>\$ 546,905</u>
2016 - 2017	<u>\$ 557,991</u>
2015 - 2016	<u>\$ 565,004</u>
2014 - 2015	<u>\$ 640,505</u>

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

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

State Bar of Georgia
Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)
With Contributions Paid Through March 31, 2024

Dues	2023-24 Dues Season	2022-23 Dues Season	2021-22 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	49,695	49,400	48,965
Active - Number Paid	42,632	42,018	41,572
Inactive - Number Paid	8,237	8,341	8,558
Total Number of Members With Dues Paid	50,869	50,359	50,130
Percent of Total Members With Dues Paid	102.4%	101.9%	102.4%
Number of Members Who Made A Contribution	3,575	3,539	3,647
Percent of Members Who Made A Contribution	7.0%	7.0%	7.3%
Total Contribution Amount	\$ 490,605	\$ 483,850	\$ 478,287
Average Contribution Amount	\$ 137	\$ 137	\$ 131

GLSP Contribution Amounts by Dues Year

2023 - 2024	\$ 490,605
2022 - 2023	\$ 483,850
2021 - 2022	\$ 478,287
2020 - 2021	\$ 436,815
2019 - 2020	\$ 366,674
2018 - 2019	\$ 295,454
2017 - 2018	\$ 312,251
2016 - 2017	\$ 276,487
2015 - 2016	\$ 264,492
2014 - 2015	\$ 255,713

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

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

**State Bar of Georgia
Income Statement
From July 1, 2023 Through March 31, 2024**

July 1, 2023 Beginning Balance	\$ 1,806,483
Income:	
Interest and Dividend Income	27,777
Gain/Loss Investment Interest Allocation	74,340
Miscellaneous Income	860,570
Total Income	962,687
Expenditures:	
Staff and Contract Lobbyists	229,798
Grassroots Efforts	1,390
Travel	1,144
Shared Office Allocation	15,420
Miscellaneous	10,037
Total Expenditures	257,789
Net Donor Temporarily Restricted Balance	\$ 2,511,381

**State Bar of Georgia
Summary of Client Security Fund Activity
For the Year To Date Period Ending March 31, 2024**

	2021 June 30	2022 June 30	2023 June 30	March 31, 2024
Fund Balance, Beginning of Year	\$ 1,009,586	\$ 1,798,187	\$ 1,634,260	\$ 2,212,202
Income:				
Interest and Dividend Income	17,568	26,218	33,117	32,090
Gain/Loss Investment Interest Allocation	(9,942)	(79,620)	19,577	85,102
Client Security Fund Assessments	78,279	77,590	751,680	756,780
Restitution Income	23,095	85,621	18,445	753
Total Income	\$ 109,000	\$ 109,809	\$ 822,819	\$ 874,725
Transfer from Others				
Operating Transfer In	1,000,000	0	0	0
Total Transfer from Others	\$ 1,000,000	\$ 0	\$ 0	\$ 0
Expenses:				
Restricted Expenses	73,000	73,000	73,000	54,750
Client Security Fund Claims Payments	238,713	186,737	159,879	96,747
Bond Premium Amortization	5,630	8,444	4,288	4,702
Investment Service Fees	3,056	5,555	7,710	5,903
Total Expenses	\$ 320,399	\$ 273,736	\$ 244,877	\$ 162,102
Net Income	\$ 788,601	\$ (163,927)	\$ 577,942	\$ 712,623
Fund Balance, End of Period	\$ 1,798,187	\$ 1,634,260	\$ 2,212,202	\$ 2,924,825

State Bar of Georgia
SBG Management Summary
Update of Unallocated Cash - Cash To Be Used
Projects To Be Completed in 2023 - 2024 Year
As of March 31, 2024 Financial Statement Period

Senior management of the State Bar of Georgia has reviewed the individual components of those items representing the priority use of unallocated cash. The items reviewed included those items previously disclosed in other reports. After review of that information, senior management established the items in a priority order. Those items are included in the schedule shown herein.

Projects To Be Completed in 2023 - 2024 Year	Estimated Budget Amount	Amount Spent Through Dec 31, 2023	Amount Spent Through March 31, 2024	Project Status and Notes:
Siemens costs for new front end building management system and remaining surface control unit cabinets to direct digital control	150,000	23,095	62,358	Estimated completion May or June 2024.
Revamp to State Bar's website	450,000	58,645	130,166	Target launch is August 15, 2024. Beta test set for June 2024.
Front lobby doors for handicap access	50,000	36,767	49,821	Completed.
Outdoor heaters for parking garage	1,000		1,220	Completed.
Courtroom audio video upgrades	30,000		34,024	Completed.
Speakers and microphone in ceilings for Auditorium, Conference Room A, Meeting Room 5 and Meeting Room 3	160,000	15,000	184,153	Completed.
Additional Video capabilities including wifi access (miscellaneous items)	10,000		0	Completed, included in courtroom, auditorium and other rooms shown above.
Kitchen tables and chairs for the break room	10,000	4,668	4,668	Completed.
Upgrade to JIMS EMS Enterprise (Management of CC process and security features for membership database)	108,000	5,799	17,651	Critical membership and security feature. Vendor selected. In software development phase.
Electrical panel replacement up to 400 amp panel with (4) 3 pole and (12) 1 pole breakers \$6,950 each	0		19,475	Initial work - panel measurement. Actual panel replacement scheduled for 2024 - 2025 Bar year.
Tenant improvement costs - 6th floor tenant	0		16,497	Initial costs. Estimated completion is May or June 2024.
Potential lease for 5th floor with GSA	0		457	Costs associated with potential GSA lease. Lease not yet signed.
Total	969,000	143,974	514,490	

2024-2025 Budget Assumptions

1. Dues increase to \$264. Number of members was estimated based upon December 31, 2023 members and estimated additional members based upon the historical passing rate of the Bar exams along with estimated dates of joining the Bar, as well as expected attrition.
2. Investment (interest) income, bond amortization premium and investment expenses are based upon the annualization of available actual results. Since investments are generally not sold but are held until maturity, no gains or losses are budgeted. However, accounting rules dictate that all gains and losses whether realized or not must be recorded.
3. As of January 2024, the rate of inflation for the year ended December 31, 2023 was reported at 4.50% based upon the Annual CPI—BLS South Region. With the recommendation of the Personnel Committee, salary increases are included at 5% on average. This represents a 3% COLA increase for all employees and a potential additional merit increase of 2% for high performers.
4. Vendor quotes or actual contracted amounts used whenever information was available.
5. The Bar does not pay rent to any independent company or organization for the Bar Center in Atlanta.
6. For building rental income, assumed all tenants in building as of January 1, 2024 will continue to be in building for the 2024-2025 year and that the amount of leased space would be the same except as follows: (1) the amount of square footage leased by CJCC would be reduced between 60% and 70% and (2) there will be an additional tenant that will occupy approximately 3,000 square feet beginning July 1, 2024.
7. Since the 2021-2022 Bar year, the parking deck has been used more for special events parking and less for monthly and daily parking. Assumed that this same type of parking operations will continue for 2024-2025.
8. Includes Programs and Personnel information.
9. Includes estimated income of a \$3.00 per transaction credit card convenience fee associated with the payment of the annual dues. This fee is only charged if the member pays by the use of a credit card.
10. Assumes that ICLE recognizes a profit.

State Bar of Georgia
2024-2025 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$264 and Inactive dues \$132 in 2024-2025)
For the Fiscal Year 2024-2025

	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Membership Numbers					
Active Members	40,611	41,143	41,500	41,940	42,695
Inactive Members	8,459	8,341	8,175	7,940	7,845
Provisional Members	28	37	185	225	20
Associates/Affiliates	15	15	12	12	10
Foreign Legal Consultants	7	6	6	7	9
Students	344	401	325	410	470
Emeritus	3,434	3,794	3,970	4,300	4,585
Total Membership Numbers	52,898	53,737	54,173	54,834	55,634
Revenue					
Dues Active	10,242,211	10,425,069	10,790,000	10,904,400	11,271,480
Dues Inactive	1,115,041	1,082,021	1,062,750	1,032,200	1,035,540
Dues Provisional	32,004	16,891	24,050	29,250	11,880
Dues Associates	1,350	1,300	1,200	1,200	1,000
Dues Foreign Legal Consultant	1,270	1,524	1,560	1,820	2,378
Dues Late Fees	66,060	285,645	260,000	250,000	265,000
Dues NSF Check Fee	180	80	200	300	200
Dues Prior Years	6,309	8,519	5,000	5,000	6,000
Total License and Dues	11,464,425	11,821,049	12,144,760	12,224,170	12,593,476
Program Registration Income	4,464,018	4,842,269	4,150,000	4,750,000	4,400,000
Section Expense Reimbursement	187,835	188,676	301,403	300,973	320,694
CSF Expense Reimbursement	73,000	73,000	73,000	73,000	73,000
Advertising and Sales	47,225	54,863	45,600	27,150	26,225
Membership Income	167,079	156,272	140,300	163,900	176,800
Credit Card Processing Fees	50,754	119,502	102,000	105,000	107,000
Interest Income	213,145	(37,130)	230,000	140,000	275,000
Miscellaneous Revenues	490	1,506	6,000	6,000	22,000
Total Bar Revenue	16,667,971	17,203,005	17,193,063	17,790,193	17,994,195
Total Bar Expenses	14,134,578	14,242,535	17,258,364	18,354,301	19,282,420
SBG Net Gain (Loss)	\$ 2,533,393	\$ 2,960,470	\$ (65,301)	\$ (564,108)	\$ (1,288,225)

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

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State Bar of Georgia Board of Governors Meeting

State Bar of Georgia
2024-2025 Proposed State Bar of Georgia Consolidated Budget - with Bar Center
(Active dues \$264 and Inactive dues \$132 in 2024-2025)
For the Fiscal Year 2024-2025

	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Total Bar Center Operations Revenue	2,663,244	2,176,271	2,972,797	2,487,700	2,638,200	2,822,960
Total Bar Center Operations Expenses	2,163,117	2,267,649	2,601,174	2,356,732	2,684,753	2,675,204
Total Bar Center Operations Net Gain (Loss)	\$ 500,127	\$ (91,378)	\$ 371,623	\$ 130,968	\$ (46,553)	\$ 147,756
Combined Revenue	19,331,215	19,379,276	20,887,255	19,680,763	20,428,393	20,817,155
Combined Expenses	16,297,695	16,510,184	18,830,364	19,615,096	21,039,054	21,957,624
Total Combined Net Income (Loss)	\$ 3,033,520	\$ 2,869,092	\$ 2,056,891	\$ 65,667	\$ (610,661)	\$ (1,140,469)

State Bar of Georgia
2024-2025 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2024-2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Bar Center Income and Cash Receipts						
Bar Center Assessments	100	350	165	200	200	200
Gain/Loss Investment Interest Allocation	(51,762)	(347,796)	55,035	0	0	0
CCLC Contributions to Bar Center	1,291,495	1,286,677	1,400,630	1,325,000	1,300,000	1,375,000
Interest and Dividend Income	97,965	115,359	115,247	100,000	98,000	102,000
Bar Center Income and Cash Receipts	\$ 1,337,798	\$ 1,054,590	\$ 1,571,077	\$ 1,425,200	\$ 1,398,200	\$ 1,477,200
Bar Center Expenses and Cash Disbursements						
Furniture/Equipment	0	0	0	0	0	0
Bond Premium Amortization	30,561	37,249	15,712	40,000	32,000	17,000
Investment Service Fees	16,866	24,411	26,697	22,000	22,000	22,000
Parking Deck Construction	0	0	850	0	0	0
Conference Center Renovations	36,792	12,911	0	0	0	0
Museum and 1st Floor Exhibit	300	0	0	5,000	5,000	0
Audio Video, Furniture and Equipment	16,317	650	18,990	28,000	3,500	5,700
Building Rehabilitation	70,623	17,794	47,347	0	0	8,400
2nd Floor Buildout	0	129,298	30,025	0	0	0
Bar Center Expenses and Cash Disbursements	171,458	222,313	139,621	95,000	62,500	53,100
Bar Center Combined Net Cash Flow	\$ 1,166,340	\$ 832,277	\$ 1,431,456	\$ 1,330,200	\$ 1,335,700	\$ 1,424,100
Conference Center Income and Expenses						
Room Rentals and Various Charges	0	5,869	12,683	11,500	10,000	12,500
Conference Center Operating Expenses	383,815	420,660	444,934	463,462	488,316	490,349
Conference Center Combined Net Cash Flow	\$ (383,815)	\$ (414,792)	\$ (432,251)	\$ (451,962)	\$ (478,316)	\$ (477,849)
Rental Income and Expenses						
Rental Income	1,301,083	935,972	919,520	875,000	920,000	760,000
Building Operating Expenses	1,481,971	1,343,086	1,683,844	1,512,300	1,824,302	1,781,945
Rental Combined Net Cash Flow	\$ (180,888)	\$ (407,114)	\$ (764,324)	\$ (637,300)	\$ (904,302)	\$ (1,021,945)
Parking Income and Expenses						
Parking Income	24,363	179,841	469,518	176,000	310,000	573,260
Parking Deck Operating Expenses	125,872	281,590	332,775	285,970	309,635	349,810

State Bar of Georgia
2024-2025 Proposed Total Bar Center Operations Budget
For the Fiscal Year 2024-2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Parking Combined Net Cash Flow	\$ (101,509)	\$ (101,749)	\$ 136,743	\$ (109,970)	\$ 365	\$ 223,450
Total Bar Center Operations Net Gain (Loss)	\$ 500,127	\$ (91,378)	\$ 371,623	\$ 130,968	\$ (46,553)	\$ 147,756

Administration

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 1,306,438	\$ 1,177,453	\$ 1,198,492	\$ 1,220,586	\$ 1,297,320	\$ 1,317,620
Overtime	4,649	6,457	3,992	7,200	7,200	4,730
Taxes and Benefits	308,095	336,685	323,243	362,348	385,059	415,905
Pension	82,416	82,039	93,904	93,855	99,276	99,832
Total Personnel Services	1,701,598	1,602,634	1,619,631	1,683,989	1,788,855	1,838,087
Operating Expenses						
Shared Office Allocation	388,008	441,480	503,989	503,989	514,013	541,791
Postage and Freight	4,905	2,765	4,235	4,800	4,900	5,200
Printing	100	0	108	100	100	2,600
Supplies	1,606	3,028	2,727	3,200	4,425	2,700
Telephone	3,525	4,350	4,500	3,600	3,600	4,500
Subscriptions and Books	1,790	2,003	2,097	3,150	4,220	2,710
Dues and Memberships	1,805	1,525	1,565	1,560	2,560	2,360
Licenses and Certifications	90	0	0	0	0	0
Seminars and Training	598	658	4,409	6,850	6,250	5,400
Miscellaneous	2,689	3,371	8,057	4,000	3,350	11,750
Attorney and Staff Travel	14,443	30,237	29,356	43,990	45,800	44,910
Executive Director Travel	5,191	10,349	16,691	15,000	17,000	22,000
Luncheons	206	945	2,065	1,600	1,900	3,000
Bank Fees	20,638	18,671	11,368	15,000	19,500	14,000
Credit Card Discount and Fees	221,634	260,735	311,947	250,000	270,000	295,000
Computer Hardware	17,038	4,077	0	0	0	1,600
Computer Software	522	1,289	1,938	600	0	1,800
Membership Software License	75,242	75,241	71,539	75,300	85,000	120,000
Contract Programming	844	5,740	4,569	6,000	6,600	5,500
Total Operating Expenses	760,874	866,464	981,160	938,739	989,218	1,086,821
Furniture/Equipment	643	0	0	0	0	0
Total Expenses	\$ 2,463,115	\$ 2,469,098	\$ 2,600,791	\$ 2,622,728	\$ 2,778,073	\$ 2,924,908

OGC & CAP Income Statement Combined

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 2,528,063	\$ 2,543,939	\$ 2,695,722	\$ 2,687,661	\$ 2,934,523	\$ 3,018,850
Salaries-Hourly PT	28,413	24,903	23,837	47,486	50,335	40,961
Overtime	0	1,230	1,771	4,300	4,300	2,800
Taxes and Benefits	705,760	610,857	645,290	728,942	814,837	876,739
Pension	184,345	176,280	195,326	196,436	195,229	193,011
Total Personnel Services	3,446,581	3,357,209	3,561,946	3,664,825	3,999,224	4,132,361
Operating Expenses						
Shared Office Allocation	450,089	492,420	562,142	562,142	606,531	639,310
Postage and Freight	13,174	12,976	14,032	15,000	16,000	16,000
Printing	0	0	56	500	500	5,500
Supplies	3,476	8,431	19,789	12,000	25,000	22,000
Telephone	3,316	3,601	3,934	3,600	3,700	4,500
Subscriptions and Books	15,121	20,059	20,075	17,400	21,000	21,000
Dues and Memberships	8,098	7,737	8,893	11,000	9,047	14,000
Seminars and Training	4,972	5,373	8,927	7,000	12,500	12,500
Miscellaneous	160	298	979	2,000	2,000	2,000
Recruitment Costs	0	0	0	2,000	2,000	2,000
Attorney and Staff Travel	13,660	28,820	38,045	50,000	50,000	78,500
Investigator Travel	377	2,436	3,402	4,000	4,500	6,000
Luncheons	0	0	578	1,300	1,300	2,000
Computer Hardware	25,807	20,973	2,795	4,000	3,000	0
Computer Software	1,131	4,499	5,043	4,000	5,500	10,600
Contract Labor	24	0	0	4,000	0	0
Contract Programming	20,875	19,937	14,625	10,000	20,000	20,000
Receiverships	2,663	1,265	7,545	6,000	5,000	7,500
State Disciplinary Board Panel	33,469	38,549	64,686	50,000	50,000	70,000
Contract Special Master	18,153	67,121	124,628	40,000	0	0
Lexis Online	19,160	18,719	21,005	21,488	23,000	24,150
Total Operating Expenses	633,726	753,214	921,179	823,430	860,578	957,560
Furniture/Equipment	1,642	0	1,110	5,000	5,000	5,000
Total Expenses	\$ 4,081,948	\$ 4,110,423	\$ 4,484,235	\$ 4,493,255	\$ 4,864,802	\$ 5,094,921

Communications

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	238,345	243,424	276,098	269,010	290,716	302,374
Overtime	0	818	535	1,600	1,600	1,000
Taxes and Benefits	75,600	77,954	94,660	92,585	99,057	104,364
Pension	8,235	13,727	18,447	17,166	18,671	19,337
Total Personnel Services	322,180	335,923	389,740	380,361	410,044	427,075
Expenses						
Shared Office Allocation	62,081	67,920	77,537	77,537	82,241	86,687
Postage and Freight	1,289	1,403	1,891	1,100	1,500	2,000
Supplies	532	1,084	80	1,000	1,000	1,000
Telephone	450	825	900	900	900	900
Subscriptions and Books	3,498	6,158	4,193	6,920	6,095	6,335
Dues and Memberships	405	270	405	405	405	405
Seminars and Training	390	50	1,185	3,500	3,500	4,500
Miscellaneous	488	961	352	1,300	1,300	1,000
Attorney and Staff Travel	6,091	8,698	11,669	11,700	12,200	16,500
Luncheons	0	0	0	100	100	100
Credit Card Discount and Fees	0	0	292	0	0	300
Computer Hardware	5,428	1,359	1,104	0	0	0
Computer Software	1,816	1,457	1,458	1,600	1,600	1,600
Media Consultants	46,336	32,474	28,759	50,000	40,000	33,000
Website Maintenance	31,502	32,111	55,660	30,000	40,000	68,000
Membership Certificates	2,929	2,143	1,845	2,000	2,000	2,000
Subtotal	163,235	156,912	187,329	188,062	192,841	224,327
Furniture/Equipment	0	0	0	4,600	0	0
Subtotal	485,415	492,834	577,068	573,023	602,885	651,402
Publications						
Bar Journal	253,874	223,868	359,790	276,750	364,300	256,500
Supplemental Directory	6,673	6,353	8,451	7,300	10,000	10,500
Special Publications and Printing	0	0	937	1,500	2,000	2,000
Total Publications	260,547	230,221	369,178	285,550	376,300	269,000
Total Communications	745,962	723,056	946,247	858,573	979,185	920,402

Fee Arbitration

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 270,971	\$ 255,292	\$ 271,077	\$ 283,555	\$ 296,848	\$ 263,660
Overtime	0	48	0	1,500	1,500	1,000
Taxes and Benefits	110,736	95,581	77,095	123,956	97,730	121,994
Pension	18,592	14,854	20,085	16,072	20,436	16,480
Total Personnel Services	400,299	365,775	368,257	425,083	416,514	403,134
Operating Expenses						
Shared Office Allocation	62,081	67,920	77,537	77,537	82,241	86,687
Postage and Freight	6,954	6,785	5,408	7,500	7,800	8,300
Printing	0	2,764	2,444	3,000	3,200	4,200
Supplies	746	1,012	1,796	1,900	1,700	2,000
Subscriptions and Books	1,346	900	977	1,010	1,010	1,900
Dues and Memberships	305	305	305	400	400	450
Seminars and Training	0	0	0	400	400	1,000
Miscellaneous	337	735	71	1,200	1,200	1,300
Attorney and Staff Travel	0	0	0	2,500	2,500	2,500
Luncheons	0	168	1,317	3,000	2,500	2,500
Computer Hardware	3,529	4,077	680	1,000	1,000	0
Contract Labor	72,000	72,000	72,000	75,000	75,000	75,000
Contract Programming	1,344	94	963	2,000	2,000	6,000
Total Operating Expenses	148,641	156,760	163,498	176,447	180,951	191,837
Furniture/Equipment	0	0	0	500	0	0
Total Expenses	\$ 548,940	\$ 522,535	\$ 531,755	\$ 602,030	\$ 597,465	\$ 594,971

Law Practice Management

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Revenues						
Consultation	\$ 450	\$ 665	\$ 1,619	\$ 8,000	\$ 1,000	\$ 1,500
Publications	26	70	110	100	100	100
Vendor Directory	14,150	12,250	350	8,000	10,000	8,000
Miscellaneous Income	873	1,008	1,413	250	750	750
Total Revenues	15,499	13,992	3,492	16,350	11,850	10,350
Personnel Services						
Salaries	237,525	209,760	261,104	259,727	275,311	286,349
Overtime	0	1,708	1,921	3,300	5,000	2,500
Taxes and Benefits	95,961	77,159	82,615	122,631	107,883	113,588
Pension	9,281	6,597	14,931	14,364	17,960	18,476
Total Personnel Services	342,767	295,224	360,571	400,022	406,154	420,913
Operating Expenses						
Shared Office Allocation	62,081	67,920	77,537	77,537	82,241	86,687
Postage and Freight	0	2,377	1,069	1,800	2,000	2,000
Printing	0	0	372	600	1,000	1,000
Supplies	27	1,069	797	1,395	1,500	1,000
Telephone	0	0	0	100	900	900
Subscriptions and Books	6,945	4,631	3,872	6,000	6,500	6,900
Dues and Memberships	485	675	324	1,500	1,700	1,800
Seminars and Training	1,176	461	211	1,300	1,300	1,500
Miscellaneous	0	163	909	350	350	350
Attorney and Staff Travel	3,811	4,524	8,133	9,550	9,950	9,950
Lunches	0	101	75	200	200	200
Credit Card Discount and Fees	0	0	116	0	0	350
Computer Hardware	1,442	4,077	0	0	0	0
Computer Software	5,160	4,785	4,899	6,786	7,034	7,034
Total Operating Expenses	81,128	90,783	98,314	107,118	114,675	119,671
Total Expenses	423,895	386,007	458,885	507,140	520,829	540,584
Solo and Small Firm	0	0	10,306	11,000	7,000	2,000
Showcase Programs	0	0	(2,763)	0	0	0

Law Practice Management

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Net Income	\$ (408,396)	\$ (372,015)	\$ (447,850)	\$ (479,790)	\$ (501,979)	\$ (528,234)

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 108,725	\$ 93,781	\$ 110,778	\$ 109,900	\$ 116,494	\$ 132,400
Overtime	0	940	419	500	500	500
Taxes and Benefits	32,317	41,820	52,227	54,825	58,410	62,660
Pension	6,510	5,962	6,902	6,635	7,032	7,987
Total Personnel Services	147,552	142,503	170,326	171,860	182,436	203,547
Operating Expenses						
Shared Office Allocation	31,041	33,960	38,768	38,768	41,121	43,343
Postage and Freight	30	13	0	0	0	0
Printing	0	0	341	0	0	0
Supplies	25	774	49	700	700	400
Telephone	900	750	900	900	900	900
Subscriptions and Books	1,899	3,101	1,984	2,500	2,500	2,500
Dues and Memberships	0	90	90	150	150	150
Seminars and Training	0	88	0	500	500	750
Miscellaneous	0	465	0	0	0	0
Attorney and Staff Travel	4,631	6,881	9,838	9,450	10,300	14,250
Luncheons	0	43	0	0	0	0
Credit Card Discount and Fees	0	0	25	0	0	0
Computer Hardware	1,414	1,358	0	0	0	0
Computer Software	364	611	729	570	800	800
Committee Brochures	0	7,063	8,987	7,500	9,200	7,500
President	6,111	8,354	10,544	23,800	20,000	20,000
President Elect	4,541	5,230	10,621	18,200	15,000	13,500
Immediate Past President	4,133	9,046	3,386	14,600	12,500	11,000
Treasurer	1,300	1,241	1,300	1,300	1,300	2,500
Secretary	1,300	1,300	1,300	1,300	1,300	2,500
Meetings	47,500	47,500	47,500	47,500	47,500	47,500
Newsletter	890	0	0	0	0	0
Total Operating Expenses	106,079	127,868	136,361	167,738	163,771	167,593
Committees Activities						
Committees Income	0	(1,470)	(4,365)	(2,000)	(2,500)	(4,000)
Committees Expense	22,409	58,708	58,561	103,000	103,100	81,950
Total Committees Activities	22,409	57,238	54,196	101,000	100,600	77,950

Young Lawyers Division

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Total Expenses	\$ 276,039	\$ 327,608	\$ 360,884	\$ 440,598	\$ 446,807	\$ 449,090

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 514,975	\$ 514,990	\$ 541,658	\$ 538,652	\$ 570,971	\$ 593,865
Overtime	0	0	0	255	255	250
Taxes and Benefits	180,188	176,574	173,957	193,596	194,405	216,233
Pension	35,691	34,177	39,161	37,231	39,041	40,436
Total Personnel Services	730,854	725,741	754,776	769,734	804,672	850,784
Operating Expenses						
Shared Office Allocation	93,122	101,880	116,305	116,305	123,362	130,030
Postage and Freight	780	818	729	800	900	900
Printing	0	0	96	100	100	100
Supplies	1,969	1,101	760	800	1,000	1,000
Subscriptions and Books	188	716	546	800	850	800
Dues and Memberships	350	500	530	714	720	700
Seminars and Training	89	300	0	500	500	500
Miscellaneous	0	310	125	1,100	1,100	1,000
Attorney and Staff Travel	0	32	0	800	800	800
Investigator Travel	1,348	2,108	851	3,750	3,750	3,000
Luncheons	0	0	0	1,200	1,200	1,000
Computer Hardware	2,044	6,794	0	0	0	0
Lexis Online	3,700	3,491	4,170	3,800	4,070	4,250
Total Operating Expenses	103,590	118,051	124,113	130,669	138,352	144,080
Total Expenses	\$ 834,444	\$ 843,792	\$ 878,889	\$ 900,403	\$ 943,024	\$ 994,864

Savannah Office

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 88,154	\$ 89,239	\$ 94,481	\$ 94,307	\$ 99,605	\$ 118,545
Overtime	0	0	0	250	250	250
Taxes and Benefits	39,323	46,988	51,917	53,435	56,905	61,423
Pension	3,355	3,261	5,855	5,683	6,002	7,139
Total Personnel Services	130,832	139,488	152,253	153,675	162,762	187,357
Operating Expenses						
Shared Office Allocation	15,520	16,980	19,384	19,384	20,560	21,672
Postage and Freight	30	96	17	80	150	150
Printing	0	0	445	100	100	100
Supplies	0	257	982	1,000	1,200	1,200
Telephone	19,429	15,735	8,179	15,000	7,000	7,500
Subscriptions and Books	0	303	174	180	180	200
Miscellaneous	57	38	4,679	4,500	4,000	4,000
Attorney and Staff Travel	1,953	1,984	2,471	2,000	2,200	1,000
Parking Savannah	2,220	2,220	1,110	3,000	0	0
Luncheons	0	0	0	100	100	100
Computer Hardware	2,583	1,359	0	0	0	0
Computer Software	0	0	0	100	100	100
Equipment Maintenance and Rental	1,878	1,467	1,459	4,000	2,300	2,300
Equipment Rental	0	0	0	100	0	0
Rent and Utilities	83,216	78,390	98,424	83,500	85,000	87,550
Facilities Maintenance	2,905	3,144	1,416	4,500	3,500	3,500
Building and Other Insurance (Not Group)	2,553	0	0	0	0	0
Total Operating Expenses	132,344	121,973	138,739	137,544	126,390	129,372
Furniture/Equipment	0	0	18,331	0	4,000	0
Total Expenses	\$ 263,175	\$ 261,461	\$ 309,323	\$ 291,219	\$ 293,152	\$ 316,729

Tifton

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Personnel Services						
Salaries	\$ 46,600	\$ 49,539	\$ 60,707	\$ 58,538	\$ 63,998	\$ 66,564
Salaries-Hourly PT	20,080	19,525	11,699	21,428	22,715	30,030
Taxes and Benefits	7,549	16,396	18,355	18,929	20,287	21,810
Pension	1,203	1,120	3,762	4,806	5,211	5,805
Total Personnel Services	75,432	86,580	94,523	103,701	112,211	124,209
Operating Expenses						
Shared Office Allocation	11,640	12,735	14,538	14,538	15,420	16,254
Postage and Freight	344	510	495	300	330	650
Printing	4	0	0	100	100	100
Supplies	442	2,195	2,025	2,500	2,500	2,500
Telephone	14,462	8,616	7,074	14,000	7,000	7,000
Subscriptions and Books	99	502	340	350	350	400
Seminars and Training	0	0	0	0	0	1,000
Miscellaneous	55	34	0	200	200	200
Attorney and Staff Travel	488	2,097	2,423	2,500	3,000	1,000
Luncheons	0	0	0	100	100	100
Computer Hardware	2,828	1,777	0	0	0	0
Computer Software	0	0	0	200	200	200
Equipment Maintenance and Rental	1,534	1,451	1,461	1,500	2,000	2,000
Equipment Rental	0	0	0	100	0	0
Rent and Utilities	18,990	19,574	19,928	20,300	21,200	23,000
Facilities Maintenance	270	360	785	1,000	1,900	6,400
Building and Other Insurance (Not Group)	2,553	0	0	0	0	0
Total Operating Expenses	53,708	49,851	49,069	57,688	54,300	60,804
Furniture/Equipment	0	0	2,760	1,100	2,500	0
Total Expenses	\$ 129,140	\$ 136,430	\$ 146,352	\$ 162,489	\$ 169,011	\$ 185,013

Law Related Education

State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Revenues						
Miscellaneous Income	\$ 0	\$ 59	\$ 218	\$ 0	\$ 0	\$ 0
Total Revenues	0	59	218	0	0	0
Personnel Services						
Salaries	161,418	182,256	210,153	211,839	227,729	236,860
Overtime	0	0	0	500	500	350
Taxes and Benefits	67,406	66,907	96,057	118,507	126,581	121,224
Pension	11,452	11,024	15,469	12,002	15,557	16,128
Total Personnel Services	240,276	260,187	321,679	342,848	370,367	374,562
Operating Expenses						
Shared Office Allocation	46,561	50,940	58,153	58,153	61,681	65,015
Postage and Freight	14	17	45	100	50	50
Printing	0	0	1,527	500	1,500	1,000
Supplies	62	930	1,244	1,200	1,200	1,000
Subscriptions and Books	1,126	355	387	450	400	250
Seminars and Training	254	0	0	600	500	1,000
Miscellaneous	0	639	185	800	800	500
Attorney and Staff Travel	0	1,700	3,163	5,866	5,500	4,608
Lunches	0	53	0	120	120	100
Computer Hardware	0	5,354	0	0	0	0
Total Operating Expenses	48,017	59,988	64,704	67,789	71,751	73,523
Furniture/Equipment	0	0	772	0	0	0
Total Expenses	288,293	320,175	387,156	410,637	442,118	448,085
Net Income	\$ (288,293)	\$ (320,116)	\$ (386,938)	\$ (410,637)	\$ (442,118)	\$ (448,085)

High School Mock Trial

State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Revenues						
Miscellaneous Income	198	\$ 40	\$ 505	\$ 400	\$ 500	\$ 5,500
Total Revenues	198	40	505	400	500	5,500
Personnel Services						
Salaries	64,887	64,259	71,086	67,870	72,080	74,970
Taxes and Benefits	34,669	33,444	36,898	39,248	41,845	30,469
Pension	3,885	0	0	4,079	4,332	4,506
Total Personnel Services	103,441	97,703	107,984	111,197	118,257	109,945
Operating Expenses						
Shared Office Allocation	15,520	16,980	19,384	19,384	20,560	21,672
Postage and Freight	1,202	230	66	900	1,000	500
Printing	0	0	56	0	0	0
Supplies	645	655	674	500	600	800
Subscriptions and Books	604	543	593	916	1,000	900
Dues and Memberships	200	200	200	200	200	200
Miscellaneous	4	0	57	400	400	200
Attorney and Staff Travel	3,167	1,674	2,004	1,000	2,750	3,150
Luncheons	0	145	0	400	500	500
Credit Card Discount and Fees	0	0	14	0	0	100
Computer Hardware	0	1,359	0	0	0	3,000
Computer Software	364	472	364	0	0	400
Total Operating Expenses	21,706	22,259	23,412	23,700	27,010	31,422
HSMT Events						
Law Academy	508	3,729	2,284	5,335	5,975	5,500
Regional Competition	(11,316)	(13,579)	(239)	(1,900)	450	(3,300)
State Competition	65	8,268	6,481	15,000	16,200	17,000
National Competition	2,352	6,944	14,442	13,000	15,000	17,000
District Competition	0	8,485	7,220	9,000	10,000	10,000
2019 NHSMTC-Athens	(76)	(19)	0	0	0	0
Total HSMT Events	(8,467)	13,828	30,188	40,435	47,625	46,200
Total Expenses	116,680	133,790	161,585	175,332	192,892	187,567

State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Net Income	(116,482)	(133,750)	(161,081)	(174,932)	(192,392)	(182,067)

Institute of Continuing Legal Education
State Bar of Georgia
Budget Report
For the Year 2024 - 2025

	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Program Revenue						
Registration Revenue	\$ 4,481,405	\$ 4,854,415	\$ 4,890,539	\$ 4,250,000	\$ 5,000,000	\$ 4,500,000
Sponsorship	0	0	1,000	0	0	0
Program Discounts	(17,387)	(18,447)	(15,585)	(100,000)	(250,000)	(100,000)
Other	0	6,300	6,110	0	0	0
Total Program Revenue	4,464,018	4,842,269	4,882,064	4,150,000	4,750,000	4,400,000
Total Program Expenditures	753,742	1,241,572	2,294,572	1,323,650	1,900,000	2,176,500
Net Margin on Programs	3,710,276	3,600,697	2,587,492	2,826,350	2,850,000	2,223,500
Personnel Services						
Salaries Full Time	982,186	870,218	908,053	1,266,287	1,160,740	1,376,679
Salaries Part Time	0	1,625	21,463	30,000	45,000	31,500
Overtime Pay	0	5,094	9,895	15,000	20,000	21,000
Taxes and Benefits	327,369	214,518	245,924	548,261	462,715	502,927
Pension	58,136	49,163	42,570	53,536	66,585	73,811
Total Personnel Services	1,367,691	1,140,618	1,227,905	1,913,084	1,755,040	2,005,917
Operating Expenses						
Shared Office Allocation	318,166	322,620	348,916	348,916	370,087	433,433
Board and Committee Meetings	0	3,860	237	3,000	4,000	4,000
Dues and Memberships	1,260	1,330	3,411	2,500	7,000	7,000
Licenses and Certification	245	502	750	1,000	3,000	3,000
Seminars and Training	3,186	3,724	5,027	12,000	25,000	22,000
Attorney and Staff Travel	3,729	9,193	30,411	15,000	50,000	20,000
Supplies	3,100	2,548	6,456	15,000	20,000	10,000
Printing	5	0	444	2,500	2,500	1,500
Subscriptions and Books	360	735	89,505	75,000	105,000	95,000
Postage and Freight	262	486	174	750	750	250
Telephone	4,500	3,450	5,400	7,500	8,100	8,100
Internet Services	2,182	630	213	2,500	4,500	4,500
Computer Software	34,461	79,479	660	10,000	5,000	1,000
Contract Programming	16,594	15,071	1,038	50,000	25,000	3,000
Computer Hardware	18,395	6,656	14,077	20,000	15,000	0
Miscellaneous	118	506	1,181	2,500	10,000	5,000
Professional Fees	0	0	4,800	12,500	12,500	5,000

Institute of Continuing Legal Education

State Bar of Georgia
Budget Report
For the Year 2024 - 2025

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Equipment Maintenance and Rental	492	0	0	1,000	1,000	0
Other Business Insurance (Not Group)	25,527	0	0	0	10,000	0
Credit Card Discount and Fees	110,816	120,795	115,004	112,000	142,500	120,000
Banking Fees	1,064	8	0	1,200	1,000	200
Luncheons	0	1,589	4,137	2,000	4,000	4,000
Recruitment	0	0	0	2,500	2,500	0
Contract Labor	0	0	0	5,000	5,000	1,000
Volunteer Recognition	0	0	0	5,000	5,000	5,000
Marketing Materials	0	0	0	0	10,000	15,000
Program Overhead	(250,550)	(372,024)	(675,526)	0	(375,000)	(575,000)
Total Operating Expenses	293,912	201,157	(43,686)	704,366	473,437	192,983
Furniture and Equipment						
Furniture and Equipment	0	0	0	5,000	5,000	2,500
Total Expenses	1,661,603	1,341,775	1,184,220	2,622,450	2,233,477	2,201,400
Net Income Before Other Inc and Exp	2,048,673	2,258,922	1,403,273	203,900	616,523	22,100
Other Income and Expenses						
Interest Income	37,753	3,356	86,605	30,000	30,000	100,000
Bond Premium Amortization	(9,826)	(6,444)	(4,868)	(7,000)	(7,000)	(6,000)
Investment Service Fees	(9,378)	(9,382)	(9,431)	(10,000)	(10,000)	(10,000)
Total Other Income and Expenses	18,549	(12,470)	72,306	13,000	13,000	84,000
Net Income	\$ 2,067,222	\$ 2,246,452	\$ 1,475,579	\$ 216,900	\$ 629,523	\$ 106,100

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Other Activities						
SBG President	13,871	11,880	19,437	41,800	36,000	36,000
SBG President Elect	6,448	3,995	6,447	26,500	22,000	22,000
SBG President Elect Elect	0	0	1,015	1,500	1,350	1,350
SBG Treasurer	1,041	3,443	3,800	3,800	4,000	4,500
SBG Secretary	2,034	3,727	1,995	3,800	4,000	4,500
SBG Immediate Past President	6,387	9,208	9,232	17,800	14,500	14,500
SBG Past Past President	0	0	1,800	1,800	1,620	1,620
Exec. Comm. - Jonathan Pannell	0	0	0	0	3,000	3,000
Exec. Comm. - R. Gary Spencer	0	0	0	0	3,000	3,000
Exec. Comm. - Shiriki Cavitt Jones	0	0	0	0	3,000	3,000
Exec. Comm. - David S. Lipscomb	0	0	0	0	3,000	3,000
Exec. Comm. - Martin E. Vaibuenha	0	0	0	0	3,000	3,000
Exec. Comm. - Javoyne Hicks	0	0	0	0	3,000	3,000
Total Officer's Expenses	29,781	32,253	43,727	97,000	101,470	102,470
Miscellaneous						
BOG and Member Meetings	347,883	384,136	400,237	471,900	556,000	588,200
Supreme Court Meetings	15,549	26,489	46,661	30,000	40,000	75,000
Executive Committee Meetings	7,091	40,983	33,891	40,000	50,000	42,000
Court of Appeals Meetings	0	0	0	0	0	20,000
Lawyer's Assistance Program	85,000	85,000	125,000	125,000	125,000	155,000
Sections	187,292	188,553	249,355	301,403	301,039	320,694
State Disciplinary Board Lawyers	31,887	32,375	30,000	30,000	34,000	31,500
Elections	34,898	18,628	23,411	18,375	19,000	20,000
Dues Notice	27,905	31,473	34,806	33,000	42,825	45,990
Letters of Good Standing	2,072	2,295	2,210	2,500	2,300	2,500
Bar Membership Cards	7,895	8,236	10,671	8,850	8,800	11,000
50 Year Certificates	2,034	1,831	3,823	2,700	6,500	6,000
Fastcase	253,597	267,738	281,419	280,000	297,000	455,000
Membership Database Project	12,605	0	0	0	0	0
Recruitment Costs	74,934	0	0	0	0	0
State Bar Committees	7,491	18,231	18,704	29,000	25,000	20,000
Georgia Diversity Program	20,000	10,000	10,000	10,000	10,000	10,000
ABA Delegate Breakfast	0	0	2,134	2,500	2,500	2,500
1st Floor Office Furniture Project	15,137	0	0	0	0	0
1st Floor Painting	0	2,700	2,600	3,000	5,500	0
Commitment to Equality Awards	2,500	2,500	2,500	2,500	2,500	2,500
Resource Center Contribution	110,332	55,166	55,166	55,166	55,166	55,166
BASICS Program Contributed	37,500	0	0	0	0	0

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Bond Premium Amortization	70,759	39,604	9,749	65,000	67,500	29,000
Investment Service Fees	39,480	21,995	14,525	36,000	29,000	35,000
Access to Justice/Pro Bono	0	0	2,500	2,500	2,500	7,500
Total Miscellaneous	1,393,842	1,237,933	1,359,363	1,549,394	1,682,130	1,934,550
Pro Bono	212,216	212,216	212,216	212,216	212,216	212,216
Total Other Activities	1,635,839	1,482,402	1,615,306	1,858,610	1,995,816	2,249,236
Unallocated Services	(91,746)	(59,323)	(133,549)	0	0	0
Grand Total	14,134,578	14,242,536	16,229,190	17,314,364	18,354,301	19,282,420

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Shared Office Overhead						
Telephone	62,411	55,305	95,780	58,000	52,800	54,000
Computer Software	2,951	3,896	5,126	4,000	4,600	5,300
Internet Services	0	0	0	0	24,750	25,200
Equipment Rental	51,443	53,242	54,525	55,000	60,000	57,500
Kitchen	2,283	15,303	22,320	23,000	23,000	27,000
Facilities Maintenance	21,951	10,270	12,007	15,000	17,000	15,000
Payroll Service	14,798	15,438	16,189	16,500	16,500	17,500
Audit	30,450	21,600	37,892	28,000	29,500	32,500
Building and Other Insurance (Not Group)	116,931	178,998	209,575	200,000	245,000	250,000
Furniture/Equipment	0	0	0	0	0	0
Supplies and Printing	31,858	41,920	47,880	55,000	48,000	48,000
Subtotal	335,075	395,972	501,295	454,000	521,150	532,000
Other Services						
Accounting	417,400	496,812	513,676	524,173	556,295	577,214
Human Resources	192,184	217,912	253,755	234,543	269,646	288,433
Mailroom	79,090	74,221	82,009	81,076	86,757	89,715
Receptionist	148,422	107,377	65,882	156,935	73,534	69,604
Information Technology	586,374	645,753	673,616	773,055	839,463	938,940
Subtotal Other Services	1,423,470	1,542,075	1,588,938	1,769,782	1,825,695	1,963,906
Total Shared Office Overhead	1,758,546	1,938,047	2,090,233	2,223,782	2,346,845	2,495,906
Total Allocated Services	(1,850,291)	(1,997,370)	(2,223,782)	(2,223,782)	(2,346,845)	(2,495,906)
Unallocated Services	(91,746)	(59,323)	(133,549)	0	0	0

**State Bar of Georgia
Budget Template
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Related Organizations Shared						
Office Allocations						
Georgia Bar Foundation	\$ 3,500	\$ 3,500	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,240
Continuing Legal Education	77,601	84,900	67,845	67,845	61,681	86,687
TILPP	46,561	33,960	29,075	29,075	41,121	0
Pro Bono	54,577	58,896	49,598	49,598	51,503	54,784
Professionalism	3,500	3,500	4,000	4,000	4,000	4,240
Sections	31,041	33,960	58,153	58,153	61,681	65,015
Subtotal	216,780	218,716	212,671	212,671	223,986	214,966
State Bar Departments - Shared						
Office Allocations						
Membership	77,601	84,900	96,921	96,921	102,802	108,358
Meetings	31,041	33,960	38,768	38,768	41,121	43,343
Executives	279,366	322,620	368,300	368,300	370,090	390,090
General Counsel	450,088	492,420	562,142	562,142	606,531	639,310
Communications	62,081	67,920	77,537	77,537	82,241	86,687
Fee Arbitration	62,081	67,920	77,537	77,537	82,241	86,687
Law Practice Management	62,082	67,920	77,537	77,537	82,241	86,687
Savannah Office	15,520	16,980	19,384	19,384	20,560	21,672
Tifton Office	11,640	12,735	14,538	14,538	15,420	16,254
Younger Lawyers	31,041	33,960	38,768	38,768	41,121	43,343
Unauthorized Practice of Law	93,122	101,880	116,305	116,305	123,362	130,030
Law Related Education	46,561	50,940	58,153	58,153	61,681	65,015
High School Mock Trial	15,520	16,980	19,384	19,384	20,560	21,672
ICLE	318,166	322,620	348,916	348,916	370,087	433,433
Conference Center	62,081	67,920	77,537	77,537	82,241	86,687
Legislative Program	15,520	16,980	19,384	19,384	20,560	21,672
Subtotal	1,633,511	1,778,654	2,011,111	2,011,111	2,122,859	2,280,940
Total Allocated Services	\$ 1,850,291	\$ 1,997,370	\$ 2,223,782	\$ 2,223,782	\$ 2,346,845	\$ 2,495,906

2024-2025 State Bar of Georgia Budget

Percentage of Shared Office Overhead Expense

	Exec	Mits	Memb	OGC	CAP	COM	F.A.	LPM	TIF	SNV	YLD	HSMT	UPL	TILPP	CONF	LRE	LEG	CLE	SEC	ICLE	GBF	PS	PROF	Total	BAR
24-25 Emp.	16	2	5	29.5	0	4	4	4	0.75	1	2	1	6	0	4	3	1	4	3	20	3	3	2	120.3	112.3
%24-25 Emp.	14.97%	1.66%	4.16%	24.53%	0.00%	3.33%	3.33%	3.33%	0.62%	0.83%	1.66%	0.83%	4.98%	0.00%	3.33%	2.49%	0.83%	3.33%	2.49%	16.63%	2.49%	2.49%	1.66%		
%24-25 Emp.	16.04%	1.78%	4.45%	26.28%	0.00%	3.56%	3.56%	3.56%	0.67%	0.89%	1.78%	0.89%	5.35%	0.00%	3.56%	2.67%	0.89%	3.56%	2.67%	17.82%	2.67%	2.67%	1.66%		

Conference Center

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Revenues						
After Hours Fees	0	\$ 3,665	\$ 8,415	\$ 7,000	\$ 7,000	\$ 8,500
Beverage Service	0	306	518	2,000	1,000	1,000
Cleaning Fees	0	930	1,725	1,500	1,000	1,000
Audio Video Support	0	968	2,025	1,000	1,000	2,000
Total Revenues	0	5,869	12,683	11,500	10,000	12,500
Personnel Services						
Salaries	215,099	218,064	231,413	224,938	238,434	247,995
Overtime	0	3,560	5,881	11,500	11,500	7,500
Taxes and Benefits	76,470	80,095	81,281	87,726	93,357	98,111
Pension	12,927	12,901	14,797	14,211	15,021	15,356
Total Personnel Services	304,496	314,620	333,372	338,375	358,312	368,962
Operating Expenses						
Shared Office Allocation	62,081	67,920	77,537	77,537	82,241	86,687
Postage and Freight	0	1	0	0	0	0
Supplies	1,039	3,379	2,477	3,000	2,913	2,500
Subscriptions and Books	8,101	5,896	5,935	6,000	11,350	7,000
Miscellaneous	95	154	120	850	1,000	500
Conference Center Copier	0	6	0	1,800	0	0
Attorney and Staff Travel	0	216	363	2,000	500	500
Credit Card Discount and Fees	0	0	138	0	0	200
Computer Hardware	1,442	4,122	0	0	0	0
After Hours Security	0	94	0	7,000	1,000	500
Room Turn Around Costs	0	0	0	1,400	0	0
Contract Programming	500	0	312	500	500	500
Equipment Maintenance and Rental	1,850	4,564	4,606	4,000	4,500	5,000
Furniture Repairs and Maintenance	469	9,889	13,050	13,000	10,000	10,000
Kitchen	889	4,085	7,024	8,000	8,000	8,000
Facilities Maintenance	0	375	0	0	0	0
Total Operating Expenses	76,466	100,701	111,562	125,087	122,004	121,387
Total Expenses	380,962	415,321	444,934	463,462	480,316	490,349
Furniture/Equipment	2,853	5,339	0	0	8,000	0

Conference Center

**State Bar of Georgia
Budget Report
For the Bar Year 2023 - 2024**

2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
\$ (383,815)	\$ (414,792)	\$ (432,251)	\$ (451,962)	\$ (478,316)	\$ (477,849)

Net Income

Other Bar Center Operations

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Revenues						
Interest and Dividend Income	\$ 97,965	\$ 115,359	\$ 115,246	\$ 100,000	\$ 98,000	\$ 102,000
Gain/Loss Investment Interest Allocation	(51,762)	(347,796)	55,035	0	0	0
Bar Center Assessments	100	350	165	200	200	200
CCLC Contributions to Bar Center	1,291,495	1,286,677	1,400,631	1,325,000	1,300,000	1,375,000
Total Revenues	1,337,798	1,054,590	1,571,077	1,425,200	1,398,200	1,477,200
Operating Expenses						
Bond Premium Amortization	30,561	37,249	15,712	40,000	32,000	17,000
Investment Service Fees	16,866	24,411	26,697	22,000	22,000	22,000
Parking Deck Construction	0	0	850	0	0	0
Conference Center Renovations	36,792	12,911	0	0	0	0
Museum and 1st Floor Exhibit	300	0	0	5,000	5,000	0
Audio Video, Furniture and Equipment	16,317	650	18,990	28,000	3,500	5,700
Building Rehabilitation	70,623	17,794	47,347	0	0	8,400
2nd Floor Buildout	0	129,298	30,025	0	0	0
Total Operating Expenses	171,458	222,313	139,621	95,000	62,500	53,100
Total Expenses	171,458	222,313	139,621	95,000	62,500	53,100
Net Income	\$ 1,166,340	\$ 832,277	\$ 1,431,456	\$ 1,330,200	\$ 1,335,700	\$ 1,424,100

Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Revenues						
Income Rental Operations	\$ 1,301,083	\$ 935,972	\$ 919,520	\$ 875,000	\$ 920,000	\$ 760,000
Total Revenues	1,301,083	935,972	919,520	875,000	920,000	760,000
Operating Expenses						
Equipment and Supplies	0	0	841	0	0	0
Personnel Management Salary	46,307	9,346	12,945	65,000	60,000	60,000
Administrative Taxes and Benefits	5,974	483	1,190	7,800	6,127	16,800
Travel	0	0	185	200	100	100
Supplies	94	0	0	200	100	100
Telephone Expense	1,156	908	5,894	1,300	1,500	2,040
Management Fees	59,920	61,718	63,569	63,000	70,000	69,000
Bank Fees	1,416	1,449	1,350	1,500	1,800	1,800
R&M Salaries	169,689	185,290	190,698	180,000	201,600	225,100
R&M Taxes and Benefits	63,497	65,729	64,992	69,000	88,000	96,800
R&M HVAC	74,372	56,631	77,878	65,000	200,000	66,600
R&M Plumbing	6,841	12,919	101,417	7,600	7,600	9,000
R&M Fire/Life Prevention	2,052	7,482	10,753	5,000	11,925	13,925
R&M Electrical/Lamps	5,491	14,669	15,156	22,000	17,000	17,000
R&M Water Treatment	9,106	8,782	10,673	11,000	12,000	12,300
R&M Life Safety Contract	38,015	6,888	7,567	7,000	12,000	12,000
R&M Tools/Radios	2,660	1,934	0	3,000	2,500	2,500
R&M Elevators	63,771	25,864	24,966	30,000	30,000	31,200
R&M Pest Control	2,828	3,528	3,480	3,000	3,500	3,780
R&M Rubbish Removal	13,695	14,547	13,269	13,000	13,000	14,000
R&M Other: Locks and Keys	42	50	0	300	300	300
R&M Painting	6,696	0	6,555	7,000	9,000	9,000
R&M Other: General Building	3,027	0	51,959	3,400	3,400	3,400
R&M Lobby	0	0	0	3,000	3,000	3,000
Uniforms	909	902	696	1,000	1,000	1,500
Electric	310,000	319,668	327,738	330,000	330,000	350,000
Water	53,959	27,033	68,345	54,000	60,000	65,000
Gas	29,629	23,378	30,932	25,000	32,000	32,000
Security Contract	253,816	273,667	340,602	275,000	373,000	388,000
Cleaning	198,078	156,544	176,181	186,000	186,000	188,700
Grounds Supplies and Maintenance	3,988	4,079	6,574	7,000	7,000	7,000
Insurance	54,943	59,599	67,439	66,000	80,850	80,000
Total Operating Expenses	1,481,971	1,343,086	1,683,844	1,512,300	1,824,302	1,781,945

Rental

**State Bar of Georgia
Budget Report
For the Bar Year 2023 - 2024**

	2020-2021 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
Total Expenses	1,481,971	1,343,086	1,683,844	1,512,300	1,824,302	1,781,945
Net Income	\$ (180,888)	\$ (407,114)	\$ (764,324)	\$ (637,300)	\$ (904,302)	\$ (1,021,945)

Parking

**State Bar of Georgia
Budget Report
For the Bar Year 2024 - 2025**

	2020-2021	2021-2022	2022-2023	2022-2023	2023-2024	2024-2025
	Actual	Actual	Actual	Annual Budget	Annual Budget	Annual Budget
Revenues						
Monthly Parking Operations	\$ 7,787	\$ 56,339	\$ 70,196	\$ 65,000	\$ 65,000	\$ 113,220
Daily Parking Operations	848	19,050	31,934	16,000	20,000	10,040
Special Events Parking Operations	15,728	104,452	367,388	95,000	225,000	450,000
Total Revenues	24,363	179,841	469,518	176,000	310,000	573,260
Operating Expenses						
Salaries	55,223	111,985	110,937	113,000	99,600	130,000
Payroll Taxes	5,798	14,458	15,467	14,000	14,000	18,200
Workers' Compensation	5,246	13,315	14,341	12,000	14,600	18,000
Medical Ins/Benefits	7,925	18,823	19,762	17,500	21,000	24,780
Signs	0	0	549	450	0	0
Uniforms	0	0	638	120	240	240
Repairs and Maintenance	24,932	24,898	27,667	30,000	25,200	26,000
Tickets	0	0	0	500	600	600
Cell Phone/Beeper	3,343	907	611	1,800	1,900	840
Office Expenses	7,983	7,078	26,939	6,900	9,270	10,290
Invoicing Expenses	3,420	4,204	4,721	4,200	4,275	5,200
Bank Charges	1,471	2,587	4,394	2,500	4,000	4,600
Credit Card Fees	554	3,478	8,722	2,700	6,800	9,500
Garage Insurance	6,305	9,059	10,367	8,400	11,400	11,000
Business License	650	1,028	1,004	800	1,200	1,410
Management Fee	4,380	4,200	4,200	4,200	4,200	4,200
Security	(3,240)	61,293	71,455	57,000	80,000	68,000
Payroll Processing	1,453	2,946	3,082	2,800	3,500	3,500
Equipment and Supplies	163	0	0	700	850	850
Miscellaneous	266	0	395	500	500	500
Cleaning	0	0	900	3,200	0	3,600
Fire Safety	0	0	1,633	700	2,500	2,500
Incentive Management Fees	0	1,331	4,991	2,000	4,000	6,000
Total Operating Expenses	125,872	281,590	332,775	285,970	309,635	349,810
Total Expenses	125,872	281,590	332,775	285,970	309,635	349,810
Net Income	\$ (101,509)	\$ (101,749)	\$ 136,743	\$ (109,970)	\$ 365	\$ 223,450

MOTION

1. That the President be authorized to secure a blanket fidelity bond to cover all officers, employees and other persons handling State Bar funds as is required by Article V, Section 8 of the Bylaws.
2. That the State Bar of Georgia and related entities open appropriate accounts with such banks in Georgia, but excluding any bank that does not participate in the IOLTA Program, and other such depositories as may be recommended by the Finance Committee and/or Investment Committee, and designated by the Executive Committee of the Board of Governors of the State Bar of Georgia, and that the persons whose titles are listed below are authorized to sign an agreement to be provided by such banks and customary signature cards, and that the said banks are hereby authorized to pay or otherwise honor any check drafts, or other orders issued from time to time for debit to said accounts when signed by two of the following: the Treasurer, the President, the President Elect, the Immediate Past President, the Executive Director, the Office Manager and the General Counsel, provided either the President or the Treasurer shall sign all checks or vouchers and that said accounts can be reconciled from time to time by said persons or their designees. The authority herein given is to remain irrevocable so as said banks are concerned until they are notified in writing of such revocation of authority and in writing, acknowledge receipt thereof.
3. That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2023-2024.

State Bar of Georgia
SBG Management Summary
Update of Unallocated Cash - Cash To Be Used
Projects To Be Completed in 2023 - 2024 Year
As of March 31, 2024 Financial Statement Period

Senior management of the State Bar of Georgia has reviewed the individual components of those items representing the priority use of unallocated cash. The items reviewed included those items previously disclosed in other reports. After review of that information, senior management established the items in a priority order. Those items are included in the schedule shown herein.

Projects To Be Completed in 2023 - 2024 Year	Estimated Budget Amount	Amount Spent Through Dec 31, 2023	Amount Spent Through March 31, 2024	Project Status and Notes:
Siemens costs for new front end building management system and remaining surface control unit cabinets to direct digital control	150,000	23,095	62,358	Estimated completion May or June 2024.
Revamp to State Bar's website	450,000	58,645	130,166	Target launch is August 15, 2024. Beta test set for June 2024.
Front lobby doors for handicap access	50,000	36,767	43,821	Completed.
Outdoor heaters for parking garage	1,000		1,220	Completed.
Courtroom audio video upgrades	30,000		34,024	Completed.
Speakers and microphone in ceilings for Auditorium, Conference Room A, Meeting Room 5 and Meeting Room 3	160,000	15,000	184,153	Completed.
Additional video capabilities including wifi access (miscellaneous items)	10,000		0	Completed, included in courtroom, auditorium and other rooms shown above.
Kitchen tables and chairs for the break room	10,000	4,668	4,668	Completed.
Upgrade to IMIS EMS Enterprise (Management of CC process and security features for membership database)	108,000	5,799	17,651	Critical membership and security feature. Vendor selected. In software development phase.
Electrical panel replacement up to 400 amp panel with (4) 3 pole and (12) 1 pole breakers \$6,950 each	0		19,475	Initial work - panel measurement. Actual panel replacement scheduled for 2024 - 2025 Bar year.
Tenant improvement costs - 6th floor tenant	0		16,497	Initial costs. Estimated completion is May or June 2024.
Potential lease for 5th floor with GSA	0		457	Costs associated with potential GSA lease. Lease not yet signed.
Total	960,000	143,974	514,490	

**State Bar of Georgia
2025 Election Schedule**

2024

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

2025

- | | |
|--------------|---|
| January 9-11 | Nomination of Officers at Midyear Board Meeting, JW Marriott Savannah Plant Riverside District, Savannah GA |
| January 17 | Deadline for receipt of nominating petitions for incumbent Board Members including incumbent nonresident (out of state) members |
| Feb 14 | Deadline for receipt of nominating petitions for new Board Members including new nonresident (out of state) members |
| March 7 | Deadline for write-in candidates for Officer to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 1 (c)) |
| March 7 | Deadline for write-in candidates for Board of Governors to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 2 (c)) |
| March 17 | Ballots mailed |
| April 18 | 11:59 p.m. Deadline for ballots to be cast in order to be valid |
| April 25 | Election service submits results to the Elections Committee |
| May 2 | Election results reported and made available |



TO: Tony DelCampo, President State Bar of Georgia

FROM: Susan Coppedge, Executive Director Georgia Legal Services Program

CC: Seth Bruckner, President Georgia Legal Services Program Board of Directors

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

DATE: May 8, 2024

Pursuant to the GLSP Bylaws, we are requesting the State Bar of Georgia designate the following representatives to serve as members of the GLSP Board for two-year terms from June 2024 – June 2026:

- Seth Bruckner, UPS Healthcare, Atlanta
- Keishan Davis, Townes Davis & Associates, Tucker
- Laverne Lewis Gaskins, Law Office of Laverne Lewis Gaskins, Augusta
- Matthew Howell, Alston & Bird, Atlanta
- Professor Ishaq Kundawala, Mercer University School of Law, Macon
- Allison White, King & Spalding, Atlanta

Respectfully submitted,

Susan Coppedge
GLSP Executive Director



CHIEF JUSTICE’S COMMISSION ON PROFESSIONALISM

Members

The Honorable Michael P. Boggs (Chair)
Chief Justice, Supreme Court of Georgia
Atlanta, Georgia

Mr. M. Lamar Barnett, Jr.
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DelCampo Grayson Lopez LLC
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Ms. Anissa D. Floyd
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Mrs. Molly Barrett Gillis
The Gillis Law Firm, L.L.C.
Marietta, Georgia

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

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

Professor Tonja Jacobi
Emory University School of Law
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Statesboro, GA

Mrs. Nekia Hackworth Jones
Federal Government
Atlanta, GA

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

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

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

Ms. Lauren Shubow
Atlanta Circuit Public Defender’s Office
Atlanta, Georgia

Mrs. Cathy Clark Tyler
Atkins Global North America, Inc
Atlanta, Georgia

Ms. LaToya Simone Williams
Georgia Public Defender Council
Atlanta, Georgia

Supreme Court of Georgia Advisor
The Honorable Andrew A. Pinson
Supreme Court of Georgia
Atlanta, Georgia

Staff
Ms. Karlise Y. Grier
Executive Director

TO: Board of Governors of the State Bar of Georgia
FROM: Karlise Yvette Grier
Executive Director, Chief Justice’s Commission on Professionalism
DATE: June 8, 2024
RE: Chief Justice’s Commission on Professionalism

The Chief Justice’s Commission on Professionalism (Commission), the first body of its kind in the nation, was created in 1989 by the Supreme Court of Georgia. The Commission’s primary charge is to enhance professionalism among Georgia’s lawyers and judges. **Chief Justice Michael P. Boggs** serves as the current Chair of the Commission. **Justice Andrew A. Pinson** serves as the Supreme Court Advisor to the Commission. You may find a complete list of Commission members, advisors, and liaisons at the Commission’s web site at <http://cjcpga.org/commission-members-2023-2024/>. A brief update regarding the Commission’s work as of May 2, 2024, is as follows.

GRANT APPLICATIONS FOR PROGRAMS OR PROJECTS THAT PROMOTE LEGAL PROFESSIONALISM

The Commission’s Grants Committee, which is chaired by **Ms. Nekia Hackworth Jones**, anticipates accepting applications electronically for grants to promote legal professionalism from **early to mid-June 2024, until July 15, 2024**. Applicants eligible for grants are limited to: 1) Charities/nonprofits organized under § 501(c)(3) of the Internal Revenue Code; 2) Law schools and law-related educational programs; 3) Courts; or 4) Local or voluntary bar associations. **An article** describing some of the programs and projects of the Commission’s past grant recipients, along with more detailed information regarding the Commission’s **Grant Criteria**, is currently available on the Commission’s website.

For more information regarding the Commission’s Grants program, **an article about previous grants, and the electronic grant application**, visit the Commission’s website at: <http://cjcpga.org/grants/>



Attorney's Council. The Planning Team for the CLE was Trish McCann Bertram; Marie G. Broder; **Elicia Hargrove**, Assistant United States Attorney, Middle District of Georgia, Albany Criminal Division; **Lauren Shubow**, Atlanta Circuit Public Defender's Office; and the Commission's Executive Director, Karlise Y. Grier. The Commission's Administrative and Communications specialist, Zaria Page, assisted with staff support for the CLE. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-j9pB_2BJZEA75v64S0FW623O_3D_3D/. To view the written materials and speaker biographies for the CLE, please visit: https://cjcpga.org/cjcp_professionalism_discovery_criminal_law_pop-up_03-28-24/.

THE 24TH ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Commission, with the assistance of the Benham Awards Planning Committee, co-chaired by **Ms. LaToya S. Williams** and **Mr. Christopher J. Chan**, hosted the 24th Annual Justice Robert Benham Awards for Community Service (CSA24) on **Wednesday, April 17, 2024, from 5:30 p.m. – 7:30 p.m.** at the Nathan Deal Judicial Center. The Georgia Legal History Foundation (GLHF) served as the Commission's fundraising partner for CSA24. The Benham Awards Selection Committee was chaired by **Judge Joy Lampley Fortson**. The Lifetime Achievement Award, the highest recognition given by the Commission, was awarded to **Mr. Jeffrey M. Smith**, Principal Shareholder, Greenberg Traurig, LLP, Atlanta. This award is reserved for a lawyer or judge who, in addition to meeting the criteria for receiving the Justice Robert Benham Award for Community Service, has demonstrated an extraordinarily long and distinguished commitment to volunteer participation in the community throughout his or her legal career. Awards were also presented to selected attorneys in the judicial districts of Georgia from which nominations were received. This year's district award recipients were **Vicky Ogawa Kimbrell**, Supervising Attorney, Georgia Legal Services Program, Atlanta; **Samuel S. Olens**, Partner, Dentons US LLP, Marietta; **Hon. Kathy Stephens Palmer**, Senior Superior Court Judge for the State of Georgia, Swainsboro; and **Hon. Cheveda McCamy**, Superior Court Judge, Newton County Superior Court, Covington.

The Commission is grateful to the 46 sponsors who made the awards ceremony possible since no Commission professionalism monies are used to fund the awards ceremonies. The sponsors are as follows:

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For more information regarding the 24th Annual Justice Robert Benham Awards for Community Service (CSA24), including the awards ceremony, including an enhanced digital version of the Program Book, videos about the award recipients, and photographs from the ceremony, visit: <https://cjcpga.org/benhamcsa24/>.



REPORT REGARDING STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM ETHICS AND PROFESSIONALISM DURING CAREER TRANSITIONS

The State Bar of Georgia Committee on Professionalism, with staff support from the Commission, presented a CLE via Zoom on **Thursday, March 28, 2024**, entitled *Ethics and Professionalism During Career Transitions*. According to the Zoom report generated for the CLE, the CLE was attended by **1,568** “Unique Viewers.” The CLE was approved for two CLE hours, including one ethics hour and one professionalism hour. The Commission has reported attendance

for 1,518 Georgia attorneys for CLE credit to the State Bar of Georgia's Commission on Continuing Legal Education Department. The planning team for the CLE included the Speakers and Writers Bureau Sub-Committee co-chairs, **Mr. Kevin Patrick and Mr. Michael Perez**, along with **Judge Kimberly Ann Alexander, Judge Rhonda Bender Kreuziger**, and Karlise Y. Grier. The ethics panel, consisting of **Paula Frederick, Sharon Edenfield, Judge Glenda Hatchett, and Judge Robert McBurney**, discussed issues such as trust account pitfalls, attorney advertising, keeping or leaving clients when moving between firms, and transitioning to the bench. The panel was moderated by Michael Pérez. The professionalism panel, consisting of **Sharon Edenfield, Cathy Hampton, Samantha Beskin-Schemer, and Judge Eric Richardson**, discussed forming professional friendships in new environments, mentoring and personal boards of advisors, maintaining or re-building professional community during transitions, and professional and community involvement for lawyers transitioning into practice. The professionalism panel was moderated by **Judge Rhonda Kreuziger**. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-ZG4qGm1MrzXU2S9ufHmRmA_3D_3D/. To view the written materials and speaker biographies for the CLE, please visit: https://cjcpga.org/sbg-cop_transitions_cle_03-28-24/.

ADDITIONAL STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM PROJECTS

The State Bar of Georgia Committee on Professionalism (Committee), currently chaired by **Mr. Michael Herskowitz**, has worked on several projects throughout the Bar year, including the Connect With A Colleague Contest, during April, and Law Day, during May. The Commission's Executive Director will provide updates regarding these projects for the Fall Board of Governors meeting.

COMING SOON: A POP-UP CLE ON MAINTAINING JUDICIAL PROFESSIONALISM: REFLECTIONS FROM THE BAR

The Commission is planning a "Pop-Up" CLE regarding judicial professionalism. As of the writing of this memorandum, the planning team for the CLE had not selected a date for the pop-up CLE. The planning team for the CLE is Trish McCann Bertram, Professional Development Director, Georgia Public Defender Council; Marie G. Broder, District Attorney, Griffin Judicial Circuit; Elicia Hargrove, Assistant United States Attorney, Middle District of Georgia, Albany Criminal Division; Lauren Shubow, Atlanta Circuit Public Defender's Office; Robert W. Smith, Jr., General Counsel, Prosecuting Attorney's Council; LaToya Simone Williams, LaToya S. Williams, Managing Attorney for the Specialized Unit II, Georgia Public Defender Council; and Karlise Y. Grier.

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



PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which was previously published six times per year. The December 2023 Georgia Bar

Journal Professionalism Page entitled *Georgia On My Mind* is attached as “Exhibit A.” *Georgia On My Mind* was written by **Daniel W. Van Horn**, an experienced trial attorney and litigator in the **Memphis** office of Butler Snow LLP. He was the 2022-2023 chair of the American Bar Association Litigation Section, and is a past president of the Tennessee Bar Association. The article first appeared in the Summer 2023 issue of the American Bar Association’s Litigation Journal and was reprinted in the Georgia Bar Journal with permission. The February 2024 Georgia Bar Journal Professionalism Page entitled *Grants to Promote Legal Professionalism* is attached as “Exhibit B.” Beginning in May 2024, the Georgia Bar Journal will be published quarterly. Many of the Commission’s Professionalism Page articles are available on the Commission’s website at the link here: <https://cjcpga.org/georgia-bar-journal-articles/>.

COMMISSION MEMBER RETIREMENTS AND APPOINTMENTS

The Commission thanks the Commission members who are retiring from the Commission on June 30, 2024, after the completion of their terms of service as follows: Ms. Brittanie Browning; Mr. Christopher J. Chan; Mr. J. Antonio DelCampo; and Hon. Shondeana Crews-Morris. The State Bar of Georgia 2024-2025 President, Ivy Cadle, has nominated Hon. Rizza O’Connor to serve an initial three-year term on the Commission, beginning on July 1, 2024, as a lawyer representative actively engaged in the practice of law for the Board of Governors, subject to Board of Governors approval at the Annual Meeting. Mr. Ivy Cadle and Mr. Kenneth Mitchell Jr. will serve on the Commission ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively. The Commission will announce additional appointments on or about July 1, 2024, on its website at <http://cjcpga.org/commission-members-2024-2025/>.

COMMISSION ASSISTANCE WITH BAR ASSOCIATION AND SECTION PROFESSIONALISM CLE PROGRAMS

The Commission’s Executive Director is available to assist State Bar of Georgia sections, local and voluntary Bar associations, and other law-related organizations with their professionalism CLE programming to ensure the programming is in compliance with the Commission’s *Revised Professionalism CLE Guidelines*, which became effective July 1, 2019. You may find the *Revised Professionalism CLE Guidelines* on the Commission’s website at the link here: <https://cjcpga.org/professionalism-cle-guidelines/>. Please contact the Commission’s Executive Director if you would like assistance in planning a professionalism CLE program or if you would like to have her to make a professionalism presentation to your organization. Please contact the Commission’s Executive Director, Karlise Y. Grier, via e-mail at kvgrier@cjcpga.org for information or assistance.

COMMISSION WEBSITE AND SOCIAL MEDIA

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

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



Georgia on My Mind

The following article appeared in the Summer 2023 issue of the American Bar Association's *Litigation Journal* and is reprinted with permission.

BY DANIEL W. VAN HORN



On a recent visit to Atlanta, I attended a talk focused on the State Bar of Georgia's Lawyer's Creed. I was certainly not aware of the creed until that night, but hearing it for the first time left a profound impression on me. The states in which I am admitted have no similar creed. Georgia's Lawyer's Creed is as follows:

To my clients, I offer faithfulness, competence, diligence and good judgment. I will strive to represent you as I would want to be represented and to be worthy of your trust.

To the opposing parties and their counsel, I offer fairness, integrity and civility. I will seek reconciliation and, if we fail, I will strive to make our dispute a dignified one.

To the courts, and other tribunals, and to those who assist with them, I offer respect, candor and courtesy. I will strive to do honor to the search for justice.

To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship.

Aspirational statements like the creed matter. We often fall short of the high standards found in such statements. But our greatness is not measured in how often we measure up to those standards. Our greatness is measured in having high standards at all and in our earnest desire to get back up and try again when we fail. In that way, documents like the creed are critical to who we are as a profession.

To the profession, I offer assistance. I will strive to keep our business a profession and our profession a calling in the spirit of public service.

To the public and our systems of justice, I offer service. I will strive to improve the law and our legal system available to all, and to seek the common good through the representation of my clients.

The creed is just 186 words. Yet, in such a limited use of words, Georgia has managed to capture everything that we as attorneys are called to be and to do.

Promising our clients that we will use good judgment is by itself profound. How does one develop the judgment necessary to appropriately represent our clients? To do so requires truly understanding our clients and their needs. It also requires understanding when what our clients say they want is not good for them. The ability to say no to our clients might be the best use of good judgment.

We certainly owe a duty to represent our clients, but do we seek to make the dispute a dignified one? Do we seek reconciliation or do we seek first to fight? The creed calls on us to think about and care for opposing parties. How often do we do that?

Do we think of other lawyers as our colleagues to whom we owe a concern for their welfare, or do we see them as competitors or, worse yet, the "enemy"? Do we even think about lawyers who are not on the other side of cases from us? If we get so busy that we fail to notice other lawyers in need, have we done our duty to care for other lawyers as colleagues? When we fail to care for fellow lawyers, especially those suffering from depression, mental illness and substance abuse, we fail the clients they serve even though they are not our clients. We know that lawyers suffering depression, mental illness or substance abuse commit malpractice at a higher rate. Part of upholding our profession is caring for fellow lawyers.

Aspirational statements like the creed matter. We often fall short of the high standards found in such statements. But our greatness is not measured in how often we measure up to those standards. Our greatness is measured in having high standards at all and in our earnest desire to get back up and try again when we fail. In that way, documents like the creed are critical to who we are as a profession.

Even though I am not a Georgia attorney, I plan to adopt the creed as my own, and I encourage you to do the same. Wouldn't it be great if every jurisdiction

adopted the creed or something very close to it and then regularly asked attorneys to reaffirm their duties under it? Just as couples renew their marriage vows, perhaps on Law Day each year, attorneys all across our country should follow Georgia's lead and affirm of reaffirm their commitment to the principles of the creed. ●

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Daniel W. Van Horn is an experienced trial attorney and litigator in the Memphis office of Butler Snow LLP. He was the 2022-23 chair of the American Bar Association Litigation Section, and is a past president of the Tennessee Bar Association. Van Horn obtained his J.D. from Vanderbilt University Law School and is licensed to practice in Tennessee, Mississippi and Arkansas. He has also been recognized as a National Outstanding Eagle Scout.

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Grants to Promote Legal Professionalism

For more than two decades, the Chief Justice's Commission on Professionalism has awarded grants to promote legal professionalism in Georgia.

BY KARLISE Y. GRIER

Since 1993, the Chief Justice's Commission on Professionalism (Commission) has awarded grants to promote legal professionalism in Georgia. During the 2019-20 year, the Commission reviewed its grant-making criteria and procedures and created a more formal process by which organizations can apply for grants. Although this article provides information regarding the Commission's grants program, readers should note that the Commission can suspend grant-making at any time for any reason and that the Commission is creating no vested rights in its grants program.

The Commission provides information about its grants program on its website.¹ If deciding to accept grants during a fiscal year, the Commission would generally begin accepting grant applications in early June until July 15. Only certain groups may apply for a Commission grant, and those groups are limited to 1) charities/nonprofits organized under § 501(c)(3) of the Internal Revenue Code; 2) law schools and law-related educational programs; 3) courts; or 4) local or voluntary bar associations. Therefore, for-profit entities, governmental entities that are not part of the judicial branch and State Bar Sections are not eligible

applicants for the grants. Grant-making organizations are also ineligible. The Commission has also decided that it will not make gifts to endowment funds. In addition to having an eligible applicant, the Commission's grants programs or projects must serve the people of Georgia and 1) relate to the regulation of the legal profession; and/or 2) promote, enhance, improve or develop: a) professionalism among Georgia's lawyers and judges (i.e., the competence, civility and character of lawyers or judges as counselors and officers of the court); b) professionalism legal education for lawyers or judges as set forth in the Revised Professionalism CLE Guidelines; c) access to justice (i.e., access to the legal system); and/or d) the administration of justice (i.e., processes, operation of the legal system).² Each of the criteria for the Commission's grants is separate and distinct with differing requirements to meet. Therefore, as an example, even if a continuing legal education program qualifies under the access to justice criteria, it does not necessarily mean that the program will qualify for professionalism CLE credit unless the program also meets the Commission's Revised Professionalism CLE Guidelines.³ The Commission gives priority to

programs or projects that, among other criteria, are new rather than existing or ongoing. Moreover, the Commission has decided that it will not accept repeat applications from the same applicant for the same project absent an invitation from the Commission to apply. Since the Commission has the ability to cease awarding grants at any time and for any reason, the Commission does not want organizations to rely on the Commission as an ongoing source of funding. Grant applicants are asked to describe their grant program or project and to explain the professionalism objectives of the grant. Thereafter, the grant application serves as the roadmap for how the applicant will execute the grant and expend grant funds if the Commission awards the applicant a grant.

Brief descriptions of four of the programs for which the Commission has awarded grants since updating its criteria follow.

1 Truancy Intervention Project—Cultural Competency Training for Lawyers

The Truancy Intervention Project (TIP) strives to decrease chronic stu-



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dent absenteeism by pairing trained volunteers with children and their families to provide them with the advocacy, resources and services necessary to ensure good attendance and success in school.

TIP used a Commission grant to support the creation and presentation of CLE materials on cultural competency for TIP attorney volunteers. Specifically, the training connected the professionalism principles of competence, diligence, communication, fairness and public service to effective representation of TIP clients. The grant supported TIP's development of training materials that met the Commission's Revised Professionalism CLE Guidelines and TIP's presentation of the training to attorney volunteers. TIP reported that addressing cultural competency through the lens of professionalism was very effective as it allowed attorneys to view cultural competency as an essential aspect of their representation of low-income clients.

Sarah Babcock, TIP's chief legal and operations officer, shared that TIP designed the training to help attorneys better understand how their own experiences could lead to faulty assumptions when working with low-income clients,

and thereby potentially adversely impact the effectiveness of an attorney's representation. Attorneys were given concrete strategies grounded in the principles of professionalism for addressing these assumptions, which TIP believed would lead to better outcomes for clients.

2 Judicial Council's Standing Committee on Access to Justice—Record Restriction Clinics

The Judicial Council of Georgia's Standing Committee on Access to Justice (A2J Committee) received grant awards to host several Record Restriction Clinics. The record restriction package (herein called the clinic) was led by Hon. Tabitha Ponder, the staff attorney for A2J, and consisted of four steps: 1) a virtual town hall meeting (to educate potential participants about eligibility, to collect records and to offer general instructions for how the virtual clinic would work); 2) lawyers reviewing and researching uploaded criminal histories and records; 3) hosting a virtual clinic where record restrictions took place; and 4) follow-up work. Professionalism was promoted as

participating attorneys were educated and mentored during virtual clinics regarding one aspect of the administration of justice (i.e., processes, operation of the legal system). One main goal was to leave an infrastructure behind that equipped other courts, legal aid organizations, volunteer attorneys and community partners to set up their own record restriction clinics in the future. The clinic also provided judges and lawyers an opportunity to collaborate and to educate the public about the laws related to record restriction, thus helping members of the public to better understand Georgia's legal system.

The A2J Committee held clinics over a two-year period either virtually (because of the COVID-19 pandemic) or in person throughout Georgia, including, but not limited to: Albany, Gainesville, Macon, Tifton, Valdosta and Wilcox County. Laverne Gaskins, who volunteers for one of the clinics, wrote an article for the *Georgia Courts Journal* about the clinics.⁵ Gaskins said, "These clinics provide a valued vehicle that facilitates legal proceedings for people to gain opportunities. An opportunity to dream. An opportunity to enjoy the freedom of developing a successful, and productive life."⁵



Connect with a counselor virtually.

Maintaining your mental health is vital. Every State Bar of Georgia member receives six pre-paid clinical sessions per calendar year through the Lawyer Assistance Program. Now, you can connect with a counselor wherever you are.

**Call the confidential LAP Hotline at 1-800-327-9631
to schedule your appointment today.**

 **State Bar
of Georgia**

3 The Mediation Center of the Coastal Empire—Conflict Management and Professionalism Training

The Mediation Center of the Coastal Empire (Mediation Center) is a community mediation center located in Savannah, Georgia, that supports community members, businesses, institutions, attorneys and the court system in resolving conflict. The Mediation Center received a grant to address the nexus between conflict and the continuous efforts made by lawyers to uphold A Lawyer's Creed and Aspirational Statement on Professionalism.⁶ The Mediation Center staff shared that there was a great need for continuing education on the subject matter. According to the Mediation Center, a participant shared during one of its training sessions:

Having events that place a heightened importance on professionalism is so important to our legal community. Without a focus on building professionalism within our community, we run the risk of becoming unorganized, overwhelmed and lacking credibility with the community we serve.

Thus, the aim of the project was to assist in the effort to generate awareness of the importance of A Lawyer's Creed and Aspirational Statement on Professionalism and provide the skills needed to better navigate potential conflict. From Jan. 1, 2022, to June 30, 2023, the Mediation Center held nine sessions with a total of 127 participants. In addition, the Mediation Center launched a self-paced Conflict Management and Professionalism CLE on its website that created a sustainable option for lawyers to continue to learn about professionalism after the funding period ended.⁷

4 University of Georgia's J.W. Fanning Institute for Leadership Development—Horace Johnson Peer Courts

The J.W. Fanning Institute for Leadership Development (Fanning Institute), a

unit of Public Service & Outreach at the University of Georgia, is dedicated to strengthening communities, organizations and individuals through leadership development, training and education.⁸ The Fanning Institute founded its first Peer Court in 2012 with the Athens-Clarke County Juvenile Court, in partnership with the Department of Juvenile Justice and UGA law students. In a peer court, youth serve as the lawyers, judge and jury in disposition hearings. All low-risk, first-time offenders charged in a community may be eligible for peer court, and possible charges that are appropriate include shoplifting, curfew violation, underage drinking, school fights and the like.

The hearing is an open and transparent decision-making process in which the respondent has a chance to share their perspective and receive a disposition from a jury of their peers. Peer courts serve the people of Georgia by enhancing and improving the administration of juvenile justice. In addition, the Fanning Institute said that the peer courts helped fulfill Georgia lawyers' obligation "to improve the law and the legal system." According to the Fanning Institute's grant application: "Peer courts are recognized by the U.S. Department of Justice Office of Juvenile Justice and Delinquency Prevention as a model program for providing immediate sanctions. Youth charged with first-time offenses are promptly held accountable for their actions and have the opportunity to restore the harm caused to the community. The youth volunteers positively influence their peers to reduce repeat offenses and to recognize the harms caused to a community when a crime is committed."

From July to December 2022, using grant funds awarded by the Commission, the Fanning Institute worked to provide training and technical assistance to support the planning, implementation and sustainability of two new peer courts in Chatham and Spalding counties. For more information regarding the peer courts, please contact the Fanning Institute.

To receive updated information from the Commission regarding its grants cy-

cle, please visit the Commission's website at cjcpga.org or contact Executive Director Karlise Y. Grier at 404-225-5040 or kygrier@cjcpga.org. ●



Karlise Y. Grier
Executive Director
Chief Justice's Commission
on Professionalism
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Endnotes

1. See Chief Justice's Commission on Professionalism, Grants, <https://cjcpga.org/grants/> (last visited Jan. 2, 2024).
2. See Chief Justice's Commission on Professionalism, Grants, Grant Criteria, v.08-28-20, <https://ij9362.p3cdn1.secureserver.net/wp-content/uploads/2020/09/CJCP-Grant-Criteria-As-Approved-By-Commission-CJCP-on-08-28-20-FINAL-v09-17-20.pdf> (last visited Jan. 2, 2024).
3. See Chief Justice's Commission on Professionalism, Professionalism CLE Guidelines, <https://cjcpga.org/professionalism-cle-guidelines/> (last visited Jan. 2, 2024).
4. See Laverne Gaskins, *On Record Restriction Clinics and Providing Opportunity*, GA. Cr. J., <https://georgiacourtsjournal.org/2021/01/27/on-record-restriction-clinics-and-providing-opportunity/> (last visited Jan. 2, 2024).
5. *Id.*
6. See Chief Justice's Commission on Professionalism, *Lawyer's Creed, A Lawyer's Creed and the Aspirational Statement on Professionalism*, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> (last visited Jan. 2, 2024).
7. Mediation Center, Training, <https://mediationsavannah.com/training/cle-conflict-management-and-professionalism/> (last visited Jan. 2, 2024).
8. J.W. Fanning Institute for Leadership Development, University of Georgia, About Us, <https://www.fanning.uga.edu/about/overview/> (last visited Jan. 2, 2024).

**STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2023**

STATE BAR OF GEORGIA

**COMBINED FINANCIAL REPORT
JUNE 30, 2023**

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INDEPENDENT AUDITOR'S REPORT

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

Opinion

We have audited the accompanying combined financial statements of the **State Bar of Georgia** and related entity (collectively the "State Bar") (a nonprofit organization), which comprise the combined statements of financial position as of June 30, 2023 and 2022, and the related combined statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the combined financial statements.

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of State Bar as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the State Bar and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

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

In preparing the combined financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern within one year after the date that the combined financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the combined financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the combined financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the combined financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the combined financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the State Bar's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the combined financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Report on Supplemental Information

Our audit was conducted for the purpose of forming an opinion on the combined financial statements as a whole. The supplemental information on pages 20 through 23 is presented for purposes of additional analysis and is not a required part of the combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined financial statements or to the combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the combined financial statements as a whole.

Mauldin & Jenkins, LLC

Atlanta, Georgia
November 14, 2023

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2023 AND 2022

	2023	2022
ASSETS		
Cash and cash equivalents	\$ 25,859,017	\$ 21,354,256
Accounts receivable, net	140,109	85,879
Receivable from related parties	803,959	793,375
Receivable from employees	18,432	19,632
Accrued interest receivable	67,748	79,211
Prepaid and other assets	389,573	381,062
Investments, at fair value	17,254,051	17,079,271
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,602,131	7,627,064
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	708,231	968,630
Right of use assets - operating	339,257	-
Total assets	\$ 52,182,508	\$ 48,388,380
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 1,902,436	\$ 1,790,694
Accrued salary and retirement plan expense	868,102	966,177
Payable to Client Security Fund	2,217,202	1,634,261
Payable to related parties	265,327	180,836
Accrued vacation	575,166	614,320
Deferred income - dues and sections	10,156,267	7,857,235
Other deferred income	23,596	23,596
Lease liability - operating	332,715	-
Total liabilities	16,340,811	13,067,119
Net assets		
Without donor restrictions		
Undesignated	6,065,703	5,122,265
Board-designated	27,460,339	28,137,424
Total without donor restrictions	33,526,042	33,259,689
With donor restrictions	2,315,655	2,061,572
Total net assets	35,841,697	35,321,261
Total liabilities and net assets	\$ 52,182,508	\$ 48,388,380

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2023

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,163,372	\$ -	\$ -	\$ 12,163,372
Advertising	48,045	-	-	48,045
Membership	293,683	-	-	293,683
Total fees	<u>12,505,100</u>	<u>-</u>	<u>-</u>	<u>12,505,100</u>
ICLE				
Program revenues	4,882,060	-	-	4,882,060
Total ICLE	<u>4,882,060</u>	<u>-</u>	<u>-</u>	<u>4,882,060</u>
Other revenues				
Contributions	-	1,448,010	1,009,287	2,457,297
Section dues	-	1,461,594	-	1,461,594
Convention and meeting fees	-	47,500	-	47,500
Law Practice Management fees	40,522	-	-	40,522
Young Lawyers Division fees	8,115	-	-	8,115
High School Mock Trial fees	50,367	-	-	50,367
Assessment income	-	165	-	165
Investment income (loss)	(57,606)	216,178	58,158	216,730
Rental income	-	931,685	-	931,685
Other	729,414	-	-	729,414
Total other revenues	<u>770,812</u>	<u>4,105,132</u>	<u>1,067,445</u>	<u>5,943,389</u>
Net assets released from restrictions	<u>-</u>	<u>813,362</u>	<u>(813,362)</u>	<u>-</u>
Total revenues and other support	<u>18,157,972</u>	<u>4,918,494</u>	<u>254,083</u>	<u>23,330,549</u>
EXPENSES				
Program services				
Counsel	4,525,472	-	-	4,525,472
Communications	951,936	-	-	951,936
Membership	966,410	-	-	966,410
Unauthorized practice of law	887,422	-	-	887,422
Law practice management	494,059	-	-	494,059
ICLE	3,505,969	-	-	3,505,969
Other	3,492,745	1,853,070	-	5,345,815
Total program services	<u>14,824,013</u>	<u>1,853,070</u>	<u>-</u>	<u>16,677,083</u>
Supporting services				
Management and general	2,506,922	3,626,108	-	6,133,030
Total expenses	<u>17,330,935</u>	<u>5,479,178</u>	<u>-</u>	<u>22,810,113</u>
CHANGE IN NET ASSETS	<u>827,037</u>	<u>(560,684)</u>	<u>254,083</u>	<u>520,436</u>
NET ASSETS, BEGINNING	<u>5,122,265</u>	<u>28,137,424</u>	<u>2,061,572</u>	<u>35,321,261</u>
TRANSFERS	<u>116,401</u>	<u>(116,401)</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 6,065,703</u>	<u>\$ 27,460,339</u>	<u>\$ 2,315,655</u>	<u>\$ 35,841,697</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2022

	Without donor restrictions		With donor restrictions	Total
	Undesignated	Board-designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,821,049	\$ -	\$ -	\$ 11,821,049
Advertising	54,864	-	-	54,864
Membership	258,773	-	-	258,773
Total fees	<u>12,134,686</u>	<u>-</u>	<u>-</u>	<u>12,134,686</u>
ICLE				
Program Revenues	4,842,268	-	-	4,842,268
Total ICLE	<u>4,842,268</u>	<u>-</u>	<u>-</u>	<u>4,842,268</u>
Other revenues				
Contributions	-	1,297,000	931,401	2,228,401
Section dues	-	1,335,765	-	1,335,765
Convention and meeting fees	-	76,965	-	76,965
Law Practice Management fees	13,992	-	-	13,992
Young Lawyers Division fees	1,470	-	-	1,470
High School Mock Trial fees	33,059	-	-	33,059
Assessment income	-	350	-	350
Investment income	(182,096)	(452,706)	(73,950)	(708,752)
Rental income	-	941,535	-	941,535
Other	453,702	-	-	453,702
Total other revenues	<u>320,127</u>	<u>3,198,909</u>	<u>857,451</u>	<u>4,376,487</u>
Net assets released from restrictions	<u>-</u>	<u>805,050</u>	<u>(805,050)</u>	<u>-</u>
Total revenues and other support	<u>17,297,081</u>	<u>4,003,959</u>	<u>52,401</u>	<u>21,353,441</u>
EXPENSES				
Program services				
Counsel	4,227,230	-	-	4,227,230
Communications	740,229	-	-	740,229
Membership	889,336	-	-	889,336
Unauthorized practice of law	866,152	-	-	866,152
Law practice management	401,818	-	-	401,818
ICLE	2,680,540	-	-	2,680,540
Other	3,343,421	1,186,155	-	4,529,576
Total program services	<u>13,148,726</u>	<u>1,186,155</u>	<u>-</u>	<u>14,334,881</u>
Supporting services				
Management and general	2,177,632	3,249,008	-	5,426,640
Total expenses	<u>15,326,358</u>	<u>4,435,163</u>	<u>-</u>	<u>19,761,521</u>
CHANGE IN NET ASSETS	1,970,723	(431,204)	52,401	1,591,920
NET ASSETS, BEGINNING	<u>2,727,803</u>	<u>28,992,367</u>	<u>2,009,171</u>	<u>33,729,341</u>
TRANSFERS	<u>423,739</u>	<u>(423,739)</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 5,122,265</u>	<u>\$ 28,137,424</u>	<u>\$ 2,061,572</u>	<u>\$ 35,321,261</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2023

	Program services										Supporting services	
	Counsel	Communications	Membership	Unauthorized practice of law	Law practice management	ICLE	Other	Total program services	Management and general	Total		
Personnel costs	\$ 2,721,329	\$ 276,633	\$ 313,333	\$ 541,658	\$ 283,024	\$ 939,410	\$ 949,914	\$ 6,006,301	\$ 1,607,913	\$ 7,613,214		
Payroll taxes	193,530	20,703	23,940	41,058	19,723	72,079	71,259	442,292	106,512	547,804		
Employee benefits	647,086	92,404	103,689	172,061	77,823	216,414	338,636	1,648,113	475,727	2,123,840		
Officers' expenses	-	-	-	-	-	-	27,151	27,151	43,726	70,877		
Shared administrative office expenses	562,142	77,537	96,921	112,007	77,537	348,916	258,828	1,533,888	20,716	1,554,604		
Rent and utilities	-	-	-	-	-	-	-	-	538,826	538,826		
Office expenses	37,811	363,598	4,842	1,585	2,238	12,474	18,982	441,530	177,062	618,592		
Subscriptions and books	20,075	4,193	301	546	3,872	89,505	6,878	126,370	8,903	134,273		
Dues and memberships	8,893	405	-	530	324	3,411	45,658	59,221	1,794	61,015		
Seminars and training	8,927	1,185	-	-	211	5,027	300	15,650	11,705	27,355		
Travel	41,447	11,669	10	881	8,134	30,441	24,879	117,401	53,275	170,676		
Meetings and luncheons	578	-	63	-	75	4,374	607,940	613,030	21,343	634,373		
Professional services and contract labor	139,253	28,759	1,200	-	-	5,838	521,844	696,984	380,087	1,076,981		
Program expenses	-	-	-	-	-	1,726,732	-	1,726,732	-	1,726,732		
Contributions	-	-	-	-	-	-	287,382	-	-	287,382		
Insurance	-	-	-	-	-	-	-	-	-	-		
Other	61,626	63,433	407,639	-	29,681	-	2,177,621	2,740,200	1,239,785	3,979,885		
Depreciation	82,775	11,417	14,272	17,126	11,417	51,378	28,543	216,928	1,159,275	1,376,203		
	\$ 4,525,472	\$ 951,936	\$ 966,410	\$ 887,422	\$ 494,059	\$ 3,505,969	\$ 5,345,815	\$ 16,677,083	\$ 6,133,030	\$ 22,810,113		

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2022

	Program services							Supporting services		
	Counsel	Communications	Membership	Unauthorized practice of law	Law practice management	ICLE	Other	Total program services	Management and general	Total
Personnel costs	\$ 2,570,073	\$ 244,242	\$ 296,029	\$ 514,990	\$ 211,468	\$ 876,937	\$ 859,599	\$ 5,575,338	\$ 1,572,428	\$ 7,147,766
Payroll taxes	181,917	18,892	22,719	39,035	16,141	65,265	63,610	407,579	103,580	511,159
Employee benefits	605,219	72,789	107,465	171,716	67,613	198,415	304,240	1,527,457	458,529	1,985,986
Officers' expenses	-	-	-	-	-	-	25,170	25,170	32,252	57,422
Shared administrative office expenses	492,420	67,920	84,900	101,880	67,920	322,620	165,743	1,303,403	21,999	1,325,402
Rent and utilities	-	-	-	-	-	-	-	-	468,042	468,042
Office expenses	25,008	227,179	3,171	1,919	3,445	6,483	15,906	283,111	191,682	474,793
Subscriptions and books	20,058	6,158	205	716	4,632	736	7,796	40,241	9,196	49,437
Dues and memberships	7,738	270	-	500	675	1,330	51,144	61,657	1,744	63,401
Seminars and training	5,373	50	-	300	461	3,724	88	9,996	1,800	11,796
Travel	31,256	8,698	-	2,140	4,324	9,193	18,027	73,638	45,111	118,949
Meetings and luncheons	-	-	84	-	101	5,449	559,245	564,879	87,050	651,929
Professional services and contract labor	87,059	32,474	1,031	-	-	15,071	480,944	616,579	309,870	926,449
Program expenses	-	-	-	-	-	-	-	1,120,761	-	1,120,761
Contributions	-	-	-	-	-	-	266,023	266,023	-	266,023
Insurance	-	-	-	-	-	-	-	-	247,656	247,656
Other	117,839	50,072	357,375	15,728	13,353	-	1,617,922	2,172,289	744,009	2,916,298
Depreciation	83,270	11,485	14,357	17,228	11,485	54,556	94,179	286,560	1,131,692	1,418,252
	\$ 4,227,230	\$ 740,229	\$ 889,336	\$ 866,152	\$ 401,818	\$ 2,660,540	\$ 4,529,576	\$ 14,334,881	\$ 5,426,640	\$ 19,761,521

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

	2023	2022
OPERATING ACTIVITIES		
Change in net assets	\$ 520,436	\$ 1,591,920
Adjustments to reconcile change in net assets to net cash and cash equivalents provided by operating activities		
Depreciation	1,376,203	1,418,252
Net realized and unrealized losses on investments	216,730	708,785
Loss on disposal of fixed assets	23,914	9,022
(Increase) decrease in accounts receivable	(54,230)	27,329
(Increase) in receivables from related parties	(10,584)	(31,245)
Decrease (increase) in receivables from employees	1,200	(374)
Decrease in accrued interest receivable	11,463	31,749
(Increase) decrease in prepaid and other assets	(8,511)	31,977
Increase in accounts payable	111,742	473,880
(Decrease) in employee benefits payable	(98,075)	(100,306)
Increase (decrease) in payables to related parties	84,491	(29,825)
(Decrease) in accrued vacation	(39,154)	(76,868)
Increase in deferred income - dues and sections	2,299,032	284,533
Increase in other deferred income	-	23,596
Increase (decrease) in payable to Client Security Fund	582,941	(163,926)
(Increase) in right of use assets - operating	(339,257)	-
Increase in lease liability - operating	332,715	-
Total adjustments	<u>4,490,620</u>	<u>2,606,579</u>
Net cash and cash equivalents provided by operating activities	<u>5,011,056</u>	<u>4,198,499</u>
INVESTING ACTIVITIES		
Purchases of building improvements, furniture, fixtures, and equipment	(114,785)	(260,181)
Purchases of investments	(8,544,641)	(5,246,959)
Proceeds from sale and maturity of investments	<u>8,153,131</u>	<u>5,236,176</u>
Net cash and cash equivalents (used in) investing activities	<u>(506,295)</u>	<u>(270,964)</u>
Net increase in cash and cash equivalents	4,504,761	3,927,535
Cash and cash equivalents, beginning	<u>21,354,256</u>	<u>17,426,721</u>
Cash and cash equivalents, ending	<u>\$ 25,859,017</u>	<u>\$ 21,354,256</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 1 – Summary of significant accounting policies

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 1 – Summary of significant accounting policies (Continued)

Cash and Cash Equivalents – For purposes of the combined statements of cash flows, the State Bar considers all highly liquid debt instruments with original maturities of three months or less to be cash equivalents. Cash equivalents were \$15,323,591 and \$8,871,327 at June 30, 2023 and 2022, respectively, consisting of money market funds. These funds are not insured.

At June 30, 2023 and 2022, in addition to the money market deposits above, the State Bar maintained bank deposits in excess of federally insured limits of \$9,771,504 and \$11,708,942, respectively.

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

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

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 1 – Summary of significant accounting policies (Continued)

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

Accounts Receivable – Accounts receivable are reported net of an allowance for doubtful accounts. As of both June 30, 2023 and 2022, the allowance for doubtful accounts was zero.

Revenue Recognition – The State Bar follows Financial Accounting Standards Board ("FASB") Topic 606, *Revenue from Contracts with Customers*. Membership dues, annual license fees, ICLE seminar fees and Bar Center assessments are recorded as revenue in the applicable year when received. Any amounts collected prior to and including June 30 applicable to the subsequent year's membership dues, assessments, or seminars are recorded as deferred income in the combined statements of financial position. Annual license fee and Bar Center assessment notices for the fiscal years ended June 30, 2023 and 2022 were sent out in April 2022 and April 2021, respectively.

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

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

Income Taxes – The State Bar was established as an instrumentality of the state of Georgia, and its income is therefore exempt from income tax under Internal Revenue Code Section 115, per the Internal Revenue Service determination letter dated May 11, 1965. Under Section 115, net income from an activity other than an essential governmental function can be subject to taxation. In management's opinion, the State Bar did not have any such net income during the years ended June 30, 2023 and 2022.

The State Bar has evaluated the effect of generally accepted accounting principles guidance for Accounting for Uncertainty in Income Taxes. Management believes that the State Bar continues to satisfy the requirements of a tax-exempt organization and therefore had no uncertain income tax positions at June 30, 2023 and 2022.

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 1 – Summary of significant accounting policies (Continued)

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

The CSF is funded by an annual assessment of \$15 per dues-paying lawyer. The Board of Trustees shall not spend more than received through the annual assessment in a single year. The Board of Governors may from time to time adjust the fund's maximum annual assessment to advance the purposes of the fund or to preserve the fiscal integrity of the fund.

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

Recent Accounting Pronouncements - In February 2016, the Financial Accounting Standards Board ("FASB") issued ASU No. 2016-02, *Leases* ("ASC Topic 842"). This standard requires lessees to recognize leases on-balance sheet and disclose key information about leasing arrangements. The new standard establishes a right-of-use model ("ROU") that requires a lessee to recognize a ROU asset and lease liability on the balance sheets for all leases with a term longer than 12 months. Leases will be classified as finance or operating, with classification affecting the pattern and classification of expense recognition in the combined statements of income. These included transition elections that permitted the State Bar to not reassess its prior conclusions about lease identification, lease classification, and initial direct costs for existing or expired leases under the new standard. In addition, the State Bar adopted ongoing accounting policies to not recognize ROU assets and lease liabilities for leasing arrangements with terms of less than one year and to not separate lease and non-lease components for all classes of underlying assets. Also, the State Bar elected the practical expedient to use the risk free rate when determining the present value of lease payments over the lease term. The State Bar elected to adopt FASB ASC 842, *Leases*, using the optional transition method that allows the State Bar to initially apply the new leases standard at the adoption date and recognize a cumulative effect adjustment to the opening balance of net assets in the period of adoption. As a result, the State Bar reporting for the comparative period presented in the financial statements is in accordance with FASB ASC 840. The State Bar has elected the package of practical expedients permitted under the transition guidance.

The adoption of FASB ASC 842 resulted in the recognition of right-of-use assets of \$420,150 and operating lease liabilities of \$410,150 as of July 1, 2022. Results for periods beginning prior to July 1, 2022 continue to be reported in accordance with the State Bar's historical accounting treatment. The adoption of FASB ASC 842 did not have a material impact on the State Bar's results of operations or cash flows.

Note 2 – Liquidity and availability of financial assets

The following reflects the State Bar's financial assets as of the combined statements of financial position date as of June 30, 2023 and 2022, reduced by amounts not available for general use within one year of the combined statements of financial position date of June 30, 2023 and 2022 because of contractual or donor-imposed restrictions or internal designations.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 2 – Liquidity and availability of financial assets (Continued)

	<u>2023</u>	<u>2022</u>
Cash and cash equivalents	\$ 25,859,017	\$ 21,354,256
Accounts receivable	962,500	898,886
Accrued interest receivable	67,748	79,211
Investments	<u>17,254,051</u>	<u>17,079,271</u>
	<u>44,143,316</u>	<u>39,411,624</u>
Less: Donor-imposed restricted cash and cash equivalents	(2,315,655)	(2,075,206)
Less: Board-designated cash and cash equivalents, accounts receivable, accrued interest receivable, and investments	<u>(20,488,773)</u>	<u>(20,140,924)</u>
Total financial assets without donor restriction or other restrictions available for general use within one year	<u>\$ 21,338,888</u>	<u>\$ 17,195,494</u>

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

Note 3 – Membership

Membership in the State Bar totaled 54,485 and 53,737 at June 30, 2023 and 2022, respectively.

Note 4 – Investments

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

As of June 30, 2023 and 2022, investments at fair value are summarized as follows:

	<u>2023</u>	<u>2022</u>
Cash equivalent	\$ 2,298,888	\$ 329,779
Equities	1,979,513	-
Fixed income	5,256,596	8,757,966
Government securities	<u>7,719,054</u>	<u>7,991,526</u>
Total investments	<u>\$ 17,254,051</u>	<u>\$ 17,079,271</u>

For the years ended June 30, 2023 and 2022, total investment income are summarized as follows:

	<u>2023</u>	<u>2022</u>
Interest and dividends	\$ 366,694	\$ 226,145
Net realized and unrealized (losses)	<u>(149,964)</u>	<u>(934,897)</u>
Total investment (loss) income	<u>\$ 216,730</u>	<u>\$ (708,752)</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 5 – Fair value measurements

As required by FASB's fair value measurements and disclosure guidance, assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2023:

	Level 1	Level 2	Level 3	Total
Investments:				
Money market funds	\$ 2,298,888	\$ -	\$ -	\$ 2,298,888
Equities	1,979,513	-	-	1,979,513
Fixed income	5,256,596	-	-	5,256,596
Government securities	7,719,054	-	-	7,719,054
Total	<u>\$ 17,254,051</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 17,254,051</u>

The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2022:

	Level 1	Level 2	Level 3	Total
Investments:				
Money market funds	\$ 329,779	\$ -	\$ -	\$ 329,779
Fixed income	8,757,966	-	-	8,757,966
Government securities	7,991,526	-	-	7,991,526
Total	<u>\$ 17,079,271</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 17,079,271</u>

Note 6 – Building, furniture, fixtures, and equipment

The Bar Center building, furniture, fixtures, and equipment as of June 30, 2023 and 2022 are summarized as follows:

	2023	2022
Building and improvements	\$ 27,157,796	\$ 27,033,158
Furniture and office equipment	3,264,030	3,247,164
Computer and electronic equipment	998,674	1,085,597
Construction in process	23,095	96,402
	<u>31,443,595</u>	<u>31,462,321</u>
Less accumulated depreciation	<u>(24,841,464)</u>	<u>(23,835,257)</u>
	<u>\$ 6,602,131</u>	<u>\$ 7,627,064</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 6 – Building, furniture, fixtures, and equipment (Continued)

Land, furniture, fixtures, and equipment other than the Bar Center as of June 30, 2023 and 2022 are summarized as follows:

	2023	2022
Furniture and office equipment	\$ 999,600	\$ 1,043,812
Computer and electronic equipment	327,319	411,248
Leasehold and building improvements	65,390	375,259
Computer software	1,493,703	1,574,060
	2,886,012	3,404,379
Less accumulated depreciation	(2,177,781)	(2,435,749)
	\$ 708,231	\$ 968,630

Note 7 – Retirement plan

The State Bar has a money purchase pension plan that covers substantially all employees. State Bar contributions to this plan for the years ended June 30, 2023 and 2022 were \$492,230 and \$429,774, respectively.

Note 8 – Leases

Lessor – The State Bar leases office space to both related and non-related parties. Rental income totaled \$931,685 and \$941,535 in 2023 and 2022, respectively. These amounts included receipts of \$62,144 and \$61,242 in 2023 and 2022, respectively, from related parties. Certain of the leases have expiration dates through June 2028 and certain of the leases are renewable annually or cancelable at the request of the lessee.

As of June 30, 2023, approximate future minimum annual lease payments for the leases that are not renewable annually or cancelable are as follows:

For the year ending June 30,	2024	\$	147,248	
	2025		115,054	
	2026		27,575	
	2027		28,117	
	2028		28,675	
	Total	\$	346,669	

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 8 – Leases (Continued)

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

In addition, the State Bar entered into a lease on November 1, 2008 for its Coastal Georgia office space in Savannah. The lease expired on October 31, 2013 with two five-year options available to renew through 2023. The State Bar renewed the lease under its second option during 2018, with expiration on October 31, 2022. The State Bar then entered into a new lease at a new location in which the lease term commenced on January 1, 2023, that expires on December 31, 2027.

The State Bar also renewed its lease at a satellite office in Tifton, Georgia and executed a lease agreement for expanded conference room space which expired on September 30, 2021. The lease was then month-to-month and was renewed on September 30, 2022, expiring on September 30, 2025.

The weighted average of the discount rate related to the State Bar's lease liability as of June 30, 2023 was 3.76%.

The adoption of FASB ASC 842, *Leases*, resulted in the following impact at July 1, 2022:

Noncurrent operating ROU assets	\$ 420,150
Total assets	<u>\$ 420,150</u>
Current lease liability – operating	\$ 85,622
Noncurrent lease liability - operating	<u>324,528</u>
Total liabilities	<u>\$ 410,150</u>

The following is a schedule by years of minimum future rentals on the operating leases and the amortization of the net present value (NPV) of the lease liability as of June 30, 2023:

Year Ending June 30:	Minimum annual lease payments	Amortization of NPV of lease liabilities - operating
2024	\$ 113,451	\$ 102,741
2025	79,709	72,167
2026	67,626	62,817
2027	64,800	62,379
2028	<u>32,879</u>	<u>32,611</u>
	<u>\$ 358,465</u>	<u>\$ 332,715</u>

The carrying value of the related right-of-use assets as of June 30, 2023 are:

Accumulated basis	\$ 420,150
Less – accumulated amortization	<u>(80,893)</u>
	<u>\$ 339,257</u>

Rental expense charged to operations amounted to \$180,401 and \$158,688 for the years ended June 30, 2023 and 2022, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 9 – Related-party transactions

The Commission on Continuing Lawyer Competency contributed \$1,400,631 and \$1,286,677 to the State Bar in 2023 and 2022, respectively. These amounts represent approximately 5% of the total amount of State Bar's revenue and other support for 2023 and 2022.

The State Bar was also reimbursed by related organizations for their share of salary and operating expenses for the years ended June 30, 2023 and 2022 as follows:

	<u>2023</u>	<u>2022</u>
Commission on Continuing Lawyer Competency	\$ 694,947	\$ 755,436
Chief Justice's Commission on Professionalism	150,384	195,862
Georgia Bar Foundation, Inc.	103,731	97,186
	<u>\$ 949,062</u>	<u>\$ 1,048,484</u>

The following represents a summary of amounts due from related parties as of June 30, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Commission on Continuing Lawyer Competency	\$ 782,565	\$ 774,717
Georgia Bar Foundation, Inc.	21,394	18,658
	<u>\$ 803,959</u>	<u>\$ 793,375</u>

The following represents a summary of amounts due to related parties as of June 30, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Chief Justice's Commission on Professionalism	\$ 265,327	\$ 180,836
	<u>\$ 265,327</u>	<u>\$ 180,836</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 10 – Board-designated net assets

The State Bar had Board-designated net assets available for the following purposes at June 30, 2023 and 2022:

	<u>2023</u>	<u>2022</u>
Bar Center	\$ 14,082,422	\$ 14,735,730
General Operations	4,750,000	4,750,000
Litigation	300,000	300,000
Sections	3,664,313	3,677,157
Conventions	77,999	88,932
Operating contingencies – ICLE	144,435	144,435
Replacement of equipment – ICLE	225,000	225,000
ICLE operations	4,216,170	4,216,170
	<u>\$ 27,460,339</u>	<u>\$ 28,137,424</u>

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

Note 11 – Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2023 and 2022 were available for the following purposes and are included in cash and cash equivalents:

	<u>2023</u>	<u>2022</u>
Legislative Program	\$ 1,806,483	\$ 1,503,629
Law-Related Education/Marshall Fund	207,599	212,684
High School Mock Trial	15,299	18,617
BASICS Program	116,951	115,094
Young Lawyers Division	87,199	87,007
Lawyer Assistance Program	31,863	33,188
Georgia Diversity Program	13,554	46,528
Bar Media Conference	3,116	13,036
Law Day	6,212	6,266
Justice Portraits	1,022	1,006
Promote Inclusion	8,702	8,842
Access to Justice	3,175	1,435
Military Vet Pro Bono	14,480	14,240
	<u>\$ 2,315,655</u>	<u>\$ 2,061,572</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2023 AND 2022

Note 12 – Net assets released from restrictions

Net assets were released from donor restrictions in 2023 and 2022 by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors as follows:

	<u>2023</u>	<u>2022</u>
Legislative Program	\$ 548,400	\$ 553,133
BASICS Program	40,616	50,916
Young Lawyers Division	126,010	75,425
Law-Related Education/Marshall Fund	9,628	11,609
Georgia Diversity Program	56,409	53,104
Promote Inclusion	10,022	11,391
Justice Hunstein's Portrait	5	25,831
Bar Media Conference	10,089	8,153
Lawyer Assistance Program	2,022	1,537
High School Mock Trial	9,883	138
State Bar Foundation	-	13,634
Other programs	278	179
	<u>\$ 813,362</u>	<u>\$ 805,050</u>

Note 13 – Contingencies

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

During the year ended June 30, 2022, the State Bar suffered a cybersecurity breach. The State Bar has cybersecurity insurance and has filed a claim to recoup expenses that were incurred from the breach. During the year ended June 30, 2023, State Bar received \$163,629 in insurance proceeds related to recouped expenses, and are presented as other income. No insurance proceeds were received during the year ended June 30, 2022. The State Bar expects to receive no further proceeds related to the cybersecurity breach.

Note 14 – Subsequent events

The State Bar has evaluated subsequent events occurring through November 14, 2023, the date on which the combined financial statements were available to be issued.

SUPPLEMENTAL INFORMATION

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2023

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Elimination</u>	<u>Total</u>
ASSETS				
Cash and cash equivalents	\$ 25,609,092	\$ 249,925	\$ -	\$ 25,859,017
Accounts receivable, net	140,109	-	-	140,109
Receivable from related parties	805,736	-	(1,777)	803,959
Receivable from employees	18,432	-	-	18,432
Accrued interest receivable	67,748	-	-	67,748
Prepaid and other assets	389,573	-	-	389,573
Investments, at fair value	14,889,516	2,364,535	-	17,254,051
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,602,131	-	-	6,602,131
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	708,231	-	-	708,231
Right of use asset - operating	339,257	-	-	339,257
	<u>\$ 49,569,825</u>	<u>\$ 2,614,460</u>	<u>\$ (1,777)</u>	<u>\$ 52,182,508</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 1,902,436	\$ -	\$ -	\$ 1,902,436
Accrued salary and retirement plan expense	868,102	-	-	868,102
Payable to Client Security Fund	2,217,202	-	-	2,217,202
Payable to related parties	265,327	1,777	(1,777)	265,327
Accrued vacation	575,166	-	-	575,166
Deferred income - dues and sections	10,156,267	-	-	10,156,267
Other deferred income	23,596	-	-	23,596
Lease liability - operating	332,715	-	-	332,715
Total liabilities	<u>16,340,811</u>	<u>1,777</u>	<u>(1,777)</u>	<u>16,340,811</u>
Net assets				
Without donor restrictions				
Undesignated	3,822,455	2,243,248	-	6,065,703
Board-designated	27,090,904	369,435	-	27,460,339
Total without donor restrictions	<u>30,913,359</u>	<u>2,612,683</u>	<u>-</u>	<u>33,526,042</u>
With donor restrictions				
	<u>2,315,655</u>	<u>-</u>	<u>-</u>	<u>2,315,655</u>
Total net assets	<u>33,229,014</u>	<u>2,612,683</u>	<u>-</u>	<u>35,841,697</u>
Total liabilities and net assets	<u>\$ 49,569,825</u>	<u>\$ 2,614,460</u>	<u>\$ (1,777)</u>	<u>\$ 52,182,508</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2022

	SBG and SBF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 21,106,171	\$ 248,085	\$ -	\$ 21,354,256
Accounts receivable, net	85,879	-	-	85,879
Receivable from related parties	793,375	-	-	793,375
Receivable from employees	19,632	-	-	19,632
Accrued interest receivable	79,211	-	-	79,211
Prepaid and other assets	381,062	-	-	381,062
Investments, at fair value	14,782,180	2,297,091	-	17,079,271
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	7,627,064	-	-	7,627,064
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	968,630	-	-	968,630
Total assets	<u>\$ 45,843,204</u>	<u>\$ 2,545,176</u>	<u>\$ -</u>	<u>\$ 48,388,380</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 1,790,694	\$ -	\$ -	\$ 1,790,694
Accrued salary and retirement plan expense	966,177	-	-	966,177
Payable to Client Security Fund	1,634,261	-	-	1,634,261
Payable to related parties	180,836	-	-	180,836
Accrued vacation	614,320	-	-	614,320
Deferred income - dues and sections	7,857,235	-	-	7,857,235
Other deferred income	23,596	-	-	23,596
Inter-company payable	-	-	-	-
Total liabilities	<u>13,067,119</u>	<u>-</u>	<u>-</u>	<u>13,067,119</u>
Net assets				
Without donor restrictions				
Undesignated	2,946,524	2,175,741	-	5,122,265
Board-designated	27,767,989	369,435	-	28,137,424
Total without donor restrictions	<u>30,714,513</u>	<u>2,545,176</u>	<u>-</u>	<u>33,259,689</u>
With donor restrictions	2,061,572	-	-	2,061,572
Total net assets	<u>32,776,085</u>	<u>2,545,176</u>	<u>-</u>	<u>35,321,261</u>
Total liabilities and net assets	<u>\$ 45,843,204</u>	<u>\$ 2,545,176</u>	<u>\$ -</u>	<u>\$ 48,388,380</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2023

	<u>SBG and SBGF</u>	<u>ICLE</u>	<u>Eliminations</u>	<u>Total</u>
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,163,372	\$ -	\$ -	\$ 12,163,372
Advertising	48,045	-	-	48,045
Membership	293,683	-	-	293,683
Total fees	<u>12,505,100</u>	<u>-</u>	<u>-</u>	<u>12,505,100</u>
ICLE				
Program revenues	4,882,060	-	-	4,882,060
Total ICLE	<u>4,882,060</u>	<u>-</u>	<u>-</u>	<u>4,882,060</u>
Other revenues				
Contributions	2,457,297	-	-	2,457,297
Section dues	1,461,594	-	-	1,461,594
Convention and meeting fees	47,500	-	-	47,500
Law Practice Management fees	40,522	-	-	40,522
Young Lawyers Division fees	8,115	-	-	8,115
High School Mock Trial fees	50,367	-	-	50,367
Assessment income	165	-	-	165
Investment (loss) income	134,924	81,806	-	216,730
Rental income	931,685	-	-	931,685
Other	729,414	-	-	729,414
Total other revenues	<u>5,861,583</u>	<u>81,806</u>	<u>-</u>	<u>5,943,389</u>
Total revenues and other support	<u>23,248,743</u>	<u>81,806</u>	<u>-</u>	<u>23,330,549</u>
EXPENSES				
Program services				
Counsel	4,525,472	-	-	4,525,472
Communications	951,936	-	-	951,936
Membership	966,410	-	-	966,410
Unauthorized Practice of Law	887,422	-	-	887,422
Law Practice Management	494,059	-	-	494,059
ICLE	3,505,969	-	-	3,505,969
Other	5,345,815	-	-	5,345,815
Total program services	<u>16,677,083</u>	<u>-</u>	<u>-</u>	<u>16,677,083</u>
Supporting services				
Management and general	6,118,731	14,299	-	6,133,030
Total expenses	<u>22,795,814</u>	<u>14,299</u>	<u>-</u>	<u>22,810,113</u>
CHANGE IN NET ASSETS	452,929	67,507	-	520,436
NET ASSETS, BEGINNING	<u>32,776,085</u>	<u>2,545,176</u>	<u>-</u>	<u>35,321,261</u>
NET ASSETS, ENDING	<u>\$ 33,229,014</u>	<u>\$ 2,612,683</u>	<u>\$ -</u>	<u>\$ 35,841,697</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2022

	SBG and SBGF	ICLE	Elimination	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 11,821,049	\$ -	\$ -	\$ 11,821,049
Advertising	54,864	-	-	54,864
Membership	258,773	-	-	258,773
Total fees	<u>12,134,686</u>	<u>-</u>	<u>-</u>	<u>12,134,686</u>
ICLE				
Program revenues	4,842,268	-	-	4,842,268
Total ICLE	<u>4,842,268</u>	<u>-</u>	<u>-</u>	<u>4,842,268</u>
Other revenues				
Contributions	2,228,401	-	-	2,228,401
Section dues	1,335,765	-	-	1,335,765
Convention and meeting fees	76,965	-	-	76,965
Law Practice Management fees	13,992	-	-	13,992
Young Lawyers Division fees	1,470	-	-	1,470
High School Mock Trial fees	33,059	-	-	33,059
Assessment income	350	-	-	350
Investment income	(709,962)	1,210	-	(708,752)
Rental income	941,535	-	-	941,535
Other	453,702	-	-	453,702
Total other revenues	<u>4,375,277</u>	<u>1,210</u>	<u>-</u>	<u>4,376,487</u>
Total revenue and other support	<u>21,352,231</u>	<u>1,210</u>	<u>-</u>	<u>21,353,441</u>
EXPENSES				
Program services				
Counsel	4,227,230	-	-	4,227,230
Communications	740,229	-	-	740,229
Membership	889,336	-	-	889,336
Unauthorized Practice of Law	866,152	-	-	866,152
Law Practice Management	401,818	-	-	401,818
ICLE	2,680,540	-	-	2,680,540
Other	4,529,576	-	-	4,529,576
Total program expenses	<u>14,334,881</u>	<u>-</u>	<u>-</u>	<u>14,334,881</u>
Supporting services				
Management and general	5,410,806	15,834	-	5,426,640
Total expenses	<u>19,745,687</u>	<u>15,834</u>	<u>-</u>	<u>19,761,521</u>
CHANGE IN NET ASSETS	1,606,544	(14,624)	-	1,591,920
NET ASSETS, BEGINNING	<u>31,169,541</u>	<u>2,559,800</u>	<u>-</u>	<u>33,729,341</u>
NET ASSETS, ENDING	<u>\$ 32,776,085</u>	<u>\$ 2,545,176</u>	<u>\$ -</u>	<u>\$ 35,321,261</u>



November 14, 2023

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

We have audited the combined financial statements of the State Bar of Georgia (the "State Bar") for the year ended June 30, 2023, and we will issue our report thereon dated November 14, 2023. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated June 21, 2023. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by the State Bar are described in Note 1 to the combined financial statements. As described in Note 1, State Bar changed accounting policies related to leases by adopting a Financial Accounting Standards Board (FASB) issued Accounting Standards Update (ASU) for the year ending June 30, 2023. ASU 2016-02, *Leases* (Topic 842) increases transparency and comparability among organizations by recognizing lease assets and lease liabilities on the statement of financial position and disclosing key information about leasing arrangements. We noted no transactions entered into by the State Bar during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the combined financial statements in the proper period.

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

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

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

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

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

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

Difficulties Encountered in Performing the Audit

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

Disagreements with Management

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

Management Representations

We have requested certain representations from management that are included in the management representation letter dated November 14, 2023.

Management Consultations with Other Independent Accountants

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

Other Audit Findings or Issues

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

Other Matters

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

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

Mauldin & Jenkins, LLC

DRAFT
STATE BAR OF GEORGIA
EXECUTIVE COMMITTEE MEETING
MINUTES
April 26, 2024, 1 p.m.
Trevitt Hall/Zoom Hybrid
Dalton, GA

Members Participating

J. Antonio “Tony” DelCampo, President; Ivy N. Cadle, President-Elect; Christopher P. Twyman, Treasurer; William C. “Bill” Gentry, Secretary; Sarah B. “Sally” Akins, Immediate Past President; Kenneth Mitchell Jr., YLD President-Elect; Ronald E. Daniels, YLD Immediate Past President; R. Javoyne Hicks; Shiriki Jones; David S. Lipscomb; R. Gary Spencer; and Martin Valbuena.

Members Absent

Brittanie D. Browning; Jonathan B. Pannell.

Staff Participating

Sarah Coole, Chief Operating Officer; Damon Elmore, Executive Director; Paula Frederick, General Counsel; Bill NeSmith, Deputy General Counsel; and Ron Turner, Chief Financial Officer.

Call to Order

President Tony DelCampo called the meeting to order at 1:03 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Tony DelCampo reviewed the Future Meetings Schedule. President-Elect Ivy Cadle said that all the meetings during his presidency, including those of the Board of Governors and Executive Committee, will be finalized and announced soon.

Executive Committee Minutes

Secretary Bill Gentry presented for approval the minutes of the February 9, 2024, Executive Committee meeting, which were passed as presented by unanimous vote.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous vote: David C. Whitlock-756218; Keith B. Romich-613970; Juliet V. Matthews-576357; David Dwyer Bishop-058353; Melissa Posey Furman-585285; John Robert Hand-322830; Deborah Lynne Conley-181171; William Dennis Horgan, III-594641; John A. Hill-354266; William Mayo Reid-600145; Raymon D. Burns-096725; E. Suzanne Whitaker-752725; Lynn Fant-Merritt-254963; Floyd Henry Fillenwarth-259901; Deborah Haas Thaler-703116; Cory Ann Fielding-177430; Sapna Kuma Jain-680949.

Members Requesting Disability

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

Request to Withdraw Petition for Resignation

The Executive Committee approved one request to withdraw a petition for resignation by unanimous vote.

Approval of the 2024-2025 Election Schedule

The Executive Committee approved the 2024-2025 Election Schedule as proposed.

Approval of the 2024-2025 Proposed State Bar Budget

The Executive Committee unanimously approved the 2024-2025 State Bar budget as proposed.

CLE Rewrite and Rules Changes

Executive Director Damon Elmore reported on the proposed changes to the CLE Rules, as was discussed at the February Executive Committee meeting. He said there have been no revisions to the proposed rules from the Spring Board of Governors Meeting. He reported that the notes from the robust discussion were reviewed, and it was determined that more detailed information could be included in an FAQ memo to further explain the changes. The questions and discussion provided good content that will be utilized in the memo. After additional discussion, the Executive Committee, by majority vote, agreed to place the proposed rules on the Board of Governors June meeting agenda without a formal recommendation.

New Process for Budget Approval

Chief Financial Officer Ron Turner presented a proposed new process for budget approval, which was discussed at the February Executive Committee meeting. The Executive Committee, by unanimous vote, approved changes to bylaws “Article III Board of Governors. Section 11. Meetings,” requiring the Board of Governors to hold a Spring Meeting, and “Article III Board of Governors. Section 12. Budget,” changing the timing of the approval of the annual budget from the Annual Meeting to the Spring Meeting. This will now be presented for a vote during the members’ meeting at the Plenary Session at the Annual Meeting.

Legislative Consultants Agreements

Executive Director Damon Elmore presented the 2024-2025 legislative consultant agreements of Rusty Sewell and Mark Middleton. The Executive Committee approved the agreements unanimously.

President’s Report

President Tony DelCampo referenced his report from the Board of Governors’ Spring Meeting the prior week. In addition, he announced that Russ Willard was offered the general counsel designate position.

Committee Updates

Executive Committee liaisons to State Bar committees gave updates regarding the committees they are assigned to.

Executive Director’s Report

Executive Director Damon Elmore reported CASA will be leasing space on the 6th floor of the Bar Center beginning in August. The required improvements to their space are going well. In addition, he reported the Board of Governors election results.

Treasurer’s Report

Treasurer Chris Twyman referenced his report from the Board of Governors’ Spring Meeting the prior week.

Office of the General Counsel Report

General Counsel Paula Frederick reported on hiring a new general counsel before her retirement in January 2025. She said that Andreea Morrison is bringing a lot of energy to her new role as deputy general counsel, including new processes for the intake and screening of grievances and better integration of the Client Assistance Program into OGC. General Counsel Frederick reported that the Formal Advisory Opinion Board is working on an opinion regarding remote work, and the Supreme Court has been asked to review the draft opinion. The Board-approved advertising rules remain pending at the Supreme Court. The International Trade in Legal Services Committee is concerned about possible changes to Rule 5.5 of the ABA Model Rules of Professional Conduct regarding multi-jurisdictional practice and the possibility of a law license becoming like a driver’s license where you can practice in any state. General Counsel Frederick acknowledged Assistant General Counsel Mercedes Ball for receiving a Commitment to Equality Award and Assistant General Counsel Billy Hearnburg for publishing a chapter in Patrick Longan’s new book,

“The Formation of Professional Identity: The Path from Student to Lawyer.” She added that there will be a no-cost CLE at the Annual Meeting providing an hour of ethics credit.

YLD Report

YLD President-Elect Kenny Mitchell referenced YLD President Brittanie Browning’s report from the Board of Governors’ Spring Meeting the prior week. He reminded everyone that it was the last day to contribute to the Legal Food Frenzy.

Creation of West Georgia Judicial Circuit

General Counsel Paula Frederick reported on SB 424, which was passed during the legislative session, splitting the Coweta Judicial Circuit into two circuits, the Coweta Judicial Circuit (Coweta, Meriwether, and Troup counties) and the West Georgia Judicial Circuit (Carroll and Heard counties). Per Bar Rule 1-302, there is no need to create a new board seat. The new circuits will have four superior court judges each, giving each circuit one Board of Governors seat. As an aside, General Counsel Frederick said that Deputy General Counsel Bill NeSmith will work on updating Rule 1-302 for better understanding.

Senior Lawyers Division

Secretary Bill Gentry updated the Executive Committee on his plan to create a Senior Lawyers Division. He said the goal is to address the needs of senior lawyers in the state, focusing on areas of law and technology, mentorship opportunities, and succession planning. He reported that the next step will be working on a new bylaw with the Office of the General Counsel.

Executive Session

Following a motion, second, and unanimous vote, the Executive Committee met in Executive Session. During the Executive Session, after an affirmative Keller vote, the Executive Committee, by majority vote, voted to approve President-Elect Ivy Cadle’s Board of Governors’ Reimbursement Program. By majority vote, the Executive Committee approved beginning the process of sunseting the BASICS Committee.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

There were no announcements.

Adjournment

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

William C. Gentry, Secretary

Approved:

J. Antonio DelCampo, President

**FORTY FOURTH ANNUAL REPORT TO
THE HONORABLE JUSTICES OF THE SUPREME COURT
AND THE HONORABLE MEMBERS
OF THE BOARD OF GOVERNORS
OF THE STATE BAR OF GEORGIA
BY
THE COMMITTEE ON THE ARBITRATION OF ATTORNEY FEE DISPUTES**

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

I. Committee Membership.

Ms. Judy C. King, an attorney in Lawrenceville, has continued to serve as the Committee Chairperson. Mr. Mark C. Bips, an attorney in Decatur, Hon. John M. Defoor II, an Atlanta attorney and judge in Fulton County, Ms. Rosalind A. Rubens-Newell, an attorney in Atlanta, and Mr. Darrell Lee Sutton, an attorney in Marietta are our returning Bar members. Mr. Alan Granath and Ms. Iris Rice are our current lay members; however, Ms. Rice will complete her term next month. Our newest Committee members, Mr. Wesley Charles Ross, an attorney in Lawrenceville, and Mr. Vince Clanton, a lay member, were both appointed July 2023. Mr. David Lipscomb, an attorney in Lawrenceville, continues to serve as our Executive Committee Liaison, and Ms. Donna Davis is our Staff Liaison. Our Committee collaborates amicably with each other and continues to work closely with the staff to ensure the success of the Fee Arbitration Program.

2. Participation.

Interest in the Fee Arbitration Program remains high. The Program's staff mailed an average of seventy-nine (79) Petitions out per month, with 47% of these Petitions being filed with the Program in fiscal year 2024, July 1, 2023, through April 30, 2024. For comparison, during fiscal years 2018 – 2022, 39% of Petitions were filed, while only 31% of Petitions were filed in fiscal year 2023. The reduction in Petitions filed in fiscal year 2023 is attributed to the Program's Rule change that required respondent attorneys to agree to be bound when clients file fee dispute complaints against them; the Fee Arbitration Program has received voluminous complaints about this specific rule. Copies of the Program's Rules and Frequently Asked Questions (FAQs) pamphlets were mailed with each Petition. Fiscal year 2024 will be the last year that we can provide this specific statistic because we placed a portable document format (PDF) of our instruction letter and Petition for Fee Arbitration, with direct links to our Rules and FAQs, on the State Bar of Georgia's website on March 15, 2024, drastically reducing the number of Petitions that are mailed to attorneys and/or the public.

3. Current Activity.

The Program staff managed an average of one thousand, one hundred and twenty-two (1122) calls each month, in fiscal year 2024, July 1, 2023, through April 30, 2024. These calls required the staff to have a sound knowledge of the Fee Arbitration Program's Rules and a familiarity with each case that was filed with the Program.

This fiscal year, the Committee, with the assistance of the Program's staff, resolved 321 cases, most of which were backlogged. In our more recent cases, we have found that the January 2022 Rule change, which required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted, has negatively impacted the Program. After being served, 48% of respondents did not agree to be bound by the results of the arbitration; this even occurred in cases where the Committee would have otherwise had jurisdiction. Another 24% of respondents failed to respond after being served multiple times. This failure to respond resulted in Petitions being dismissed, even in cases where jurisdiction appeared to be proper, because the attorney's lack of response is tantamount to declining to be bound by the results of the arbitration.

The revisions that the staff made to the Program's webpage in March 2024 shows the Program in a positive light, making it more appealing to Georgia's attorneys and their former clients. Although the Program's staff's creativity is extremely limited in that all Bar webpages must look similar, we expect that the information that has been published on our webpage will allow the algorithms for search engines, such as Google or Bing, to bring more traffic to the page when keywords are used in individual searches.

4. **Hearings.**

The Fee Arbitration Program has continued to provide both in-person and Zoom hearings for cases in which jurisdiction was accepted. Each case is heard by a panel of three (3) volunteer arbitrators. These arbitration panels consist of two active

members of the Bar, who are in good standing, with no disciplinary history and no cases pending before the Committee. We offer small tokens of gratitude, lapel pens and a letter of appreciation, to each arbitrator. Additionally, we provide a light lunch for arbitrators who appear in-person for hearings.

5. **Director of the Fee Arbitration Program.**

Ms. Donna Davis is the Director of the Fee Arbitration Program. Ms. Davis began her career at the Bar in the Fee Arbitration Program almost 28 years ago, then assisted several departments on the Administrative side of the Bar. Ms. Davis worked in the Client Assistance Program of the Office of the General Counsel for 25 years, before returning to the Fee Arbitration Program as Director, upon the retirement of the previous Director, Rita Payne.

6. **Appreciation.**

The Committee wishes to continue to show our appreciation to the attorneys and public members who have served as volunteer arbitrators for the Fee Arbitration Program. Our Program depends on them for our success.

We would also like to thank the Supreme Court of Georgia Justices and staff for approving our newest Committee members, who along with our returning members, are great assets to the Program.

The Committee hopes that all who read this report will understand the importance of the Fee Arbitration Program and its desire to renew and strengthen the trust the public has in Georgia's legal system and members of the State Bar of Georgia.

*Respectfully submitted, this
7th day of May 2024,
Judy C. King,*



**Chairperson
Committee on the Arbitration of Attorney Fee Disputes**

Law Practice Management Program

(Abbreviated report for the 2023-2024 Bar Year)

Total Number of Members Served – 526

July 1, 2023 – April 26, 2024

Between July 1, 2023, and April 26, 2024, the program assisted **526** members and their staff, representing an increase of **+97** compared to the 2022-2023 fiscal year. Here's the breakdown comparison from the past fiscal year of those assisted by our program:

- New members: **362 (+118)**
- Existing members: **148 (-37)**
- Law firm staff: **16 (+ 8)**

Resource Requests

Members have contacted our program to discuss or request the following:

- **Starting a Law Practice** - A total of **139 (-65)** *Starting a Georgia Law Practice* guides were distributed to our members by request via email (**14/-0**), web store order (**111/+15**), and during their visit to the Bar Center (**14/+7**).
- **Software Recommendation/Technology Advice** – A total of **17 (-1)** members contacted our program for a law office software recommendation by phone (**9/+7**) and email (**8/-8**).
- **LPM Resources Assistance**—The program has successfully handled a total of **864 (+156)** phone calls and emails, addressing a wide range of resource requests. These requests encompassed sample practice management forms, guidance on closing a law practice and succession planning, trust accounting resources, assistance with starting a law practice, information about program events, and queries regarding member benefit services. Furthermore, the program's resource advisor provided expert guidance and responses to **110 (+50)** inquiries on diverse practice management topics and requests.

Consultations

A total of **16 (-2)** virtual consultation appointments were completed during this period. Our program scheduled and completed **12 (-0)** general law firm assessments and **4 (-1)** corrective action virtual consultations to discuss law firm practice management matters.

Resource Library

The *LPM lending library* has **1,427 (+30)** books, CDs, and DVDs for members and their staff to check out. Members have the option to pick up materials at the Bar Center or have them mailed. A total of **64 (+29)** members registered to get access to the *lending library*. During this period, the resource library received a total of **28 (+13)** visits from **22 (+7)** patrons. **28 (+13)** patrons borrowed a total of **106 (+48)** books. We responded to **85 (+66)** emails and **5 (-4)** phone inquiries about the library.

Social Media Outreach

Members can follow the LPM's GA Law Practice Advisor on [LinkedIn](#), and [Instagram](#), and subscribe to our e-newsletter, the *LPM Insider*, for practice tips and the latest on LPM events and programming. Since our social media channels were created, we have **171 (+47)** Instagram followers, **69 (+32)** LinkedIn followers, and **306 (+192)** people who have subscribed to the *LPM Insider E-Newsletter*, for a grand total of **546 (+271)** followers and growing.

Speaking Engagements and LPM Seminars

A total of **8 (+1)** programs were completed and scheduled during this period. The Program's staff has given **6** continuing legal education and special presentations to Georgia lawyers and other related groups nationally and locally. **2** programs are scheduled for a future date. See list of events below:

Date	Event Name	Presentation / Sponsor
August 16, 2023	Technology Threats and Best Practices for Your Office: What Every Small Law Firm Lawyer Should Know Webinar	Sponsored by the Law Practice Management Program Advisory Committee
September 22, 2023	Take Charge: Solo and Small Firm Summit CLE--The Profitability Blueprint: Building a Strong Law Firm Business Model (In Person)	Sponsored by the Law Practice Management Program
November 9, 2023	Convos & Cocktails: AI Meets the Law CLE (In Person)	Sponsored by the Founders Legal and the Law Practice Management Program
January 30, 2024	Elevate Your Law Practice: Innovative Strategies for Peak Productivity CLE Webinar	Sponsored by the Law Practice Management Program
February 23, 2024	Cobb County Bar Solo & Small Firm Section and Young Lawyers Section CLE	<i>What's New with Fastcase! New Features Update and Cutting Edge Tech for Cutting Edge Lawyers-Top Ten Tech Swap Meet</i> (Sheila Baldwin)
March 22, 2024	Hot Tips for Practicing Lawyers in 60 Minutes Webinar	Sponsored by the Law Practice Management Advisory Committee
May 9, 2024	Enhancing Your Legal Work (and Life) with Technology and Innovation CLE	Sponsored by the American Bar Association, Law Practice Division (Panelists: Nkoyo Effiong, Danielle M. Hall and Emily A. Gordon)
September 26-27, 2024	Take Charge: Solo & Small Firm Conference CLE	Sponsored by the Law Practice Management Program

vLex Fastcase Report

[Fastcase](#) is ranked as one of the best member benefits the Bar offers, with over 50% of our 50,000+ members logging into their Fastcase account each year. The State Bar of Georgia members utilize their vLex Fastcase member benefit to enhance their practice and firm resources.

During 2024, bar members can expect a significant improvement to the vLex Fastcase platform as well as the new citator, Cert within the platform. A tutorial is now available to members when they log into their accounts.

Also coming in July 2024 is [Docket Alarm](#), a database of over 650M dockets and documents, the largest of its kind. The data included in Docket Alarm is at the heart of many legal workflows, e.g., litigation strategy, calendaring, research, business development, and calculating legal risk. Docket Alarm's aim is to provide coverage for every litigation docket, with relevant information extracted and made actionable. These documents will be a part of your Fastcase subscription and will populate in the results of your search query when you choose briefs, motions, and orders within your search criteria.

Training will be available for the new vLex Fastcase platform and the Docket Alarm library.

Fastcase Usage Report (July 2023-March 2024)

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Total
First Time Logins	65	65	58	73	71	76	73	78	62	621
Total Logins	9,114	10,869	9,271	9,918	8,643	7,704	10,105	10,060	9,895	85,579
Total Users Who Logged In	2,559	2,750	2,600	2,661	2,488	2,317	2,687	2,671	2,623	23,356
Searches Conducted	34,746	40,265	35,779	37,808	30,911	28,239	37,183	36,567	34,789	316,267
Documents Viewed	117,878	146,016	129,920	138,426	114,847	104,316	131,181	130,007	125,092	1,137,683
Documents Printed	29,918	27,380	25,915	34,704	25,475	21,124	34,183	31,917	40,227	270,845
Total Transactions	194,280	227,345	203,544	223,590	182,436	163,776	215,412	211,300	212,688	1,621,683

Fastcase Reported Issues / Problems	
Issue Reported to Member Benefits Coordinator (MBC)	Response
SBOG Member Benefits Coordinator-12/8/2023 Member reported that the Boolean Operators were not responding as expected.	Fastcase Response-12/8/2023: Unfortunately, what you are experiencing here is a bit of a bug with our Term Highlighter feature. She then worked with our member to help them find research.
MBC 1/26/2024 Two members reported that FC was not working. MBC called FC and discovered they were having an outage problem with the site.	Fastcase Response-1/26/2024 Fastcase Support called MBC a few hours later to alert us and our members that the site was back up.

CloudLawyer/ReliaGuide Report

Due to the successful growth of the directory last year, ReliaGuide was able to gain valuable information on where people are searching and which areas of law they were searching for. This year, we will be working to target communities where members of the public searched but were not able to find legal representation because lawyers did not add their practice areas.

Since the beginning of the year, there have been **113,871** interactions with member profiles (views, clicks, and contact requests), including **23,738** profile views, **2,027** completed contact form requests, **1,756** clicks on a lawyer's email, and **3,887** clicks on a lawyer's phone number. Member engagement remains steady with **1,423** sign-ins, **262** Profile Plus, **11** analytics products, and **3** website products.



State Bar of Georgia
Private Health Insurance Exchange
April 26, 2024

WEBSITE ANALYTICS	
Total Users	80,307
Total Sessions	108,535
Total Pageviews	277,624
INDIVIDUAL ENROLLMENTS	
Total Enrollments	7,879
• Medical	2,420
• Medicare	43
• Dental	1,136

• Vision	553
• Telehealth	573
• ID Theft Protection	48
• Life / AD&D	2,747
• Disability	289
• Long-term Care Enrollments	70
EMPLOYER ENROLLMENTS	
Total Enrollments	2,666
• Medical	1,233
• Ancillary	1,133
• Professional Liability	298
• Cyber Security	2

Administrative Law Section 2023-24 Annual Report

Section Chair: Dominic Capraro

This letter shall serve as the Administrative Law Section's annual report for 2023-2024.

The Section held its Annual Meeting on August 31, 2023 and held elections for Section officers. The undersigned was re-elected Chair of the Section, Tara Dickerson, Esq., was elected Vice-Chair, and Allen Lightcap, Esq., was re-elected as Secretary.

The Annual Meeting also featured a presentation by Dee Brophy, Esq. of the Georgia Department of Public Safety, and Ben Sessions, Esq. of the firm Sessions & Fleischman, LLC. Ms. Brophy and Mr. Sessions presented on the administrative license suspension hearing process. Attendees received one hour of CLE credit at no charge.

The Section hosted its Annual Holiday Party at Fadó on December 15, 2023. As usual, the event was well-attended, and presented an excellent networking opportunity for Section members.

The Administrative Law Section has partnered with the Dispute Resolution Section of the Atlanta Bar Association in holding a breakfast at the Buckhead Club. The breakfast will feature a panel of experts, who will discuss their diverse experiences in various areas of alternative dispute resolution practice. We are seeking one (1) hour of CLE credit for attendees.

On April 26, 2024, Section officers held a meeting to discuss plans for future events, including another CLE, a community outreach opportunity, and a social networking event.

Currently, the Section has 198 members, and its budget is in excellent condition.

Aviation Law Section 2023-24 Annual Report

Section Chair: Alan Armstrong

The Aviation Section of the State Bar of Georgia is a somewhat non-traditional section, the focus of which is on aviation law, flight operations, aircraft ownership, pilot certification, aircraft certification and, of course, air disasters and accidents. While not all members of the section are pilots, many are pilots and their enthusiasm for flying affects their passion for the practice of law.

The most recent achievement of the Aviation Section of the State Bar of Georgia was to conduct an Aviation Law Seminar on September 29, 2023. The speakers who made presentations at the seminar and their topics were as follows:

1. William NeSmith, Esq., Deputy General Counsel - State Bar of Georgia, gave a presentation on Legal Ethics that was multifaceted and very interesting.
2. Glenn Armellino gave a presentation on A Primer on Aircraft Design, Development and Structural Analysis. Mr. Armellino gave a detailed description concerning how aircraft designs are conceived in an evolutionary process with insights into the structural analysis that aircraft design certification must undergo. He used 3-D models to illustrate how aircraft design takes place.
3. Robert Lee "Hoot" Gibson, an aeronautical engineer, Navy fighter pilot, Navy test pilot, Space Shuttle Command Pilot and Reno Air Races pilot gave a thorough presentation on Aerodynamics for Lawyers. For those to whom mathematical and algebraic formula are somewhat foreign, Gibson made the topic of aerodynamics understandable to trial lawyers. For that he is to be commended.
4. Randall Davis, Esq., a lawyer and pilot with Phoenix Air Group gave a rousing presentation on special missions he had flown around the world including flights in third-world countries and in the Soviet Union. Randy's presentation was fascinating.
5. Edward "Mickey" Bresee, Esq., of Mosley, Finlayson and Loggins, LLP gave a presentation on The Death on the High Seas Act which is a topic many lawyers may never encounter during the course of their entire career.
6. Kim Jackson, Esq. gave a presentation on Professionalism that was thought provoking and dug into some of the ethical minutia that lawyers must navigate in the course of engaging in the practice of law.

After the seminar, the Chair was approached by a number of people who indicated that they considered the seminar a rousing success. It was no ordinary seminar. They appreciated the diversity of the topics and the diversity of the disciplines.

The membership of the Aviation Section of the State Bar of Georgia stands at 181. The funds on deposit for the Section are \$8,488.75.

The undersigned has served as the Chair of the Aviation Section of the State Bar of Georgia since 1999, a span of 25 years. It has been my pleasure to serve in the capacity as the Chair of the Aviation Section of the State Bar of Georgia.

Bankruptcy Law Section 2023-24 Annual Report

Section Chair: Michon Walker

This letter shall serve as the Bankruptcy Law Section's annual report for 2023 -2024.

The two remaining officers in the section, Leah Fiorenza McNeill and I led the section as the Vice Chair and Chair, respectively. The Consumer and Business Bankruptcy Institute two-day event began with a meet and greet and section dinner at the Omni Atlanta Hotel at Centennial Park on December 6, 2024, and the Bankruptcy Institute was held at the State Bar of Georgia on December 7, 2024. Attendees received 9 hours of CLE credit at no charge.

The Bankruptcy Institute featured several presentations. The first presentation was Professionalism for the Modern Practitioner by Leah Fiorenza McNeill of Alston & Bird LLP and Michon Walker of Arthur L. Walker & Associates, LLC.

Attendees had the choice of attending either a Consumer Breakout Session: Navigating the DOJ's New Guidance Regarding Student loan Bankruptcy Litigation by Lindsey Anderson of the Atlanta Legal Aid Society and Vivieon Kelly Jones, an Assistant United States Attorney or a Commercial Breakout Session: High-Stakes Litigation in Bankruptcy Court by Robert Mercer of Merner Law LLC, Jacob Johnson of Alston & Bird LLP, Donald Kirk of Carlton Fields, P.A., and Andrew Woltman, the Managing Director & Co-founder of Stratera Capital, LLC.

The attendees received Case Law Update from Honorable James P. Smith, Judge Middle District of Georgia, Honorable Paul Baisier, Judge Northern District of Georgia, and Honorable John T. Laney, III, Judge Middle District of Georgia. The remaining presentation for the morning was The Moral Predicate to the Discharge in Bankruptcy by Jack Williams, Professor of Law at the Georgia State University of Law.

Attendees had a wonderful lunch and Judge James C. Smith was recognized for his dedication to the law and bid heartfelt wishes for a happy retirement. The afternoon portion of the Bankruptcy Institute featured a presentation on Cross Examination/Direct Examination Tips & Tricks by Honorable Jeffery W. Cavender, Judge Northern District of Georgia, Honorable Sage M. Sigler, Judge Northern District of Georgia, Brian E. Bates, Parker, Hudson, Rainer & Dobbs LLP, and Leslie M. Pineyro of Jones & Walden LLC.

Attendees had the opportunity to learn about artificial intelligence and its intersection with bankruptcy. Jason S. Brookner of Gray Reed presented A.I. in the Bankruptcy Practice and the Ethics Involved. The final presentation was Post-Petition Appreciation of Property by Nate Juster, Judicial Law Clerk for the Northern District of Georgia, Jason Pettie of Taylor English Duma LLP, Mark Gensburg of Jones & Warden LLC, Mandy Campbell, Senior Staff Attorney for Standing Chapter 13 Trustee of the Northern District of Georgia, Melissa Davey.

The section is actively planning the Consumer & Business Bankruptcy Institute for 2024. The Section's budget is in excellent condition.

Class Action Law Section 2023-24 Annual Report

Section Chair: Bob Alpert

This letter shall serve as the Class Action Section's annual report for 2023-2024.

The Section met at the State Bar of Georgia's Midyear Meeting on January 11, 2024. The meeting featured a presentation by an accomplished panel of class action practitioners, who discussed recent developments in class action law in Georgia and around the country. The panel included insight from plaintiffs' counsel, defense counsel, and corporate in-house counsel.

In particular, the panel included the following speakers:

- Will Barnette (Assistant General Counsel, The Home Depot)
- Cari Dawson (Partner, Alston & Bird)
- Ronan Doherty (Partner, Bondurant, Mixson & Elmore, LLP)
- Jonathan Palmer (Partner, Knight Palmer, LLC)

In addition, the Class Action Section circulated a newsletter discussing recent developments in Georgia class action law. The Class Action Section is currently working on additional newsletter content and planning for additional educational and networking opportunities during the upcoming Bar year.

Currently, the Section has 134 members, and its budget is in excellent condition.

Construction Law Section 2023-24 Annual Report

Section Chair: Peter Crofton

The Construction Law Section (the “Section”) had a great fifth year. Since its formation on November 2, 2018, Section membership has grown to 477 members, and the Section has collected \$32,939.08 in our account with the Bar. Our significant projects this year are discussed below.

1. Habitat For Humanity Home Build

On August 26, 2023, the Construction Law Section undertook its first ever construction project by spearheading a State Bar Sections Habitat for Humanity build day. Although temperatures exceeded 100 degrees, we were joined by members of the Non-Profit Law Section to help build a dream home for a single mother and her children. Last year was especially significant for Habitat for Humanity as it was the 40th anniversary of its establishment. We distributed hard hats with the State Bar Sections logo for the build participants to both use and take home as a commemorative item.



Hard Hat with State Bar Section Logo



Photo of Habitat Build Volunteers

2. Women in Construction

The Construction Law Section partnered with the National Association of Women in Construction (NAWIC) in conducting our fourth annual Women in Construction Roundtable. This year, the Georgia General Assembly passed resolutions recognizing the week of March 4 as Women in Construction week. The Women in Construction Roundtable was held on March 6, and showcased the contributions of women in the construction industry, particularly in construction law. The Roundtable featured an engaging panel discussion about the impact of women and women attorneys in the construction industry. The event was preceded by a networking reception for the

attendees.

3. Holiday Party

The Construction Section held its first Holiday Party this year. The event, hosted by King & Spalding on its rooftop event space, allowed section members and their spouses an opportunity to mingle in an informal and non-work focused environment. The party was enjoyed by all who attended (as demonstrated by the number of people cut off in the below photo) and plans are underway for a repeat event later this year.



Inaugural Construction Law Section Holiday Party 2023

4. Leadership

In four years, The Section has grown from an idea to an organization with 477 members. We are expanding our section leadership to increase the range of offerings to members and to give more people an opportunity to be involved. We are in the process of adding Board-Members-at-Large to help grow the events offered to the section members.

5. Education

The Section is continuing to fulfill its mission of providing education and fostering professionalism in and among members. The Section conducted three CLE events this year at no cost to Section members. As we expand our leadership team, we anticipate offering more CLE this year, including online or hybrid events so members located throughout the state can easily participate.

6. Conclusion

It has been an exciting and productive year in which the Construction Law Section has both given back to our community and expanded our social events to improve camaraderie in the Section. We look forward to continuing to serve our members through an expanding array of offerings.

Consumer Law Section 2023-24 Annual Report

Section Chair: Cliff Carlson

Tashia Zeigler and Jill Sandt were elected to the position of Vice Chair and Secretary, respectively. We held a virtual Spring Meet and Greet on April 19, 2024. We have also tentatively scheduled a CLE and annual meeting for October 2024. Looking forward to a great 2024.

Alternative Dispute Resolution Section 2023-24 Annual Report

Section Chair: Scott Zucker

The Dispute Resolution Section (A/K/A the “Alternative Dispute Resolution Section”) is pleased to report on its activities for the past year.

General Overview

The Dispute Resolution Section is dedicated to giving its 615 members, many who actively practice in the fields of mediation and arbitration, a strong forum for learning, engagement, and networking.

Leadership

Our Section leadership has built a promising pipeline of interested practitioners to keep the Section strong and vigorous into the coming years. Shan Momin is scheduled to step into the shoes of Chair in June 2023. Shan has ably served as Vice-Chair this past year and has assisted with the organization and implementation of numerous programs. Joyce Klemmer, this year’s Secretary, will step into the position of Vice-Chair. Doug Witten, this year’s treasurer, will assume the role of Secretary and Casey Crumbley, a current At-Large Board member, will assume the role of Treasurer.

The Section will continue to be guided by our current and longstanding At-Large Board members, Mark Dehler and Ray Chadwick and will be joined by Sam Sparks and the Honorable Gail Tusan, both of whom have been active with our Section and come from leadership roles in the Atlanta Bar Association’s Alternative Dispute Resolution Section. The Board slate was approved by the Section members during our Annual Meeting on March 20, 2024. We are very lucky that our leadership in this Section continues to thrive.

Programming

Our Board was determined to create programming for the Section members each month of our fiscal year and successfully achieved that objective. Especially with the ability of adding virtual programming in a “Lunch & Learn” format, the Section was able to present a variety of educational and networking programs throughout the year (Big Shout Out to Lane for all of his help coordinating and managing these virtual programs!!). We believe that with the success of this short one-hour format, we can continue to offer important information to our members in an efficient and positive way for otherwise busy practitioners around the State who cannot easily travel for “in-person” programming. Virtual meetings were recorded and have been made available on our Section webpage for later viewing.

Our Program Summary for the year is attached.

Bylaw Updates

Section Board Members, especially Immediate Past Chair Erika Birg and Vice Chair Shan Momin worked tirelessly to revise the By-Laws for our Section to bring them up to

date with the needs and services of the State Bar. The proposed new By-Laws were delivered to the membership by publication and messaging in advance of the Annual Meeting on March 20, 2024, and, without objection, unanimously passed by vote of the Section members in attendance.

Financials

We started this past fiscal year with \$49,925.99 in our account. We were determined to use our funds appropriately to pay for the enhancement of our events this year. The Section currently has \$67,258.54 on hand for its next fiscal year.

As with my predecessors, it has been my honor and pleasure to lead this Section as we continue to reinvigorate it and provide helpful resources to our many members. We are proud of the work we have done this past year and look forward to much more in the coming year.

PROGRAM SUMMARY:

July 20, 2023: “ADR Best Practices in Diversity, Inclusion and Cultural Competency”

August 31, 2023: “Family Law Mediation: A to Z in 60 Minutes”

September 28, 2023: “ADR in National Reconciliation and Rebuilding-Experiences from Liberia, Rwanda and the Gambia” (presented by The Carter Center)

October 19, 2023: Conflict Resolution Day

November 17, 2023: Georgia Office of Dispute Resolution/Dispute Resolution Section Annual “ADR Institute”

December 15, 2023: “Conflict Disclosures and Award Vacatur Issues in Arbitration”

January 25, 2024: Live Joint Program with the Construction Law Section on “Arbitration Topics in Construction Law”

February 15, 2024: Joint Program with the General Practice & Trial Law Section “Applying ADR in a General Practice”

March 20, 2024: “Handling Difficult Arbitrations”

April 18, 2024: “Updates and Observations on Mediation Strategies” with special guest Presenter, State Bar President Tony DelCampo

May 16, 2024 “Meet the Mediators” Cocktail and Networking Event held at the State Bar Offices

E-Discovery & the Use of Technology Law Section 2023-24 Annual Report

Section Co-Chair: Marc Effron

The E-Discovery and Use of Technology Section is pleased to report on its activities for the past year.

The Section is dedicated to giving its over 240 members, a forum for learning, engagement, and networking around the subjects of E-Discovery and the Use of Technology.

Leadership

This has been a pivotal year for the Section as we have recovered from challenges associated with in-person engagement as a result of SARS-CoV-2 global pandemic. In 2023 the Section initiated planning for the first ever inaugural E-Discovery and Use of Technology Symposium scheduled for September 25, 2024. We are proud to have incredible contributions from our strong Section leaders:

<u>Name</u>	<u>Organization</u>	<u>Position</u>
Marc Effron	White Elm Group	Section Co-Chair
MaryBeth Gibson	Gibson Consumer Law Group, LLC	Section Co- Chair
Alex Khoury	Smith Gambrell	Section Vice Chair of Operations
Lori Burton	King & Spalding	Section Vice Chair of Programming

Section leadership was supplemented this year, by the induction of Lori Burton from King & Spalding. We are proud to have a diverse group of knowledgeable and networked experts leading the Section at this important time.

Programming

This year’s programming is squarely focused on planning and developing a newly designed marquis annual Section event. The E-Discovery & Use of Technology Annual Symposium is developed to be the marquis event and number one resource for State Bar of Georgia and Section members to learn and engage in developing technologies serving the legal community. The event includes participation from leading experts in the bar community, cutting edge vendors, Judges, and other constituents committed to the mission of expanding and utilizing technologies.

Leadership intends to implement “Lunch-and-Learn” programs after the Fall Symposium to encourage more casual participation from the Section members.

In addition to the planning and execution of the Fall event, the Section resumed virtual CLE programming this year, including its Webcast offering of Digital Forensic Investigations – E-Discovery and Tools.

Community and Philanthropy

The Section joined forces with the Atlanta chapters of Women in eDiscovery and the Association of Certified eDiscovery Specialists (ACEDS) to co-sponsor a holiday party that was well attended and benefited the Ronald McDonald House charity RMH “Wish List”.

Bylaw Updates

The Section has not made any Bylaw changes in the current term.

Administrative

Section leaders have worked closely with Bar personnel to increase functional and administrative resources of the Section, including increased sponsorship engagement and administration, adoption of the section logo and increasing online presence to market the annual symposium.

Financials

We started this past fiscal year with \$34,558 in our accounts. To date we have not expended funds with the exception of de minimis charges, section assessments and service fees. The Section has raised funds through Section membership fees and programming sponsorship fees. The section currently holds a fund balance of \$54,082 with no associated liabilities. Use of funds within budget is planned for the Fall Symposium.

It has been my honor and pleasure to lead this Section as we continue to foster member engagement and provide valuable programming to our many members. We are proud of the work we have done this past year and look forward to much more in the coming year.

Employee Benefits Law Section 2023-24 Annual Report

Section Chair: Douglas Robinson

Board Members:

Section Chair- Douglas Robinson

Vice Chair - Matthew Zischke

Secretary - Marcy Dunlap

Treasurer - Craig Queen

Event Co-Chair - Emily Friedman

Event Co-Chair - Mathew Graebel

Member at Large - Clancy Mendoza

Current Membership: 220 Members

Current Financials:

Balance: \$38,236.77

Net Revenue: \$280.00

Overview/Activity/Goals:

The Employee Benefits Section (“EBS”) provides a forum for practitioners, in-house counsel, and government attorneys to discuss topics in the pension and benefits law practice and ERISA-related issues. The EBS section executive committee meets monthly via remote video conference to discuss section-related issues. This year, the EBS section created and submitted by-laws that conform to the Bar’s template. In September 2023, the EBS section hosted a happy hour that was free for members at the offices of Smith Gambrell Russell in Atlanta. The executive committee is planning a two-hour virtual seminar for 2024 that will focus on topics relevant to employee benefits law.

Energy Law Section 2023-24 Annual Report

Section Chair: Peter Crofton

The Energy Law Section was approved by the Board of Governors and the Bar membership on October 28, 2023. Since its formation, we have worked to organize the Section and recruit members. We conducted our first meet-and-greet reception to attract new members and publicize the Section's existence, and we are scheduling a second membership event for next month. We currently have 27 members and have \$157.48 in our account with the Bar.

We are conducting our annual meeting at the Bar's annual meeting, where we will co-host a cocktail reception for Section members.

It has been a productive first year, and our membership continues to grow as we strive to reach our goal of supporting the members in their practices.

Fiduciary Law Section 2023-24 Annual Report

Section Chair: Joseph A. Sillitto

The State Bar of Georgia Fiduciary Law Section supports its members and the practice of fiduciary law in Georgia by, among other things, sponsoring continuing legal education programs for its members; providing a repository of past and current documents and information to aid fiduciary practitioners; and studying, reviewing, initiating, and communicating with members regarding proposed legislation affecting fiduciary law in Georgia and making appropriate recommendations thereon to the State Bar of Georgia.

The Section's activities during the 2023-2024 year are summarized below:

Members

The Fiduciary Law Section has 1,197 members.

Account Balance

The current balance of our operating account is approximately \$ 228,545.14.

Continuing Education

The Section holds four programs annually with ICLE, which are chaired by officers of the Section. The Basic Fiduciary Practice 201 seminar was held in-person in Atlanta, Georgia in October of 2023. The Estate Planning Institute was held in Athens, Georgia on February 1-2, 2024. The Basic Fiduciary Law 101 seminar was held in-person in Macon, Georgia on March 21, 2024. Finally, we are currently planning what is traditionally our largest seminar, the Fiduciary Institute, which will take place in Amelia Island, Florida on July 25-27, 2024.

Leadership

The Section is led by five officers (chair, vice chair, secretary, assistant secretary, and immediate past chair), who are currently, Joseph Sillitto, J.W. Haas, Elizabeth Faist, Alyson Graham and LeAnne Gilbert, respectively.

The Section maintains the following committees – a Forms Committee, co-chaired by Opehlia Chan and Margaret Head; a Code Revision/Legislative Committee, co-chaired by Nick Djuric and Kyle King; a Programs Committee, chaired by Joseph Sillitto; a Long-Range Planning Committee, comprised of former Section Chairs and led by Nick Djuric and Adam Gaslowitz; and an Executive Committee that is comprised of the officers and also four at-large members serving staggered two-year terms. At-large committee appointments are for two years, with the current chairs serving through June 30, 2025.

Achievements

Primary accomplishments, in addition to the continuing legal education programs, of the Section this year include:

1. *Grant to Georgia Heirs Property Law Center.* The Section once again awarded a \$5,000 grant to the GHPLC to help fund the Center's work with the Probate Council of Georgia, as well as other judicial and legislative partners, to understand, streamline, and make more efficient the resolution and prevention of heir's property.

2. *Section Intranet.* The Section continues to maintain its Intranet site, which, among other things, provides a forum for members to communicate with each other and a document repository where members can quickly access Word and PDF versions of the Georgia Probate Form, current and former relevant Georgia statutes, legislative summaries, and other resources.

3. *Annual Meeting.* The Section's annual business meeting was held in person in Athens, Georgia on February 2, 2024. The meeting included the election of officers and members of the Executive Committee.

Insurance Law Section 2023-24 Annual Report

Section Chair: Nik Makarenko

The section had another successful year that culminated in the annual Insurance Law Institute Seminar at the Ponte Vedra Inn and Club on October 12-14, 2023. This in-person seminar was well attended and allowed members to successfully complete their CLE requirements for the year. We had members as well as medical doctors and engineers speak on various topics including “A Nightmare on Demand Street”, “Sprains, Strains and Brains”, “Fictional Medical Bills” and “Recent Developments in Georgia Case Law”. We are currently looking to hold the 2024 seminar at the same location during October 10 through 12, 2024.

We currently have over 2600 members in the section.

The Section is led by an Executive Committee whose current members are as follows:

Chair: Nik Makarenko
Vice Chair: Dale Ellis
Treasurer: Sam Sykes
Secretary: Curtis Anderson
Immediate Past Chair: Tiffany Winks

Intellectual Property Law Section 2023-24 Annual Report

Section Chair: Chris Lightner

I. 2023-2024 Accomplishments

Growing upon last year's successes, the IP Section once again this year undertook multiple in-person events, with topics focused across all areas of practice engaged by our members. We have also begun investigating reviving of historical member favorite events (Institute, Judges Dinner) from the pre-pandemic era. Hosting of a local section-wide event of this nature is in the works for the 2024-2025 Bar year.

This year we also revamped and revitalized the Section website, through engagement with a third-party vendor that has streamlined the update process and significantly improved access and usability issues for our members. We are continuing efforts in this regard as we near the new bar year.

Overall, the Section is in outstanding shape. This year's **Executive Committee** included **Chris Lightner** (Chair), **Katie Bates** (Chair Elect), **Chittam Thakore** (Vice Chair), **Josh Curry** (Secretary), and **Meredith Ragains** (Treasurer). Our membership remains strong, still exceeding 1,200 members. We are also fiscally sound, with a balance of approximately \$235,000—the result of accumulated member dues, fiscal responsibility, and suspension of certain section-wide in-person events post-pandemic. While sponsorship funding remained low this year, reinstatement of our section-wide member favorite events in the 2024-2025 Bar year will be pursued conservatively, so as to balance the expenses thereof (much higher now, post-pandemic) with heightened sponsorship drive efforts. In this regard, we will continue to support and partner with our sister and related-IP-focused organizations, including the Pro Bono Partnership of Atlanta, Georgia Lawyers for the Arts, Georgia PATENTS, the Georgia Intellectual Property Alliance, and the IP Section of the Atlanta Bar.

II. Committee Reports

(i) The **In-House Committee**, led by **Joe Staley** and **Justin Ward**, hosted a virtual CLE on October 30, 2023, entitled "2023 In-House Law Update". The moderators were Joe Staley (Partner; Perilla, Knox & Hildebrandt) and Justin Charles Ward (General Counsel; Blue Force Gear, Inc.) and the panelists were Robert Gravois (Assistant General Counsel, Intellectual Property; ADT, Inc.) and Michael Sochor (Senior Lead IP Counsel; Dexcom, Inc.). The Virtual CLE was well attended, and each attendee received one hour of General CLE credit. The panel discussed some of the most important in-house law updates from the last year and the impact each has on their practices. Some of the hot topics included Third-Party Litigation Funding and Venue Trends, Generative AI - General Thoughts, Interest Level, Experience and Concerns, and Patent Inventorship. The In-House Committee is working on a summer CLE and happy hour that will be fun and inclusive of other sections to drive up membership. The In-House Committee will also conduct a late winter virtual CLE as well.

(ii) The **Community Outreach Committee**, led by **Meredith Ragains**, hosted a new community service-focused event for the Section this year. On Saturday, March 2, 2024, eighteen (18) members volunteered at PAWS Atlanta. PAWS Atlanta is Georgia's oldest no-kill animal shelter, having started in 1966 as the DeKalb Humane Society. The shelter has found homes for more than 49,000 dogs and cats in the past almost 60 years!

We rolled up our sleeves with two different tasks: First, some of us helped the PAWS Development Team with their upcoming St. Pittie's Day campaign. The volunteers cut out and laminated gold coins and took down the Valentine's Day hearts, cleaned them, and reset the lobby for the campaign. We saved our Development Team several hours of work! Second, another group of us picked up branches and sticks (which had fallen the previous night in a rainstorm) on the walking trail and throughout the shelter. This allowed the PAWS volunteers and staff to walk the dogs safely while they get the exercise and stimulation they need. Plus, it provides adopters and fosters a nice environment to meet their new best friend!

The big pay-off for our hard work was that at the end of our time we got to socialize with Harley, Boston, and Teddy Bear (plus the kitties in the Cat Cottage)! We helped them get ready to meet potential adopters! Providing some snuggles and attention to two puppies, Prosperous and Fortunate, helps them socialize at a young age and sets them up for a great future as they grow.

(iii) **The Patent Committee**, led by **Andrew Strickland** and **David Reed**, hosted two CLE events during the 2023-2024 Bar Year. On October 26, 2023, the Patent Committee hosted a CLE at the State Bar Conference Center titled "2023 Patent Law Case Update." A panel of Josh Curry (Partner, Lewis Brisbois), Hala Mourad (Partner, Lee & Hayes) and Andrew Strickland (General Counsel, Unirac Inc.) discussed several cases that impacted the panelists' practices including *Sonos v. Google* (prosecution laches); *Amgen v. Sanofi*: (enablement for "genus" style claims), *Thayler v. Vidal / Thayler v. Perlmutter* (AI as inventor/author), *LKQ Corp. v. GM Global Tech. Operations LLC* (design patent obviousness standard and interplay with *KSR*). The panelists also discussed new litigation financing disclosure rules for the District of Delaware and previewed some potential upcoming Supreme Court cases. On February 15, 2023, the Patent Committee hosted a CLE event at the office of Kilpatrick Townsend & Stockton LLP titled "Recent Updates on European Patent Law." Robert Alderson and Mariella Massaro (both Partners at Berggren Oy) discussed differences between classic European Patent and Unitary Patent systems and prosecution and litigation strategies relevant to each. The Patent Committee also plans to present a CLE in late June 2024 providing a further case law update to members that focuses on providing summaries of important decisions related to patent law and provides practice tips and lessons learned based on those cases. The Patent Committee is still in the process of finalizing the panelist and the list of cases. Finally, the Patent Committee also plans to partner with Georgia PATENTS in Fall 2024 to host an inventor Intake Clinic.

(iv) The **Copyright Committee**, led by **Rachel Geist** and **Liz Wheeler**, continued its focus this year upon rebuilding membership and committee engagement. On

November 9th, the committee held a pro bono event, fully staffing a free legal clinic for the Georgia Lawyers for the Arts. Shortly thereafter, the committee held its first in-person social gathering since the COVID pandemic at the City Winery in Ponce City Market. The event enjoyed great turnout and created opportunities for new committee members to welcome and connect. On April 26th, the Copyright Committee will host a forthcoming CLE titled “The Right to Repair: New Trends in Legislation and Lawsuits.” The CLE feature Committee member Courtney Lytle Sarnow, speaking on an important but under-recognized element of Copyright Law with important implications for Georgians. Plans for an additional CLE on Developments in Copyright and AI are ongoing, with the CLE tentatively scheduled for later in the Spring. In 2024-2025, the Copyright Committee will welcome two new co-chairs, longtime members Alcide Honoré and Jelani Miller.

(v) The **Trade Secrets Committee**, led by **Mike Cicero** and **Neal Weinrich**, kicked off the year on July 31, 2023, with a 90-minute CLE session at the State Bar of Georgia Building entitled “The ‘Why’ and ‘How’ of Trade Secret Management: Why it is Critically Important, and How to Actually Accomplish It.” The panelists for this CLE session were nationally recognized trade secret authority James Pooley; Shawntel Hebert Clark, an in-house employment attorney with Vanderlande Industries; and Chris Buntel, a Co-Founder and the Chief Intellectual Property Officer of Tangibly Inc. Mr. Pooley participated remotely, while Ms. Hebert Clark and Mr. Buntel delivered their presentations in person. Mr. Pooley discussed fundamental trade secret concepts, together with the nature and importance of trade secret management. Ms. Hebert Clark then discussed her experience in recently spearheading the implementation of an Intellectual Property Agreement at Vanderlande Industries. Finally, Mr. Buntel discussed best practices to implement a trade secret management program, including Tangibly’s software-as-a-service (SaaS) platform that can help automate the management process.

Plans are underway to conduct two more 90-minute Trade Secrets Committee CLEs before the end of June. First, on April 23, 2024, the FTC voted to implement its Proposed Rule banning restrictive covenants. We therefore recognize that a follow-up to a CLE conducted on March 27, 2023, titled “The FTC’s Proposed Ban on Non-Competes: Everything You Need to Know” would likely be of great interest to practitioners and their clients alike. We aspire to conduct that CLE by the end of May. Second, we are targeting late June for a CLE directed to trade secret implications involving artificial intelligence (AI). Both the Chair and the Vice Chair have attorneys in their respective firms who possess the credentials to serve as panelists, and inquiries to each attorney have been sent out.

(vi) The **Communications Committee**, led by **Rachel Fields**, revamped, and revitalized the Section website (<http://georgiaip.org>) to increase member usability and access thereto. Efforts remain ongoing to improve the website, as activities are planned. A Section Newsletter was also released in November 2023, with a second planned for May 2024.

III. Summation With all the various challenges faced, the IP Section has still been able to serve its members efficiently and effectively. A mix of diverse speakers, across a mix

of IP-related topics, has provided exciting educational and networking opportunities for our members. While reinstatement of our flagship section-wide events remains a work in progress, preparations to reimagine and refocus these events for 2024-2025 have already begun. Through these—and other—efforts the IP Section will continue to promote the highest standards of excellence in the practice of IP law.

III. Summation

With all the various challenges faced, the IP Section has still been able to serve its members efficiently and effectively. A mix of diverse speakers, across a mix of IP-related topics, has provided exciting educational and networking opportunities for our members. While reinstatement of our flagship section-wide events remains a work in progress, preparations to reimagine and refocus these events for 2024-2025 have already begun. Through these—and other—efforts the IP Section will continue to promote the highest standards of excellence in the practice of IP law.

Privacy & Technology Law Section 2023-24 Annual Report

Section Chair: Amanda Witt

Introduction:

Over the last five years, the Privacy & Technology Law Section for the State Bar of Georgia (“PTLS”) has continued to grow, even during a global pandemic. In the last year, the officers and executive committee leaders have reshaped the section significantly in attempt to broaden the reach of the section. It was also a rebuilding year after the section was largely inactive other than periodic CLE’s in the prior year. The section’s activities over the past year, which are discussed in detail below, demonstrate the outreach and range of activities that were designed to bring significant value to our members including the launch of a mentoring program.

As an officer over the past three years, it has been one of the most challenging and rewarding leadership roles I’ve had the pleasure of holding. As a leader for this section, my goal was to have a lasting impact and continued success of the section and the attorneys. I also hope that the changes we’ve implemented this year will result in the advancement of attorneys in this field including the recruitment of law students into the section.

To ensure the success of the section after my Chair year has concluded, the section and its leaders used our collective strengths to mitigate shortcomings. In this past year, the PTLS launched a mentoring program, held a 2-day conference with over 60 speakers, hosted a law student speed networking event, had our first CLE on LGBTQ+ issues, a book club discussion and mixer for Black History Month along with other regular book clubs, made CLEs available on the section’s YouTube channel, broadened the reach of the section’s LinkedIn page, provided more consistent communication with our section members, delivered relevant and up to date CLEs, hosted a number of social events and much more. We also hosted joint events with the Child Advocacy Section, the International Section, the Stonewall Bar and the Gate City Bar Association.

The entire section has worked incredibly hard this year and I am honored to present our work to the Board of the State Bar of Georgia.

Officers:

Amanda Witt – Chair
Heather Kuhn – Vice Chair
Antonette Igbenoba - Secretary

The PTLS elects a new Secretary every June for a three-year term in which that individual will succeed from Secretary to Vice Chair and finally Chair on their third year. Last year our section members voted Antonette Igbenoba as Secretary. These three officers cannot do all the work that is required to continue to bring diverse and

impactful programs to our section members. As such, the Officers have created Executive Committees in which we have additional leaders for our section. The Officers & Executive Committee Leaders create the Board. The PTLS Executive Committees and Executive Committee leaders are as follows:

Executive Committee (“EC”) Leaders:

- a. Programming
 - a. Jason Loring– Chair
 - b. Robert Jett – Vice Chair
 - c. Mary Alexander Myers – Vice Chair
- b. Social
 - a. Ashley Whitaker - Chair
 - b. Madiha Merchant – Vice Chair
- c. Communications
 - a. Bunny Sandefur Howell – Chair
 - b. Leeza Snyderman – Vice Chair
- d. New Practitioner & Pro Bono
 - a. Charlie Britt – Chair
 - b. Kendall Carter– Vice Chair
- e. Diversity & Inclusion
 - a. Zain Haq – Chair
 - b. Ami Rodrigues – Vice Chair

Membership:

As of the last update in April, this section has grown to 937 members (up from 850 in 2022). In the last five years, our section membership has more than doubled. I believe all the work put into the PTLS by the Officers, EC Leaders, section members, and State Bar of Georgia employees are thanks for our continued success. With the increasing global and domestic laws of privacy, cybersecurity, AI and the advancement of technology, the importance of the PTLS is becoming more important than ever.

Financials:

Our section continues to be financially secure and apply the funds to legal activities, community outreach, and CLEs for our members. We require two Officers to approve spend over \$2,500 per event hosted by our EC Leaders. As of April 17th, we have \$48,136.17 in our account, which will help the PTLS to achieve its goals in years to come.

Board Meetings:

A cadence is established for the Officers to meet every month (“Officer Meeting”). The Officers and EC Leaders meet once per month on the second Friday from 12:30 to 1:30 pm (“Board Meeting”). The agenda and past meeting minutes are sent out the Thursday

prior to the Board Meeting so all corrections can be made during our meeting. During the Board Meeting, we approve minutes, review financials & membership numbers, discuss any old business, review each committee programs in detail, and have an open table for discussion.

Executive Committee Annual Updates:

a. Programming Committee

Purpose: This committee is focused on bringing relevant and engaging privacy, cybersecurity, technology and AI-related CLE content to our section members. At the beginning of the year, we solicited our members using a survey in order to find out what content they would like covered in CLEs. The following CLEs were offered by the section in the past year:

- a. Litigation & State Privacy Law Innovations in Advertising & Tracking Technologies – July 26, 2023
- b. State Privacy Law Round-up – August 24, 2023
- c. India Privacy Law CLE on 11/6/23 – joint CLE with International Section
- d. Ad Tech Workshop – January 17, 2024
- e. Children’s Privacy CLE – April 11, 2024

b. Social Committee

Purpose: This committee is focused on bringing social events, whether virtual or in-person, that offer our section members educational and networking opportunities.

a. Bi-Monthly Book Club

i. To reach our section members, we came up with creative ways in which to meet virtually. One of those being a bi-monthly virtual book club which is hosted by Kendall Carter. This year our section members have read and had thoughtful discussions on the following books:

- 1. “The Quantified Worker” by Ifeoma Ajunwa on September 29, 2023
- 2. “The Fight for Privacy: Protecting Dignity, Identity and Love in the Digital Age” by Danielle Citron
- 3. Your Face Belongs to Us: A Secretive Startup’s Quest to End Privacy As We Know It” by Kashmir Hill – January 24, 2024
- 4. “The Coming Wave: Technology, Power, and the 21st Century’s Greatest Dilemma” by Mustafa Suleyman, co-founder of DeepMind and Inflection AI. – May 1, 2024

b. Networking Event - Flight Club Mixer. On October 12, 2023, the Events Committee held an in-person happy hour at Flight Club. We received

positive feedback about the venue and event generally.

c. On November 8, 2023, we held a nutrition webinar titled Healthy Eating During the Holidays. The audience was engaged and participated throughout the webinar. We received positive feedback about the event, specifically that the speaker was engaging and informative.

d. Holiday Party at Park Tavern on 12/13/24

e. Privacy Week Mixer at Establishment– January 24, 2024

b. Communications Committee

Purpose: This committee is focused on discovering and enhancing ways in which to communicate and deliver information to all our section members.

a. The Communications Committee has spent countless hours updating our website. This is a space where we communicate on future events, post jobs in the field, provide photos of past events, and provide presentation materials for all to continue to their education in the technology or privacy legal field. Please review our website here.

b. The Communications Committee also greatly expanded the reach of our section this year by making CLEs available on our YouTube page. We also increased outreach by creating a more active LinkedIn presence and more regularly communicating with members.

c. Newsletters

i. The Board has worked had this year to bring a newsletter to our members. A newsletter is a valuable tool in which to communicate past, present, and future events. It also allows a forum in which members can submit articles they wish to educate and bring awareness to all our section members. We plan to send another one out before the end of the Bar year.

d. New Practitioner & Pro Bono

Purpose: This committee is focused on pro bono opportunities, as well as, seeking ways to reach out to new practitioners (both students and attorneys entering into the privacy, cybersecurity or technology law field). This committee was formed this year and accomplished the following:

a. Launch of Mentoring Program

b. Law Student Speed Interviewing Event – January 26, 2024

c. AVLF donation of \$1,000

d. \$1,500 donation to Georgia Lawyers for the Arts

e. New practitioner CLE on 12/6 – joint CLE with Child Advocacy Section. This webinar explored the landscape of privacy and technology laws and was tailored for small or solo practitioners. Our session focused on the essentials, including cybersecurity and organizational best practices. The panelists also covered safeguarding data within agreements and health data privacy enforcement. The panelists included the following: Ayeisha

Starghill, Associate General Counsel – Health Data Privacy, Medica, Will Bracker, Sr. Corporate Counsel – Privacy, Cox Communications, and Johnny Lee, Principal & National Practice Leader – Forensic Technology Services, Grant Thornton LLP.

f. Joint Event with Child Advocacy Section – Youth Advocacy Presentation 4/13/24

g. \$2,000 donation to the Pro Partnership of Atlanta

e. Diversity & Inclusion Committee

Purpose: This committee is focused on ensuring all activities are inclusive and diverse for all section members and reaching out to the broader community. This committee was formed this year.

a. LGBTQ+ Virtual CLE – October 10, 2023. The Diversity & Inclusion Committee held the Section’s first ever Pride month CLE, co-hosted by the Stonewall Bar Association. The virtual CLE, entitled “Hiding OUT: Digital Privacy & the LGBTQ+ Community” shed light on the unique privacy and security threats facing the LGBTQ+ Community. We highlighted the impact of state privacy laws on the LGBTQ+ community and unique harms resulting from data breaches and algorithmic categorization, censorship, and surveillance. Carlos Gutierrez, Deputy Director & General Counsel at LGBT Technology Partnership and Institute, discussed the impacts of location tracking, telling the story of a top official in the Catholic church resigning after being outed by individuals who accessed his mobile location data from Grindr. He also touched on issues created by children’s privacy bills that call for parental supervision and parental consent. Nneka Ewulonu, Staff Attorney at the ACLU of Georgia, concluded by shedding light on issues of online harassment and social media data collection and sharing. The presentation was well received.

b. Black Women in Privacy Dinner - On October 20th, 2023, the Privacy and Technology Law Section sponsored a networking dinner for black female lawyers in Privacy Law. This event was hosted by the leadership from the Black Law Students Association (BLSA) and the Student Data Privacy Professionals (SDPP) from Georgia State University College of Law and Emory University School of Law. In attendance was legal representation from federal and state government agencies, small and large law firms, HP, Change Healthcare, Morgan Stanley, WABTEC, McKesson Company, and insurance organizations. During the event, experiences were shared regarding defining career moments and imposter syndrome. The event closed with a presentation from Angelique McClendon, General Counsel at the Georgia Department of Driver Services, who has implemented the digitalization of drivers’ licenses in the state of Georgia.

c. Black History Month Book Club & Happy Hour – February 28 & 29, 2024

Privacy & Technology Law Forum (“PTLF”):

Every year the PTL Vice Chair is responsible for our annual conference, which occurred even amidst a pandemic. This year was our 38th annual conference where we had over 60+ speakers from around the world. We expanded our PTLF program to hold it over two days at AmericasMart on March 5 & 6, 2024. We had almost 200 people in attendance with 63 speakers from across the world including California, D.C. and Brazil. Day One was focused on in-depth workshops to allow for hands-on experiences and discussions and Day Two focused on a variety of topics from operationalizing privacy, Generative AI, regulatory landscapes and cybersecurity. We had keynote speakers from the Department of Justice as well as a privacy company focused on deep fakes and AI identification, Reality Defenders. Overall, participants had great feedback on the quality, depth and breadth of the content and look forward to next year.

Conclusion:

This past year, we have had a very active year while rebuilding the section and making it more representative. We had a broad variety of CLEs and social events. Along with the 2-day PTLF conference, we had 7 CLEs and 5 networking events. Our members often express appreciation for how active the section is and how interesting the programming is. We believe that we deliver value to our members and respond to their needs.

It goes without saying that success is not achieved on your own, and the PTL success is attributed to the Officers, EC Leaders, our members, and Mary Jo Sullivan, Lane Sosebee and Challie Smith. All the information provided herein shows how the Officers, EC Leaders, and our members participated this Bar year. I specifically would like to focus on Mary Jo Sullivan, Lane Sosebee and Challie Smith. These individuals go above and beyond to make sure the Officers can bring value to our section members – main point of contact to assist in planning events, communication pointers more efficiently and effectively to our section members, fielding all our questions as it relates to the State Bar, assisting in all our CLEs since we have gone virtual, and much more. They were key to the success of PTLF this year. We could not be as impactful or successful without them.



REAL PROPERTY
LAW SECTION

ANNUAL REPORT

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YEAR IN REVIEW

From the Chair

"This year, we increased our social media presence, and continued our efforts to connect with younger attorneys and other sections" - Amanda F. Calloway - Section Chair



It has been a great honor to serve as the Section Chair for the Real Property Law Section for the 2023- 2024 year and am so pleased with everything we have accomplished over these past 9 months! During my 8 years serving on the RPLS Executive Committee I've found myself repeatedly impressed with the amount of time and talent the Executive Committee members contribute to our section year in and year out, and this year was no different. We kicked off our 2023-2024 session with our annual planning retreat, which was held at Lake Lanier Islands Resort. The Executive Committee spent over 5 hours in various committee and subcommittee meetings mapping out our plans and strategies for the upcoming year. During our general session we established our main goals for this year, which were to increase regular communication with the section members through a variety of outlets; to connect with younger attorneys interested in real estate law practice; to provide networking opportunities for members of our section with each other, as well as with members of other sections; and to provide a wide variety of high quality continuing legal education. Following our kickoff planning retreat, our Executive Committee met each month for 90 minutes to plan and execute our strategic plan. As I reflect now on what we have done as a section this year, I am quite proud of how much we have accomplished!

In furtherance of our goal to increase regular communication with the section, our communications subcommittee crafted and distributed 2 robust newsletters (with a third in process to be sent out in June) and facilitated regular social media posts across multiple platforms including Facebook, Instagram, and LinkedIn. This subcommittee also kept our

section website up to date and added new resources for section members. We utilized emails and our section listserv to regularly let our section members know about upcoming section events, distribute summaries of new real estate cases, and keep our section members informed about real estate related issues during the legislative session.

This year we made a concerted effort to connect with younger real estate attorneys by offering members of the Young Lawyers Division discounted pricing for every real property law continuing legal education program we have sponsored. Furthermore, during the annual State Bar Midyear Meeting, our section sponsored a 1-hour CLE panel discussion for the Young Lawyer's Division during which 3 seasoned real estate section members discussed how real estate practice differs during slow economic cycles. This spring we have formed a subcommittee that is working with the Real Property Section of the Atlanta Bar Association to create a 3-hour Real Property Basics CLE for attorneys who are new to real estate practice. This program will focus upon fundamentals such as title examination and survey review and will be held in September of this year.

We held several networking events throughout the year to facilitate in-person connections for our section members including a happy hour with the Atlanta Bar Association Bankruptcy Section at Fado Pub; a dinner to honor our 2023 Georgia law student scholarship recipients with several distinguished members of the Section including our past Pindar Award winners and previous Section Chairs; a happy hour following the Title Standards Seminar at the State Bar Headquarters; and a happy hour with the Eminent Domain Section of the Georgia Bar at the Atlanta offices of Parker Poe. Each of these events was well attended and we received very positive feedback from our section members on the increase in networking opportunities.



Our section has always had a robust continuing legal education program, and this year we added to it! In addition to our annual 6-hour Commercial Real Estate Seminar, 6-hour Title Standards Seminar, 6-hour Residential Real Estate Seminar and our 3-day Real Property Law Institute, this year we also hosted a professionalism seminar with the Eminent Domain Section

of the Georgia State Bar as well as the panel discussion for the Young Lawyers Division members I mentioned above. Aside from our extensive CLE efforts, the Executive Committee also supported various real estate related pro bono groups with financial donations, granted 3 scholarships for section members who practice full time with pro bono organizations to attend our 3-day Real Property Law Institute, awarded scholarships to students who have excelled in real estate related studies at each of Georgia's law schools, and selected the recipient of the 2024 Pindar Award.

I have enjoyed my time as Chair of the Real Property Law Section and I am very pleased with the direction we are headed. I feel confident that our section will continue to thrive as we transition to new leadership and add 4 new Executive Committee members at our annual section meeting in May.

Amanda F. Calloway
Chair

SUB-COMMITTEES

Real Property Law Institute

Committee Chairs: Amanda F. Calloway (2023) and Stuart Gordon (2024)



The Executive Committee implements many CLE courses for our members throughout the year. The largest of these is our seminar in May of each year - Real Property Law Institute (RPLI). Our 2023 RPLI was held in Amelia Island, FL with around 250 attendees. The seminar hosted 23 speakers including Executive Committee members, Georgia attorneys, surveyors, and an American Land Title Association officer.

Over the three days we held a joint session, and a residential and commercial break out for a total of 12 hours CLE credit including 2 trial practice, 1 professionalism and 1 ethics.

The 2024 Real Property Law Institute is scheduled for May 16-18, 2024, in Charleston, SC, the reigning No. 1 City in the U.S. as awarded by Travel + Leisure magazine. An annual event sponsored by the Real Property Law Section, the Institute provides Section members with continuing legal education hours and opportunities to socialize and meet colleagues and industry partners.

The Institute's schedule is a 3-day event, with Day 1 being a joint session, Day 2 having both a Residential Breakout Session and a Commercial Breakout Session and Day 3 back in a joint session. With a theme of Navigating Our Future, the individual sessions are designed to provide attendees with critical information for practicing law in the coming years. In addition to returning, all-time favorite sessions such as the Judicial Update presented by Carl Clark and Cases Since Last RPLI That You'll Know by One Name This Year presented by T. Matthew Mashburn, there also are sessions titled 2024 State of Wire Fraud, CIFUS and Laws Restricting Who May Own Property, Built to Rent Communities, Marijuana Minefields, and At the Junction of Artificial Intelligence and Legal Professionalism. Each of these sessions touch on hot topics in today's society and legal profession, as well as again, help Section members plan to navigate their futures.

Additional highlights of the Institute include a session about historic preservation law in Charleston, as presented by the Addlestone Chair in Historic Preservation at the College of Charleston, a family-friendly tour and scavenger hunt at the Charleston Museum, the oldest museum in the U.S., a NASCAR-themed McFee 5k Fun Run/Walk around Francis Marion Square and The Raiford Memorial Golf Tournament at Patriots Point Golf Links.

An important part of the Institute is the collaboration and involvement with industry partners, many of whom are other lawyers, companies and vendors. We are thankful to these partners, as all available sponsor tables sold-out this year. The Institute certainly will be a great event for Section members.

Commercial Real Estate

Committee Co-Chairs: Kyle J. Levstek and Paula Rothenberger

The Real Property Law Section organized a dynamic and interactive seminar on November 8th. The workshop was headlined by two distinguished George A. Pindar Award Winners, T. Matthew Mashburn (2022) and Leonard R. Gray, Jr. (2023), and covered the basics of Mechanic's Lien Underwriting, the standards of professionalism, and discovering the Record Room at the courthouse.

The afternoon session was a hands-on workshop that provided participants with an overview of how to draft legal descriptions, focusing on the mechanics of metes and bounds to accurately describe land boundaries. The session also included exploring various tracts of land containing numerous special exceptions and easements.

The Co-Chairs of the Commercial Section, Paula Rothenberger (Counsel, Balch and Bingham, LLP) and Kyle J. Levstek (Managing Partner, Calloway Title and Escrow, LLC) led the seminar along with surveyor and crowd favorite Mark Chastain (Chastain and Associates, PC.), which not only provided registrants with 6 hours of CLE credit, but also generated revenue that will reduce registration fees for "dirt" lawyers at the remaining 2023-2024 Real Property Law Section events.

Feedback from attendees was positive and included some of the following, "The best part was that I felt that every section was relevant to my actual job, and that rarely happens at a title

seminar...”, “I especially enjoyed Mark Chastain’s presentation, his historical knowledge, and the interactive survey review.”, and “very interesting and informative!”

Fall Seminar Speakers:

- Paula Rothenberger: Counsel, Balch and Bingham, LLP
- Donna Massey: Senior Title Examiner, Calloway Title and Escrow, LLC
- T. Matthew Mashburn: Partner, Aldridge Pite, LLP
- Leonard R. Gray, Jr: Senior Underwriting Counsel, First American Title Insurance Company
- Mark Chastain: President, Chastain and Associates, PC.

Communication

Committee Chair: Kelsea Laun

Following our commitment to provide information to the section in a more efficient and modern manner, we continued to build on our relationship with the digital media advisor first engaged last year and have built a robust social media presence through our section accounts with Facebook, LinkedIn, and Instagram.

We publish a quarterly newsletter with substantial content, including topical articles authored by our membership, and continue to share section email and social media blasts with legislative updates, continuing education opportunities, and solicitation of input and updates from our section members. Our listserv continues to be an active resource for our members, holding strong with approximately 10 emails and responses per day.

Legislative and Governmental Relations

Committee Co-Chairs: Rob Brannen and Mark Robinson

During this past 2023-2024 Legislative Session of the Georgia General Assembly, the Legislative Subcommittee (“Legislative Committee”) of the Real Property Law Section (“RPLS” or “Section”) worked with lawyers, bankers, realtors, title company representatives, as well as representatives of many interest groups, to help further legislation related to real property in Georgia. The Section worked with both local and national lobbying groups, including the Georgia Association of Realtors, the American Land Title Association’s National Legislative team in Washington, D.C., the Southeast Land Title Association, the Mortgage Bankers Association of Georgia, the Georgia Bankers Association, the Community Bankers Association, The Atlanta Legal Aid Society, the Georgia Home Builders Association, and several sections of the State Bar of Georgia, including the Fiduciary Law Section, the Business Law Section, the Bankruptcy Law Section, the Elder Law Section, and the Consumer Law Section. Although limited on some bills in our direct lobbying efforts by the Keller Rule, the Legislative Committee discussions and involvement with requests to sponsor and/or support several bills, as well as testify in hearings at the Georgia General Assembly, included several bills that affect the practice of law involving real estate as well as positively affect the citizens of Georgia.

Recognition

Committee Chair: Thua G. Barlay

Our Recognition sub-committee this year continued to focus on ensure that bar members understand the good works that our section does.

In addition, we continued recognizing individuals for great work focused on real property law:

Pindar Award: The George A. Pindar Award is granted by our section to a member of the section whose lifetime contribution has been significant to the real estate bar. The main objective of the award is to honor a member who unselfishly gives of him or herself for the benefit of the bar. The Executive Committee determined annually if the award shall be granted and will vote to give the award to a person or persons whom the committee thinks represents the ethics and ideals of



George A. Pindar. For the 2023, the awardee was **Leonard R. Gray, Jr.** Leonard is Senior Underwriting Counsel - Commercial in the Atlanta office of First American Title and an attorney

licensed in the State of Georgia. A 32-year industry professional, Leonard provides underwriting guidance and support to our valued agents.



Scholarships: For the 2023-24 year, the section awarded scholarships to students from several Georgia law schools. At our annual awards dinner, the section recognized these students. The awarded students were **Lauryn Morris** (Emory University School of Law), **Amanda Claxton** (Mercer University School of Law), **Alissa Williams** (Georgia State College of Law), **Hunter A. Davis** (University of Georgia School of Law), and **Jesse C. Moore** (John Marshall School of Law).

Residential Real Estate

Committee Chair: Tamara Brooks & Kirsten Howard

The Residential Sub-Committee typically hosts an annual Residential Seminar to provide CLE hours to members of the State Bar. The last in-person Residential Seminar was in January 2020, with the January 2021 moving to a one-day virtual seminar. Due to the unknown with COVID in the winter of 2021, we planned for another virtual seminar for 2022. This year, though, we successfully held 3 separate 2-hour sessions spread out over 5 weeks: January 13, 2022, February 3, 2022, and February 17, 2022. This allowed a variety of dates and times for members to access CLE content. The number of attendees jumped from 172 on January 13, 2022, to 214 on February 3, 2022, and 241 on February 17, 2022. The topics presented were varied, from a deep-dive into how and where money flows-in for the mortgage industry, to a presentation from an FBI Special Agent with the FBI Computer Intrusion Squad. Here is the schedule of speakers and titles:

- Jack Keeler, Vice President Sales, Flagstar Bank: Tour de Mortgage Finance
- Kenneth Stroud, Esq., Associate State Counsel, CATIC: Bankruptcies on Title: Avoiding Pitfalls and Getting to the Closing Table
- Chad Hunt, Supervisory Special Agent, FBI Computer Intrusion Squad: Cyber - An Enterprise Risk: Best Practices and Lessons Learned

- Jonathan S. R. Anderson, Esq., Vice President and Chief Underwriting Counsel and Tucker Dulong, Esq.: Associate Massachusetts State Counsel, CATIC: 2021 ALTA forms: key changes and additions
- Jane Bond, Esq., Florida Litigation Managing Partner, McCalla Raymer Leibert Pierce, LLC: eNotes and Foreclosure of eNotes
- Allie Jett, Esq., Attorney at Law, Jett Law Group: Process and Substance of a Quiet Title Action

As with our commercial real estate seminar, we also enlisted sponsors for this seminar with each attendee paying only ten dollars per CLE credit.

Title Standards

Committee Chair: Allie Jett and Joe Wilburn

The Title Standards committee's activities for the 2023-2024 year involved putting on our annual CLE - this time broken into two segments and with the addition of a social hour afterwards that was well attended. The focus of most of our speakers was to update our attendees on changes that came out of the 2023 legislative session and recent court decisions to help our members stay on top of recent developments. To expand the reach of our section, we offered discounts to YLD members as well as non-lawyers that closing attorneys frequently rely on such as closing paralegals and title examiners.

We will be presenting a number of updates to the Title Standards to the membership of the section at our annual meeting in May.

Pro Bono Initiatives

Committee Chairs: Beth Jones and Cate Hoskins

The pro bono subcommittee worked diligently this year to identify a wide variety of pro bono organizations across the state to support with financial donations. This year our section has provided financial grants in amounts ranging from \$1,500 to \$5,000 each to 7 different organizations and we have also increased our giving above the amounts given by our Section in previous years. We have received wonderfully positive feedback from this year's recipient

organizations including a letter from Georgia Heirs Property Law Center which stated, in part that "continued funding from the Section will be used to develop Gentry Mander's role as the Center's subject matter expert and trainer, title search specialist and quality control and case management systems manager." Similarly, Middle Georgia Justice let us know that the grant provided by our Section this year will provide for law student interns from Mercer Law School. This law student intern program at Middle Georgia Justice extends the reach of this valuable pro bono organization enabling them to take on more work and provide more legal services to the Middle Georgia community, while also exposing law students to working on real people and the very real and difficult legal issues they face.

In addition to these financial donations, we have offered 3 scholarships for a pro bono Georgia attorney who is a member of our Section to attend our annual Real Property Law Institute. These scholarships cover the conference registration as well as hotel accommodations for the 3-day educational event. These scholarships allow pro bono attorneys whose employers do not have the financial means to sponsor attendance to the Real Property Law Institute an opportunity to make new connections, spread the word about their pro bono efforts and how Section members can help, as well as expose attendees to presentations on emerging topics in real property law. This is the second year we have offered these scholarships, and we had numerous applicants from which to select our recipients. Our Section is excited to continue this pro bono scholarship in the years to come!

Religious Liberty Law Section 2023-24 Annual Report

Section Chair: Kurtis Anderson

The Section has continued to improve upon its membership and events in its third year.

The Section leadership has held frequent discussions to coordinate events and programming of interest to Section membership and advance the Section's purpose of providing opportunities to discuss and understand our first freedom. We have also grown our membership and expanded involvement in Section leadership.

Consistent with successful events in line with our usual programming, this year the Section hosted its largest event yet: a continuing legal education event featuring David Courtman, a veteran U.S. Supreme Court litigator from the Alliance Defending Freedom, who spoke about the cutting edge of religious liberty litigation happening before the Court and the impact of the COVID-19 pandemic on religious free exercise. This event was partially subsidized by the Section as a service to its members. It was well attended by Section members and those exploring what the Section has to offer.

Following our previous years success with events featuring faculty from Emory's distinguished Center for the Study of Law and Religion, Section leadership has continued talks with the Center to discuss opportunities to cross-sponsor and plan events that may be of interest to members of both the Section and the Center. We anticipate this relationship will continue to bear fruit for the Section going forward.

The Section is planning to host its annual meeting and elect next year's officers. Currently, the Section has 87 members, and its budget is in excellent condition.

School & College Law Section 2023-24 Annual Report

Section Chair: Randall Farmer

This memo serves as the Georgia Bar Association School and College Law Section's annual report to the Georgia Bar Association. The School and College Law Section is comprised of attorneys practicing in both K-12 and higher education. While the Section has not been significantly active in recent years, its 2023-2024 year was an exciting one of reinvigoratorion, new learning and networking opportunities.

A. Section Officers

In July 2023, previous Section Chair Dan Murphy, Daniel Murphy PC, elected to step down from his leadership position after a successful tenure. Randall Farmer and Sonya Sallis, Gregory, Doyle, Calhoun & Rogers, filled the vacancies of Section chair and vice-chair, respectively. In October 2023, Andrea Joliffe, Walton County Schools director of legal services and policy, was appointed Section secretary.

B. Section 2023/2024 Year Programs

On October 16, 2023, the Section hosted its annual meeting and CLE lunch-and-learn. The meeting was well attended by K-12 and college law practitioners. In addition to addressing section business and nominations, U.S. Department of Education Office for Civil Rights attorneys Eulen Jang and Lorraine Irier presented a one-hour presentation on Title IX. The session was presented free of charge to section members and provided one hour of CLE credit to participants.

On January 19, 2024, the Section hosted a six-hour school and college law CLE. It was organized by Program Chair and Section Founder Patrick McKee, Law Office of Patrick McKee. Presentations included: Section 504 in public education, presented by Section Chair Randall Farmer; Title IX regulations, presented by Section Vice-Chair Sonya Sallis; Pregnant workers fairness act, presented by previous Section Chair Dan Murphy; Professionals and ethics, presented by Hon. Brian Rickman, Court of Appeals of Georgia; First amendment audits, presented by Ken Jarrard, Jarrard & Davis; and Title IX litigation, presented by Keri Ware and Jill T. Young, Wilson Morton & Downs.

The next upcoming event scheduled for the Section is a lunch-and-learn for August 23, 2024. The meeting will serve as the Section's annual meeting, including 1.5 hour CLE credit and will be free to Section members. Covered topics will include: key school/college law case updates, pregnant workers fairness act and final Title IX regulations.

C. Section Status

The School and College Law Section has 287 current members. The current section balance is \$42,087.14. These figures were current as of the date of March 15, 2024.

We are excited as a Section to see the current reinvigoration and opportunities for engagement and networking that have developed for school and college law practitioners within the past year. We look forward to a continued year of growth and development in the coming year.

Taxation Law Section 2023-24 Annual Report

Section Chair: Alla Raykin

The Taxation Law Section fulfilled its purpose “to promote the objectives of the State Bar of Georgia with the field of tax law” during the 2023-2024 State Bar fiscal year. As provided in its bylaws, the Taxation Law Section actively promoted the continuing education of its members in the field of tax law, provided opportunities for professionals and business groups to interact and engage in activities related to tax law, and worked to achieve improved compliance with the tax laws of Georgia and the U.S.

GOVERNANCE

The Taxation Law Section is governed by its Executive Committee. During the current fiscal year the Executive Committee consisted of the following officers:

Chairperson: Alla Raykin
Chair-Elect: David Greenberg
Vice Chairperson: DiAndria Green
Treasurer: Lauren White
Secretary: Edward Rappaport
Member-at-Large: Open
Immediate Past Chairperson: Andrew Vasquez

SEMINARS AND MEETINGS

Annual NASBTS Meeting: On September 29 and 30, 2023, the Section participated again in the annual meeting of the National Association of State Bar Tax Sections, which was held in Washington DC. The Tax Section Chair, Alla Raykin, participated in the Virtual Boot Camp with other section chairs throughout the country.

Georgia Department of Revenue Liaison Meeting (with the Atlanta Bar – Tax Section): On December 5, 2023, the Section co-sponsored a hybrid tax practitioner conference with officials of the DOR. The program was organized and moderated by Richard Litwin, Mace Gunter, and Assistant Commissioner Frank O’Connell. The Taxation Section paid all fees for members’ CLEs, who could ask the panel or presenters from the DOR or Georgia Department of Law questions in real time.

Joint Happy Hour (with the Atlanta Bar – Tax Section): On February 1, 2024, the Tax Section, in conjunction with the Atlanta Bar – Tax Section hosted a happy hour, informal networking event at Establishment in Midtown, Atlanta. Over 50 people attended the event, so the section plans to continue doing more informal happy hours such as this on a regular basis in the future, including in the early summer 2024.

Annual Professionalism and Ethics Conference: On March 19, 2024, the Section, in partnership with the Atlanta Bar Association, sponsored a hybrid two-hour CLE event. David Golden of Troutman, Pepper, Hamilton, Sanders organized the webinar and gave an excellent ethics refresher. The Honorable Charles Beaudrot, Jr., a Georgia Administrative Law Judge, presented a welcomed presentation on professionalism from the perspective of the bench. Christopher Perkins, clerk at the Georgia Tax Tribunal presented about the Tax Tribunal. There were approximately 50 in-person attendees, who also stayed for a reception afterward, and over 150 virtual attendees. The Taxation Section paid all fees for members' CLEs.

Pro Bono Settlement Day: On April 13, 2024, the Georgia State University College of Law Philip C. Cook Low Income Tax Clinic hosted a pro bono settlement day. Members of the Taxation Section joined with attorneys in the Internal Revenue Service Office of Chief Counsel to assist taxpayers in settling their pending U.S. Tax Court cases without the need for trial. This program, which has been successfully completed for a few years, was restricted to taxpayers who filed their tax challenges on a pro se basis.

SPONSORSHIPS

Law Student Awards: The Taxation Law Section continued its annual support of the future practice of tax law in Georgia with a series of \$1,500 awards to exceptional law students at Mercer University, Georgia State University, Emory University, and the University of Georgia. The recipients of these annual awards were:

Emory University: Jordan Pool

Georgia State University: Elizabeth Bull

Mercer University: Jeannie Zipperer

University of Georgia: Jack F. Pease

Pro Bono Partnership of Atlanta: The Taxation Law Section made a \$1,500 donation to the Pro Bono Partnership of Atlanta. The PBPA is focused on providing attorneys with opportunities to serve nonprofit organizations on a pro bono basis.

M E M O R A N D U M

To: ICLE Advisory Board Members
From: Julia Neighbors, ICLE Director
Date: May 1, 2024
Re: Institute of Continuing Legal Education

I am pleased to present the following report for your review of the Institute of Continuing Legal Education's activities.

ICLE is not able to do its work without the support of volunteers who serve as Program Chairs and speakers, and we are indebted to them and to every Georgia lawyer who volunteers his or her time in service to the legal profession.

ICLE Programs (January 1 – March 31, 2024)

- 34 In Person Programs
 - 28 Bar Center Programs
 - 3 Off-Site Programs
 - Ancient Foundations and Modern Equivalents at the Carlos Museum, Emory University
 - Basic Fiduciary 101 and Agriculture Law in Macon, GA
 - 3 Institutes
- On Demand Programs
 - 11,271 on demand programs purchased by 7,517 customers/members July 1 – April 30, 2024)
 - May 1 – April 30, 2024: 12,018 on demand products purchased by 7,867 customers/members

Upcoming Off-Site Programs and Institutes

- General Practice and Trial – March 14- 16, 2024 – New Orleans, LA
- Real Property - May 16-18, 2024 – Charleston, SC
- Family Law – May 31- June 2, 2024 – Hilton Head Island, SC

HEADQUARTERS

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- Annual Meeting CLEs – June 6, 2024 – Omni Amelia Island, FL
 - War Stories and Evidence Update
 - Leadership for Lawyers
- Tri-State Environmental Conference – June 14-15, 2024- Savannah, GA
- Fiduciary Law – July 25-27, 2024 – Omni Amelia Island
- Urgent Legal Matters- August 30-September 1, 2024 – Jekyll Island Convention Center
- Wellness Institute – September 6-8, 2024 – Callaway Gardens (contract pending)
- City and County Institute – September 12-13, 2024 – UGA Center for Continuing Education
- Solo and Small Firm Conference – September 26-27, 2024 – State Bar of Georgia

UGA MBA Student Project

During the Spring 2024 semester, ICLE engaged with the University of Georgia, Terry College of Business MBA program. The course, Business and Corporate Strategy Spring 2024, assigned four students to work with us throughout the semester, where they provided analysis and recommendations for content workflow; marketing and visibility via social media; and continuous improvement.

Programming Updates

ICLE continues to encourage and support innovative programming and recent programs have incorporated the use of the Bar's courtroom; utilized a podcast format; and was held at the Michael C. Carlos Museum. In addition to the traditional lecture and panel discussion formats, we continue to see the use of break-out sessions and interactivity and encourage these formats and explore new ways to enhance the delivery of educational content.

**STATE BAR OF GEORGIA INVESTIGATIONS REGARDING
THE UNLICENSED PRACTICE OF LAW**

Reporting period May 1, 2023, through April 30, 2024

Informal Investigations Initiated in 2023 (CY)	111
Informal Investigations Initiated in 2024 (to date)	81
Informal Investigations Pending (as of April 30, 2024)	78

Statistics

Formal Investigations Initiated	21
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Nature of Formal Investigation:

Regular UPL	14
Paralegal/Document Preparation Service	3
Disbarred/Suspended/Inactive Lawyer	2
Out of State Lawyer	2

Source of Formal Investigation:

Lawyer	10
State Bar of Georgia	6
Judge	2
Public (Corporation)	2
Public (Individual)	1

Judicial Districts:

District 1	1
District 2	1

District 3	3
District 4	6
District 5	7
District 6	1
District 7	1
District 8	0
District 9	0
District 10	1
Formal Investigations Pending	101
Formal Investigations Closed	25
Disposition:	
Subject Agreed to Comply	20
Further Action Unnecessary	5

State Bar of Georgia Coastal Georgia Office Statistics July 2023 to April 2024								
Month	Client/Misc Meetings	Depositions	Mediation/Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)	Telephone Engagement (Inbound/Answered)
Jan-23								
February								
March								
April								
May								
June								
July	5	4	4	1		14	55	157/131
August	4	4	5			13	111	211/188
September	5	2	3			10	52	184/164
October	1	5	3			9	43	197/188
November	7	6	4	1	1	19	102	141/130
December	2	3	5	1		11	52	131/116
To Date Total:	24	24	24	3	1	76	415	1021/917
Attorney Locations for 2023: Savannah, Atlanta, Hinesville, Lawrenceville, Valdosta, New Orleans LA, Elberton, Ceader Park TX, Decatur, Alpharetta, Tucker, Canton, Thomaston, Cordele, Roswell, Lexington, Temple, Sylvania, Macon, Pembroke, Cartersville, Hazlehurst, Vidalia, Brunswick, Washington DC, Tallahassee FL								
Month	Client/Misc Meetings	Depositions	Mediation/Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients and Attorneys)	Telephone Engagement (Inbound/Answered)
Jan-24	1	1	1	1	2	6	22	130/119
February		1	2	1		4	21	118/112
March	2	3	1			6	35	126/117
April	3	3				6	47	117/112
May								
June								
July								
August								
September								
October								
November								
December								
To Date Total:	6	8	4	2	2	22	125	491/460
Attorney Locations for 2024: Savannah, Atlanta, Brunswick, Valdosta, Macon, Johns Creek, Statesboro								

State Bar of Georgia - South Georgia Office Statistics (2023 - 2024)

2023

Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients, Attorneys, General Public in person visits)	Telephone Engagement** (Inbound/Answered)
January								
February								
March								
April								
May								
June								
July	0	10	1	6	0	17	51	84/53
August	1	4	2	10	0	17	41	88/63
September	1	2	0	13	0	16	28	89/73
October	3	2	0	16	0	21	47	57/52
November	1	8	0	13	0	22	84	57/51
December	0	4	0	10	0	14	36	78/55
Year Total:	6	30	3	68	0	107	287	453/347

Attorney Locations 2023: Adel, Albany, Athens, Atlanta, Brunswick, Columbus, Cordelle, Douglas, Homerville, Jacksonville (FL), Lawrenceville, Macon, Monroe, Savannah, Sylvester, Tallahassee (FL), Thomasville, Tifton, Valdosta, Watkinsville

2024

Month	Client/Misc Mtgs*	Depositions	Mediation/ Arbitration	Walk-ins	CLE Opportunities/ Training	Total Events	Total Number of People Using Facility (Clients, Attorneys, General Public in person visits)	Telephone Engagement** (Inbound/Answered)
January	1	2	1	16	2	22	60	106/73
February	2	0	2	13	0	17	27	95/72
March	3	4	0	12	0	19	59	112/85
April	3	4	0	15	0	22	68	95/79
May								
June								
July								
August								
September								
October								
November								
December								
Year Total:	9	10	3	56	2	80	214	408/309

Attorney Locations 2024: Adel, Albany, Atlanta, Buckhead, Cordelle, Dallas (TX), Jacksonville(FL), Jonesboro, Macon, Moultrie, New Orleans (LA), New York, (NY), Peachtree Corners, Pooler, Savannah, St. Simon, Sylvester, Tallahassee (FL), Thomasville, Tifton, Valdosta, Waycross

*** Note: Miscellaneous Meetings include video conferences, hearings and focus groups ** Note: New reporting category as of February 2023.**

PUBLISHED ARTICLES 2023-2024			Headline	Circulation
Date	Newspaper			
6/21/2023	Morgan County Citizen, Madison		Tony DelCampo installed as 61st president of State Bar of Georgia	2,500
6/21/2023	Albany Herald		Tony DelCampo installed as 61st president of State Bar of Georgia	5,271
6/21/2023	Rockdale Citizen, Conyers		Tony DelCampo installed as 61st president of State Bar of Georgia	1,420
6/21/2023	Rome News-Tribune		Chris Twyman installed as treasurer of State Bar of Georgia	9,556
6/21/2023	Griffin Daily News		Tony DelCampo installed as 61st president of State Bar of Georgia	3,331
6/23/2023	Daily Report		DelCampo, Browning Sworn in as State Bar of Georgia's New Presidents	2,012
6/23/2023	Dekalb Champion, Decatur		Chamblee High alum named president of State Bar of Georgia	494
6/24/2023	Covington News		Michael Geoffroy re-elected to Board of Governors of State Bar of Georgia	2,814
6/24/2023	Cordele Dispatch		Craig Cotton Elected to Board of Governors of State Bar of Georgia	1,481
6/24/2023	Madison County Journal, Danielsville		Higginbotham re-elected to Bar board	1,988
6/25/2023	Valdosta Daily Times		Parrish-Bennett elected to State Bar board	4,894
6/27/2023	Griffin Daily News		State Bar of Georgia: Griffin Circuit Judge elected to Board of Governors	3,331
6/28/2023	Effingham Herald, Rincon		Troy Marsh Elected to Board of Governors of State Bar of Georgia	3,200
6/29/2023	Gwinnett Daily Post, Lawrenceville		Gwinnett's John C. Sammon Receives 2023 State Bar Distinguished Service Award	50,011
6/29/2023	Rome News-Tribune		Jackson's term extended on State Bar of Georgia governing board	9,556
6/30/2023	Polk County Standard Journal, Cedartown		McRae re-elected to State Bar of Georgia governing board	2,887
7/4/2023	Daily Citizen-News, Dalton		Smalley reelected to Board of Governors of the State Bar of Georgia	4,896
7/4/2023	Daily Citizen-News, Dalton		Dalton attorney honored by State Bar of Georgia's Young Lawyers Division	4,896
7/4/2023	Valdosta Daily Times		Valdosta attorney joins State Bar's governing board	4,894
7/5/2023	Gwinnett Daily Post, Lawrenceville		Gwinnett Bar Association Honored by State Bar of Georgia	50,011
7/6/2023	McDuffie Progress, Thomson		Judge Britt Hammond re-elected to Board of Governors of State Bar of Georgia	2,580
7/7/2023	Daily Report		Georgia Legal Community Mourns Loss of George Lawson Jr.	2,012
7/11/2023	Daily Report		Georgia Legal Community Mourns Loss of Judge Marvin Arrington Sr.	2,012
7/12/2023	Albany Herald		Tabitha Payne re-elected to serve on State Bar Board of Governors	5,271
7/12/2023	Cherokee Tribune, Canton		Eric Ballinger re-elected to State Bar of Georgia Board of Governors	3,929
7/12/2023	Monroe County Reporter, Forsyth		DA's Holland receives Award of Achievement	3,773
7/13/2023	Daily Citizen-News, Dalton		Georgia Legal Community Mourns Alfred Mullins Jr.	2,012
8/2/2023	Jeff Davis Ledger, Hazlehurst		Tillman re-elected	3,060
8/9/2023	Covington News		Congratulations to Judge John Ott on slate appointment	2,814
8/11/2023	Newnan Times-Herald		Congratulations to DA Cranford on slate appointment	4,176
10/28/2023	Daily Report		Georgia Legal Community Mourns Loss of Sonny Seiler	2,012
10/28/2023	Barrow News-Journal, Winder		Congratulations to Assistant District Attorney James Chafin on appointment	2,342
10/29/2023	Morgan County Citizen, Madison		Congratulations to Judge Bradley on slate appointment	2,500
11/3/2023	Daily Report		Congratulations to U.S. Attorney Ryan Buchanan on GRACE Commission App	2,012
11/3/2023	Statesboro Herald		Legal Community mourns loss of Reba Neville	5,300

Media Report

11/12/2023	Rockdale Citizen, Conyers	Congratulations to David LaMalva	1,420
12/21/2023	Albany Herald	Newly appointed Judge Dent committed to state justice system	5,271
12/21/2023	Daily Report	Congratulations to New Superior Court Judge Alice Benton	2,012
1/19/2024	Daily Report	Georgia Legal Community Mourns Loss of James Elliott	2,012
2/12/2024	Cordele Dispatch	Congratulations and thanks to Judge Robert Chasteen	1,481
2/26/2024	Newman Times-Herald	Congratulations to new Coweta Solicitor General Amy Godfrey	4,176
2/27/2024	Efingham Herald, Rincon	Congratulations to new Effingham Solicitor General Spencer Tyson	3,200
4/2/2024	Daily Report	YLD President Urges Georgia Lawyers to Form Teams in Legal Food Frenzy	1,905
4/2/2024	Newman Times-Herald	Congratulations to new State Court Judge Matthew Swope	4,822
4/4/2024	Daily Report	State Bar Mourns Loss of Judge Hugh Lawson	1,905
4/11/2024	Athens Banner-Herald	Letter: Judge Irwin W. Stolz Jr. dies at age of 94	3,417
4/11/2024	Daily Report	Georgia Legal Community Mourns Loss of Judge Irwin Stolz	1,905
		TOTAL CIRCULATION	248,774

