



State Bar  
of Georgia

# BOG BOARD BOOK

**2024 Spring Meeting**  
**Young Harris, GA**

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*This book serves as the agenda and materials for the State Bar of Georgia's 2024 Spring Board of Governors Meeting.*



# State Bar of Georgia

## 301<sup>st</sup> BOARD OF GOVERNORS MEETING

**Saturday, April 20, 2024**

**9:00 a.m. – 12:00 p.m.**

**Brasstown Valley Resort and Spa**

**Young Harris, Georgia**

[Zoom Webinar Link](#)

Webinar ID: 854 1941 4301

Passcode: 967138

One tap mobile: +19292056099,,85419414301#

Telephone: +1 929 205 6099

*Dress: Business*

### AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
<b>1) ADMINISTRATION</b>		
a) Welcome and Call to Order.....	J. Antonio DelCampo ..... President	1
b) Pledge of Allegiance .....	William J. Monahan Out-of-State, Post 2	
c) Invocation.....	Hon. Joy R. Parks Enotah Circuit	
d) Recognition of Special Guests .....	Tony DelCampo	
e) Roll Call .....	William C. Gentry..... Secretary	5
f) Future Meetings Schedule.....	Tony DelCampo .....	10
<b>2) ACTION</b>		
a) Minutes of the 300 <sup>th</sup> Meeting of the.....	Bill Gentry .....	12
Board of Governors on January 13, 2024		



<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
b) Proposed Changes to the Georgia Rules of Professional Conduct	William D. NeSmith Deputy General Counsel	18
(1) Rule 4-102 Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct		
(2) Rule 9.4 Jurisdiction and Reciprocal Discipline		
c) Dues 2024-2025	Christopher P. Twyman Treasurer Nancy J. Whaley Finance Chair	38
(1) Recommendations of the Executive Committee		
• <b>Active Dues \$264</b>		
• <b>Inactive Dues \$132</b>		
(2) Approval of Other Bar Dues Statement Items		
a) Section Dues: \$10 to \$50 opt-in		
b) Assessments Required by Bar Rules or Mandated by the Supreme Court		
• Clients' Security Fund: \$15 per member per Bar Rule 1-506		
• Professionalism Fee: \$11/year		
c) Other Contributions		
• Legislative and Public Education Fund Contribution: \$100 optional contribution		
• Georgia Legal Services Program: \$400 suggested individual contribution/ \$100 suggested contribution for YLD		

### 3) INFORMATIONAL REPORTS

a) President's Report	Tony DelCampo	
b) Executive Director's Report	Damon E. Elmore Executive Director	
c) Treasurer's Report	Chris Twyman	47
d) Young Lawyers Division Report	Brittanie D. Browning YLD President	61
e) 2024 Legislative Update	Russell N. Sewell Legislative Consultant	
f) CLE Rewrite and Rules Change	Damon Elmore Bill NeSmith	65



<b><u>Topics</u></b>	<b><u>Presenter</u></b>	<b><u>Page No.</u></b>
g) New Process for Budget Approval .....	Ronald W. Turner .....	148
	Chief Financial Officer	
h) Chief Justice’s Commission on .....	Karlise Y. Grier.....	151
Professionalism Report	Executive Director, CJCP	

**4) WRITTEN REPORTS**

a) Executive Committee Minutes		
(1) December 15, 2023 .....		160
(2) February 9, 2024 .....		166
b) Law Practice Management Report .....		172
c) Office of the General Counsel Report .....		175
d) Institute of Continuing Legal Education Report .....		177
e) Media Report.....		179

**5) CLOSING**

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





# *2024 Spring Meeting*

## BOARD OF GOVERNORS & YOUNG LAWYERS DIVISION



### *Brasstown Valley Resort & Spa*

YOUNG HARRIS, GEORGIA | APRIL 19-21, 2024



Hotel Cut-off | Friday, March 29  
Registration Cut-off | Friday, April 12



# Schedule of Events



## Friday, April 19

9 a.m. – 6 p.m.

Registration

10 – 11:30 am

ICLE Board Meeting

*By invitation only & virtual only*

10 a.m. – 2 p.m.

State Disciplinary Board Meeting

*By invitation only*

12 – 1 p.m.

Law Practice Management Program

Advisory Committee Meeting

*By invitation only & virtual only*

12 – 2 p.m.

State Disciplinary Review Board Meeting

*By invitation only*

1 – 6 p.m.

- ② Networking on the Golf Course With the YLD

1:30 – 3:30 p.m.

- ② Horseback Riding

6:30 – 9 p.m.

Board of Governors Dinner

## Saturday, April 20

7 a.m. – 12 p.m.

Registration

7 – 8 a.m.

- ② Morning Yoga With the YLD

9 a.m. – 12 p.m.

Board of Governors Meeting

12 – 1 p.m.

- ② YLD CLE | Wellness & Mental Health for Attorneys:

A Discussion

1:30 – 2:30 p.m.

YLD General Session

2:30 – 3:30 p.m.

YLD Leadership Academy Session 4

*By invitation only*

4 – 5:30 p.m.

- ② YLD Kickball Game

7 – 9:30 p.m.

YLD Dinner & Bingo

## Special Event

**BOARD OF GOVERNORS DINNER**

Friday, April 19 | 6:30 – 9 p.m.

Please join us for Friday night's Board of Governors dinner where you can network with your fellow Board members.

## Things to Do Around Young Harris

**CRANE CREEK VINEYARDS**

[cranecreekvineyards.com](http://cranecreekvineyards.com)

Crane Creek Vineyards sits high in the Blue Ridge Mountains just three miles north of Young Harris in the shadow of Brasstown Bald. This family owned and operated vineyard offers two distinct tasting room locations: the Stone House Tasting Room and the Farmhouse Market.

**MILLER TREK**

[www.brasstownvalley.com/activities/hiking-fishing/](http://www.brasstownvalley.com/activities/hiking-fishing/)

Miller Trek is a journey that begins at Brasstown Valley Resort and takes you into the Chattahoochee National Forest. The 6.5-mile trail is blazed in blue/green and has a 2.5-mile loop for those that are not looking for a lengthy hike.

**ROLLINS PLANETARIUM**

[www.yhc.edu/planetarium](http://www.yhc.edu/planetarium)

A part of Young Harris College, Rollins Planetarium is a state-of-the-art attraction, which uses their Sky-Skan Definiti full-dome digital projection system to create an immersive experience under a 40-foot dome.

## Hotel Accommodations

**BRASSTOWN VALLEY RESORT & SPA**

6321 U.S. Highway 76

Young Harris, GA 30582

706-379-9900

**Cut-off date | Friday, March 29**

Brasstown Valley Resort & Spa will be our host hotel offering discounted room rates. A block of rooms has been reserved for the meeting. Room rates are \$239 single/double plus applicable taxes and fees. To book a room, visit [bit.ly/2024\\_spring](http://bit.ly/2024_spring) or call 1-800-201-3205. Reservations must be made by Friday, March 29, as rooms will be on a space and rate availability basis after this date.

A \$15 resort services charge will apply per room, per night, which includes:

- Admission to the Fitness Center
- Bottled Water
- Coffee Service
- Internet Service
- Lobby Refreshments
- Self-parking

Check-in is 4 p.m.

Check-out is 12 p.m.

## Attire

Business casual dress for all meetings.

### VALET PARKING\*

- \$10 daily
- \$12 overnight
- Complimentary for handicap guests

\*not included in resort fee

# A Weekend of Wellness with the YLD

## *Wellness events are open to everyone!*

Our Spring Meeting features a series of wellness-focused events, highlighting the crucial link between prioritizing wellness and achieving a successful legal practice. Promoting balance and resilience among lawyers aligns with the State Bar's mission to enhance the quality of legal services.

### 🌿 NETWORKING ON THE GOLF COURSE WITH THE YLD

**Friday, April 19 | 1 – 6 p.m.**

Join the YLD for golf at Brasstown Valley Golf Club, which offers 18 holes of championship Scottish link-style golf for all levels of play. All registrants are welcome to sign up individually or as a team. Tee times will begin with a shotgun start; includes two drink tickets per person.

### 🐎 HORSEBACK RIDING

**Friday, April 19 | 1:30 – 3:30 p.m.**

*Limited spots available*

Enjoy an hour-long guided horseback ride through Hiawassee. Please arrive no later 1:30 p.m. for check-in. All riders will be required to sign a waiver. Additional disclaimers, including weight restrictions, can be found at [www.brasstownvalley.com/stables](http://www.brasstownvalley.com/stables).

### 🧘 MORNING YOGA WITH THE YLD

**Saturday, April 20 | 7 – 8 a.m.**

Join the YLD for a mindful start to your day with sunrise yoga. This session is open to anyone to join, not just YLD members. Yoga will be in the Creekside Pavilion.

### 👥 YLD CLE | WELLNESS & MENTAL HEALTH FOR ATTORNEYS: A DISCUSSION

**Saturday, April 20 | 12 – 1 p.m.**

Join the YLD for a panel discussion on attorney wellness and mental health featuring Supreme Court of Georgia Justice Shawn Ellen LaGrue, Jeremy Burnette, partner, Akerman LLP, and former practicing psychologist; and Alina Lee, founding partner, Your Ad Attorney. This panel, moderated by YLD President Brittanie Browning, will discuss the impact of mental well-being on attorneys' professional careers and development. Don't miss this insightful conversation with legal professionals. Lunch will be provided.

### YLD GENERAL SESSION

**Saturday, April 20 | 1:30 – 2:30 p.m.**

The YLD General Session is open to all members. YLD officers will give reports, and members of the council will provide updates about projects and events.

### YLD LEADERSHIP ACADEMY SESSION 4

**Saturday, April 20 | 2:30 – 3:30 p.m.**

By invitation only for the 2024 YLD Leadership Academy class.

### 🏈 YLD KICKBALL GAME

**Saturday, April 20 | 4 – 5:30 p.m.**

Join the YLD, YLD past presidents and members of the State Bar Executive Committee for a fun afternoon featuring a classic game of kickball. Limited player spots are available, so don't miss out on your chance to sign up. This event will take place at the Young Harris College softball field, located at 1 College St., Young Harris, GA 30582. The cheering section is open to everyone.

### YLD DINNER & BINGO

**Saturday, April 20 | 7 – 9:30 p.m.**

All are welcome to attend the YLD dinner followed by competitive bingo. Prizes will be awarded.



PHOTO BY RICHIE PARKS



PHOTO COURTESY OF BRASSTOWN VALLEY RESORT & SPA

# 2024 Spring Meeting Registration Form

Please complete and remit the enclosed registration form by Friday, April 12, 2024. Please use this form to register by checking all events you plan to attend. Registration is required for all events, including "no charge" functions.

Online registration is available at [www.gabar.org](http://www.gabar.org).

## Attendee Information

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

Name \_\_\_\_\_

Nickname \_\_\_\_\_

Spouse/Guest Name \_\_\_\_\_

Address \_\_\_\_\_

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

Email \_\_\_\_\_

## Special Needs/ Dietary Restrictions

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

## Registration and Payment Information

Register online at [www.gabar.org](http://www.gabar.org). Visa, Mastercard and American Express are accepted. If paying by check, please make checks payable to State Bar of Georgia and mail to Meetings Department, 2024 Spring Meeting, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations will be processed on a first-come, first-served basis.

## Cancellation/ Refund Policy

Cancellation of registration must be received in writing no later than Friday, April 12, 2024. Cancellations will receive a full refund. Absolutely no refunds will be made after Friday, April 12. Requests should be emailed to [gakiik@gabar.org](mailto:gakiik@gabar.org); mailed to the State Bar of Georgia, Attn: Gakii Kassamba, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; or faxed to 404-527-8717.

## Registration Form

	<i>In-person</i>	<i>Virtual</i>
<b>BOARD OF GOVERNORS FUNCTIONS</b>		
<input type="radio"/> Board of Governors Dinner (Fri.)	\$100	_____
<input type="radio"/> Board of Governors Meeting (Sat.)	N/C	_____ N/C _____

**YOUNG LAWYERS DIVISION EVENTS**  
*Wellness events are open to everyone!*

- Horseback Riding \$60 \_\_\_\_\_
- Morning Yoga With the YLD N/C \_\_\_\_\_
- Networking on the Golf Course With the YLD \$80 \_\_\_\_\_
- YLD CLE | Wellness & Mental Health for Attorneys \$40 \_\_\_\_\_
- YLD Dinner & Bingo \$75 \_\_\_\_\_
- YLD General Session N/C \_\_\_\_\_
- YLD Kickball Game (player) N/C \_\_\_\_\_  
(spectator) N/C \_\_\_\_\_

TOTAL ENCLOSED \$ \_\_\_\_\_

## Credit Card Information

Please bill my  VISA  MasterCard  AMEX

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

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

Name as it appears on card (please print) \_\_\_\_\_

Signature \_\_\_\_\_

Credit card and "no charge" registrations may be faxed to 404-527-8717.



Thank You to Our Corporate Sponsor

5-GAVEL



Member Benefits

**Board of Governors Attendance Record**

	1-23	3-23	6-23	6-23	10-23	1-24
	Buckhead/Zoom	Pine Mtn/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom
Sarah Brown Atkins	•	•	•	•		•
Jonathan Lang Adams	n/a	n/a	n/a	•	•	•
Keith E. Adams	•	u	•	•	•	•
Mark W. Alexander	•	•	•	•	•	•
Kent Edward Altom	•	•	•	•	•	•
Anthony B. Askew	•	•	u	e	•	u
JaDawnya Cintelle Baker	•	e	•	•	e	•
Nina M. Baker	•	•	•	•	•	u
Eric A. Ballinger	•	•	•	•	•	•
Donna G. Barwick	•	•	u	•	•	•
John C. Bell Jr.	n/a	n/a	n/a	•	•	•
Tracee R. Benzo	•	•	•	•	u	•
N. John Bey	•	•	•	•	u	•
James D. Blitch IV	•	•	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	•
Carl S. Cansino	•	•	u	•	u	u
Chris M. Carr	•	e	u	•	u	•
Vernon L. Chambless	n/a	n/a	n/a	•	e	•
Kimberly A. Childs	n/a	n/a	n/a	n/a	•	•
Amanda Rourk Clark Palmer	•	•	•	u	•	•
Edward R. Collier	•	e	•	u	u	•
Daniel Jackson Connell III	•	•	u	u	•	•
Susan P. Coppedge	n/a	n/a	n/a	•	•	•
John Craig Cotton	n/a	n/a	n/a	e	e	•
Martin L. Cowen III	•	•	•	•	•	•
Kenneth B. Crawford	u	u	u	•	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	10-23	1-24	
	Buckhead/Zoom	Pine Mtn/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom
Ronald E. Daniels	•	•	•	•	•	•
Gerald Davidson Jr.	•	•	•	•	•	•
J. Anderson Davis	•	u	•	•	•	•
Randall H. Davis	•	•	•	•	•	•
William T. Davis	•	u	•	•	•	•
Howard Mark Delashmit	n/a	n/a	n/a	•	•	•
J. Antonio DelCampo	•	•	•	•	•	•
Joseph W. Dent	•	•	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	•	•
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	•	•	•	•	u	•
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	•	•	•
Render M. Heard Jr.	•	•	•	•	•	•
Amanda Nichole Heath	•	•	•	•	•	•
Matthew J. Hennessy	•	•	•	•	•	•
Thomas W. Herman	u	•	u	u	•	•
R. Javoyne Hicks	•	•	•	•	•	•
Kimberly Wilkerson Higginbotham	•	•	•	•	•	•
Donna S. Hix	•	•	•	•	•	•

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Michael D. Hobbs	u	u	u	u	u	•	•	•	•	Michael D. Hobbs
Norbert D. "Bert" Hummel IV	n/a	n/a	n/a	n/a	•	•	•	•	•	Norbert D. "Bert" Hummel IV
Christopher Huskins	•	u	u	u	u	•	•	•	•	Christopher Huskins
Stacey K. Hydrick	•	•	•	•	•	•	•	•	•	Stacey K. Hydrick
Shukura L. Ingram	•	•	•	•	•	•	•	•	•	Shukura L. Ingram
James T. Irvin	•	e	•	•	•	•	•	e	•	James T. Irvin
Christopher Ross Jackson	•	•	•	•	•	•	•	•	•	Christopher Ross Jackson
Charles Michael Johnson	•	•	u	•	•	u	•	•	•	Charles Michael Johnson
Lester B. Johnson, III	•	e	•	•	•	•	•	u	•	Lester B. Johnson, III
Shiriki L. Cavitt Jones	•	•	•	•	•	•	•	•	•	Shiriki L. Cavitt Jones
Jennifer A. Jordan	u	•	u	•	u	•	•	u	•	Jennifer A. Jordan
Zahra S. Karinshak	•	•	•	•	•	•	•	•	•	Zahra S. Karinshak
John F. Kennedy	u	•	u	•	u	u	•	•	•	John F. Kennedy
Barry E. King	•	•	•	•	•	•	•	•	•	Barry E. King
Judy C. King	•	•	•	•	•	•	•	•	•	Judy C. King
Catherine Koura	•	e	•	•	•	•	•	•	•	Catherine Koura
Rachel R. Krause	•	•	•	•	•	•	•	•	•	Rachel R. Krause
Rhonda Bender Kreuziger	n/a	n/a	n/a	n/a	•	•	•	•	•	Rhonda Bender Kreuziger
Edward B. Krugman	•	•	•	•	•	•	•	•	•	Edward B. Krugman
Jeffrey R. Kuester	•	•	•	•	•	e	•	•	•	Jeffrey R. Kuester
Anne Templeton LaMalva	•	•	•	•	•	•	•	•	•	Anne Templeton LaMalva
Rosten Dara Diya "Chinny" Law	•	•	•	•	•	•	•	•	•	Rosten Dara Diya "Chinny" Law
Allegra Lawrence-Hardy	•	•	•	•	•	•	•	•	•	Allegra Lawrence-Hardy
Nicole C. Leet	•	•	•	•	•	•	•	•	•	Nicole C. Leet
Katie K. Leonard	•	•	e	•	e	•	•	•	•	Katie K. Leonard
Dawn Renee Levine	u	•	•	•	•	•	•	•	•	Dawn Renee Levine
Joyce Gist Lewis	•	•	•	•	•	•	•	•	•	Joyce Gist Lewis
Lisa Katsuiko Liang	•	•	•	•	•	•	•	•	•	Lisa Katsuiko Liang
David S. Lipscomb	•	•	•	•	•	•	•	•	•	David S. Lipscomb
John R. B. Long	•	•	•	•	•	•	•	•	•	John R. B. Long
Dax Eric Lopez	•	•	•	•	•	•	•	•	•	Dax Eric Lopez
Ronald A. Lowry	•	•	•	•	e	•	•	•	•	Ronald A. Lowry
John Bell Manly	•	•	•	•	•	•	•	u	•	John Bell Manly
Troy Windel Marsh Jr.	n/a	n/a	n/a	n/a	•	•	•	•	•	Troy Windel Marsh Jr.

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	Buckhead/Zoom	Pine Mtn/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom
Hugh J. McCullough	•	•	•	•	u	•
Graham Elliott McDonald	•	•	•	•	•	•
Letitia A. McDonald	•	•	•	u	u	•
Brad J. McFall	•	•	•	•	•	•
Michael D. McRae	•	•	•	•	•	u
Terry L. Miller	•	•	•	•	•	•
Kenneth Mitchell Jr.	n/a	n/a	n/a	•	•	•
William J. Monahan	e	•	•	•	•	•
Shondeana Crews Morris	•	•	•	•	•	•
Kattrell Nash	n/a	n/a	n/a	n/a	•	•
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	•	•	•
Tabitha Edwina Payne	•	•	•	•	•	•
Brandon Lee Peak	•	•	•	•	u	•
Edward Piasta	•	•	•	•	u	•
Kathryn Lauranne Powers	•	u	•	•	u	•
Michael Prieto	•	•	•	u	u	u
Jill Pryor	•	•	•	•	•	•
William M. Ragland	•	•	•	•	•	•
Tina S. Roddenberry	•	•	•	•	•	•
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	•	•	•	•	•	•
R. Rucker Smith	•	•	•	•	•	•
Daniel B. Snipes	•	•	•	•	e	•

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	Buckhead/Zoom	Pine Mtn/Zoom	Friday Savannah/Zoom	Saturday Savannah/Zoom	Jekyll Island/Zoom	Buckhead/Zoom
R. Gary Spencer	•	•	•	u	•	•
H. Craig Stafford	•	u	•	•	•	•
Lawton E. Stephens	•	•	•	u	e	•
Donna Coleman Stribling	•	•	•	•	•	•
Frank B. Strickland	•	u	u	u	•	•
Joseph C. Sumner, Jr.	•	•	u	•	•	•
Jason W. Swindle	•	•	u	•	•	u
Anita W. Thomas	•	u	u	u	•	•
Stephen Elliot Tillman	•	•	u	•	u	•
Edward D. Tolley	•	u	u	u	u	•
Clayton Tomlinson	•	•	u	•	•	•
Chris P. Twyman	•	•	•	•	•	•
Martin E. Valbuena	•	•	•	•	•	•
Ralph L. Van Pelt, Jr.	•	•	•	•	•	e
Carl A. Veline, Jr.	•	•	•	•	•	•
J. Henry Walker	•	•	•	•	•	•
Janice M. Wallace	•	•	•	•	•	•
Amy Carol Walters	•	•	•	•	•	•
Harold B. Watts	•	•	•	•	u	•
John P. Webb	•	•	•	•	•	•
Nancy J. Whaley	•	•	•	•	•	•
Paige Reese Whitaker	•	•	•	•	•	•
Martha Wilson Williams	•	•	•	•	•	•
Robert D. Wolf	e	•	u	•	•	•
Douglas Woodruff	•	•	•	•	u	•
• - attended meeting						
• - attended virtually, as of 6-23						

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





# State Bar of Georgia

## Future Meetings Schedule

### Executive Committee

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April 26, 2024	Executive Committee Meeting The Carpentry Hotel & Cyra's Restaurant Dalton, GA
August 21 – 23, 2024	Supreme Court/Executive Committee Joint Meeting Cloudland at McLemore Resort, Rising Fawn, GA (Contract Pending)
October 3, 2024	Executive Committee Meeting Virtual
December 5-6, 2024	Executive Committee Meeting Swainsboro, GA (Hotel TBD)

### Board of Governors

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Annual 2024	June 6-9, 2024	Omni Amelia Island Resort Amelia Island, FL
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 20 – 21, 2025	Hyatt Place Athens & Classic Center Athens, GA (Contract Pending)
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 Amelia Island, FL

(Updated 2.27.24)



# State Bar of Georgia

## Future Meetings Schedule

### Young Lawyers Division

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Annual 2024	June 6-9, 2024	Omni Amelia Island Resort Amelia Island, FL
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
Midyear 2025	January 9 – 11, 2025	JW Marriott Savannah Plant Riverside District Savannah, GA In conjunction with the State Bar Midyear Meeting
Spring 2025	TBD	To Be Determined
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 Amelia Island, FL

### American Bar Association Meetings

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

### Southern Conference of Bar Presidents Meetings

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

*(Updated 2.27.24)*

**DRAFT**  
**STATE BAR OF GEORGIA**  
**BOARD OF GOVERNORS**  
**MEETING MINUTES**  
**Saturday, January 13, 2024, 9:00 a.m.**  
**The Westin Buckhead, Atlanta, Georgia**  
**Hybrid**

The 300<sup>th</sup> meeting of the Board of Governors of the State Bar of Georgia was held at the location, date and time shown above. President J. Antonio “Tony” DelCampo presided and called the meeting to order at 9:00 a.m.

Pledge of Allegiance

Jonathan B. Pannell, Eastern Circuit, Post 3, led the pledge of allegiance.

Invocation

Hon. Stacey K. Hydrick, Stone Mountain Circuit, Post 1, 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. President DelCampo also recognized Georgia Bar Foundation Executive Director Len Horton on his retirement after almost 38 years of service. Hroton then introduced his successor, Rachel Barnhard.

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 and then asked President-Elect Ivy N. Cadle to announce his 2024-2025 Bar year meetings. Cadle said he does not intend to continue hybrid meetings for several reasons.

Minutes of the 299<sup>th</sup> Meeting of the Board of Governors

The minutes of the Board of Governors meeting held on October 28, 2023, were approved as presented by a majority vote.

Proposed Rules and Bylaws Changes

Following a report by Deputy General Counsel Bill NeSmith, the Board of Governors, by majority vote, approved proposed amendments to the following rules:

*Rule 1.8 Conflict of Interest: Prohibited Transactions.*

The proposed change to this rule would adopt a recent amendment to the American Bar Association Model Rules. It would allow lawyers who represent a client pro bono, an indigent client through a nonprofit legal service or public interest organization pro bono, or an indigent client pro bono through a law school clinical or pro bono program to provide modest gifts to the client for food, rent, transportation, medicine, and other basic living expenses. However, the proposed amendment

prohibits lawyers from making any promises or assurances to clients before or after they have been retained. The comments section has been revised to explain the rule more clearly. It emphasizes that lawyers still are not allowed to financially support a lawsuit or administrative proceeding on behalf of their clients.

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

President DelCaino adjourned the Board of Governors Meeting and called to order the Plenary Session of the Membership of the State Bar of Georgia.

Following a report by Deputy General Counsel Bill NeSmith, the Board of Governors, by majority vote, approved proposed amendments to the following rules:

*Article VIII, Committees – Generally, Sections 1 and 2*

The purpose of the proposed change to this bylaw is to provide clarity regarding voting and quorum requirements for committees. The amendment specifically states that a member serving ex officio retains the right to vote and their presence contributes to meeting the quorum requirements for voting in both standing and special committees. Also, the proposed change clearly states that liaisons and advisory members are not granted voting rights, and their presence does not contribute to establishing a quorum for conducting business in a standing or special committee.

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

President DelCaino adjourned the Plenary Session of the Membership of the State Bar of Georgia and reconvened the Board of Governors Meeting.

White Collar Section Proposal

Deputy General Counsel Bill NeSmith presented the proposed White Collar Section. The white-collar law practice is an amalgamation of several practice areas, including business litigation, criminal law, technology law, civil litigation, securities litigation, compliance, and corporate governance. Instead of duplicating any of the sections mentioned above, the White Collar Section would uniquely fuse a few specific, applicable aspects from each of them to create a common ground for professionals working on criminal, civil, parallel, or internal white-collar matters or investigations, compliance, and any resulting litigation.

The Board of Governors, by majority vote, approved the new White Collar Section.

Standing Board Policy 1000

Executive Director Damon Elmore presented proposed Standing Board Policy 1000 (Positions, Articles, Programs, Meetings, Activities of Committees and Sections. Guidelines for the State Bar of Georgia). He said the policy was designed to ensure that the Bar's activities are consistent with its mission and purposes. This will be voted on at the Annual Meeting in June.

Member Benefits Committee Recommendation: DocketAlarm

Chief Operating Officer Sarah Coole presented the Fastcase contract with the option of adding the new DocketAlarm benefit, a docket research database that lives alongside Fastcase, enhancing members' research experience, which came from the Member Benefits Committee and then the Executive Committee as a recommendation. She said it was reviewed internally and found to be beneficial for members, specifically for solo/small firm litigators. DocketAlarm would cost an additional \$146,000, which equates to a \$4 dues increase. Members can purchase DocketAlarm separately for \$95 a month, and some pay that

now. By majority vote, the Board of Governors approved the DocketAlarm proposal. This new benefit will begin in July 2024.

Appointment to the Commission on Continuing Lawyer Competency (CCLC)

The Board of Governors approved the 3-year appointment of LaToya Williams to the CCLC (2024-2026) by majority vote.

Nominations of ABA Delegates

ABA State Delegate Bob Rothman proposed the ABA delegate nominations listed below. The Board of Governors nominated the following attorneys to the Georgia ABA Delegate Posts as indicated. These positions are open to Georgia lawyers who are members of the ABA.

<u>Post</u>	<u>Delegate</u>
1	Alvin T. Wong (two-year appointment)
3	C. Elisia Frazier (two-year appointment)
7	Vera S. Edenfield (two-year appointment)
2	Glenn Hendrix (one-year appointment to fill an unexpired term)

Nominations of State Bar Officers

The Board of Governors received the following nominations for State Bar officers for the 2024-2025 Bar year:

<u>Office</u>	<u>Nominator</u>	<u>Nominee</u>
Secretary	Hon. Shondeana Morris Donna Hix (Seconding)	Javoyne Hicks
Treasurer	Past President Elizabeth L. Fite Hon. Bobby Wolf (Seconding)	William Gentry
President-elect	Brandon Peak Joyce Gist Lewis (Seconding)	Christopher P. Twyman

Per Article VII, Section 1 “Nominations and Elections” of the State Bar of Georgia Bylaws, nominations are open for 10 days after this meeting.

Advisory Committee on Legislation (ACL)/Legislative Proposals

Following a report by ACL Chair Brandon Peak, the Board of Governors took the following action on proposed legislation:

<u>Legislative Proposal</u>	<u>Germane to Purposes of the Bar</u>	<u>Support on Merits 2/3 Majority</u>
<i>Professionalism Committee</i>		
1) Support for a Resolution of the General Assembly Recognizing April 2024 as Legal Professionalism Month	Passed by majority vote	Passed by 2/3 majority
<i>Indigent Defense Committee</i>		
2) Support for the Judicial Council’s Budget Request for FY 2025 –	Passed by majority vote	Passed by 2/3 majority

Increased Funding for the  
Georgia Resource Center

*Committee to Promote Inclusion  
in the Profession*

- |   |                         |                        |
|---|-------------------------|------------------------|
| 3) Support for the Judicial Council's Budget Request for FY 2025 – Funding for Civil Legal Services Grants for Victims of Domestic Violence | Passed by majority vote | Passed by 2/3 majority |
|---|-------------------------|------------------------|

*Access to Justice Committee*

- |  |                         |                        |
|--|-------------------------|------------------------|
| 4) Support for the Judicial Council's Budget Request for FY 2025 – Increased Appropriations for Medical Legal Partnerships | Passed by majority vote | Passed by 2/3 majority |
|--|-------------------------|------------------------|

*Advisory Committee on Legislation*

- |   |                         |                        |
|---|-------------------------|------------------------|
| 5) Support for Judicial Council's Judicial Compensation Reform Proposal | Passed by majority vote | Passed by 2/3 majority |
|---|-------------------------|------------------------|

Legislative Update

Legislative Consultants Mark Middleton and Rusty Sewell reported that it was currently day five of the legislative session. They noted that all of the Bar's bills have sponsors and are underway. They said it should be a fast session, finishing on March 28, since this is an election year. Not on the Bar's legislative agenda but of interest to lawyers are decreasing the age of eligibility for retirement benefits for appellate court judges, lawyer advertising, tort reform, and online notary bills. They also noted that the state has a \$16 billion surplus.

President's Report

President Tony DeCampo reported that the priorities that he outlined at the onset of his presidency are proceeding. He said the building improvements have begun and have been performed at or under budget. The website redesign is a priority and is being worked on very diligently.

President DeCampo continues to stress the Bar's attorney wellness initiatives every time he has a chance to speak at different bar associations and meetings and encouraged others to do so as well. He reported on his attendance and participation at the Southern Conference of Bar Presidents, the Columbus Bar Association, the Sandy Spring Bar Association, and the Georgia Hispanic Bar, as well as speaking at the Judicial Council Meeting. He said he is focusing on the Bar's Unlicensed Practice of Law Program in connection with the Attorney-Client Solicitation Committee being chaired by Dax Lopex and Michael Geoffroy. He said he wants to improve efforts in this area to protect the public from these unethical practices.

He announced that after several rounds of interviews, Andreea Morrison had been hired as deputy general counsel, succeeding Jenny Mittelman, who has been at the State Bar for 34 years. He thanked Jenny Mittelman for her many years of excellent work and service.

Treasurer's Report

Treasurer Chris Twyman reported on the Bar's finances. The Bar received a clean audit, which has been posted to the Bar's website for those who want to review it. He commended Chief Financial Officer Ron Turner and his team for their great work. The Board of Governors received a copy of the October 2023

financials. Currently, finances are tracking on schedule, and there are no known issues. Treasurer Twyman thanked everyone for their voluntary contributions to the Legislative Fund and GLSP, noting that both are higher than they have been in recent years.

#### Executive Director's Report

Executive Director Damon Elmore reported Bar staff have had an active first half of the Bar year, and they continue to find ways to make our work better, being consistent with the Bar's mission and improving the quality of legal services. He said a main priority is the 2024-2025 proposed budget, which the Board will review at the Spring Meeting. He thanked the Atlanta, Savannah and Tifton staff for their hard work. He also thanked the Supreme Court liaisons, Bar officers and Executive Committee members.

#### Young Lawyers Division Report

YLD President Brittanie Browning reported that the Signature Fundraiser the previous evening was a success. She acknowledged the 32 members of the Leadership Academy Class of 2025 who attended the meeting. The YLD hosted a service project at the Midyear Meeting, collecting new socks for the MLK Beloved Service Project. She reminded everyone that the Legal Food Frenzy kicks off in April with a \$1 million goal. She reminded everyone that the HSMT program and the Intrastate Moot Court Competition need volunteers to ensure the success of both programs.

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

Executive Director Karlise Grier reported on the activities of the Chief Justice's Commission on Professionalism. She announced the following events: The Significant Lawyer: The Pursuit of Purpose and Professionalism CLE on Jan. 23; the Ethics and Professionalism During Career Transactions virtual CLE on March 28; and the Annual Robert Benham Awards event on April 17.

#### Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meeting held on August 24, 2023.

#### Office of the General Counsel

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

#### Law Practice Management Program

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

#### ICLE Report

The Board of Governors received a written report on the activities of the Institute of Continuing Legal Education of the State Bar of Georgia.

#### Media Report

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

#### Old Business

There was no old business.

#### New Business

President Tony DelCampo recognized Hon. Stacey Hydrick to speak about the newly formed Jewish Bar Association of Georgia.

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 11:20 a.m.

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William C. Gentry, Secretary

Approved:

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J. Antonio DelCampo, President





MEMORANDUM

To: Board of Governors  
From: Bill NeSmith  
Date: February 28, 2024  
Re: Proposed Rules Changes

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Below is a short explanation of the proposed rules changes on the agenda for the April 27, 2024, Board of Governors Spring Meeting:

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

Beginning at line 75, 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 changes.

2. Rule 9.4 Jurisdiction and Reciprocal Discipline

Beginning at line 1, the colon is removed after “Rule 9.4” to make this rule consistent with the other Rules of Professional Conduct.

At lines 45-51, 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.

Likewise, in lines 92-98, the proposed change has the State Disciplinary Review Board filing 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.

## **RULE 4-102**

74 **Contents**

75 Preamble, and Scope ~~and Terminology~~

76 *Rules: Client-Lawyer Relationship*

77 1.0 Terminology

78 1.1 Competence

79 1.2 Scope of Representation and Allocation of Authority Between

80 Client and Lawyer

81 1.3 Diligence

82 1.4 Communication

83 1.5 Fees

84 1.6 Confidentiality of Information

85 1.7 Conflict of Interest: General Rule

86 1.8 Conflict of Interest: Prohibited Transactions

87 1.9 Conflict of Interest: Former Client

88 1.10 Imputed Disqualification: General Rule

89 1.11 Successive Government and Private Employment

## **RULE 4-102**

74 **Contents**

75 Preamble and Scope

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87 1.9 Conflict of Interest: Former Client

88 1.10 Imputed Disqualification: General Rule

89 1.11 Successive Government and Private Employment

1 **RULE 9.4: JURISDICTION AND RECIPROCAL DISCIPLINE**

2 (a) Jurisdiction. Any lawyer admitted to practice law in this  
3 jurisdiction, including any formerly admitted lawyer with respect  
4 to acts committed prior to resignation, suspension, disbarment, or  
5 removal from practice on any of the grounds provided in Rule 4-  
6 104 of the State Bar of Georgia, or with respect to acts subsequent  
7 thereto that amount to the practice of law or constitute a violation  
8 of the Georgia Rules of Professional Conduct or any Rules or Code  
9 subsequently adopted by the Supreme Court of Georgia in lieu  
10 thereof, and any Domestic or Foreign Lawyer specially admitted  
11 by a court of this jurisdiction for a particular proceeding and any  
12 Domestic or Foreign Lawyer who practices law or renders or offers  
13 to render any legal services in this jurisdiction, is subject to the  
14 disciplinary jurisdiction of the State Bar of Georgia.

15 (b) Reciprocal Discipline. Upon being suspended or disbarred in  
16 another jurisdiction, a lawyer admitted to practice in Georgia  
17 shall promptly inform the Office of the General Counsel of the  
18 State Bar of Georgia of the discipline. Upon notification from any  
19 source that a lawyer within the jurisdiction of the State Bar of

20 Georgia has been suspended or disbarred in another jurisdiction,  
21 the Office of the General Counsel shall obtain a certified copy of  
22 the disciplinary order and file it with the Clerk of the State  
23 Disciplinary Boards. Nothing in this Rule shall prevent a lawyer  
24 suspended or disbarred in another jurisdiction from filing a  
25 Petition for Voluntary Discipline under Rule 4-227.

26 (1) Upon receipt of a certified copy of an order demonstrating  
27 that a lawyer admitted to practice in Georgia has been  
28 disbarred or suspended in another jurisdiction, the Clerk of  
29 the State Disciplinary Boards shall assign the matter a State  
30 Disciplinary Board docket number.

31 (2) The Clerk of the State Disciplinary Boards shall issue a  
32 notice to the respondent that shall show the date of the  
33 disbarment or suspension in the other jurisdiction and shall  
34 include a copy of the order therefor. The notice shall direct  
35 the respondent to show cause to the State Disciplinary  
36 Review Board within 30 days from service of the notice why  
37 the imposition of substantially similar discipline in this  
38 jurisdiction would be unwarranted. The notice shall be

39 served upon the respondent pursuant to Rule 4-203.1, and  
40 any response thereto shall be served upon the Office of the  
41 General Counsel.

42 (3) If neither party objects within 30 days, the State  
43 Disciplinary Review Board shall recommend imposition of  
44 substantially similar discipline and shall file that  
45 recommendation with the ~~Supreme Court of Georgia-Clerk of~~  
46 the State Disciplinary Boards, within 60 days after the time  
47 for the filing of objections expires. A copy of the State  
48 Disciplinary Review Board's report and recommendation  
49 shall be served upon the respondent, and the Clerk shall file  
50 the record in the case with the Supreme Court of Georgia  
51 within 10 days after the report and recommendation is filed.

52 The Office of the General Counsel or the respondent may  
53 object to imposition of substantially similar discipline by  
54 demonstrating that:

- 55 i. The procedure was so lacking in notice or opportunity  
56 to be heard as to constitute a deprivation of due  
57 process; or

- 58           ii. There was such infirmity of proof establishing the  
59           misconduct as to give rise to the clear conviction that  
60           the court could not, consistent with its duty, accept as  
61           final the conclusion on that subject; or  
62           iii. The discipline imposed would result in grave injustice  
63           or be offensive to the public policy of the jurisdiction; or  
64           iv. The reason for the original disciplinary status no  
65           longer exists; or  
66           v.  
67                 A. The conduct did not occur within the state of  
68                 Georgia; and,  
69                 B. The discipline imposed by the foreign jurisdiction  
70                 exceeds the level of discipline allowed under these  
71                 Rules; or  
72           vi. The discipline would if imposed in identical form be  
73           unduly severe or would require action not  
74           contemplated by these Rules.

75           If the State Disciplinary Review Board finds that it clearly  
76           appears upon the face of the record from which the discipline



77 is predicated that any of those elements exist, the State  
78 Disciplinary Review Board shall make such other  
79 recommendation to the Supreme Court of Georgia as it  
80 deems appropriate. The burden is on the party seeking  
81 different discipline in this jurisdiction to demonstrate that  
82 the imposition of the same discipline is not appropriate.

83 (4)The State Disciplinary Review Board may consider  
84 exceptions from either the Office of the General Counsel or  
85 the respondent on the grounds enumerated at paragraph (b)  
86 (3) of this Rule and may in its discretion grant oral  
87 argument. Exceptions and briefs shall be filed with the State  
88 Disciplinary Review Board within 30 days of service of the  
89 Notice of Reciprocal Discipline. The responding party shall  
90 have 30 days after service of the exceptions within which to  
91 respond. The State Disciplinary Review Board shall file its  
92 report and recommendation with the Clerk of the State  
93 Disciplinary Boards within 60 days of receiving the response  
94 to exceptions. A copy of the State Disciplinary Review  
95 Board's report and recommendation shall be served upon the

respondent, and the Clerk shall file the record in the case  
with the Supreme Court of Georgia within 10 days after the  
report and recommendation is filed.

(5) In all other aspects, a final adjudication in another jurisdiction that a lawyer, whether or not admitted in that jurisdiction, has been guilty of misconduct, or has been removed from practice on any of the grounds provided in Rule 4-104 of the State Bar of Georgia, shall establish conclusively the misconduct or the removal from practice for purposes of a disciplinary proceeding in this State.

(6) Discipline imposed by another jurisdiction but of a lesser nature than disbarment or suspension may be considered in aggravation of discipline in any other disciplinary proceeding.

(7) For good cause, the Chair of the State Disciplinary Review Board in a reciprocal discipline proceeding may make an interim recommendation to the Supreme Court of Georgia that the respondent be immediately suspended pending final disposition.

115 (8) For purposes of this Rule, the word “jurisdiction” means any  
116 State, Territory, country, or federal court.

117 The maximum penalty for a violation of this Rule is disbarment.

118 Comment

119 [1] If a lawyer suspended or disbarred in one jurisdiction is also  
120 admitted in another jurisdiction and no action can be taken against the  
121 lawyer until a new disciplinary proceeding is instituted, tried, and  
122 concluded, the public in the second jurisdiction is left unprotected  
123 against a lawyer who has been judicially determined to be unfit. Any  
124 procedure that so exposes innocent clients to harm cannot be justified.  
125 The spectacle of a lawyer disbarred in one jurisdiction yet permitted to  
126 practice elsewhere exposes the profession to criticism and undermines  
127 public confidence in the administration of justice.

128 [2] Reserved.

129 [3] The imposition of discipline in one jurisdiction does not mean that  
130 Georgia and every other jurisdiction in which the lawyer is admitted  
131 must necessarily impose discipline. The State Disciplinary Review  
132 Board has jurisdiction to recommend reciprocal discipline when a

133 lawyer is suspended or disbarred in a jurisdiction in which the lawyer is  
134 licensed or otherwise admitted.

135 [4] A judicial determination of misconduct by the respondent in another  
136 jurisdiction is conclusive, and not subject to re-litigation in the forum  
137 jurisdiction. The State Disciplinary Review Board should recommend  
138 substantially similar discipline unless it determines, after review  
139 limited to the record of the proceedings in the foreign jurisdiction, that  
140 one of the grounds specified in paragraph (b) (3) exists.

141 [5] For purposes of this Rule, the suspension or placement of a lawyer  
142 on inactive status in another jurisdiction because of want of sound  
143 mind, senility, habitual intoxication or drug addiction, to the extent of  
144 impairment of competency as a lawyer shall be considered a  
145 disciplinary suspension under the Rules of the State Bar of Georgia.

1 **RULE 9.4 JURISDICTION AND RECIPROCAL DISCIPLINE**

2 (a)Jurisdiction. Any lawyer admitted to practice law in this  
3 jurisdiction, including any formerly admitted lawyer with respect  
4 to acts committed prior to resignation, suspension, disbarment, or  
5 removal from practice on any of the grounds provided in Rule 4-  
6 104 of the State Bar of Georgia, or with respect to acts subsequent  
7 thereto that amount to the practice of law or constitute a violation  
8 of the Georgia Rules of Professional Conduct or any Rules or Code  
9 subsequently adopted by the Supreme Court of Georgia in lieu  
10 thereof, and any Domestic or Foreign Lawyer specially admitted  
11 by a court of this jurisdiction for a particular proceeding and any  
12 Domestic or Foreign Lawyer who practices law or renders or offers  
13 to render any legal services in this jurisdiction, is subject to the  
14 disciplinary jurisdiction of the State Bar of Georgia.

15 (b)Reciprocal Discipline. Upon being suspended or disbarred in  
16 another jurisdiction, a lawyer admitted to practice in Georgia  
17 shall promptly inform the Office of the General Counsel of the  
18 State Bar of Georgia of the discipline. Upon notification from any  
19 source that a lawyer within the jurisdiction of the State Bar of

20 Georgia has been suspended or disbarred in another jurisdiction,  
21 the Office of the General Counsel shall obtain a certified copy of  
22 the disciplinary order and file it with the Clerk of the State  
23 Disciplinary Boards. Nothing in this Rule shall prevent a lawyer  
24 suspended or disbarred in another jurisdiction from filing a  
25 Petition for Voluntary Discipline under Rule 4-227.

26 (1) Upon receipt of a certified copy of an order demonstrating  
27 that a lawyer admitted to practice in Georgia has been  
28 disbarred or suspended in another jurisdiction, the Clerk of  
29 the State Disciplinary Boards shall assign the matter a State  
30 Disciplinary Board docket number.

31 (2) The Clerk of the State Disciplinary Boards shall issue a  
32 notice to the respondent that shall show the date of the  
33 disbarment or suspension in the other jurisdiction and shall  
34 include a copy of the order therefor. The notice shall direct  
35 the respondent to show cause to the State Disciplinary  
36 Review Board within 30 days from service of the notice why  
37 the imposition of substantially similar discipline in this  
38 jurisdiction would be unwarranted. The notice shall be

39 served upon the respondent pursuant to Rule 4-203.1, and  
40 any response thereto shall be served upon the Office of the  
41 General Counsel.

42 (3) If neither party objects within 30 days, the State  
43 Disciplinary Review Board shall recommend imposition of  
44 substantially similar discipline and shall file that  
45 recommendation with the Clerk of the State Disciplinary  
46 Boards within 60 days after the time for the filing of  
47 objections expires. A copy of the State Disciplinary Review  
48 Board's report and recommendation shall be served upon the  
49 respondent, and the Clerk shall file the record in the case  
50 with the Supreme Court of Georgia within 10 days after the  
51 report and recommendation is filed. The Office of the  
52 General Counsel or the respondent may object to imposition  
53 of substantially similar discipline by demonstrating that:

- 54 i. The procedure was so lacking in notice or opportunity  
55 to be heard as to constitute a deprivation of due  
56 process; or

- 57           ii. There was such infirmity of proof establishing the  
58           misconduct as to give rise to the clear conviction that  
59           the court could not, consistent with its duty, accept as  
60           final the conclusion on that subject; or
- 61           iii. The discipline imposed would result in grave injustice  
62           or be offensive to the public policy of the jurisdiction; or
- 63           iv. The reason for the original disciplinary status no  
64           longer exists; or
- 65           v.
- 66                 A. The conduct did not occur within the state of  
67                 Georgia; and,
- 68                 B. The discipline imposed by the foreign jurisdiction  
69                 exceeds the level of discipline allowed under these  
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80 different discipline in this jurisdiction to demonstrate that  
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82 (4)The State Disciplinary Review Board may consider  
83 exceptions from either the Office of the General Counsel or  
84 the respondent on the grounds enumerated at paragraph (b)  
85 (3) of this Rule and may in its discretion grant oral  
86 argument. Exceptions and briefs shall be filed with the State  
87 Disciplinary Review Board within 30 days of service of the  
88 Notice of Reciprocal Discipline. The responding party shall  
89 have 30 days after service of the exceptions within which to  
90 respond. The State Disciplinary Review Board shall file its  
91 report and recommendation with the Clerk of the State  
92 Disciplinary Boards within 60 days of receiving the response  
93 to exceptions. A copy of the State Disciplinary Review  
94 Board's report and recommendation shall be served upon the

95                    respondent, and the Clerk shall file the record in the case  
96                    with the Supreme Court of Georgia within 10 days after the  
97                    report and recommendation is filed.

98                    (5) In all other aspects, a final adjudication in another  
99                    jurisdiction that a lawyer, whether or not admitted in that  
100                    jurisdiction, has been guilty of misconduct, or has been  
101                    removed from practice on any of the grounds provided in  
102                    Rule 4-104 of the State Bar of Georgia, shall establish  
103                    conclusively the misconduct or the removal from practice for  
104                    purposes of a disciplinary proceeding in this State.

105                    (6) Discipline imposed by another jurisdiction but of a lesser  
106                    nature than disbarment or suspension may be considered in  
107                    aggravation of discipline in any other disciplinary  
108                    proceeding.

109                    (7) For good cause, the Chair of the State Disciplinary Review  
110                    Board in a reciprocal discipline proceeding may make an  
111                    interim recommendation to the Supreme Court of Georgia  
112                    that the respondent be immediately suspended pending final  
113                    disposition.

114 (8) For purposes of this Rule, the word “jurisdiction” means any  
115 State, Territory, country, or federal court.

116 The maximum penalty for a violation of this Rule is disbarment.

117 Comment

118 [1] If a lawyer suspended or disbarred in one jurisdiction is also  
119 admitted in another jurisdiction and no action can be taken against the  
120 lawyer until a new disciplinary proceeding is instituted, tried, and  
121 concluded, the public in the second jurisdiction is left unprotected  
122 against a lawyer who has been judicially determined to be unfit. Any  
123 procedure that so exposes innocent clients to harm cannot be justified.  
124 The spectacle of a lawyer disbarred in one jurisdiction yet permitted to  
125 practice elsewhere exposes the profession to criticism and undermines  
126 public confidence in the administration of justice.

127 [2] Reserved.

128 [3] The imposition of discipline in one jurisdiction does not mean that  
129 Georgia and every other jurisdiction in which the lawyer is admitted  
130 must necessarily impose discipline. The State Disciplinary Review  
131 Board has jurisdiction to recommend reciprocal discipline when a

132 lawyer is suspended or disbarred in a jurisdiction in which the lawyer is  
133 licensed or otherwise admitted.

134 [4] A judicial determination of misconduct by the respondent in another  
135 jurisdiction is conclusive, and not subject to re-litigation in the forum  
136 jurisdiction. The State Disciplinary Review Board should recommend  
137 substantially similar discipline unless it determines, after review  
138 limited to the record of the proceedings in the foreign jurisdiction, that  
139 one of the grounds specified in paragraph (b) (3) exists.

140 [5] For purposes of this Rule, the suspension or placement of a lawyer  
141 on inactive status in another jurisdiction because of want of sound  
142 mind, senility, habitual intoxication or drug addiction, to the extent of  
143 impairment of competency as a lawyer shall be considered a  
144 disciplinary suspension under the Rules of the State Bar of Georgia.

## State Bar Budget Timetable for the 2024-2025 State Bar Budget

Oct. 31, 2023	Budget Timetable and the Budget Request Forms are sent to President-elect, YLD President-elect, Committee/Program Chairs and Bar staff directors. Due date: Nov. 13.
Nov. 13, 2023	<b>Deadline</b> for submission of all new budget requests to be submitted to Executive Director, Chief Operating Officer or Chief Financial Officer. <b>Non-emergency requests received after this date will be held for consideration in the next year's budget cycle.</b>
Nov. 14, 2023	<b>State Bar Managers' Meeting</b> to discuss departmental budget process, expectations and requests.
Nov. 15, 2023	<b>Personnel Committee</b> reviews any final requests.
Nov. 30, 2023	<b>(Managers) Departmental budgets due</b> to Sarah, Paula and Damon.
Dec. 1, 2023	<b>Programs Committee</b> reviews any new budget requests from existing State Bar programs and any requests for new programs. Proponents are requested to appear to present and justify their requests.
Dec. 6, 2023	<b>(Sen. Staff) Departmental budgets due</b> to Ron and accounting team.
Jan. 30, 2024	<b>Finance Committee</b> reviews the recommendations of the Programs and Personnel Committees (the review is limited to their financial impact on dues and budget) and recommends the 2024-2025 license fee level to the Executive Committee for the February 9 Executive Committee meeting. ( <u>Note: EC agenda deadline Jan. 18; financials by ASAP.</u> )

*(Dates below are determined by the Executive Committee meeting schedule and subject to change.)*

Feb. 9, 2024	<b>Executive Committee</b> receives the recommendations of the Programs and Personnel Committees, and the Finance Committee's draft budget (including its report on the financial impact of those recommendations) and recommends the 2024-2025 license fee level to the Board of Governors for the April 20 Board meeting. ( <u>Note: Board agenda deadline Feb. 13.</u> )
April 20, 2024	<b>Board of Governors</b> sets the 2024-2025 license fee level at the Spring Board Meeting (Brasstown Valley Resort & Spa, Young Harris, GA)
April 23, 2024	<b>Finance Committee</b> recommends the 2024-2025 proposed budget to the Executive Committee for the April 26 Executive Committee meeting. ( <u>Note: EC agenda deadline is Apr. 4, financials by ASAP.</u> )
April 26, 2024	<b>Executive Committee</b> recommends the 2024-2025 proposed budget to the Board of Governors for the June 8 Board meeting. ( <u>Note: Board agenda deadline Apr. 30; financials by ASAP.</u> )
June 8, 2024	<b>Board of Governors</b> receives 2024-2025 final draft budget for approval at the Annual Board Meeting (Omni Amelia Island Resort, Amelia Island, FL).

### Overview of the Budget Process:

1. Programs Committee recommends **substantial program changes** (additions, changes or deletions) to the Executive Committee.
2. Personnel Committee recommends staffing for **existing programs** to the Executive Committee.
3. Finance Committee recommends a draft budget to the Executive Committee, including the financial impact of the recommendations of the Programs and Personnel Committees. It does not hear from proponents or repeat the work of the Programs and Personnel Committees, but instead advises on the financial results of their work.
4. Executive Committee reviews the recommendations of all three committees and suggests dues level and budget to the Board of Governors.
5. Board of Governors sets the dues level, check-offs and section fees at its Spring Meeting, and sets the 2024-2025 budget at its Annual Meeting after a hearing open to all members.

## 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 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 Annual Budget
<b>Membership Numbers</b>						
Active Members	40,611	41,143	41,628	41,500	41,940	42,695
Inactive Members	8,459	8,341	8,169	8,175	7,940	7,845
Provisional Members	28	37	26	185	225	20
Associates/Affiliates	15	15	11	12	12	10
Foreign Legal Consultants	7	6	9	6	7	9
Students	344	401	453	325	410	470
Emeritus	3,434	3,794	4,189	3,970	4,300	4,585
<b>Total Membership Numbers</b>	<b>52,898</b>	<b>53,737</b>	<b>54,485</b>	<b>54,173</b>	<b>54,834</b>	<b>55,634</b>
<b>Revenue</b>						
Dues Active	10,242,211	10,425,069	10,798,285	10,790,000	10,904,400	11,271,480
Dues Inactive	1,115,041	1,082,021	1,085,384	1,062,750	1,032,200	1,035,540
Dues Provisional	32,004	16,891	18,524	24,050	29,250	11,880
Dues Associates	1,350	1,300	1,050	1,200	1,200	1,000
Dues Foreign Legal Consultant	1,270	1,524	1,429	1,560	1,820	2,376
Dues Late Fees	66,060	285,645	252,825	260,000	250,000	265,000
Dues NSF Check Fee	180	80	220	200	300	200
Dues Prior Years	6,309	8,519	5,655	5,000	5,000	6,000
Total License and Dues	11,464,425	11,821,049	12,163,372	12,144,760	12,224,170	12,593,476
Program Registration Income	4,464,018	4,842,269	4,882,064	4,750,000	4,750,000	4,400,000
Section Expense Reimbursement	187,835	188,676	301,403	301,403	300,973	320,694
CSF Expense Reimbursement	73,000	73,000	73,000	73,000	73,000	73,000
Advertising and Sales	47,225	54,863	48,045	45,600	27,150	26,225
Membership Income	167,079	156,272	174,181	140,300	163,900	176,800
Credit Card Processing Fees	50,754	102,501	119,582	102,000	105,000	107,000
Interest Income	213,145	(37,130)	(33,332)	230,000	140,000	275,000
Miscellaneous Revenues	490	1,506	186,223	6,000	6,000	22,000
Total Bar Revenue	16,667,971	17,203,005	17,914,458	17,193,063	17,790,193	17,994,195
Total Bar Expenses	14,134,578	14,242,535	16,229,190	17,258,364	18,354,301	19,282,420
<b>SBG Net Gain (Loss)</b>	<b>\$ 2,533,393</b>	<b>\$ 2,960,470</b>	<b>\$ 1,685,268</b>	<b>\$ (6,301)</b>	<b>\$ (564,108)</b>	<b>\$ (1,288,225)</b>

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

**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 Actual	2021-2022 Actual	2022-2023 Actual	2022-2023 Annual Budget	2023-2024 Annual Budget	2024-2025 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
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 500,127</b>	<b>\$ (91,378)</b>	<b>\$ 371,623</b>	<b>\$ 130,968</b>	<b>\$ (46,553)</b>	<b>\$ 147,756</b>
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
<b>Total Combined Net Income (Loss)</b>	<b>\$ 3,033,520</b>	<b>\$ 2,869,092</b>	<b>\$ 2,056,891</b>	<b>\$ 65,667</b>	<b>\$ (610,661)</b>	<b>\$ (1,140,469)</b>

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

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State Bar of Georgia



**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
<b>Bar Center Income and Cash Receipts</b>						
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
<b>Bar Center Income and Cash Receipts</b>	<b>\$ 1,337,798</b>	<b>\$ 1,054,590</b>	<b>\$ 1,571,077</b>	<b>\$ 1,425,200</b>	<b>\$ 1,398,200</b>	<b>\$ 1,477,200</b>
<b>Bar Center Expenses and Cash Disbursements</b>						
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
<b>Bar Center Expenses and Cash Disbursements</b>	<b>171,458</b>	<b>222,313</b>	<b>139,621</b>	<b>95,000</b>	<b>62,500</b>	<b>53,100</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ 1,166,340</b>	<b>\$ 832,277</b>	<b>\$ 1,431,456</b>	<b>\$ 1,330,200</b>	<b>\$ 1,335,700</b>	<b>\$ 1,424,100</b>
<b>Conference Center Income and Expenses</b>						
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
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (383,815)</b>	<b>\$ (414,792)</b>	<b>\$ (432,251)</b>	<b>\$ (451,962)</b>	<b>\$ (478,316)</b>	<b>\$ (477,849)</b>
<b>Rental Income and Expenses</b>						
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
<b>Rental Combined Net Cash Flow</b>	<b>\$ (180,888)</b>	<b>\$ (407,114)</b>	<b>\$ (764,324)</b>	<b>\$ (637,300)</b>	<b>\$ (904,302)</b>	<b>\$ (1,021,945)</b>
<b>Parking Income and Expenses</b>						
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

**State Bar of Georgia  
Dues and Revenue History**

<b>Dues History:</b>		<b>Year End 6-30</b>	<b>Active &amp; Inactive Members (Includes Nonpaying students)</b>
\$75	8 Years	1976-1983	6/30/83 = 15,000
\$90	4 Years	1984-1987	6/30/87 = 19,425
\$110	2 Years	1988-1989	6/30/89 = 20,193
\$135	6 Years	1990-1995	6/30/95 = 26,320
\$150	5 Years	1996-2000	6/30/00 = 30,694
\$175	3 years	2001-2003	6/30/03 = 33,706
\$190	1 year	2004	6/30/04 = 34,717
\$208	1 year	2005	6/30/05 = 35,704
\$218	1 year	2006	6/30/06 = 36,694
\$230	2 years	2008	6/30/08 = 38,852
\$236**	3 years	2009-2011	6/30/11 = 42,334
\$238	1 year	2011-2012	6/30/12 = 42,957
\$240	1 year	2012-2013	6/30/13 = 44,184
\$246***	1 year	2013-2014	6/30/14 = 45,143
\$248	3 years	2014-2017	6/30/17 = 47,967
\$250	1 year	2017-2018	6/30/18 = 48,046
\$252	1 year	2018-2019	6/30/19 = 48,324
\$254	1 year	2019-2020	6/30/20 = 49,005
\$254	1 year	2020-2021	6/30/21 = 49,464
\$254	1 year	2021-2022	6/30/22 = 49,943
\$260	1 year	2022-2023	6/30/23 = 50,296
\$260	1 year	2023-2024	6/30/24 = 50,534 - Budgeted

\*\*One time dues credit of \$20 per active member (\$10 inactive) approved by Board of Governors, reducing net active dues to \$216 (\$108 inactive) for 2008-09 only.

\*\*\*One time dues credit of \$2 per active member (\$1 inactive) approved by Board of Governors, reducing net active dues to \$244 (\$122 inactive) for 2013-14 only.

Membership counts as of June 30, 2017 and subsequent represent total members excluding emeritus.

**State Bar of Georgia  
Dues and Revenue History**

Year	Total Revenue	\$ Increase	% Increase	Dues Rate	Total Expenditures	Annual Surplus (Deficit)
1992-93	\$3,334,777	\$115,329	3.6%	\$135	\$ 5,198,542	\$ (7,079)
1993-94	\$3,571,459	\$236,682	7.1%	\$135	\$ 5,279,323	\$ 803,857
1994-95	\$3,889,932	\$318,473	8.9%	\$135	\$ 5,567,740	\$ 503,790
<b>1995-96</b>	<b>\$4,354,349</b>	<b>\$464,417</b>	<b>11.9%</b>	<b>\$150</b>	<b>\$ 5,837,776</b>	<b>\$ 384,400</b>
1996-97	\$4,593,984	\$239,635	5.5%	\$150	\$ 6,193,333	\$ 564,149
1997-98	\$4,891,840	\$297,856	6.5%	\$150	\$ 6,710,316	\$ 1,248,305
1998-99	\$5,007,430	\$115,590	2.4%	\$150	\$ 5,198,542	\$ 1,330,946
1999-00	\$5,191,463	\$184,033	3.7%	\$175	\$ 5,279,323	\$ 803,857
<b>2000-01</b>	<b>\$6,083,180</b>	<b>\$891,717</b>	<b>17.2%</b>	<b>\$175</b>	<b>\$ 5,567,740</b>	<b>\$ 503,790</b>
2001-02	\$6,071,530	(\$11,650)	-0.2%	\$175	\$ 5,837,776	\$ 384,400
2002-03	\$6,172,176	\$100,646	1.7%	\$175	\$ 6,193,333	\$ 564,149
<b>2003-04</b>	<b>\$6,757,482</b>	<b>\$585,306</b>	<b>9.5%</b>	<b>\$190</b>	<b>\$ 6,710,316</b>	<b>\$ 1,248,305</b>
<b>2004-05</b>	<b>\$7,958,621</b>	<b>\$1,201,139</b>	<b>17.8%</b>	<b>\$208</b>	<b>\$ 7,441,085</b>	<b>\$ 988,231</b>
<b>2005-06</b>	<b>\$8,429,316</b>	<b>\$470,695</b>	<b>5.9%</b>	<b>\$218</b>	<b>\$ 7,910,506</b>	<b>\$ 1,291,785</b>
2007-08	\$9,630,335	\$428,044	4.7%	\$230	\$ 8,299,389	\$ 1,330,946
<b>2008-09**</b>	<b>\$9,217,164</b>	<b>(\$413,171)</b>	<b>-4.3%</b>	<b>\$238</b>	<b>\$ 10,496,996</b>	<b>\$ (1,279,832)</b>
2009-10	\$9,906,285	\$689,121	7.5%	\$236	\$ 9,623,930	\$ 282,355
2010-11	\$9,865,704	(\$40,581)	-0.4%	\$236	\$ 9,916,253	\$ (50,549)
2011-12	\$10,042,547	\$176,843	1.8%	\$238	\$ 10,402,265	\$ (359,718)
2012-13	\$10,380,463	\$337,916	3.4%	\$240	\$ 10,824,527	\$ (444,064)
2013-14	\$10,828,612	\$448,149	4.3%	\$246	\$ 11,564,635	\$ (736,023)
2014-15	\$11,061,075	\$232,463	2.2%	\$248	\$ 12,284,888	\$ (1,223,813)
2015-16	\$11,112,424	\$51,349	0.5%	\$248	\$ 12,346,511	\$ (1,234,087)
2016-17	\$11,360,546	\$248,122	2.3%	\$248	\$ 12,393,776	\$ (1,033,230)
2017-18	\$11,689,164	\$328,618	2.9%	\$250	\$ 13,106,634	\$ (1,417,470)
2018-19	\$11,837,149	\$147,985	1.3%	\$252	\$ 13,276,203	\$ (1,439,054)
2019-20	\$12,421,092	\$583,943	4.9%	\$254	\$ 12,163,113	\$ 237,979
2020-21	\$12,166,199	(\$254,893)	-2.1%	\$254	\$ 11,700,028	\$ 466,171
2021-22	\$12,357,380	\$191,181	1.6%	\$254	\$ 11,643,362	\$ 714,018
2022-23	\$12,945,789	\$588,409	4.6%	\$260	\$ 12,736,099	\$ 209,689
<b>2023-24 (budgeted)</b>	<b>\$13,010,193</b>	<b>\$64,404</b>	<b>0.5%</b>	<b>\$260</b>	<b>\$ 14,203,824</b>	<b>\$ (1,193,631)</b>

\* Dues changed from cycle (large increases every few years) to indexing (small increases more frequently) with mandatory new program approval by Board of Governors on April 5, 2003.  
 \*\*One time dues credit of \$20 per active member (\$10 inactive) approved by Board of Governors, reducing net active dues to \$216 (\$108 inactive) for 2008-09 only.  
 \*\*\*Unrestricted and board designated reserves. Does not include restricted funds, such as CCLC, Client Security Fund, Legislative Fund, Sections, and Bar Center.  
 # One time dues credit of \$2 per active member (\$1 inactive) approved by Board of Governors, reducing net active dues to \$244 (\$122 inactive) for 2013-14 only.

## **2024-2025 Dues Recommendation to the Board of Governors and Other Dues Items**

Motion: To submit the following recommendation to the Board of Governors for approval:

1. Dues at \$264 for active members and \$132 for inactive and provisional members
2. Section dues to be reflected on the dues statement ranging from \$10-\$50; and
3. In accordance with Bar Rule 1-506 regarding the Clients' Security Fund, each member is assessed a fee of \$15. This assessment shall be used only to fund the Clients' Security Fund; and
4. Professionalism Fee (\$11) mandated by the Supreme Court; and
5. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
6. A suggested \$400 opt-in provision for individual contributions (\$100 for younger lawyers) for the Georgia Legal Services Program.



# State Bar of Georgia

To: Bar Officers  
Finance Committee

From: Ron Turner *RT*

Date: February 29, 2024

Re: January 2024 Financial Statements-Bar Operations and Bar Center

Attached please find the January 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.**

Office of General Counsel

Investigator travel is over budget by **\$1,357** primarily because one additional investigator attended a conference than what was originally budgeted for.

Computer software is in excess of the budget by \$2,806 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.

Communications

The Bar has incurred **\$69,896** 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.

### 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.

### Investment Service Fees

**Investment service fees are over budget primarily due to investment fees charged by our outside investment advisors. These fees are initially charged to the Bar's investments but then are subsequently allocated at the end of each quarter to where the charge should apply (i.e. sections, restricted, etc.).**

### Sections

Supplies for sections are in excess of the budget by **\$1,138** primarily due to the 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.

### Other Bar Center Operations

Audio and video equipment for the Bar is in excess of the budget by approximately **\$215,500** 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 **\$53,300**. The majority of these costs were incurred as a result of the initial payment associated with work being performed on the doors to the front lobby. This work will improve handicap access to the building and 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 \$2,323 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.

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 **\$120,400**. 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 January 31, 2024**

	Year Ending	Year To Date	Year Ending
	06/30/2023	January 31, 2024	06/30/2024
	Actual	Actual	Annual Budget
<b>Membership Numbers</b>			
Active Members	41,940	42,216	41,940
Inactive Members	8,169	8,027	7,940
Provisional Members	26	10	225
Associates/Affiliates	11	10	12
Foreign Legal Consultants	9	9	7
Students	453	515	410
Emeritus	4,189	4,282	4,300
<b>Total Membership Numbers</b>	<b>54,485</b>	<b>55,069</b>	<b>54,834</b>
<b>Revenue</b>			
Dues Active	10,798,285	10,930,468	10,904,400
Dues Inactive	1,085,384	1,059,604	1,032,200
Dues Provisional	18,524	13,520	29,250
Dues Associates	1,050	900	1,200
Dues Foreign Legal Consultant	1,429	2,340	1,820
Dues Late Fees	252,825	239,375	250,000
Dues NSF Check Fee	220	80	300
Dues Prior Years	5,655	3,436	5,000
<b>Total License and Dues</b>	<b>12,163,372</b>	<b>12,249,723</b>	<b>12,224,170</b>
Program Registration Income	4,882,064	2,040,586	4,750,000
Section Expense Reimbursement	301,403	301,039	300,973
CSF Expense Reimbursement	73,000	42,583	73,000
Advertising and Sales	48,045	24,230	27,150
Membership Income	174,181	94,145	163,900
Credit Card Processing Fees	119,502	39,249	105,000
Interest Income	(33,332)	324,609	140,000
Miscellaneous Revenues	186,223	(246)	6,000
<b>Total Bar Revenue</b>	<b>17,914,458</b>	<b>15,115,918</b>	<b>17,790,193</b>
<b>Total Bar Expenses</b>	<b>16,229,190</b>	<b>9,886,825</b>	<b>18,354,301</b>
<b>SBG Net Gain (Loss)</b>	<b>\$ 1,685,268 \$</b>	<b>5,229,093</b>	<b>\$(926,977) % \$ (564,108)</b>
			<b>% of Budget</b>
			100.66 %
			101.10 %
			4.44 %
			83.33 %
			128.57 %
			125.61 %
			99.58 %
			<b>100.43 %</b>

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

**State Bar of Georgia**  
**Consolidated Revenues and Expenditures**  
**Operations and Bar Center Combined**  
**For the Year To Date Period Ending January 31, 2024**

	Year Ending	Year To Date		Year Ending
	06/30/2023	January 31, 2024	Actual	06/30/2024
	Actual			Annual Budget
Total Bar Center Operations Revenue	2,972,797	1,627,199		2,638,200
Total Bar Center Operations Expenses	2,601,174	1,733,912		2,684,753
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ 371,623 \$</b>	<b>(106,713)</b>		<b>\$ (46,553)</b>
Combined Revenue	20,887,255	16,743,117		20,428,393
Combined Expenses	18,830,364	11,620,736		21,039,054
<b>Total Combined Net Income (Loss)</b>	<b>\$ 2,056,891 \$</b>	<b>5,122,381</b>		<b>(838,833) \$</b>
				<b>(610,661)</b>

61.68 %  
64.58 %

229.23 % \$  
(838.83) % \$

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 January 31, 2024**

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
<b>Bar Center Income and Cash Receipts</b>							
Bar Center Assessments	0	0.00 %	0	0.00 %	200	200	165
Gain/Loss Investment Interest Allocation	0	0.00 %	164,814	0.00 %	0	(164,814)	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	0	0.00 %	60,150	61.38 %	98,000	37,850	115,247
<b>Bar Center Income and Cash Receipts</b>	<b>\$ 0</b>	<b>0.00 %</b>	<b>\$ 724,963</b>	<b>51.85 %</b>	<b>\$ 1,398,200</b>	<b>\$ 673,237</b>	<b>\$ 1,571,077</b>
<b>Bar Center Expenses and Cash Disbursements</b>							
Bond Premium Amortization	0	0.00 %	11,096	34.67 %	32,000	20,904	15,712
Investment Service Fees	0	0.00 %	11,076	50.35 %	22,000	10,924	26,697
Parking Deck Construction	0	0.00 %	0	0.00 %	0	0	850
Museum and 1st Floor Exhibit	0	0.00 %	0	0.00 %	5,000	5,000	0
Audio Video, Furniture and Equipment	203,177	5,805.06 %	219,035	6,258.13 %	3,500	(215,534)	18,990
Building Rehabilitation	8,274	0.00 %	53,339	0.00 %	0	(53,339)	47,347
2nd Floor Buildout	0	0.00 %	0	0.00 %	0	0	30,025
<b>Bar Center Expenses and Cash Disbursements</b>	<b>211,451</b>	<b>338.32 %</b>	<b>294,546</b>	<b>471.27 %</b>	<b>62,500</b>	<b>(232,046)</b>	<b>139,621</b>
<b>Bar Center Combined Net Cash Flow</b>	<b>\$ (211,451)</b>	<b>(15.93) %</b>	<b>\$ 430,418</b>	<b>32.22 %</b>	<b>\$ 1,335,700</b>	<b>\$ 905,282</b>	<b>\$ 1,431,456</b>
<b>Conference Center Income and Expenses</b>							
Room Rentals and Various Charges	1,761	17.61 %	7,734	77.34 %	10,000	2,266	12,683
Conference Center Operating Expenses	40,867	8.37 %	269,963	55.28 %	486,316	216,353	444,934
<b>Conference Center Combined Net Cash Flow</b>	<b>\$ (39,106)</b>	<b>8.18 %</b>	<b>\$ (262,229)</b>	<b>54.82 %</b>	<b>\$ (478,316)</b>	<b>\$ (216,087)</b>	<b>\$ (432,251)</b>
<b>Rental Income and Expenses</b>							
Rental Income	77,193	8.39 %	540,350	58.73 %	920,000	379,650	919,520
Building Operating Expenses	117,848	6.46 %	1,003,172	54.99 %	1,824,302	821,130	1,683,844
<b>Rental Combined Net Cash Flow</b>	<b>\$ (40,655)</b>	<b>4.50 %</b>	<b>\$ (462,822)</b>	<b>51.18 %</b>	<b>\$ (904,302)</b>	<b>\$ (441,480)</b>	<b>\$ (764,324)</b>
<b>Parking Income and Expenses</b>							
Parking Income	45,346	14.63 %	354,152	114.24 %	310,000	(44,152)	469,518
Parking Deck Operating Expenses	20,958	6.77 %	166,231	53.69 %	309,635	143,404	332,775
<b>Parking Combined Net Cash Flow</b>	<b>\$ 24,388</b>	<b>6,661.61 %</b>	<b>\$ 187,920</b>	<b>51,485.04 %</b>	<b>\$ 365</b>	<b>\$ (187,555)</b>	<b>\$ 136,743</b>
<b>Total Bar Center Operations Net Gain (Loss)</b>	<b>\$ (266,824)</b>	<b>573.16 %</b>	<b>\$ (106,713)</b>	<b>229.23 %</b>	<b>\$ (46,553)</b>	<b>\$ 60,160</b>	<b>\$ 371,623</b>

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 January 31, 2024**

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Revenues</b>				
Dues - Active	\$ 10,930,468	\$ 10,904,400	100.24 %	\$ 10,798,285
Dues - Inactive	1,059,604	1,032,200	102.65 %	1,085,384
Dues - Provisional	13,520	29,250	46.22 %	18,524
Dues - Misc. Types	3,240	3,020	107.28 %	2,479
Dues - Late Fees	242,891	255,300	95.14 %	258,700
Total Dues & Licenses	12,249,723	12,224,170	100.21 %	12,163,372
Program Registration Income	2,040,586	4,750,000	42.96 %	4,882,064
Section Expense Reimbursement	301,039	300,973	100.02 %	301,403
CSF Expense Reimbursement	42,583	73,000	58.33 %	73,000
Advertising and Sales	24,230	27,150	89.24 %	48,045
Membership Income	46,070	71,500	64.43 %	82,506
Pro Hac Vice	302,975	420,000	72.14 %	429,175
Pro Hac Vice Contra	(254,900)	(327,600)	77.81 %	(337,500)
Credit Card Processing Fees	39,249	105,000	37.38 %	119,502
Interest Income	324,609	140,000	231.86 %	(33,332)
Miscellaneous Revenues	(246)	6,000	(4.11) %	186,223
<b>Total Revenues</b>	<b>15,115,918</b>	<b>17,790,193</b>	<b>84.97 %</b>	<b>17,914,458</b>
<b>Expenses</b>				
Administration	1,558,390	2,778,073	56.10 %	2,600,791
General Counsel	2,713,426	4,864,802	55.78 %	4,484,235
Communications	604,902	979,185	61.78 %	946,247
Lawyer's Assistance Program	93,750	125,000	75.00 %	125,000
Fee Arbitration	338,678	597,465	56.69 %	531,755
Law Practice Management	263,704	501,979	52.53 %	447,850
Sections	175,455	301,039	58.28 %	249,355
Savannah Office	172,156	293,152	58.73 %	309,323
Tifton Office	93,078	169,011	55.07 %	146,352
Young Lawyers	231,598	446,807	51.83 %	360,884
Unauthorized Practice of Law	543,785	943,024	57.66 %	878,889
Law Related Education	243,324	442,118	55.04 %	386,937
High School Mock Trial	55,929	192,392	29.07 %	161,081
ICLE	2,095,997	4,150,477	50.50 %	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 January 31, 2024**

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	123,793	212,216	58.33 %	212,216
Fastcase	297,471	297,000	100.16 %	281,419
Officers' Expenses	35,910	101,470	35.39 %	43,726
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	310,748	903,925	34.38 %	648,423
Unallocated Services	(120,437)	0	0.00 %	(133,549)
Total Expenses	9,886,825	18,354,301	53.87 %	16,229,190
<b>Net Income</b>	<b>\$ 5,229,093</b>	<b>\$ (564,108)</b>	<b>(926.97) %</b>	<b>\$ 1,685,268</b>

*Note: For Total Other Expenses, the details can be found on the next page.*

Created on 02/20/2024  
State Bar of Georgia

**State Bar of Georgia**  
**Supporting Schedule of Other Expenses - YTD**  
**For the Year To Date Period Ending January 31, 2024**

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
<b>Other Expenses</b>				
BOG and Member Meetings	\$ 119,786	\$ 556,000	21.54 %	\$ 400,237
Supreme Court Meetings	56,537	40,000	141.34 %	46,661
Executive Committee Meetings	1,875	50,000	3.75 %	33,891
State Disciplinary Board Lawyers	17,500	34,000	51.47 %	30,000
Electronic Ballots	11,865	19,000	62.45 %	23,411
Dues Notice	9,807	42,825	22.90 %	34,806
Letters of Good Standing	1,173	2,300	51.01 %	2,210
Bar Membership Cards	6,405	8,800	72.79 %	10,671
50 Year Certificates	1,185	6,500	18.23 %	3,823
Membership Database Project	11,442	0	0.00 %	0
State Bar Committees	3,311	25,000	13.25 %	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	19,282	67,500	28.57 %	9,749
Investment Service Fees	35,362	29,000	121.94 %	14,525
Access to Justice/Pro Bono	601	2,500	24.06 %	2,500
<b>Total Other Expenses</b>	<b>\$ 310,748</b>	<b>\$ 903,925</b>	<b>34.38 %</b>	<b>\$ 648,423</b>

State Bar of Georgia  
Status and Use of Cash and Investments  
For the Current Period Ending January 31, 2024

<b>Cash and Investments - Bar</b>	<b>\$ 37,766,721</b>
<b>Less:</b>	
Georgia Bar Foundation Cash Included in Above Amount	(34,550)
CCLC Cash and Investments Included in Above Amount	<u>(5,168,837)</u>
<b>Net Cash Available for State Bar</b>	<b><u>32,563,333</u></b>
<b>Use of Cash:</b>	
<b>Less:</b>	
Board Designated - See Separate Schedule Attached	(9,021,602)
Donor Temporarily Restricted - See Separate Schedule Attached	(3,136,474)
<b>Total Board Designated and Temporarily Restricted</b>	<b><u>(12,158,076)</u></b>
<b>Other - Cash Allocated:</b>	
Collection of Outstanding Accounts Receivable	104,109
Payment of Accounts Payable	(449,469)
Payment of Accrued Vacation	(575,166)
Deferred Income	(168,680)
Payment of Credit Card Bill	(167,814)
Payment of Accrued Salary	(449,930)
Payment of Accrued Taxes	(34,420)
Payment of Other Accrued Expenses (primarily pension)	(353,795)
Payment to Client Security Fund	(2,949,430)
Operational Expenses for Remaining Bar Year	(8,094,624)
Additional Revenue for Bar Operations (Excluding Bar Center)	2,674,275
Net Amount to be paid to Related Entities	(421,567)
<b>Total Other - Cash Allocated</b>	<b><u>(10,886,511)</u></b>
<b>Estimated Cash and Investments - June 30, 2024 - Bar</b>	<b><u><u>9,518,746</u></u></b>
<b>Cash and Investments - Bar Center</b>	<b>59,062</b>
<b>Other Cash Allocated - Bar Center:</b>	
Collection of Outstanding Accounts Receivable	164,148
Payment of Accounts Payable	(25,447)
Payment of Other Accrued Expenses	(41,262)
Additional Expenses for Bar Center Operations	(203,058)
<b>Total Other - Cash Allocated - Bar Center</b>	<b><u>(105,619)</u></b>
<b>Estimated Cash and Investments June 30, 2024 - Bar Center</b>	<b><u><u>(46,557)</u></u></b>
<b>Total Estimated Cash Balance at June 30, 2024</b>	<b>\$ 9,472,189</b>

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 January 31, 2024**

	June 30, 2021	June 30, 2022	June 30, 2023	January 31, 2024
<b>Board Designated</b>				
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	153,017
Board Designated - Sections	3,431,439	3,677,156	3,664,312	4,045,582
YLD Meetings	116,852	88,929	77,999	73,003
<b>Total Board-Designated excludes ICLE</b>	<b>\$ 8,598,291</b>	<b>\$ 8,816,085</b>	<b>\$ 8,792,311</b>	<b>\$ 9,021,602</b>
<b>Donor Temporarily Restricted</b>				
Legislative	1,350,873	1,503,629	1,806,483	2,547,790
Law Related Education/Marshall fund	231,160	212,684	207,599	192,107
High School Mock Trial	15,482	18,617	15,299	17,243
Basics Program	119,460	115,094	116,951	119,802
Younger Lawyers	115,020	87,006	87,199	114,193
Lawyers Assistance	34,650	33,188	31,863	32,640
Georgia Diversity Program	55,807	46,528	13,555	10,617
Bar Media Conference	21,834	13,037	3,115	2,472
Justice Hunstein's Portrait	25,651	0	0	0
Law Day	6,516	6,266	6,212	6,363
Access to Justice	1,492	1,435	3,175	25,521
Promote Inclusion	13,285	8,842	8,701	11,556
State Bar of Georgia Foundation	3,134	0	0	40,290
Military Vet Pro Bono	14,807	14,240	14,481	14,833
Justice Portraits	0	1,006	1,022	1,048
<b>Total Donor Temporarily Restricted</b>	<b>\$ 2,009,171</b>	<b>\$ 2,061,572</b>	<b>\$ 2,315,655</b>	<b>\$ 3,136,475</b>
<b>Net Board Designated and Donor Temporarily Restricted</b>	<b>\$ 10,607,462</b>	<b>\$ 10,877,657</b>	<b>\$ 11,107,967</b>	<b>\$ 12,158,076</b>



**State Bar of Georgia**  
**Summary of Members and Voluntary Legislative Contributions**  
**With Contributions Paid Through January 31, 2024**

Dues Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	2023-24 Dues Season	2022-23 Dues Season	2021-22 Dues Season
	<u>49,695</u>	<u>49,400</u>	<u>48,965</u>
Active - Number Paid	42,554	42,018	41,572
Inactive - Number Paid	<u>8,224</u>	<u>8,341</u>	<u>8,558</u>
<b>Total Number of Members With Dues Paid</b>	<u><b>50,778</b></u>	<u><b>50,359</b></u>	<u><b>50,130</b></u>
<b>Percent of Total Members With Dues Paid</b>	<u><b>102.2%</b></u>	<u><b>101.9%</b></u>	<u><b>102.4%</b></u>
Number of Members Who Made A Contribution	<u>9,078</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>
<b>Total Contribution Amount</b>	<u><b>\$ 862,040</b></u>	<u><b>\$ 803,415</b></u>	<u><b>\$ 760,350</b></u>
<b>Average Amount Paid</b>	<u><b>\$ 95</b></u>	<u><b>\$ 95</b></u>	<u><b>\$ 93</b></u>

**Legislative Contribution Amounts by Dues Year**

2023 - 2024	<u>\$ 862,040</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 January 31, 2024**

Dues	2023-24 Dues Season	2022-23 Dues Season	2021-22 Dues Season
<b>Total Number of Members</b> at Apr 30 of Previous Bar year (active and inactive)	<b>49,695</b>	<b>49,400</b>	<b>48,965</b>
Active - Number Paid	42,554	42,018	41,572
Inactive - Number Paid	8,224	8,341	8,558
<b>Total Number of Members With Dues Paid</b>	<b>50,778</b>	<b>50,359</b>	<b>50,130</b>
<b>Percent of Total Members With Dues Paid</b>	<b>102.2%</b>	<b>101.9%</b>	<b>102.4%</b>
Number of Members Who Made A Contribution	3,569	3,539	3,647
Percent of Members Who Made A Contribution	7.0%	7.0%	7.3%
<b>Total Contribution Amount</b>	<b>\$ 489,955</b>	<b>\$ 483,850</b>	<b>\$ 478,287</b>
<b>Average Contribution Amount</b>	<b>\$ 137</b>	<b>\$ 137</b>	<b>\$ 131</b>

**GLSP Contribution Amounts by Dues Year**

2023 - 2024	<u>\$ 489,955</u>
2022 - 2023	<u>\$ 483,850</u>
2021 - 2022	<u>\$ 478,287</u>
2020 - 2021	<u>\$ 436,815</u>
2019 - 2020	<u>\$ 366,674</u>
2018 - 2019	<u>\$ 295,454</u>
2017 - 2018	<u>\$ 312,251</u>
2016 - 2017	<u>\$ 276,487</u>
2015 - 2016	<u>\$ 264,492</u>
2014 - 2015	<u>\$ 255,713</u>

*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 January 31, 2024**

<b>July 1, 2023 Beginning Balance</b>	<b>\$ 1,806,483</b>
<b>Income:</b>	
Interest and Dividend Income	17,146
Gain/Loss Investment Interest Allocation	51,026
Miscellaneous Income	859,720
<b>Total Income</b>	<b><u>927,892</u></b>
<b>Expenditures:</b>	
Staff and Contract Lobbyists	165,725
Grassroots Efforts	781
Travel	1,144
Shared Office Allocation	11,993
Miscellaneous	6,941
<b>Total Expenditures</b>	<b><u>186,584</u></b>
<b>Net Donor Temporarily Restricted Balance</b>	<b><u>\$ 2,547,790</u></b>



April 20, 2024

Dear Board of Governors,

I am honored to serve as the 77<sup>th</sup> President of the YLD to continue the great work of our division. The YLD continues to provide programming and events to support our members and their professional journeys. The Signature Fundraiser raised \$43,700, thanks to the generosity of our sponsors and donors. The Public Interest Internship Program received \$36,500 as this year's beneficiary to support future public interest attorneys who would otherwise have an unpaid internship. I extend my thanks to this year's Signature Fundraiser leaders: Carlos Fernandez, Virginia Josey, Kelsey Kicklighter, and LaToya Williams.

In March, the YLD hosted a judicial power hour luncheon in honor of International Women's Day with female jurists. The panel discussed mentorship for professional development and growth in our careers. Mentors play a crucial role – especially for first generation attorneys – to discuss professional goals and paths. The event was held at Akerman LLP in Atlanta to be central to our membership during this inaugural event, and hopefully will be an annual event to expand outside of Atlanta to reach more colleagues.

Today, the YLD will host a CLE focusing on mental health of lawyers and wellness to provide better legal services to our clients. The panel will feature Georgia Supreme Court Justice Shawn Ellen LaGrúa, Alina Lee, and Jeremy Burnette. I extend my thanks to our panelists for journeying up here to speak to our group about this important topic and how we can learn skills to better serve. You are welcome to join us for this event to be held immediately after today's meeting.

Our YLD Leadership Academy Class joins us today for the next installment in their program. If you see them around this weekend, please do say "hello" and answer any questions that they may have about the important work of the BOG and the Bar. It is a great way to build a bridge for future leaders in the profession and raise awareness.

We are currently in the Legal Food Frenzy competition period with an ambitious goal to raise \$1 million for our food banks across the state. The Legal Food Frenzy supports our food banks 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. This friendly competition is a fantastic way to contribute to our neighbors in need to thrive. Sadly, the food banks have experienced an increase in demand due to inflation and yet the donations have not kept pace. But we can do something. Together, we can reach the \$1 million goal for this year's Legal Food Frenzy.

#### **YLD COMMITTEES**

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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 since the last BOG meeting:

#### **YLD Community Service Projects Committee**

***Meredith "Merry" Layman and Mary Lynn Paulson, Co-Chairs***

Upcoming Events:

March Virtual Lunch and & Learn with United Way on Service Leadership for Lawyers

Feed Georgia Day in April with the Legal Food Frenzy Committee for a day of service at the food banks across Georgia to gear up for the Frenzy.

### **YLD Advocates for Students with Disabilities Committee**

***Krysta Grymes and Megan Glimmerveen, Co-Chairs***

The YLD Advocates for Students with Disabilities Committee held a Coffee & Conversations (10 am lunch & learn) on November 17th and are in the process of scheduling a similar spring event, likely in March or April. We are coordinating with potential speakers. More information to come soon.

### **YLD Estate Planning and Elder Law Committee**

***Laura Walsh, Chair***

The Estate and Elder Law Committee is partnering with the Gwinnett County and Walton County Bar Associations to host Wills Clinics for first responders. We are currently coordinating with the Gwinnett County Police Training Academy to host informational presentations on Wills and incapacity documents and will be setting follow up dates for those interested to meet with one of our attorneys to prepare basic Wills and incapacity documents for new recruits and for veteran officers. The Walton County Bar is working on coordinating a host location for these events and we expect to provide materials and attorneys. All dates will be forthcoming as we are still coordinating at this time.

We are also working to coordinate a CLE on the types of trusts and the tax implications of each. We are in talks with presenters and hope to have materials ready for CLE approval in the Spring.

### **YLD Inclusion in the Profession Committee**

***Megan Aubrey, Ashley Horton, Ashley O'Neil and Blair Weatherly, Co-Chairs***

We have two events in the works: One is a discussion of the Students for Fair Admissions v. Harvard case and the second is a meet and greet with Cobb's newest Judge, Sonya Brown, in conjunction with the Cobb YLD and YLD Family Law Section.

### **YLD Intrastate Moot Court Competition**

***Hannah Couch and Megan Howerter, Co-Chairs***

The annual Intrastate Moot Court Competition will be held March 15-16 at the State Bar of Georgia in Atlanta. All five Georgia law schools will be represented. Judges and sponsors for the competition have become increasingly difficult to find. Attorneys who volunteer to judge are given two hours of CLE credit.

### **YLD Judicial Law Clerk Committee**

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

The Judicial Law Clerk Committee is excited to collaborate with the Women in the Profession Committee to host a Power Hour Women in the Judiciary Luncheon, in celebration of International Women's Day on March 8. This event will focus on how mentorship can help lawyers become better practitioners and people in general.

For the remainder of the Bar year, we hope to host a one-hour CLE on legal writing, and (hopefully!) to collaborate with the Wellness Committee on another fun outdoorsy activity.

### **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 will take on Macon, Georgia for their third session learning about leadership in their local bars. We will hear 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 will complete their fourth session on attorney wellness. They will start off the day with sunrise yoga. There is a CLE on attorney wellness. They will kick the Big Bar's butt in kickball!

**YLD Legal Food Frenzy Committee**  
***Ashley Akins and Caroline Scalf, Co-Chairs***

Don't forget to donate to the 13th Annual Legal Food Frenzy! The competition runs from April 15-26, 2024. If your firm, office, or legal organization is not already registered, there is still time to participate! Visit [galegalfoodfrenzy.org](http://galegalfoodfrenzy.org) to register or donate.

The Legal Food Frenzy Committee has been hard at work planning this statewide fundraiser aimed to meet demand at our food banks during the summer months, when school-aged children are out of school and lack access to free or reduced lunches they receive during the school year. All funds raised stay local, benefiting your local food bank. We are asking all Georgia lawyers to donate the equivalent of one billable hour. Help us meet our \$1 Million goal to stock Georgia's food banks for the summer! Winners of the competition will be recognized at the Annual Meeting in Amelia Island.

**YLD Litigation Committee**  
***Franklin Gaddy, Nolan Hendricks and Lindsey Macon, Co-Chairs***

The Litigation Committee has been hosting a 5-part virtual CLE series, each one hour long. This format better accommodates rural attorneys and young attorneys who may not be able to attend a 5-hour in-person event. The five topics addressed are professionalism, trial preparation, wellness, legal writing, and oral advocacy. Our presenters are a mix of academics and practicing attorneys.

**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 are also hosting a kickball game at the YLD Spring Meeting on April 20. More details to come.

**YLD Women in the Profession Committee**  
***Cayton Chrisman, Farheen "Lina" Khan and Olivia Mercer, Co-Chairs***

We recently 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 have planned two events for International Women's Day on 3/8/24 - one will be the Power Hour Lunch with omen in the Judiciary at Akerman and the other will be 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 are also working on planning two more events this year – an in person and virtual lunch and learn in addition to a sporting event (Hawks or Atlanta United) where tickets will be subsidized (dates and locations TBD).

## **YLD AFFILIATES**

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

Macon Pickleball Fundraiser on Saturday, April 27 from 10:00 AM – 1:00 PM, at Rhythm & Rally, the YLD will be reserving courts and bringing snacks for Macon Pickleball players! A minimum \$20 required donation will go to 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 17<sup>th</sup> 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!

## **MEETINGS**

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### **Spring Meeting | April 19-21**

Brasstown Valley Resort & Spa  
Young Harris, Georgia

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

### **Annual Meeting | June 6-9**

Omni Amelia Island Resort  
Fernandina Beach, Florida

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

The YLD moves forward with the innovative ideas and planning of our leaders. As you can see, the YLD committees are hard at work planning for young lawyers around the state. I encourage all members across the state to get involved and come out to YLD events – it will pay dividends in your personal and professional development as a legal practitioner.

Sincerely,



Brittanie D. Browning  
2023-24 YLD President

## **Highlights of the Changes to the CLE Rules and Regulations:**

- 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 is the end of the compliance period. Eliminating the grace period does not mean that the lawyers will be suspended immediately at the end of the compliance period. The CLE Department has to notify lawyers of their noncompliance, and give time for the lawyer to make corrections, add courses not on their transcript and pay the CLE late fee for missing the deadline if that is the case. A limited amount of time after the deadline (not advertised) will be given for lawyers to complete their requirement and pay late fees before suspension.
- **CLE 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 of the exemptions to be in one place under Rule 8-104 (d). Previously the exemptions were spread out in three places: 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 of the definitions to the top (Rule 8-102).
- Changed the CLE late fee to \$200 after the compliance deadline (currently it is a \$100), but eliminated the additional CLE late fee of \$150 that is currently in the regulation.
- TILPP Rules and Regulations were all moved to be under one rule (new Rule 8-105).
- Changed “sponsor” to “provider” and changed “attorney” to “lawyer” throughout.



### **Change to the CLE Rules and Regulations under consideration:**

- Grant CLE hours for pro bono legal representation through an organized State Bar of Georgia Pro Bono program, an approved pro bono organization such as Georgia Legal Services, or any pro bono representation approved by the State Bar of Georgia Pro Bono Resource Center.

### **Evaluate Additional Policy Changes:**

- Consider faster suspensions of attorneys for CLE noncompliance (Q2 after the compliance deadline).
- Involve UPL Department to review and support enforcement of administrative suspension.
- Create reduced cost/free professionalism CLE courses to make available to members.
- Transfer reinstatement fee for suspended lawyers to the Supreme Court of Georgia.

**Part VIII – Continuing Legal Education**

1

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

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**Rule 8-101. Purpose.**

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It is of utmost importance to members of the Bar and to the public that ~~attorneys~~lawyers maintain

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their professional competence throughout their active practice of law. To that end, these rules

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establish the minimum requirements for continuing legal education.

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

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(a) “Accredited ~~sponsor~~provider” shall mean an organization whose entire continuing legal

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education program has been accredited by the Commission on Continuing Lawyer Competency.

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A specific, individual continuing legal education activity presented by such a ~~sponsor~~provider

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constitutes an approved legal education activity.

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(b) “Active member” shall include any person who is licensed to practice law in the State of

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Georgia and who is an active member of the State Bar of Georgia, ~~but shall not include the~~

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~~Governor, Lieutenant Governor, Speaker of the House of Representatives, other Constitutional~~

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~~Executive Officers elected statewide, members of the Georgia Senate and the Georgia House of~~

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~~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 (e)(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 (d)(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](http://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. ~~(e)Professionalism CLE includes, but is not limited~~  
44 to, courses on the duties of lawyers to the systems of justice, courts, public, clients, other  
45 lawyers, and the profession; the roles of lawyers as advocates, counselors, negotiators, problem  
46 solvers, and consensus builders; various forms of dispute resolution; pro bono service; the  
47 concept of a profession; history of the legal profession; comparison of the legal profession in  
48 different 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 ~~(Aa)~~ 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~~  
98 ~~a chair of the Standards of the Profession Committee which shall devise and~~  
99 ~~recommend policy to the Commission for the operation of the Transition Into Law~~  
100 ~~Practice Program. The Standards of the Profession Committee shall be composed~~  
101 ~~of the designee of the Executive Committee of the State Bar of Georgia, the chair~~  
102 ~~of the Board of Trustees of the Institute of Continuing Legal Education in Georgia~~  
103 ~~or his or her designee, the designee of the Chief Justice's Commission on~~  
104 ~~Professionalism, the designee of the President of the Young Lawyers Division of~~  
105 ~~the State Bar of Georgia, and any other member of the State Bar of Georgia~~

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*appointed to the Standards of the Profession Committee by the Chairperson of the Commission. In addition, the Standards of the Profession Committee of the Commission shall initially be composed of the members of the Standards of the Profession Committee of the State Bar of Georgia, who shall serve at the pleasure of the Chair of the Commission.*

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

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

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

**(Bb) Powers and Duties of the Board:**

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

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

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

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

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

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

- 128 (ev) To adopt ~~rules and~~ regulations ~~not inconsistent~~consistent with these Rules;
- 129 (fvi) To establish an office or offices and to employ such persons as the Commission  
130 deems necessary for the proper administration of these Rules and to delegate to them  
131 appropriate authority, subject to the review of the Commission;
- 132 (gvii) To report at least annually to the State Bar and to the Supreme Court the  
133 activities and recommendations of the Commission and the effectiveness of the  
134 enforcement of these Rules; and
- 135 (hviii) To report promptly to the Supreme Court any violation of these Rules.

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

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

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



150 (3) All parties are ~~welcomed~~welcome to appear before the Commission in writing.  
151 If the Commission determines that further information is needed, the parties may  
152 be invited to present their position or appeal in person or by telephone conference  
153 call.

154 (c) Finances:

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

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

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

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

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

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

175 (1) **Sponsor Provider Fee**. The ~~sponsor~~provider fee, a charge paid directly by the  
176 ~~sponsor~~provider, is required for all approved programs held within Georgia and  
177 for distance learning programs attended by Georgia ~~attorneys~~lawyers. It is  
178 optional for approved programs held elsewhere. ~~Sponsors~~Providers shall remit  
179 the fee, together with a list showing the names and Georgia Bar membership  
180 numbers of all Georgia attendees, within ~~thirty (30)~~ days after the program is  
181 held. ~~For courses held after June 30, 2019, the~~The fee is set at \$4.00 per  
182 approved CLE hour per active State Bar of Georgia member in attendance. It is  
183 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

187 (2) **Attendee Fee**. The attendee fee is paid by the Georgia ~~attorney~~lawyer who  
188 requests credit for a program for which no ~~sponsor~~provider fee was paid.  
189 ~~Attorneys should~~Members will be billed for their attendee fee on their online CLE  
190 transcript. Members must remit the fee for courses taken in the current year, by

191 ~~March 31 of the following year. For courses held after June 30, 2019, their fee~~  
192 ~~on or before the compliance period deadline. The fee is set at \$4.00 per approved~~  
193 ~~CLE hour for which the attorney/lawyer claims credit. The fee is computed as~~  
194 ~~shown in the 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

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

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

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

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

210 ~~(Aa)~~ Minimum Continuing Legal Education Requirement.

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

220 ~~(Bb)~~ Basic Legal Skills Requirement.

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

226 (2) Each active member, except those participating in the Georgia Transition Into Law  
227 Practice Program, shall complete a minimum of two hours of continuing legal education  
228 during each compliance period in an activity meeting the Professionalism CLE Guidelines  
229 of the Chief Justice's Commission on Professionalism. These hours are to be included in.

230 and not in addition to, the 18-hour requirement. Professionalism hours cannot be carried  
231 from one compliance period to the next compliance period.

232 (c) Requirements for Participation in Litigation.

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

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

242 **Trial CLE**

243 (1) Lead Counsel is defined as the lawyer who has primary responsibility for  
244 making all professional decisions in the handling of the case.

245 (2) The trial CLE rule applies to all members who appear as sole or lead counsel  
246 in the Superior or State Courts of Georgia in any contested civil case or in the  
247 trial of a criminal case. As a segment of the 18-hour biennial total CLE  
248 requirement, the CLE exemptions are applicable to the trial CLE rule. Likewise,  
249 the normal CLE deadlines are applicable to the trial CLE rule.

250 (3) Due to the “exclusively limited” requirement, trial CLE must be (a) clearly  
251 segregated and identified (b) a minimum of one hour in length, and (c) limited to  
252 one or more of the five listed subjects in order to receive trial CLE credit. The

253 “exclusively limited” requirement does not prohibit credit for a seminar that deals  
254 with one or more of the subjects stated in the Rule in the context of a particular  
255 field of trial practice, such as medical malpractice, personal injury defense,  
256 criminal cases, construction law, etc.

257 (4) CLE transcripts will reflect trial CLE in addition to legal ethics,  
258 professionalism and total CLE. However, the certification of compliance is made  
259 by the members when they make the court appearance described in the Rules. The  
260 sanctions for false certification or other non-compliance lie with the Court in  
261 which the lawyer appeared and with the State Disciplinary Board of the State Bar  
262 of Georgia. If the Commission receives allegations or evidence of a false  
263 certification or other non-compliance, a report thereof shall be forwarded to the  
264 State Disciplinary Board for any action it deems necessary.

265 (d) Exemptions.

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

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

274 (3) Any active member having reached the age of 70 prior to [EFFECTIVE DATE],  
275 remains exempt from the continuing legal education requirements of this Rule, including

276 the reporting requirements, unless the member notifies the Commission in writing that  
277 the member wishes to continue to be covered by the continuing legal education  
278 requirements of this Rule.

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

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

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

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

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

296 (9) Constitutional Executive Officers elected statewide. The Governor, Lieutenant  
297 Governor, Speaker of the House of Representatives, other members of the Georgia Senate  
298 and the Georgia House of Representatives, United States Senators and Representatives

299 shall be exempt from the continuing legal education but not the reporting requirements of  
300 this Rule.

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

302 (1) Inactive. To be fully exempt, the member must be inactive during the entire  
303 compliance period. An active lawyer who changes to inactive status does not have  
304 to complete the CLE requirement. If the lawyer changes back from inactive status  
305 to active status, the lawyer must complete any CLE hours past due from the  
306 previous compliance period. An inactive lawyer who changes to active status must  
307 also comply with the full 18 CLE hour requirement of the current compliance  
308 period.

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

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

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

314 (1) Except as set out in subsections (a) and (b) below, any newly admitted active  
315 member ~~admitted after June 30, 2005,~~ must complete in the year of ~~his or her~~their  
316 admission or in the next calendar year the State Bar of Georgia Transition Into Law  
317 Practice Program, ~~and such completion.~~ Completion of the Transition Into Law Practice  
318 Program shall satisfy the mandatory continuing legal education requirements for such



319 newly admitted active member for both the year of admission and the next succeeding  
320 year.

321 (ai) Any newly admitted active member, who has practiced law in another United  
322 States jurisdiction other than Georgia for two or more years immediately prior to  
323 admission to practice in this state, may be exempted from completing the Transition  
324 Into Law Practice Program upon the submission, within three months of admission,  
325 of an ~~affidavit~~ written notice to the Commission on Continuing Lawyer Competency.  
326 The ~~affidavit~~ written notice shall provide the date or dates of admission in every  
327 other state in which the member is admitted to practice and a declaration that the  
328 newly admitted member has been actively engaged in the practice of law for two or  
329 more years immediately prior to admission in this state. Upon submission of a  
330 satisfactory ~~affidavit~~ written notice, the newly admitted active member shall be  
331 required to complete the ~~annual twelve hours of instruction in approved continuing~~  
332 ~~legal education activity beginning at the start of the first full calendar year after the~~  
333 ~~date of admission: biennial CLE requirement~~. Any newly admitted active member,  
334 who has practiced law in another ~~United State~~ jurisdiction other than Georgia for  
335 two or more years immediately prior to admission to practice in this state and who  
336 does not timely file the required ~~affidavit~~ written notice, shall be required to  
337 complete the Transition Into Law Practice Program as set out above:  
338 ~~(b.)(ii)~~ Any newly admitted active member, who is a judicial law clerk or who begins  
339 a clerkship within three months of admission, shall not be subject to the requirement  
340 of completing the Transition Into Law Practice Program during the period of the  
341 judicial clerkship. Within thirty days of admission to the State Bar or within thirty

342 days of the beginning of the clerkship if said clerkship begins within three months  
343 after admission, the member shall provide written notice to the Commission on  
344 Continuing Lawyer Competency of the date of entry into the clerkship position.  
345 Judicial law clerks are required to complete the ~~annual twelve hours~~ biennial CLE  
346 requirement of regular instruction in approved continuing legal education courses  
347 ~~beginning at the start of the first full calendar year after the date of admission.~~  
348 Within ~~thirty~~ 30 days of the completion of the clerkship, the member shall provide  
349 written notice to the Commission on Continuing Lawyer Competency of the date of  
350 such completion. The member must complete, in the year the clerkship was  
351 concluded, or the next calendar year, the Georgia Transition Into Law Practice  
352 Program. Such completion of the Transition Into Law Practice Program shall satisfy  
353 the mandatory continuing legal education requirements for such member for both the  
354 year of completion of the clerkship and the next succeeding calendar year.

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

361 ~~(3) Each active member, except those participating in the Georgia Transition Into Law~~  
362 ~~Practice Program, shall complete a minimum of one (1) hour of continuing legal education~~  
363 ~~during each year in an activity of any sponsor approved by the Chief Justice's Commission~~  
364 ~~on Professionalism in the area of professionalism. This hour is to be included in, and not in~~

365 addition to, the twelve hour (12) requirement. If a member completes more than one (1)  
366 hour in professionalism during the calendar year, the excess professionalism credit may be  
367 carried forward up to a maximum of two (2) hours and applied to the professionalism  
368 requirement for succeeding years.

369 (4) Confidentiality of Proceedings.

370 (a) The confidentiality of all inquiries to, decisions of, and proceedings by the  
371 Transition Into Law Practice Program shall be respected. No disclosure of said  
372 inquiries, decisions and proceedings shall be made in the absence of the agreement  
373 of all participating.

374 (b)(2) Confidentiality of Proceedings.

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

377 (ii) Except as expressly permitted by these rules, no person connected with the  
378 Transitions Into lawLaw Practice Program operated under ~~the auspices of the~~  
379 ~~Standards of the Profession Committee of~~ the Commission on Continuing Lawyer  
380 Competency shall disclose any information concerning or comments on any  
381 proceeding under these ~~rules~~Rules.

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

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

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

392 (1) Definitions:

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394 ~~(a) Newly Admitted Active Member (a)~~ A “newly admitted active member”  
395 is one who becomes an active member of the State Bar of Georgia for the  
396 first time.

397 ~~(b) Transition Into Law Practice Program.~~ “Transition Into Law Practice  
398 Program” is a program ~~organized and defined by the Standards of the~~  
399 ~~Profession Committee~~ of the Commission on Continuing Lawyer  
400 Competency. Currently, the Transition Into Law Practice Program consists  
401 of ~~two~~ three components:

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

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(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.

~~(d) Enhanced Bridge the Gap. "Enhanced Bridge the Gap," is the(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.~~

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

~~(f)(d) Mentoring Plan of Activities and Experiences. The "Mentoring Plan of Activities and Experiences" is the plan that structures and guides the mentoring component of the Transition Into Law Practice Program. The~~

431 Plan shall be submitted to the Program in the year of admission or early  
432 in the next calendar year by the newly admitted active member and his or  
433 her mentor. The Plan must be completed in the year of admission or the  
434 next calendar year.

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

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

444 ~~*(4) Professionalism. The professionalism CLE requirement is distinct from, and*~~  
445 ~~*in addition to, the ethics CLE requirement. The one-hour professionalism*~~  
446 ~~*requirement is satisfied only by attending an activity of any sponsor approved by*~~  
447 ~~*the Chief Justice's Commission on Professionalism in the area of professionalism.*~~

448 Legal ethics sets forth the minimal standards of professional conduct required of a  
449 lawyer, professionalism encompasses what is more broadly expected of lawyers  
450 to serve both client and public good. Professionalism refers to the intersecting  
451 values of competence, civility, integrity, and commitment to the rule of law,  
452 justice, and the public good. The general goal of the professionalism CLE  
453 requirement is to create a forum in which lawyers, judges, and legal educators can

454 explore and reflect upon the meaning and goals of professionalism in  
455 contemporary legal practice. The professionalism CLE sessions should encourage  
456 lawyers toward conduct that preserves and strengthens the dignity, honor, and  
457 integrity of the legal profession. *Professionalism CLE includes, but is not limited*  
458 *to, courses on (a) the duties of lawyers to the systems of justice, courts, public,*  
459 *clients, other lawyers, and the profession, (b) the roles of lawyers as advocates,*  
460 *counselors, negotiators, problem solvers, and consensus builders, (c) various*  
461 *forms of dispute resolution, (d) pro bono service, (e) the concept of a profession,*  
462 *(f) history of the legal profession, (g) comparison of the legal profession in*  
463 *different nations' systems of advocacy, and (h) jurisprudence or philosophy of*  
464 *law.*

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

468 *(6)(2) **Approval of Mentors; Minimum Qualifications.***

469 *Minimum Qualifications for Mentors.* A volunteer mentor shall meet the following  
470 *Minimum Qualifications:*

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

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

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

478 ~~(iv)(d)~~ Disciplinary Action. Never have received the sanction of  
479 disbarment or suspension from the practice of law in any jurisdiction, nor  
480 have voluntarily surrendered his or her license to practice law for the  
481 purpose of disposing with a pending disciplinary proceeding in any  
482 jurisdiction. During the ~~ten(10)~~ years preceding the nomination as  
483 mentor, the prospective mentor shall not have been otherwise sanctioned  
484 by the pertinent entity governing the admission and practice of law in any  
485 jurisdiction. The term “sanctioned” means subjected to disciplinary  
486 action. (For example, in Georgia, “sanctioned” currently means any of  
487 the levels of discipline whether public or confidential listed in State Bar of  
488 Georgia Rule 4-102(b) (i.e., Disbarment; Suspension; Public Reprimand;  
489 State Disciplinary Review Board Reprimand; State Disciplinary Board  
490 Reprimand; Formal Admonition); ~~Rule 8-107(C) (i.e., Administrative~~  
491 ~~Suspension for deficiency in continuing legal education hours);~~ or State  
492 Bar Bylaws Article I, Section 4, Item 2 (i.e., Failure to Register with State  
493 Bar of Georgia within one year upon eligibility)). Nominations of  
494 individuals having formal complaint-(s) pending before the Supreme Court  
495 of Georgia will be deferred until the final disposition of the formal  
496 complaint-(s); and,



497 ~~(e)~~ Court-ordered Disciplinary Action. During the ~~ten~~(10) years  
498 preceding the nomination as mentor, the prospective mentor shall not have  
499 been the subject of a written order issued by a court of competent  
500 jurisdiction that prohibits or otherwise limits the prospective mentor from  
501 practicing before that court or class of courts. A directive, request or order  
502 by a judge of a court requesting or directing that ~~an attorney~~a lawyer  
503 employed by an agency of government or a legal aid organization who is  
504 assigned to handle cases before that judge be transferred or reassigned to  
505 other duties or another courtroom does not constitute court-ordered  
506 disciplinary action under this part. A prospective mentor who is or has  
507 within the preceding ~~ten~~(10) years been the subject of such a written  
508 order may petition the Commission on Continuing Lawyer Competency  
509 (the "Commission") for a waiver of this requirement. After review of the  
510 facts and circumstances which led to the entry of such order, the  
511 Commission may, upon good cause shown, grant such waiver if the  
512 prospective mentor is otherwise qualified to be a mentor.

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

516 ~~(C) Exemptions.~~

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

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

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

~~(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,~~

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

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

~~(2) Each active member who appears as sole or lead counsel in the Superior or State Courts of Georgia in any contested civil case or in the trial of a criminal case in 1990 or in any subsequent calendar year, shall complete for such year a minimum of three (3) hours of continuing legal education activity in the area of trial practice. A trial practice CLE activity is one exclusively limited to one or more of the following subjects: evidence, civil practice and procedure, criminal practice and procedure, ethics and professionalism in litigation, or trial advocacy. These hours are to be included in, and not in addition to, the 12 hour (twelve) requirement. If a member~~

566 completes more than three (3) trial practice hours, the excess trial practice credit may be carried  
567 forward and applied to the trial practice requirement for the succeeding year only.

568 **Regulations**

569 ***Trial MCLE***

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

572 *(2) The trial MCLE rule applies to all members who appear as sole or lead*  
573 *counsel in the Superior or State Courts of Georgia in any contested civil case or*  
574 *in the trial of a criminal case. As a segment of the 12-hour (twelve) total MCLE*  
575 *requirement, the MCLE exemptions are applicable to the trial MCLE rule.*

576 *Likewise, the normal MCLE deadlines (December 31st and approved deficiency*  
577 *plan extensions) are applicable to the trial MCLE rule.*

578 *(3) Due to the “exclusively limited” requirement, trial CLE must be (a) clearly*  
579 *segregated and identified (b) a minimum of one (1) hour in length, and (c) limited*  
580 *to one or more of the five (5) listed subjects in order to receive trial CLE credit.*

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

582 *The “exclusively limited” requirement does not prohibit credit for a seminar that*  
583 *deals with one or more of the subjects stated in the Rule in the context of a*  
584 *particular field of trial practice, such as medical malpractice, personal injury*  
585 *defense, criminal cases, construction law, etc.*

586 *(4) MCLE transcripts will reflect trial CLE in addition to ethics and total CLE.*

587 *However, the certification of compliance is made by the members when they make*  
588 *the court appearance described in the Rules. The sanctions for false certification*

589 ~~or other non-compliance lie with the Court in which the lawyer appeared and~~  
590 ~~with the State Disciplinary Board of the State Bar of Georgia. If the Commission~~  
591 ~~receives allegations or evidence of a false certification or other non-compliance,~~  
592 ~~a report thereof shall be forwarded to the State Disciplinary Board for any action~~  
593 ~~it deems necessary.~~

594 ~~(5)~~ For participants in the Transition Into Law Practice Program who wish to  
595 appear as sole or lead counsel in the Superior or State Courts of Georgia in any  
596 contested civil case or in the trial of a criminal case, the mentors and beginning  
597 lawyers shall devise five ~~(5)~~ mandatory Advocacy Experiences tailored to the  
598 practices of the beginning lawyers. The following are examples:

599 ~~i.~~ (a) An actual or simulated deposition of a witness or adverse party in a  
600 civil action; ~~i.~~

601 ~~ii.~~ (b) An actual or simulated jury trial in a civil or criminal case in either  
602 a state or federal court; ~~ii.~~

603 ~~iii.~~ (c) An actual or simulated nonjury trial or evidentiary hearing in a  
604 state or federal court; ~~iii.~~

605 ~~iv.~~ (d) An actual or webcast of an appellate argument in the Supreme Court  
606 of Georgia, the Court of Appeals of Georgia, or a United States Circuit  
607 Court of Appeals; ~~iv.~~ ~~and~~

608 ~~v.~~ (e) An actual or simulated mediation.

609 Other advocacy experiences may be selected by Mentors to comply with Rule 8-  
610 ~~104(D)~~ 105(b).

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

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

615 A member whose record contains credit for unearned hours shall report corrections ~~on or~~  
616 ~~before January 31st~~within 30 days following the end of the compliance period. A member  
617 whose record fails to include credit for earned hours ~~may~~must report corrections ~~on or~~  
618 ~~before January 31st~~within 30 days following the end of the compliance period.

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

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

623

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

625 **(1) Computation Formula.** *CLE hours shall be computed by the following*

626 *formula: \_*

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

60

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

632 (3) **Teaching.** For their contribution to the legal profession, attorneys/lawyers  
633 may earn credit for non-paid teaching in an approved continuing legal education  
634 activity. Presentations accompanied by thorough, high quality, readable, and  
635 carefully prepared written materials will qualify for CLE credit on the basis of  
636 three ~~(3)~~ credits for each hour of presentation. Repeat presentations qualify for  
637 one-half of the credits available for the initial presentation. A speaker may elect  
638 to split the teaching credit with another attorney/lawyer who, under the speaker's  
639 supervision, prepares the written materials. If the intended speaker prepares the  
640 written materials and cannot speak due to health problems, emergency or  
641 required court appearance, the teaching credit will be split between the speaker  
642 and the substituted speaker at the request of either. Should neither make such  
643 request, the credit will be given to the actual speaker.

644 (4) **Author.** The CCLC may award up to a maximum of ~~(6)~~six hours of CLE credit  
645 for the authoring of legal articles upon the written certification by the  
646 attorney/lawyer to the CCLC of (a) the amount of time expended in researching  
647 and writing the article and (b) the submission of a copy thereof to the CCLC for  
648 review, provided that ~~(1)~~ the article or treatise's content and quality are  
649 consistent with the purposes of CLE, ~~(2)~~ it is published in a recognized

650 publication which is primarily directed at lawyers; ~~and (3)~~ the project was not  
651 done in the ordinary course of the practice of law, the performance of judicial  
652 duties, or other regular employment. If co-authors are involved, the credit may be  
653 divided on the basis of each ~~attorney's~~lawyer's contribution. ~~An attorney~~A lawyer  
654 requesting author credit shall pay the normal attendee fee.

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

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

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

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

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

672 (4) Continuing legal education materials are to be prepared, and activities conducted, by



673 an individual or group qualified by practical or academic experience;  
674 (5) Thorough, high quality, and carefully prepared written materials should be distributed  
675 to all attendees at or before the time the course is presented. It is recognized that written  
676 materials are not suitable or readily available for some types of subjects; the absence of  
677 written materials for distribution, should, however, be the exception and not the rule (See  
678 CCLC Regulation 8-107(b)(10));  
679 (6) The Commission will review requests from CLE providers for accredited provider  
680 status. Any provider desiring to be approved for accredited provider status must file an  
681 application with the Commission with such program material and information as the  
682 Commission may require;  
683 (7) Any accredited provider must keep and maintain attendance records of each  
684 continuing legal education program sponsored by it, which shall be furnished to the  
685 Commission upon its request.

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

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

692 *(2) **Law School Courses.** Courses offered by an ABA accredited law school shall*  
693 *receive credit on the basis of one-half hour of CLE credit for each 60 minutes of*  
694 *actual instruction. Success on an examination is not required for credit and the*  
695 *course may be attended on an audit (not for academic credit) basis. No credit is*

696 available for law school courses attended prior to becoming an active member of  
697 the State Bar of Georgia. Law courses in schools other than law schools will not  
698 qualify.

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

702 **(4) Approval.** CLE activities may be approved upon the written application of  
703 providers on an individual program basis, providers on an accredited provider  
704 basis, or lawyers on an individual program basis. In addition, the CCLC may  
705 approve both CLE activities and accredited providers on its own motion, on  
706 either an individual program or accredited provider basis. All applications for  
707 CLE course approval shall:

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

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

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

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

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

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

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

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

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

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

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

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

738 (a) Complete such application as the CCLC requires;

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

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(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;

(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, through the online provider portal the following:

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

(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

762 Continuing Education of the State Bar of Georgia. At the sole discretion of the  
763 CCLC, an accredited provider may be required to place a disclaimer upon any  
764 communication with members of the State Bar which disclaims the accredited  
765 provider from any connection with the State Bar or CCLC. Such disclaimer, if  
766 required, shall be approved by the CCLC.

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

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

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

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

780 (b) All In-House CLE activities must be open to observation by members  
781 of the CCLC and its staff:

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

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

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

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

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

803 Examples of written materials which alone would not qualify include, but are not  
804 limited to, the following: (1) topical outlines; (2) topical outlines with case  
805 citations; (3) copies of statutes or cases (unless accompanied by qualifying

806 explanatory text); (4) copies of leases, contracts, wills and other legal instruments  
807 (unless accompanied by qualifying explanatory text).

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

810 *It is recognized that on rare occasions, or for unique topics, preparation of*  
811 *written materials may not be possible or appropriate. Thus, for example, where*  
812 *the particular law which is the topic of a seminar changes dramatically*  
813 *immediately before the seminar is given, the prepared materials may be rendered*  
814 *obsolete. Likewise, written materials may not always be suitable for a clinical*  
815 *program on oral advocacy. In these exceptional circumstances, the requirements*  
816 *of this regulation may not apply. If there is any question as to whether written*  
817 *materials are required for a given topic, the provider is advised to contact the*  
818 *Commission in advance of the seminar.*

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

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

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

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

835 (14) **Practice Management CLE.** (CLE activities relating to the development and  
836 management of a law practice including client relations) Practice Management  
837 CLE includes, but is not limited to, those activities which (1) teach lawyers how to  
838 organize and manage their law practices so as to promote the efficient,  
839 economical and competent delivery of legal services; and (2) teach lawyers how  
840 to create and maintain good client relations consistent with existing ethical and  
841 professional guidelines so as to eliminate malpractice claims and bar grievances  
842 while improving service to the client and the public image of the profession.  
843 Practice Management CLE is consistent with Accreditation Standards 1 and 2  
844 where such programs meet the other criteria set forth herein.

845 (15) Lawyer Wellness. Wellness and mental health issues, including stress,  
846 anxiety, substance use, depression and suicide, materially affect lawyers'  
847 competency to practice law and their lives. CLE credit as required under Rule 8-  
848 104(Aa) is available for seminars on these and similar quality of life and law  
849 practice topics. To receive CLE credit these wellness topics must be discussed in  
850 the context of the legal profession and the effects on the quality of the legal  
851 services the lawyer is able to provide. Presentations approved may include stress



852 management in the context of work/life balance in the practice of law, signs of  
853 substance abuse or mental health issues in oneself or a colleague within the legal  
854 community, lawyer assistance programs and other topics that are focused on the  
855 impact of substance abuse, mental health issues or stress management on lawyers  
856 and judges. CLE credit will not be given to presentations which solely focus on  
857 personal stress reduction techniques such as breathing exercises, meditation and  
858 yoga. In addition, professionalism CLE credit is available when these topics ~~are~~  
859 ~~presented in a professionalism program approved by~~meet the Chief Justice's  
860 Commission on Professionalism- current professionalism CLE guidelines  
861 ([cjcpga.org/professionalism-cle-guidelines](http://cjcpga.org/professionalism-cle-guidelines)).  
862 ~~(16~~**(15) Distance Learning CLE.** In addition to traditional approved continuing  
863 legal education activities attended live and in-person by groups of  
864 ~~attorneys~~lawyers, distance learning delivery formats are acceptable provided they  
865 are designed specifically as organized programs of learning and meet the other  
866 accreditation standards set out in these Rules and Regulations. Examples of  
867 qualifying distance learning formats include: live CLE activities presented via  
868 video or audio replays of live CLE activities; computer-based CLE activities, on  
869 demand CLE programs, teleconference CLE programs and live CLE  
870 webcasts/webinars. ~~Attorneys~~Lawyers can earn all or any portion of their CLE  
871 requirement through Distance Learning CLE programs.

872 ~~(16~~**(17) Interactivity Requirement for Approval of Distance Learning CLE.**  
873 ~~(Effective January 2022)~~ CLE ~~sponsors~~providers are reminded that CCLC  
874 emphasizes the importance of engagement in distance learning programming. The

875 CCLC recognizes high levels of interaction that can be achieved through  
876 ubiquitous video streaming services and encourages the use of these technologies  
877 to maximum the educational experience.

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

884 ~~The Due to changes in technology, the CCLC doesis not undertake the~~  
885 ~~indeterminate task of issuing a precise definitionsdefinition of interactivity.~~  
886 Specific implementation of all of the above is not required, but incorporation of  
887 technology to ensure a positive and interactive educational experience is  
888 required.

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

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

891 (1) Members ~~who are deficient in~~must complete their CLE requirement, fees, or other  
892 requirements ~~at~~by the end of ~~a calendar year are entitled to an automatic grace~~the  
893 biennial compliance period ~~until March 31st of the succeeding year to make up their~~  
894 ~~deficiency. This does not change the requirement that.~~ The compliance period deadline  
895 date is the same for all members ~~file their annual report by January 31st.~~ The CLE

896 compliance period and deadline date are listed on the State Bar of Georgia's website and  
897 are also shown on each members' online CLE transcript.

898 (2) Members who remain deficient on April 1st following the end of the **succeeding**  
899 **year compliance period** shall pay a CLE late **CLE** fee in an amount to be set by the  
900 Commission.

901 **(Bb)** Noncompliance

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

908 (2) Hearing. Members may contest their noncompliance by requesting a hearing before the  
909 Commission. The request should be in writing, contain the reasons for their contest, and be  
910 made within 60 days of the date of the notice of noncompliance **mailed sent** by the  
911 Commission. The Commission shall hear the matter at its next meeting. No action will be  
912 taken while hearings are pending. All decisions by the Commission are final.

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

916 (4) Supreme Court of Georgia Action. Upon receipt from the Commission of a report of  
917 noncompliance, the Supreme Court of Georgia shall enter an order it deems appropriate

918 including an allowance of additional time for compliance or summary suspension from the  
919 practice of law until further order of the Court.

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

921 (1) ~~CLE Late CLE Fee: An attorney~~ *A lawyer* who does not complete the  
922 ~~annual, minimum~~ CLE requirement ~~until after March 31st~~ *by the end* of the  
923 ~~following year~~ *compliance period* shall pay a ~~\$100~~ *200* CLE late CLE fee. This  
924 ~~late fee shall be due April 1st. Thereafter, if the attorney's CLE deficiency is not~~  
925 ~~corrected by September 30th~~ *30 days following the end of the same year, or if the*  
926 ~~\$100 late CLE fee remains unpaid on that September 30th, an additional \$150~~  
927 ~~late fee shall be due immediately~~ *compliance period*.

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

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

932 **CCLC Regulations Rule 8-109**

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

- 938 (2) ~~(2)~~ **Policy.** Reinstatement will be granted only upon a showing that the  
939 member has attended sufficient approved CLE activity to make-up the  
940 deficiencies causing the suspension and all deficiencies in subsequent  
941 ~~years-compliance periods.~~ Also, the member's progress toward meeting  
942 ~~MCLECLE~~ requirements in the ~~calendar year~~ current compliance period in  
943 which the reinstatement is requested will be included as information in the  
944 CCLC's motion to the Supreme Court.
- 945 (3) ~~(3)~~ **Motion.** The motion for reinstatement shall list the CLE activities by  
946 course number, ~~sponsor~~ provider, location, dates and hours. It shall be  
947 accompanied by proof of attendance, any attendee fee that may be due, and  
948 the reinstatement fee.
- 949 (4) **CCLC Action.** If the suspended member is found to be in compliance, the  
950 CCLC will file a motion with the Supreme Court of Georgia setting forth the  
951 facts along with its recommendation which may or may not be that  
952 reinstatement be granted. The Supreme Court will make the final decision on  
953 reinstatement. If the suspended member is found to not be in compliance, the  
954 CCLC will inform ~~him~~ them of the curative actions necessary to cure ~~his~~ their  
955 deficiencies.

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

957 Records of the Commission are not confidential.

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

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

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

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

## 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](http://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 cannot be carried  
190 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 cannot be carried  
196 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 serves as the sole or lead counsel in a  
199 state, county, municipal, or federal court, or any other tribunal must complete a minimum of  
200 three hours of continuing legal education focused on trial practice. A trial practice CLE activity is  
201 one exclusively limited to one or more of the following subjects: evidence, civil practice and  
202 procedure, criminal practice and procedure, legal ethics and professionalism in litigation, or trial  
203 advocacy. These hours are to be included in, and not in addition to, the 18-hour biennial CLE



204 requirement. Trial CLE hours cannot be carried from one compliance period to the next  
205 compliance period.

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

207 ***Trial CLE***

208 *(1) Lead Counsel is defined as the lawyer who has primary responsibility for*  
209 *making all professional decisions in the handling of the case.*

210 *(2) The trial CLE rule applies to all members who appear as sole or lead counsel*  
211 *in the Superior or State Courts of Georgia in any contested civil case or in the*  
212 *trial of a criminal case. As a segment of the 18-hour biennial total CLE*  
213 *requirement, the CLE exemptions are applicable to the trial CLE rule. Likewise,*  
214 *the normal CLE deadlines are applicable to the trial CLE rule.*

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

222 *(4) CLE transcripts will reflect trial CLE in addition to legal ethics,*  
223 *professionalism and total CLE. However, the certification of compliance is made*  
224 *by the members when they make the court appearance described in the Rules. The*  
225 *sanctions for false certification or other non-compliance lie with the Court in*  
226 *which the lawyer appeared and with the State Disciplinary Board of the State Bar*

227 *of Georgia. If the Commission receives allegations or evidence of a false*  
228 *certification or other non-compliance, a report thereof shall be forwarded to the*  
229 *State Disciplinary Board for any action it deems necessary.*

230 (d) Exemptions.

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

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

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

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

248 (5) Active members admitted to another mandatory CLE state and not residing in  
249 Georgia, may satisfy all Georgia requirements by (a) meeting the CLE requirements of

250 the resident state, (b) affirming each compliance period on their online CLE transcript,  
251 and (c) paying the Georgia CLE fees normally paid by active members residing in  
252 Georgia.

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

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

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

261 (9) Constitutional Executive Officers elected statewide. The Governor, Lieutenant  
262 Governor, Speaker of the House of Representatives, other members of the Georgia Senate  
263 and the Georgia House of Representatives, United States Senators and Representatives  
264 shall be exempt from the continuing legal education but not the reporting requirements of  
265 this Rule.

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

267 *(1) Inactive. To be fully exempt, the member must be inactive during the entire*  
268 *compliance period. An active lawyer who changes to inactive status does not have*  
269 *to complete the CLE requirement. If the lawyer changes back from inactive status*  
270 *to active status, the lawyer must complete any CLE hours past due from the*  
271 *previous compliance period. An inactive lawyer who changes to active status must*  
272 *also comply with the full 18 CLE hour requirement of the current compliance*

273 *period.*

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

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

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

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

285 (i) Any newly admitted active member, who has practiced law in another United  
286 States jurisdiction other than Georgia for two or more years immediately prior to  
287 admission to practice in this state, may be exempted from completing the Transition  
288 Into Law Practice Program upon the submission, within three months of admission,  
289 of written notice to the Commission on Continuing Lawyer Competency. The  
290 written notice shall provide the date or dates of admission in every other state in  
291 which the member is admitted to practice and a declaration that the newly admitted  
292 member has been actively engaged in the practice of law for two or more years

293 immediately prior to admission in this state. Upon submission of a satisfactory  
294 written notice, the newly admitted active member shall be required to complete the  
295 biennial CLE requirement. Any newly admitted active member, who has practiced  
296 law in another jurisdiction other than Georgia for two or more years immediately  
297 prior to admission to practice in this state and who does not timely file the required  
298 written notice, shall be required to complete the Transition Into Law Practice  
299 Program as set out above.(ii) Any newly admitted active member, who is a judicial  
300 law clerk or who begins a clerkship within three months of admission, shall not be  
301 subject to the requirement of completing the Transition Into Law Practice Program  
302 during the period of the judicial clerkship. Within thirty days of admission to the  
303 State Bar or within thirty days of the beginning of the clerkship if said clerkship  
304 begins within three months after admission, the member shall provide written notice  
305 to the Commission on Continuing Lawyer Competency of the date of entry into the  
306 clerkship position. Judicial law clerks are required to complete the biennial CLE  
307 requirement of regular instruction in approved continuing legal education courses.  
308 Within 30 days of the completion of the clerkship, the member shall provide written  
309 notice to the Commission on Continuing Lawyer Competency of the date of such  
310 completion. The member must complete, in the year the clerkship was concluded, or  
311 the next calendar year, the Georgia Transition Into Law Practice Program. Such  
312 completion of the Transition Into Law Practice Program shall satisfy the mandatory  
313 continuing legal education requirements for such member for both the year of  
314 completion of the clerkship and the next succeeding calendar year.

315 (2) Confidentiality of Proceedings.

- 316 (i) All records of the Transition Into Law Practice Program are confidential. No  
317 disclosure shall be made without a waiver in writing by all parties.
- 318 (ii) Except as expressly permitted by these rules, no person connected with the  
319 Transitions Into Law Practice Program operated under the Commission on  
320 Continuing Lawyer Competency shall disclose any information concerning or  
321 comments on any proceeding under these Rules.
- 322 (iii) The Transition Into Law Practice Program operated under the Commission on  
323 Continuing Lawyer Competency may reveal private records when required by law,  
324 court rule, or court order.
- 325 (iv) Any records maintained by the Transition Into Law Practice Program operated  
326 under the Commission on Continuing Lawyer Competency, as provided herein, shall  
327 be available to Counsel for the State Bar only in the event the State Bar or any  
328 department thereof receives a discovery request or properly executed subpoena  
329 requesting such records.

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

331 *(1) Definitions*

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

334 *(b) Transition Into Law Practice Program. “Transition Into Law Practice*  
335 *Program” is a program of the Commission on Continuing Lawyer*  
336 *Competency. Currently, the Transition Into Law Practice Program consists*  
337 *of three components:*

338 (i) Attendance at the Beginning Lawyers Program of the Institute  
339 of Continuing Legal Education of the State Bar of Georgia, or a  
340 comparable program approved by the Commission on Continuing  
341 Lawyer Competency.

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

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

345 (c) Beginning Lawyers Program is a six-hour continuing legal education  
346 program of the Transition Into Law Practice Program that is delivered by  
347 the Institute of Continuing Legal Education of the State Bar of Georgia  
348 either in a group setting or in a distance learning format. New lawyers  
349 employed as prosecutors and public defenders who attend approved  
350 programming are not required to attend the Beginning Lawyers Program.

351 (d) Mentoring Plan of Activities and Experiences. The "Mentoring Plan of  
352 Activities and Experiences" is the plan that structures and guides the  
353 mentoring component of the Transition Into Law Practice Program. The  
354 Plan shall be submitted to the Program in the year of admission or early  
355 in the next calendar year by the newly admitted active member and his or  
356 her mentor. The Plan must be completed in the year of admission or the  
357 next calendar year.

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

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

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

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

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

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



383 *pending before the Supreme Court of Georgia will be deferred until the*  
384 *final disposition of the formal complaint(s); and,*  
385 *(e) Court-ordered Disciplinary Action. During the 10 years preceding the*  
386 *nomination as mentor, the prospective mentor shall not have been the*  
387 *subject of a written order issued by a court of competent jurisdiction that*  
388 *prohibits or otherwise limits the prospective mentor from practicing before*  
389 *that court or class of courts. A directive, request or order by a judge of a*  
390 *court requesting or directing that a lawyer employed by an agency of*  
391 *government or a legal aid organization who is assigned to handle cases*  
392 *before that judge be transferred or reassigned to other duties or another*  
393 *courtroom does not constitute court-ordered disciplinary action under this*  
394 *part. A prospective mentor who is or has within the preceding 10 years*  
395 *been the subject of such a written order may petition the Commission on*  
396 *Continuing Lawyer Competency (the “Commission”) for a waiver of this*  
397 *requirement. After review of the facts and circumstances which led to the*  
398 *entry of such order, the Commission may, upon good cause shown, grant*  
399 *such waiver if the prospective mentor is otherwise qualified to be a*  
400 *mentor.*

401 (b) Requirements for Participation in Litigation for newly admitted active members.

402 Prior to appearing as sole or lead counsel in the Superior or State Courts of Georgia in any  
403 contested civil case or in the trial of a criminal case, all participants in the Transition Into Law  
404 Practice Program shall complete the mandatory Advocacy Experiences of the Transition Into  
405 Law Practice Program. The mandatory Advocacy Experiences shall be completed as part of the

406 Mentoring Plan of Activities and Experiences, except that up to three of the five mandatory  
407 Advocacy Experiences may be obtained after completion of 60% of the credit hours required for  
408 law school graduation and prior to admission to practice. At least two of the mandatory  
409 Advocacy Experiences must be completed as part of the Mentoring Plan of Activities and  
410 Experiences.

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

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

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

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

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

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

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

427 *Other advocacy experiences may be selected by Mentors to comply with Rule 8-*  
428 *105(b).*

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

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

432 A member whose record contains credit for unearned hours shall report corrections within 30  
433 days following the end of the compliance period. A member whose record fails to include credit  
434 for earned hours must report corrections within 30 days following the end of the compliance  
435 period.

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

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

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

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

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

443 (2) ***Actual Instruction.*** *Only legal education shall be included in computing the*  
444 *total hours of actual instruction. The following shall not be included: (a)*

445 introductory remarks, (b) breaks, (c) business meetings, (d) questions and answer  
446 sessions at a ratio in excess of 10 minutes per CLE hour, (e) programs of less  
447 than 60 minutes in length.

448 (3) **Teaching.** For their contribution to the legal profession, lawyers may earn  
449 credit for non-paid teaching in an approved continuing legal education activity.  
450 Presentations accompanied by thorough, high quality, readable, and carefully  
451 prepared written materials will qualify for CLE credit on the basis of three credits  
452 for each hour of presentation. Repeat presentations qualify for one-half of the  
453 credits available for the initial presentation. A speaker may elect to split the  
454 teaching credit with another lawyer who, under the speaker's supervision,  
455 prepares the written materials. If the intended speaker prepares the written  
456 materials and cannot speak due to health problems, emergency or required court  
457 appearance, the teaching credit will be split between the speaker and the  
458 substituted speaker at the request of either. Should neither make such request, the  
459 credit will be given to the actual speaker.

460 (4) **Author.** The CCLC may award up to a maximum of six hours of CLE credit  
461 for the authoring of legal articles upon the written certification by the lawyer to  
462 the CCLC of (a) the amount of time expended in researching and writing the  
463 article and (b) the submission of a copy thereof to the CCLC for review, provided  
464 that the article or treatise's content and quality are consistent with the purposes  
465 of CLE; it is published in a recognized publication which is primarily directed at  
466 lawyers; and the project was not done in the ordinary course of the practice of  
467 law, the performance of judicial duties, or other regular employment. If co-

468 *authors are involved, the credit may be divided on the basis of each lawyer's*  
469 *contribution. A lawyer requesting author credit shall pay the normal attendee fee.*  
470 *(5) Organizer. The chairperson who organizes an approved CLE activity and who*  
471 *does not make a formal oral presentation therein shall qualify for CLE credit as if*  
472 *he or she had made a one-hour presentation. If co-chairpersons are involved, the*  
473 *credit shall be divided on the basis of each lawyers' contribution. A lawyer*  
474 *requesting this type of credit should pay, or arrange for the provider to pay, the*  
475 *normal attendee fee.*

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

- 478 (1) Activities shall have significant intellectual or practical content, and the primary  
479 objective shall be to increase the participant's professional competence as a lawyer;
- 480 (2) Activities shall constitute an organized program of learning dealing with matters  
481 directly related to the practice of law, professional responsibility or ethical obligations of  
482 lawyers;
- 483 (3) Credit may be given for continuing legal education activities where (a) live  
484 instruction is used or (b) by using distance learning programs that meet interactive,  
485 technical and accreditation standards set forth by the Commission.
- 486 (4) Continuing legal education materials are to be prepared, and activities conducted, by  
487 an individual or group qualified by practical or academic experience;
- 488 (5) Thorough, high quality, and carefully prepared written materials should be distributed  
489 to all attendees at or before the time the course is presented. It is recognized that written  
490 materials are not suitable or readily available for some types of subjects; the absence of

491 written materials for distribution, should, however, be the exception and not the rule (See  
492 CCLC Regulation 8-107(b)(10));

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

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

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

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

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

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

516                   (4) **Approval.** CLE activities may be approved upon the written application of  
517 providers on an individual program basis, providers on an accredited provider  
518 basis, or lawyers on an individual program basis. In addition, the CCLC may  
519 approve both CLE activities and accredited providers on its own motion, on  
520 either an individual program or accredited provider basis. All applications for  
521 CLE course approval shall:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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



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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

624 *It is recognized that on rare occasions, or for unique topics, preparation of*  
625 *written materials may not be possible or appropriate. Thus, for example, where*  
626 *the particular law which is the topic of a seminar changes dramatically*  
627 *immediately before the seminar is given, the prepared materials may be rendered*  
628 *obsolete. Likewise, written materials may not always be suitable for a clinical*  
629 *program on oral advocacy. In these exceptional circumstances, the requirements*  
630 *of this regulation may not apply. If there is any question as to whether written*  
631 *materials are required for a given topic, the provider is advised to contact the*  
632 *Commission in advance of the seminar.*

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

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

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

649                   (14) **Practice Management CLE.** (CLE activities relating to the development and  
650                   management of a law practice including client relations) Practice Management  
651                   CLE includes, but is not limited to, those activities which (1) teach lawyers how to  
652                   organize and manage their law practices so as to promote the efficient,  
653                   economical and competent delivery of legal services; and (2) teach lawyers how  
654                   to create and maintain good client relations consistent with existing ethical and  
655                   professional guidelines so as to eliminate malpractice claims and bar grievances  
656                   while improving service to the client and the public image of the profession.  
657                   Practice Management CLE is consistent with Accreditation Standards 1 and 2  
658                   where such programs meet the other criteria set forth herein.

659                   (15) **Lawyer Wellness.** Wellness and mental health issues, including stress,  
660                   anxiety, substance use, depression and suicide, materially affect lawyers'  
661                   competency to practice law and their lives. CLE credit as required under Rule 8-  
662                   104(a) is available for seminars on these and similar quality of life and law  
663                   practice topics. To receive CLE credit these wellness topics must be discussed in  
664                   the context of the legal profession and the effects on the quality of the legal  
665                   services the lawyer is able to provide. Presentations approved may include stress  
666                   management in the context of work/life balance in the practice of law, signs of  
667                   substance abuse or mental health issues in oneself or a colleague within the legal  
668                   community, lawyer assistance programs and other topics that are focused on the

669 *impact of substance abuse, mental health issues or stress management on lawyers*  
670 *and judges. CLE credit will not be given to presentations which solely focus on*  
671 *personal stress reduction techniques such as breathing exercises, meditation and*  
672 *yoga. In addition, professionalism CLE credit is available when these topics meet*  
673 *the Chief Justice’s Commission on Professionalism current professionalism CLE*  
674 *guidelines ([cjcpga.org/professionalism-cle-guidelines](http://cjcpga.org/professionalism-cle-guidelines)).*

675 *(16) **Distance Learning CLE.** In addition to traditional approved continuing*  
676 *legal education activities attended live and in-person by groups of lawyers,*  
677 *distance learning delivery formats are acceptable provided they are designed*  
678 *specifically as organized programs of learning and meet the other accreditation*  
679 *standards set out in these Rules and Regulations. Examples of qualifying distance*  
680 *learning formats include: live CLE activities presented via video or audio replays*  
681 *of live CLE activities; computer-based CLE activities, on demand CLE programs,*  
682 *teleconference CLE programs and live CLE webcasts/webinars. Lawyers can*  
683 *earn all or any portion of their CLE requirement through Distance Learning CLE*  
684 *programs.*

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

690 *Courses must provide mechanisms to ensure interactivity and permit the*  
691 *attendee to interact with the presenter, other attendees or with the educational*

692 software itself based on responses by the participant. The following methods are  
693 provided as examples of course monitoring: Periodic Quizzing, Response  
694 Tracking, Web Logs, Video Monitoring, Time Recorders, Live Chat, Final  
695 Tests, User Navigation Monitoring and User Prompts.

696 Due to changes in technology, the CCLC is not issuing a precise definition  
697 of interactivity. Specific implementation of all of the above is not required, but  
698 incorporation of technology to ensure a positive and interactive educational  
699 experience is required.

700 **Rule 8-108. Compliance Period and Noncompliance.**

701 (a) Compliance Period

702 (1) Members must complete their CLE requirement, fees, or other requirements by the end  
703 of the biennial compliance period. The compliance period deadline date is the same for all  
704 members. The CLE compliance period and deadline date are listed on the State Bar of  
705 Georgia's website and are also shown on each members' online CLE transcript.

706 (2) Members who remain deficient following the end of the compliance period shall pay a  
707 CLE late fee in an amount to be set by the Commission.

708 (b) Noncompliance

709 (1) Notice. Members who remain deficient in their CLE, fees, or other requirements at the  
710 end of the compliance period are in noncompliance. The Commission shall so notify the  
711 members by email to the member's current email address contained in the membership

712 records of the State Bar of Georgia. Service or actual receipt is not a prerequisite to actions  
713 authorized by these Rules.

714 (2) Hearing. Members may contest their noncompliance by requesting a hearing before the  
715 Commission. The request should be in writing, contain the reasons for their contest, and be  
716 made within 60 days of the date of the notice of noncompliance sent by the Commission.  
717 The Commission shall hear the matter at its next meeting. No action will be taken while  
718 hearings are pending. All decisions by the Commission are final.

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

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

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

727 *(1) CLE Late Fee: A lawyer who does not complete the CLE requirement by the*  
728 *end of the compliance period shall pay a \$200 CLE late fee. This late fee shall be*  
729 *due 30 days following the end of the compliance period.*

730 **Rule 8-109. Reinstatement.**



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

734 ***CCLC Regulations Rule 8-109***

735 (1) ***Reinstatement Fee.*** *The reinstatement fee is \$500 for a member's first*  
736 *reinstatement, \$1,000 for a second reinstatement by the same member, and*  
737 *\$2,000 for all subsequent reinstatements by the same member. This fee must*  
738 *accompany the reinstatement motion. It shall not be waived and is non-*  
739 *refundable if reinstatement is not granted.*

740 (2) ***Policy.*** *Reinstatement will be granted only upon a showing that the member*  
741 *has attended sufficient approved CLE activity to make-up the deficiencies*  
742 *causing the suspension and all deficiencies in subsequent compliance periods.*  
743 *Also, the member's progress toward meeting CLE requirements in the current*  
744 *compliance period in which the reinstatement is requested will be included as*  
745 *information in the CCLC's motion to the Supreme Court.*

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

749 (4) ***CCLC Action.*** *If the suspended member is found to be in compliance, the*  
750 *CCLC will file a motion with the Supreme Court of Georgia setting forth the*  
751 *facts along with its recommendation which may or may not be that*  
752 *reinstatement be granted. The Supreme Court will make the final decision on*  
753 *reinstatement. If the suspended member is found to not be in compliance, the*

754 *CCLC will inform them of the curative actions necessary to cure their*  
755 *deficiencies.*

756 **Rule 8-110. Confidentiality.**

757 Records of the Commission are not confidential.

758 **Rule 8-111. Immunity.**

759 The State Bar of Georgia, the Commission on Continuing Lawyer Competency, the Chief  
760 Justice's Commission on Professionalism, their employees, board of directors, members, and  
761 liaisons, shall be absolutely immune from civil liability in the performance of their official  
762 duties.

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

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

## MEMORANDUM

To: Executive Committee  
From: Ron Turner  
Date: January 30, 2024  
Re: Proposed changes to the By-laws of the State Bar of Georgia

Below is a summary of the proposed by-law change. This is an informational item only.

### **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 of 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) assist with the timing related to the new evaluation process and (4) create efficiencies within the Accounting Department.

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.



# CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

## Members

The Honorable Michael P. Boggs (Chair)  
Chief Justice, Supreme Court of Georgia  
Atlanta, Georgia

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AFLAC  
Columbus, Georgia

Associate Dean Michael Scott Boone  
Atlanta's John Marshall Law School  
Atlanta, Georgia

Mrs. Marie Greene Broder  
Griffin Judicial Circuit District Attorney's  
Office  
Griffin, Georgia

Ms. Brittanie Browning  
Akerman LLP  
Atlanta, Georgia

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Atlanta, Georgia

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Georgia State University College of Law  
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WestRock Company  
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The Gillis Law Firm, LLC  
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

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Emory University School of Law  
Atlanta, Georgia

Mr. Francis Johnson  
Davis Bozeman Johnson Law  
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Mrs. Nekia Hackworth Jones  
Federal Government  
Atlanta, GA

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Mercer University School of Law  
Macon, Georgia

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

The Honorable Shondana 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:** April 20, 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 March 7, 2024, is as follows.

## TRIBUTES

In January 2024, shortly after the Board of Governor's mid-year meeting, the Commission lost two leaders in the professionalism community, and this is the Commission's first opportunity since that time to pay tribute to them in a Board memorandum.

## REMEMBERING A. JAMES ELLIOTT

Dean A. James Elliott, one of the founders of the professionalism movement in Georgia, passed away on January 14, 2024. In 1988, Jim participated in a *Consultation on Professionalism* convened by Supreme Court of Georgia Chief Justice Thomas O. Marshall and that was attended by a group of influential judges and lawyers. As a result of the *Consultation*, the Supreme Court created the Chief Justice's Commission on Professionalism in February 1989. Thereafter, when Jim was elected to serve as president of the State Bar of Georgia for the 1988-1989 Bar year, he gave Georgia's professionalism movement additional momentum by placing the professionalism project at the top of his agenda. In conjunction with Chief Justice Marshall, President Elliott also gathered 120 prominent judges and lawyers from around the state to convene the first Georgia Convocation on Professionalism. Jim was an inaugural member of the Commission and remained a long-time and active member of the Commission for many years. Jim served on the Commission during part of 1989, as the President of the State Bar of Georgia.

From July 1, 1989 – 1998, and from 2011 – 2017, Jim served on the Commission as a practicing lawyer appointed by the Supreme Court of Georgia. From 2001 through 2011, Jim served on the Commission as a designee of the Dean of Emory University School of Law, and from 2011 through 2017, Jim served on the Commission as an appointee of the Board of Governors of the State Bar of Georgia. As a lawyer, Jim also led many other important initiatives to improve access to justice and to promote ethics, integrity and public service within the legal profession. According to Emory Law’s website, in 1971, as a member of the Bar’s Young Lawyers Division, Jim was instrumental in founding the Georgia Legal Services Program, which has provided legal services to almost one million poor Georgians. He also co-founded Georgia’s Interest on Lawyers’ Trust Accounts program (IOLTA) which has raised \$100,000,000 for legal charities, primarily to provide civil legal services for indigent persons. In 2009, Emory Law established the A. James Elliott Community Service Award, which is given annually to the 3L demonstrating the greatest commitment to community service while at the law school. Jim’s impactful service to the legal profession was an example of the professionalism ideals he sought to instill in all Georgia lawyers. For more information about Jim, visit <https://law.emory.edu/news-and-events/releases/2024/01/jim-elliott-2024.html>.

#### **REMEMBERING AVARITA L. HANSON**

Avarita L. Hanson, who served as the third Executive Director of the Chief Justice’s Commission on Professionalism, passed away on January 22, 2024. During her eleven (11) year tenure as the Commission’s Executive Director, Avarita served under five (5) Chief Justices who chaired the Commission: Justice Leah Ward Sears, Justice Carol W. Hunstein, Justice George H. Carley, Justice Hugh P. Thompson and Justice P. Harris Hines. In addition, Avarita oversaw and coordinated several special major programs, including a celebration of the Commission’s 25th Anniversary, raising \$44,000 for the Georgia Legal Services Program and honoring co-founder A. James Elliott. She also coordinated and presented four (4) highly successful Convocations on Professionalism, namely *Law Practice 2010 and Beyond: Challenges and Opportunities* (2010); *The Future of Legal Education: Will It Produce Practice-Ready Lawyers?* (2012); *Aging in the Law: It’s More Than a Senior Moment!* (2014); and *The New Normal for Delivery of Legal Services* (2016). Nationally, Avarita chaired the American Bar Association’s Consortium on Professionalism for three years (2011 - 2014), thereby helping to bring Georgia’s professionalism programs to the forefront. In addition to her service to the Commission, Avarita also served Georgia lawyers in many other ways. In 1985, she became the Pro Bono Project Director of the Georgia Legal Services Program for the State Bar of Georgia. As an early member and the fourth President of the Georgia Association of Black Women Attorneys (GABWA), she was known as “Mama Rita” to three generations of attorneys who continue to benefit from her leadership and generous mentorship. During the 1980s she hosted “Legally Speaking,” a public television program that featured female lawyers and lawyers of color. A stalwart member of Cascade United Methodist Church for twenty-five years, she was a member of the Legal Ministry, serving as chair from 2009-2012. Avarita was also an active member and officer of the Gate City Bar Association. The Black Law Students Association at John Marshall Law School now bears her name. After her retirement in 2017, Avarita remained active by teaching continuing legal education courses focused on social justice and the history of African American lawyers, mentoring young leaders, and doing community service. Her service and commitment to highlighting professionalism was an inspiration to many Georgia lawyers. For more information about Avarita, visit <https://www.mbfh.com/obituary/avarita-hanson>.

**COMING SOON: A POP-UP CLE ON MAINTAINING JUDICIAL PROFESSIONALISM: REFLECTIONS FROM THE BAR**

The Commission is planning a “Pop-Up” CLE for late April or early May 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; LaToya Simone Williams, 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/>



**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. More detailed Information regarding the Commission’s **Grant Criteria** is currently available on the Commission’s website at <http://cjcpga.org/grants/>.

**The Commission will hold a training regarding its Grants Program sometime during the month of May or June.** Please monitor the Commission’s grants page for the exact date and time of the training. In addition, please **START NOW** sharing information regarding the Commission’s Grant Criteria and Application process with your courts, local and voluntary bar associations, professional associations, and other eligible applicants in your networks.

**For more information** regarding the Commission’s Grants program and **upcoming training**, visit the Commission’s website at: <http://cjcpga.org/grants/>



**THE 24<sup>TH</sup> ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE**

As of the writing of this memorandum, the Commission, in partnership with the Georgia Legal History Foundation (GLHF), is scheduled to host the 24<sup>th</sup> 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 Commission will provide a complete report on the awards ceremony at the Annual Meeting. Information regarding the awards ceremony is also available at <https://cjcpga.org/benhamcsa24/>.

**ABA ARTICLE REGARDING GEORGIA PROFESSIONALISM CLE: *GEORGIA ON MY MIND***

In the Summer 2023 issue of the American Bar Association’s Litigation Journal, the 2022-2023 chair of the American Bar Association Litigation Section, **Mr. Daniel W. Van Horn**, wrote an article entitled *Georgia On My Mind*. Mr. Van Horn wrote the article about a visit he made to Atlanta where he attended a talk about “Georgia’s Lawyer’s Creed.” Mr. Van Horn, who is an experienced trial attorney and litigator in the **Memphis** office of Butler Snow LLP and a past president of the Tennessee Bar Association, said in the article: “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.” The Commission’s Executive Director reprinted the article in the December 2023 Georgia Bar Journal with the permission of the ABA. The complete article is attached to this Memorandum as “Exhibit A.”

**STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM PROGRAMS AND PROJECTS**

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), currently chaired by **Mr. Michael Herskowitz**. Below are updates on the FY23-24 programs and projects of the Committee.

**APRIL 2024 IS LEGAL PROFESSIONALISM MONTH AND CONNECT WITH A COLLEAGUE CONTEST**

The State Bar Committee’s Connect With A Colleague Sub-Committee is co-chaired by **Mr. Carlos Vilela and Ms. Cathy Hampton**. The Connect With A Colleague Sub-Committee, with staff support from the Commission’s Executive Director and Bar staff obtained a gubernatorial *Proclamation* to have April 2024 declared as legal professionalism month in Georgia. This was the second year in a row that the Committee received the *Proclamation*. In connection with the *Proclamation*, the Connect With A Colleague Sub-Committee will host a Connect With A Colleague Contest from April 1, 2024 – April 30, 2024, which is Professionalism Month for the American Inns of Court. During the contest, Georgia attorneys may submit up to five entries; one for each separate lunch, dinner or coffee connection with a colleague outside of their office or firm that occurs between April 1, 2024 – April 30, 2024. Only one entry per NEW connection is eligible. A “Colleague” is a member in good standing with the State Bar of Georgia with whom an attorney has not yet shared a meal, coffee, or other social interaction.

**For more information** regarding *Proclamation*, the Connect With A Colleague Contest, and **Contest Prizes** visit the Commission’s website at:  
[https://cjcpga.org/connect\\_with\\_a\\_colleague\\_2024/](https://cjcpga.org/connect_with_a_colleague_2024/).



**VOLUNTEER PRESENTERS ARE NEEDED FOR LAW DAY 2024**

The State Bar’s Law Day initiatives are a joint project of the State Bar of Georgia’s Committee on Professionalism and the State Bar’s Local and Voluntary Bars Committee. The leaders for the State Bar’s 2024 Law Day initiatives are **Judge Ashley Palmer and Attorney Denise Warner**. Each year, the State Bar, along with many other bar associations and legal organizations, partner with the American Bar Association to promote Law Day. The American Bar Association’s Law Day theme for 2024 is “Voices of Democracy.” As you may know, Law Day is May 1, 2024, but can be celebrated the entire month of May! As we are in a critical time in our democracy, it is imperative that we as legal professionals uplift the voices of our democracy and encourage confidence in our judicial system. *In Georgia, the State Bar’s 2024 Law Day focus will be civics education on the importance of the judicial branch and the role of judicial elections.* The Law Day sub-committee will provide talking points for those participating in the State Bar’s Law Day activity.

To sign up to volunteer to arrange and to make a Law Day Presentation, or for more information regarding the Bar’s 2024 Law Day activities, visit the State Bar’s website:  
<https://www.gabar.org/newsandpublications/lawday.cfm>.



**SERVE AS A GROUP LEADER VOLUNTEER FOR THE 2024 LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM**

The Commission funds in part and supports the State Bar Committee’s work on the Law School Orientations on Professionalism. The orientations are designed to provide incoming first year law students with their first introduction to professionalism. Georgia judges and lawyers are invited to serve as “Group Leaders” during the orientations to help students learn the meaning of professionalism and why it is important for them as law students. **Ms. Maria Waters** is Chair of the sub-committee and **Ms. Samantha Beskin-Schemer** is Vice Chair of the sub-committee. The Commission and the Committee will begin recruiting volunteers to serve as Group Leaders in late May or early June.

For more information regarding the Law School Orientations on professionalism, or if you are interested in receiving the Group Leader application when it becomes available please visit  
<http://cjcpga.org/law-school-orientations-on-professionalism-2024/>.



### REPORT REGARDING JANUARY 23, 2023, SIGNIFICANT LAWYER CLE

The Speakers and Writers Bureau Sub-Committee of the State Bar’s Committee on Professionalism, with staff support from the Commission, presented a hybrid in-person and online CLE entitled *The Significant Lawyer: The Pursuit of Purpose and Professionalism, Back by Popular Demand*. The State Bar of Georgia Committee on Professionalism Speakers and Writers Bureau Sub-Committee is co-chaired by **Mr. Kevin Patrick and Mr. Michael Perez**. The CLE was held in-person at the State Bar of Georgia in Atlanta and via a live webcast on Zoom on Tuesday, January 23, 2024, from 12:15 p.m. – 1:30 p.m. The cost for the CLE was \$25.00, which included the cost of the CLE credits in Georgia for Georgia attorneys and lunch for in-person CLE attendees. During the CLE, Attorney Kevin Patrick guided a conversation with **retired federal Judge William S. Duffey, Jr.** Judge Duffey discussed a book he wrote, entitled *The Significant Lawyer: The Pursuit of Purpose and Professionalism*. Fifteen (15) attorneys, including one attorney not barred in Georgia, attended the CLE in person. According to the Zoom report generated for the CLE, the CLE was attended by 149 “Unique Viewers.” The Commission reported attendance for 163 Georgia attorneys to the State Bar of Georgia’s Commission on Continuing Legal Education Department for CLE credit. To view the agenda and materials for the CLE, please visit: [https://cjcpga.org/sbg\\_cop\\_significant\\_lawyer\\_01-23-24/](https://cjcpga.org/sbg_cop_significant_lawyer_01-23-24/). The evaluations from the CLE are available at the link here: [https://www.surveymonkey.com/results/SM-5KJUKr0rEd0Dmhg2BO\\_2F8g\\_3D\\_3D/](https://www.surveymonkey.com/results/SM-5KJUKr0rEd0Dmhg2BO_2F8g_3D_3D/).

### ETHICS AND PROFESSIONALISM DURING CAREER TRANSITIONS

As of the writing of this memorandum, the State Bar of Georgia Committee on Professionalism, with staff support from the Commission, is scheduled to present a **free to attend** CLE via Zoom only on **Thursday, March 28, 2024, from 8:45 a.m. to 11:15 a.m.**, entitled *Ethics and Professionalism During Career Transitions* under the leadership of a planning team that includes 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 Commission will provide a complete report about the CLE at the annual meeting.

### PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which is currently published six times per year. Beginning in May 2024, the Georgia Bar Journal will be published quarterly. Most 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/>.

### UPDATE ON COMMISSION MEMBERSHIP

Commission member, Ms. Sandy Wisenbaker, submitted her resignation from the Commission, effective December 31, 2023, after leaving her position as the Coweta County Solicitor General to assume another position within Coweta County. On February 1, 2024, the Supreme Court of Georgia appointed **Mrs. Marie G. Broder**, the District Attorney for the Griffin Judicial Circuit to the Commission to fill the unexpired term of Ms. Sandy Wisenbaker. For a complete list of Commission members, visit the Commission’s website at <http://cjcpga.org/commission-members-2023-2024/>. The Commission staff thanks all of its members for their service.

### **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 the Commission's Executive Director to make a professionalism presentation to your organization. Please contact the Commission's Executive Director, Karlise Y. Grier, via e-mail at [kygrier@cjcpga.org](mailto:kygrier@cjcpga.org) for information or assistance.

### **COMMISSION WEBSITE AND SOCIAL MEDIA**

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

**Professionalism 2U:** <http://cjcpga.org/2u/>

**Twitter:** <https://twitter.com/CJCPGA>

**LinkedIn:** <https://www.linkedin.com/company/cjcpga/>

**YouTube:** <https://www.youtube.com/user/cjcpga/videos>



# Exhibit A

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GBJ | Professionalism Page

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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.

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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 or 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.

**STATE BAR OF GEORGIA  
EXECUTIVE COMMITTEE MEETING  
MINUTES  
December 15, 2023, 12 p.m.  
Bar Center/Hybrid  
Atlanta, 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; Brittanie D. Browning, YLD President; Kenneth Mitchell Jr., YLD President-Elect; Ronald E. Daniels, YLD Immediate Past President; R. Javoyne Hicks; Shiriki Jones; David S. Lipscomb; Jonathan B. Pannell; R. Gary Spencer; and Martin Valbuena.

Members Absent

None.

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 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Tony DelCampo reviewed the Future Meetings Schedule. He said the schedule has been updated to reflect that the April Executive Committee meeting will be held in Dalton, which is Justice Charles J. Bethel’s hometown.

Executive Committee Minutes

Secretary Bill Gentry presented for approval the minutes of the August 24, 2023, Executive Committee meeting. The minutes were passed as amended by unanimous vote.

Members Requesting Resignation

Pursuant to State Bar Rule 1-208, the Executive Committee approved the following resignation requests by unanimous vote: Reuben Allen Akin-086601, Christopher C. Antone-020680, Frances Marie Attaway-027220, Catherine Ford Boone-067710, Mark Wellman Botsch-069951, Bradley Matthew Burman-940379, Rocco Joseph Carbone III-484226, Michael C. Castellon-116106, Gene Bert Clark Jr.-126867, Michael Shields Connor-935921, Louis A. Cruz-199665, Germaine Curtin-202348, Cynthia Lee Davis-207780, Ellen Victoria Endrizzi-304178, Gregory David Goolsby-301850, Jeffrey Bruce Goore-301931, Andrew Lamkin Hamilton-895442, Dawn Marie Jordan-404452, Christopher John Kiefer-417247, Gai Lynn McCarthy-482223, Mark McDermott-488323, Mark Alan Murphy-530401, Michael J. O’Leary-551025, Mark Frederick Padilla-558769, Brooks Pennington III-571375, Deana Kay Pruitt-588880, Lillian Myrick Robinson-631273, Leonard Alan Scott-632170, Ashlee K. Smith-214971, Rina So-515766, Dawn Vernise Stephens-141218, Robert S. Ukeiley-721597, Rachel Kathryn Watson-808707, John Andrew Wickham-734848, Steven Thomas Wittmer-772550.

Members Requesting Disability Status

Pursuant to State Bar Rule 1-202, the Executive Committee approved two requests for disabled status by unanimous vote. Executive Committee Member David Lipscomb suggested a review of Rule 1-202(e), adding information about who can request a disability status. Currently, it only says “member,” and there are times when the member is in a coma or otherwise unable to send the application themselves. Deputy General Counsel Bill NeSmith will revise the rule and provide it at an upcoming Executive Committee meeting.

Proposed Change to Rule 1.8(e) Conflict of Interest: Prohibited Transactions.

General Counsel Paula Frederick presented the following proposed change to “Rule 1.8 Conflict of Interest: Prohibited Transactions.” The proposed change to this rule would adopt a recent amendment to the American Bar Association Model Rules. It would allow lawyers who represent a client pro bono, an indigent client through a nonprofit legal service or public interest organization pro bono, or an indigent client pro bono through a law school clinical or pro bono program to provide modest gifts to the client for food, rent, transportation, medicine, and other basic living expenses. The proposed amendment prohibits lawyers from making any promises or assurances to clients before or after they have been retained. The comments have been revised to emphasize that lawyers still are not allowed to financially support a lawsuit or administrative proceeding on behalf of their clients. By unanimous vote, the Executive Committee approved the proposed change as presented. This will now go before the Board of Governors at the Midyear Meeting in January.

Request to Remove Discipline from the Website

General Counsel Paula Frederick reported that at the last meeting, the Executive Committee discussed the request from a member to remove from the website directory information about a public reprimand imposed more than 25 years ago. There was a similar request from the friend of a deceased lawyer whose disciplinary history was still public after death. General Counsel Frederick reported information from 15 jurisdictions—Alabama, Colorado, Florida, Hawaii, Illinois, Kentucky, Maine, Michigan, New Jersey, North Carolina, Rhode Island, Utah, Virginia, Washington, and Wisconsin. Twelve of them never remove public discipline from the lawyer’s listing on the website. Three do: Alabama only lists discipline imposed since 2018, although they do provide information about discipline that occurred before 2018 in response to calls or written request; Florida only lists current status and discipline that occurred within the past 10 years; and Utah, which only lists the current status of the attorney and does not publicly list any discipline that occurred in the past.

By majority vote, the Executive Committee denied the member’s request. There was a motion and second to send this issue to the Rules Committee for consideration of a rule that would allow a member to request that their disciplinary history not appear in the website directory after a certain period of time, which passed unanimously.

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

Executive Director Damon Elmore presented proposed Standing Board Policy 1000 (Positions, Articles, Programs, Meetings, Activities of Committees and Sections. Guidelines for the State Bar of Georgia). He said the policy was designed to support the ability, mainly the staff’s ability, to adjust, change or omit program design and publications. The staff felt a policy was easier to refer to and helped support their position. He said it is also essential considering recent cases and believes it will support the ability to ensure events and publications are in line. He added that it may have an added benefit of having something in the Bar rules that can be pointed to acknowledging the narrow focus on the Bar’s mission, lawyer regulation, helping members’ practice and improving the quality of legal services.

By unanimous vote, the Executive Committee approved Proposed Standing Board Policy 1000. This will now go to the Board of Governors as an informational item at the Midyear Meeting and then as an action



item at the Spring Meeting.

#### Legislative Consultant Agreement

Executive Director Damon Elmore presented the 2024 legislative consultant agreement for Roy Robinson. The Executive Committee approved the agreement unanimously.

#### Fastcase/vLex Contract with DocketAlarm Benefit

Chief Operating Officer Sarah Coole presented the vLex/Fastcase contract with the option of adding the new DocketAlarm benefit, a docket research database that lives alongside Fastcase, enhancing members' research experience, which came from the Member Benefits Committee as a recommendation. She said that it was reviewed internally and found to be a helpful benefit for members, solo/small firm litigators specifically. DocketAlarm would cost an additional \$146,000, which equates to a \$4 dues increase. Members already have the option to purchase Docket Alarm separately, for \$95 a month, and some pay that now. By majority vote, the Executive Committee approved the DocketAlarm proposal. This will now go to the Board of Governors as an action item at the Midyear Meeting.

#### Proposed White Collar Section

Deputy General Counsel Bill NeSmith presented the proposed new White Collar Section. The application states the section "would focus on the practice of white collar law, an amalgamation of several practice areas, including business litigation, criminal law, technology law, civil litigation, securities litigation, compliance, and corporate governance. Instead of duplicating any of the above-mentioned sections, the White Collar Section would uniquely fuse a few specific, applicable aspects from each of them to create a common ground for professionals working on criminal, civil, parallel, or internal white-collar matters or investigations, compliance, and any resulting litigation." By unanimous vote, the Executive Committee approved the new White Collar Section. This will now go to the Board of Governors as an action item at the Midyear Meeting.

#### President's Report

President Tony DelCampo reported that the first year's plan for the unallocated cash continues to go well, and all projects are either completed or being worked on at a steady pace. He said the Wellness CLE in South Carolina went well, and he uses every chance he gets to tout #UseYourSix. He said he has had great feedback and shared stories of people letting him know they have used their benefit. President DelCampo reported on the meeting of the Southern Conference of Bar Presidents that he attended in Virginia and the information he was able to share with the other bars who attended and said he was amazed at what the Bar does with our resources and staff compared to other bars. He reported that he continues to work with the Supreme Court regularly.

President DelCampo said that the Bar has hired Andreea Morrison as the new deputy general counsel in the Office of the General Counsel. He said Jenny Mittelman has done great work over her 30 years at the Bar and will retire in February. He said after interviewing several candidates and offering the position to one of the applicants, they did not accept the director of governmental affairs position. For this legislative session, our contract lobbyists will handle the Bar's legislative package. Afterward, the Bar will start the process of hiring again. He said they are also beginning the process of hiring General Counsel Paula Frederick's replacement with her upcoming retirement in January 2025.

#### Executive Director's Report

Executive Director Damon Elmore reported he and other staff are still working on a lease with Georgia CASA, and there is still work being done for leasing the fifth floor. He said the JQC nominating committee met and considered candidates for the Judicial Legal Defense Fund and compiled a list of 14 lawyers that has been delivered to the Governor's office. Executive Director Elmore said that there continues to be

improvement and progress with ICLE and sections. He mentioned the 60<sup>th</sup> anniversary of the unified Bar. Staff explored events and decided that 60 was not necessarily a “milestone” year, but that it will be mentioned at meetings and on social media, etc. He said that he recently visited the Alabama State Bar for the first “11th Circuit Bar Associations” cohort and there was good discussion and shared lessons learned. For staff, he said that all people in new roles are clicking appropriately, and HR is rolling out new initiatives focused on training and development.

#### Treasurer’s Report

Treasurer Chris Twyman reviewed the finances of the Bar for the year-to-date period ending Sept. 30, 2023, and said that everything is on track and the Bar continues to be fiscally sound. He pointed out that the voluntary legislative contributions have already surpassed last year’s contributions. He gave kudos to Chief Financial Officer Ron Turner and his staff for a successfully completed audit with no adjustments.

#### Young Lawyers Division Report

Young Lawyers Division President Brittanie Browning reported the YLD Fall Meeting went well, and they had 10 new young lawyers who attended because they liked the location and wanted to be more involved. There was a “fireside chat” with Justice Verda Colvin. They also had a Murder Mystery dinner that everyone enjoyed. The service project as part of the meeting was at Holy Smokes and benefited the Ronald McDonald House. YLD President Browning mentioned tickets are on sale for Signature Fundraiser at the Midyear Meeting with the YLD’s Public Interest Internship Program (PIIP) as the beneficiary. Also, the Leadership Academy will kick off during the Midyear Meeting. She said to contact her if anyone is interested in judging the Moot Court Competition that will be held at the Bar Center in March.

#### Office of the General Counsel Report

General Counsel Paula Frederick thanked everyone for their support during the hiring process for the deputy general counsel and said that they will now focus on hiring someone for the GC position. She reported that in September, the Supreme Court ordered that the proposed changes to the advertising rules be briefed. The justices seem to be particularly concerned about the constitutionality of the proposed rules under the Georgia Constitution. The Clerk sent their order to several organizations and invited any interested bar members to file amicus briefs. Oral arguments will be in February.

#### Committee Updates

The following committee updates were provided:

- Executive Committee Member Shiriki Jones reported on the recent Georgia Bar Journal Editorial Board meeting where they reviewed and accepted an article for February. For cost, staff efficiency and more time to get in better quality articles, the Journal will be going to four issues instead of six beginning in 2024.
- Executive Committee Member Shiriki Jones reported the Georgia Diversity program held their 30<sup>th</sup> anniversary dinner in October where they celebrated many award recipients. They are currently planning for the February 2024 Business Development CLE.
- Executive Committee Member Shiriki Jones reported the Law Practice Management Committee hosted a networking and CLE event on Nov. 9 focused on AI.
- Executive Committee Member Shiriki Jones said the Seeking Equal Justice and Addressing Racism & Racial Bias Committee has been meeting and planning for 2024, including new Courageous Conversations topics.
- Executive Committee Member Martin Valbuena reported that the BASICS Committee is drafting a Memorandum of Understanding with Southeastern Management, which runs the BASICS program on behalf of the Committee. While the Bar no longer funds the program with member license fees, the Georgia Bar Foundation has been supporting them through grants and requested

the Bar continue to support the program by allowing the committee to continue to serve as an advisory board.

- Executive Committee Member Javoyné Hicks reported the Wellness Committee is beginning the planning for the 2024 retreat. She said Wellness Committee members reached out to other committees for the planning of the Wellness Center. Initially they are looking at charging \$40 to be a member of the Wellness Center. Once leadership is in place, they will continue the initial planning of the Center.
- Executive Committee Member Javoyné Hicks reported that Lawyer Assistance Program Committee Chair Lynn Garson will be stepping down as chair. The LAP committee will be looking to get new leadership and members to create new ideas and push the committee forward even more.
- Executive Committee Member Gary Spencer reported the Access to Justice Committee recently held the Pro Bono Awards Reception at Wild Leap to honor the recipients.
- Executive Committee Member David Lipscomb said the Fee Arbitration Committee is updating the Fee Arb petition based on the new rules.

#### Legislative Report

Legislative Consultants Rusty Sewell and Mark Middleton presented the legislative report. They reminded the Executive Committee that the Board of Governors approved two bills at the Fall Meeting, the Fiduciary Law Section's "Amendments to Title 53 and Related Code Sections" and the Business Law Section's "Amendments to O.C.G.A. Title 11." At the Midyear Meeting, the Board will be voting on additional legislative support, including various funding support requests, support for the General Assembly to recognize April 2024 as professionalism month, and support for the Judicial Council's Compensation Reform Proposal. They updated the committee on what the special session covered in early December. They said among other items that the Bar may be interested in is tort reform, which will be a big area this legislative session.

#### Personnel Committee Update

President-Elect Ivy Cadle reported the Personnel Committee met on Nov. 15. No new positions were evaluated, although there will be a change in the Office of the General Counsel as Paula Frederick prepares for retirement. The committee's discussion focused on salary increases for staff for the 2024-2025 budget. Senior staff recommended a 3% cost of living increase to all staff, and an optional 2% as merit for eligible employees, which the committee approved.

#### Programs Committee Update

Executive Committee Member Martin Valbuena reported that the Programs Committee met on Dec. 1. He said the committee does a full, comprehensive review of all programs every three years. This year was the second year in that rotation, so only those asking for additional funding were reviewed. The Georgia Diversity Program requested an additional \$10,000 (for a total of \$20,000). Halima White, director of the program, said despite her best efforts, she has not been able to raise enough money from law firms and bar associations to cover her out-of-pocket expenses and contract price over the past few months. The Programs Committee voted to keep the Georgia Diversity Program's 2024-2025 budget consistent with last year's funding of \$10,000. The Access to Justice Committee requested a budget increase of \$7,000 (for a total of \$9,500). They requested \$4,000 to integrate their annual pro bono awards reception into a Bar Board of Governors event. The ATJ Committee also requested \$3,000 to cover an ATJ Committee retreat in the spring of 2025. The Programs Committee voted to increase the Access to Justice Committee's 2024-2025 budget by \$5,000, for a total of \$7,500. The vote passed unanimously. The Committee to Promote Inclusion in the Profession requested that the Bar continue their support at \$2,500, which the committee approved. The Georgia Resource Center requested that the Bar continue their support at \$55,166. The committee recommended maintaining the request of \$55,166 this year.

Board of Governors Minutes

The Fall Board of Governors Meeting minutes were provided as informational material.

Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss the status of potential tenants at the Bar Center.

Old Business

There was no old business.

New Business

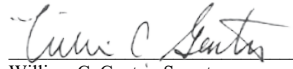
President-Elect Ivy N. Cadle announced his meetings for the upcoming Bar year. He said that he will not hold hybrid meetings. Instead, there will be in-person meetings only. There will be an option to view a stream of the meeting, but that will not be counted as attending the meeting because there is no way to interact.

Announcements

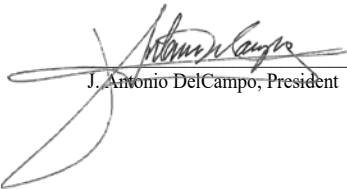
There were no announcements.

Adjournment

There being no further business, the meeting was adjourned at 3:57 p.m.

  
\_\_\_\_\_  
William C. Gentry, Secretary

Approved:

  
\_\_\_\_\_  
J. Antonio DelCampo, President

**D-R-A-F-T**  
**STATE BAR OF GEORGIA**  
**EXECUTIVE COMMITTEE MEETING**  
**MINUTES**  
**February 9, 2024, 1 p.m.**  
**Bar Center/Hybrid**  
**Atlanta, GA**

Members Participating

J. Antonio “Tony” DelCampo, President; Ivy N. Cadle, President-Elect; William C. “Bill” Gentry, Secretary; Sally B. Akins, Immediate Past President; Brittanie D. Browning, YLD President; Kenneth Mitchell Jr., YLD President-Elect; Ronald E. Daniels, YLD Immediate Past President; R. Javoyné Hicks; Shiriki Jones; David S. Lipscomb; Jonathan B. Pannell; R. Gary Spencer; and Martin Valbuena.

Members Absent

Christopher P. Twyman.

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 p.m. Members of the Executive Committee in attendance are indicated above.

Future Meetings Schedule

President Tony DelCampo reviewed the Future Meetings Schedule. He pointed out that the Spring BOG Meeting will be held in Young Harris at Brasstown Valley Resort and Spa, April 19-21, and then the following week, the Executive Committee Meeting will be held in Dalton at Hilton Garden Inn, April 26.

Executive Committee Minutes

Secretary Bill Gentry presented for approval the minutes of the December 15, 2023, Executive Committee meeting. The minutes 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: Christopher Bennett-050590; Harry Dewey-142125; Diane Flannery-589634; Robert Foster, Jr.-271065; Robert Hebble-324333; Charles Hollis-362792; Shelley Kreimer-887475; Leslie Pfrang-575193; Amy Savela-428423; Albert Thom, II-100148; Timothy Trankina-715420.

Members Requesting Disability

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

Request for Military Dues Waiver

Pursuant to State Bar of Georgia Bylaws, Article 1, Section 8, the Executive Committee approved one military dues waiver by unanimous vote.

Proposed Changes to the Georgia Rules of Professional Conduct

Deputy General Counsel Bill NeSmith presented the following proposed changes to the Georgia Rules of Professional Conduct:

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

Beginning at line 75, the title under Contents will be changed to “Preamble and Scope.” The word “terminology” is being removed because Terminology and Definitions are contained in Rule 1.0. This is a housekeeping change with no substantive changes.

By unanimous vote, the Executive Committee approved the proposed change as presented.

2. Rule 9.4 Jurisdiction and Reciprocal Discipline

Beginning at line 1, the colon is removed after “Rule 9.4” to make this rule consistent with the other Rules of Professional Conduct.

At lines 45-51, 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.

Likewise, in lines 92-98, the proposed change has the State Disciplinary Review Board filing 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.

By unanimous vote, the Executive Committee approved the proposed change as presented.

2024-2025 License Fee Recommendation to the Board of Governors and Other License Fee Items

President Tony DelCampo presented the 2024-2025 license fee recommendation and other license fee items. The motion to submit the following recommendation to the Board of Governors for approval passed by unanimous vote:

1. Dues at \$264 for active members and \$132 for inactive and provisional members, an increase of \$4 for active members and \$2 for inactive members.
2. Section dues to be reflected on the dues statement ranging from \$10-\$50; and
3. In accordance with Bar Rule 1-506 regarding the Clients’ Security Fund, each member is assessed a fee of \$15. This assessment shall be used only to fund the Clients’ Security Fund; and
4. Professionalism Fee (\$11) mandated by the Supreme Court; and
5. Continuation of a \$100 opt-out contribution for the Legislative and Public Education Fund; and
6. A suggested \$400 opt-in provision for individual contributions (\$100 for younger lawyers) for the Georgia Legal Services Program.

President’s Report

President Tony DelCampo reported that he continues to work with Bar staff on the infrastructure and building upgrades. Painting and flooring for the 6<sup>th</sup> floor will be moved up a bit so it will be 4 months faster than expected but will not cost additional funds. CASA has signed a 10-year, 6-month lease and there will

be initial tenant improvements. By year five, the Bar will start recouping those costs. He said he continues to work very closely with the Supreme Court on the General Counsel search and the interviews will begin in the coming weeks.

#### Executive Director's Report

Executive Director Damon Elmore provided an update on ICLE programming, including a new, innovative and interactive program that was a reenactment of a trial. He said that the vacant UPL committee appointments are being made and approved by the Supreme Court. He has also requested that the UPL department help research members who have been suspended to ensure they are not practicing law.. He also brought to the attention of the Executive Committee several members of Bar staff and the hard work that they put in.

#### Employee of the Year Recipient

Executive Director Damon Elmore said the Employee of the Year recipient will be revealed at the Annual Meeting.

#### Distinguished Service Award Recipient

President Tony DelCampo said the Distinguished Service Award recipient will be revealed at the Annual Meeting.

#### Treasurer's Report

Chief Financial Officer Ron Turner reported on the finances of the Bar. The Executive Committee received a copy of the November 2024 financials. At this point in time, finances are tracking on schedule and there are no known issues. He reported parking revenue is doing better than expected due to increased use during special functions in the area. Chief Financial Officer Turner said that the auditors will begin the 2023-2024 audit in June, should they be reappointed at the June meeting. He said that an updated schedule on the use of the unallocated cash will be presented at the next Executive Committee meeting.

#### Office of the General Counsel Report

General Counsel Paula Frederick reported that Andreea Morrison has been hired as the new Deputy General Counsel and Lori Anderson has been hired as the new Assistant General Counsel. Both will begin their new positions the first week of March. General Counsel Frederick asked for recommendations for lay members for the Disciplinary Board. She asked that Executive Committee members send her suggestions from people in their communities. Lay members are reimbursed for their expenses.

#### Committee Updates

The following committee updates were provided:

- Executive Committee Member Gary Spencer reported the Formal Advisory Opinion Board met last week.
- YLD Immediate Past President Ron Daniels said the SOLACE Committee met and expressed concerns about the committee continuing, the need, and what that looks like. He said one idea was to perhaps have the YLD take on SOLACE. Those are future conversations, but it's difficult to get new members involved in the committee.
- Executive Committee Member Javoyne Hicks said that Chair Lynn Garson is stepping down on the Lawyer Assistance Program Committee. Lynn will continue until a replacement is found. She said people have expressed an interest in leading the committee, but finding someone to commit to it has been difficult.
- Executive Committee Member Javoyne Hicks said that the Wellness Committee is still waiting on a few things before they get started on forming the Well-Being Center.

- Executive Committee Member David Lipscomb reported that the Fee Arbitration Committee met two weeks ago. He said the committee is revising the brochures to make sure they are accurate and match the current rules.
- Executive Committee Member David Lipscomb reported on the Disciplinary Rules and Procedures Committee.
- Executive Committee Member Shiriki Jones reported that the Georgia Bar Journal Editorial Board meeting was canceled in February because there were no legal articles to review. The Board is currently reviewing the legal fiction contest entries. She said the Journal will be publishing four issues a year instead of six.
- Executive Committee Member Shiriki Jones reported that the Georgia Diversity Program Committee recently met and discussed the upcoming business development symposium.
- Executive Committee Member Shiriki Jones said the Law Practice Management Program Committee had their meeting in January. They recently had a highly informative virtual CLE about practical tips on how to elevate your practice and practical marketing tips.
- Executive Committee Member Shiriki Jones reported that the Seeking Equal Justice and Addressing Racism & Racial Bias Committee met in January. They are reviewing their mission to ensure it is aligned with the work of the committee. They are also working on a new topic for their Courageous Conversation series that is slated to take place in March.

#### Legislative Report

Legislative Consultant Rusty Sewell reported on the State Bar's legislative activities and other bills of interest to the Bar. He said the Fiduciary Section's bill (HB1218) was filed yesterday, which relates to general provisions relative to probate and requires that notice be provided to beneficiaries of a testate estate. HB 947 is a judicial compensation reform proposal to increase compensation received by superior court judges and create the Judicial System Compensation Commission; it has not been taken up yet. HB 1240 seeks to update and modernize various statutes in the commercial code relating to commercial transactions in order to maintain uniformity in this state's statutes governing commercial transactions. It also establishes commercial law for transactions involving digital assets. It is currently in the House hopper. All of the Bar's legislative funding support requests passed out of the house. Not on the Bar's legislative agenda, but of interest to lawyers are: decreasing age of eligibility for retirement benefits for appellate court judges, lawyer advertising, tort reform, and online notary bills.

#### YLD Report

YLD President Brittanie Browning reported on the recent activities of the Young Lawyers Division. The BOG/YLD Spring Meeting will include many wellness activities, including a kickball tournament that will be held at the Young Harris College campus. As always, the YLD helps assist in finding judges for High School Mock Trial and Moot Court. She encouraged those in attendance to volunteer and spread the word. In honor of International Women's Day, the YLD Women in the Profession Committee and YLD Judicial Law Clerk Committee present "Power Hour Lunch with Women in the Judiciary." The YLD is also hosting a CLE and a Hawks game as a social, and those tickets are sold out.

#### CLE Rewrite and Rules Changes

Executive Director Damon Elmore reported on the proposed changes to the CLE Rules. Based on the Lawyer Competency Task Force Report, Justice Peterson asked that the Bar look into a longer compliance period and a reduction of required hours. Bar staff have worked on a draft incorporating those items, as well as taking the opportunity to make minimal housekeeping changes.

#### *Summary of the Proposed Changes:*

- Moved from an annual CLE requirement to a biennial CLE requirement (every two years).
- First Compliance Period – April 1, 2025, to March 31, 2027. All lawyers will have the same CLE



- deadline every odd year (except new lawyers in TILPP).
- Eliminated reference to a grace period. The deadline is the end of the compliance period. Eliminating the grace period does not mean that the lawyers will be suspended immediately at the end of the compliance period. The CLE Department must notify lawyers of their noncompliance, and give time for the lawyer to make corrections, add courses not on their transcript and pay the CLE late fee for missing the deadline if that is the case. A limited amount of time after the deadline (not advertised) will be given for lawyers to complete their requirement and pay late fees before suspension.
  - CLE 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 of the exemptions to be in one place under Rule 8-104(d). Previously the exemptions were spread out in three places: 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 to get 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 of the 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 that is currently in the regulation.
  - TILPP Rules and Regulations were all moved to be under one rule (new Rule 8-105).
  - Changed “sponsor” to “provider” and changed “attorney” to “lawyer” throughout.

Executive Committee Member David Lipscomb did not agree with removing the age 70 exemption. After further discussion of the proposed changes, they will now be added to the Board of Governors Spring Meeting agenda as information.

#### 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 now be presented as information at the Board of Governors Spring Meeting.

#### Discussion of Senior Lawyers Division

Secretary Bill Gentry presented a discussion on the possibility of a Senior Lawyers Division and said there's a strong need for it. They discussed a minimum age requirement of 55. Secretary Gentry said that Past President Pat O'Connor appointed him to the Aging Lawyers Task Force that then morphed into a 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 provide guidance on 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 going forward, 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. He said he will report this as an informational item at the upcoming Spring BOG Meeting.

Executive Session

Following a motion, second, and unanimous voice vote, the Executive Committee met in Executive Session to discuss future tenants for the Bar Center. Thereafter, the Executive Committee emerged from Executive Session by unanimous voice vote.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

There were no announcements.

Adjournment

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

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William C. Gentry, Secretary

Approved:

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J. Antonio DelCampo, President

# Law Practice Management Program

(Abbreviated report for the 2023-2024 Bar Year)

Total Number of Members Served – 457

July 1, 2023 – March 1, 2024

From July 1, 2023, to March 1, 2024, the program served **457** members and their staff. During this period, our program contacted **137** existing members, **306** new members, and **14** law firm staff.

## Resource Requests

Members have contacted our program to discuss or request the following:

- **Starting a Law Practice** - A total of **90** [Starting a Georgia Law Practice](#) guides were distributed to our members by request via email (13), web store order (89), and during their visit to the Bar Center (12).
- **Software Recommendation/Technology Advice** – A total of **6** members contacted our program for a law office software recommendation by phone and email.
- **LPM Resources Assistance**—The program has responded to **700** phone calls and emails requesting resources such as sample practice management forms, closing a law practice/succession planning resources, trust accounting resources, opening a law practice resources, program events, and member benefit services. In addition, the program's resource advisor advised and responded to **94** practice management inquiries on various practice management topics and requests.

## Consultations

A total of **13** virtual consultation appointments were completed during this period. Our program scheduled and completed **9** general law firm assessments and **4** corrective action virtual consultations to discuss law firm practice management matters.

## Resource Library

The [LPM lending library](#) has **1,427** 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 **49** members registered to get access to the [lending library](#). During this period, the resource library received a total of **26** visits from **19** patrons. **28** patrons borrowed a total of **95** books. We responded to **63** emails and **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 **163** Instagram followers, **65** LinkedIn followers, and **257** people who have subscribed to the [LPM Insider E-Newsletter](#), for a grand total of **485** followers and growing.

## Speaking Engagements and LPM Seminars

A total of **7** were completed and scheduled programs during this period. The Program's staff has given **5** continuing legal education and special presentations to Georgia lawyers and other related groups nationally and locally. **2** programs are scheduled for a future date.

Date	Event Name	Presentation / Sponsor
August 16, 2023	<a href="#">Technology Threats and Best Practices for Your Office: What Every Small Law Firm Lawyer Should Know Webinar</a>	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	<a href="#">Elevate Your Law Practice: Innovative Strategies for Peak Productivity CLE Webinar</a>	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	<a href="#">Hot Tips for Practicing Lawyers in 60 Minutes Webinar</a>	Sponsored by the Law Practice Management Advisory Committee
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 docket 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 in July 2024.

### **Fastcase Usage Report (July 2023-February 2024)**

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Total
First Time Logins	65	65	58	73	71	76	73	78	559
Total Logins	9,114	10,869	9,271	9,918	8,643	7,704	10,105	10,060	75,684
Total Users Who Logged In	2,559	2,750	2,500	2,661	2,488	2,317	2,687	2,671	20,733
Searches Conducted	34,746	40,265	35,779	37,808	30,911	28,239	37,183	36,567	281,498
Documents Viewed	117,878	146,016	129,920	138,426	114,847	104,316	131,181	130,007	1,012,591
Documents Printed	29,918	27,330	25,916	34,704	25,476	21,124	34,183	31,917	230,618
Total Transactions	194,280	227,345	203,544	223,590	182,436	163,776	215,412	211,300	1,621,683

### **Fastcase Reported Issues / Problems**

<b>Issue Reported to Member Benefits Coordinator (MBC)</b>	<b>Response</b>
<b>SBOG Member Benefits Coordinator-12/8/2023</b> Member reported that the Boolean Operators were not responding as expected.	<b>Fastcase Response-12/8/2023:</b> 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.
<b>MBC 1/26/2024</b> Two members reported that FC was not working. MBC called FC and discovered they were having an outage problem with the site.	<b>Fastcase Response-1/26/2024</b> 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.

In January and February, there were **75,467** interactions with member profiles (views, clicks, and contact requests) including **16,157** profile views, **1,727** completed contact form requests, **1,303** clicks on lawyer’s email and **2,767** clicks on lawyer’s phone numbers. Member engagement is remains steady with **881** sign ins, **260** Profile Plus, **11** analytics products, and **3** website products.



**MB** | **MemberBenefits**  
 State Bar of Georgia  
 Private Health Insurance Exchange  
 March 1, 2024

WEBSITE ANALYTICS	
<b>Total Users</b>	<b>79,147</b>
<b>Total Sessions</b>	<b>107,007</b>
<b>Total Pageviews</b>	<b>275,490</b>
INDIVIDUAL ENROLLMENTS	
<b>Total Enrollments</b>	<b>7,779</b>
• Medical	2,387
• Medicare	40
• Dental	1,114
• Vision	543
• Telehealth	572
• ID Theft Protection	46
• Life / AD&D	2,718
• Disability	289
• Long-term Care Enrollments	70
EMPLOYER ENROLLMENTS	
<b>Total Enrollments</b>	<b>2,505</b>
• Medical	1,181
• Ancillary	1,024
• Professional Liability	298
• Cyber Security	2



MEMORANDUM

To: Members, Board of Governors

From: Paula Frederick

Date: March 19, 2024

Re: Report of the Office of the General Counsel

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I am pleased to report on highlights of the activity of the Office of the General Counsel for the period since the Midyear meeting.

Discipline: The Office has received 1,316 grievances thus far this Bar year, which were added to 428 that were pending on June 30. The screening office has closed 1,314 matters and sent 141 to the Disciplinary Board for additional investigation. Since July 1 fifty-two lawyers have received discipline in 72 separate cases.

Rule Changes: Recent proposals to amend the Bar Rules have dealt mostly with housekeeping matters. Among the substantive changes under consideration is a revision to Rule 1.8 that would allow a lawyer who represents a client pro bono or through a nonprofit legal services program to provide modest gifts to the client for basic living expenses. The proposed rule will be filed with the Supreme Court of Georgia in the coming weeks.

Proposed amendments to Bar Rules 7.1, 7.2, and 7.3 (Information About Legal Services) Rule 1-706 (the Center for Lawyer Wellbeing) and 4.2 (prohibiting a lawyer who is pro se in a legal matter from communicating about the matter with a represented person on the other side) are pending at the Supreme Court for approval.

Formal Advisory Opinion Board: The Board requested review of Advisory Opinion 22-1 and it has been filed with the Supreme Court. The question presented is whether a non-Georgia lawyer may provide legal services by remote means from Georgia while residing in Georgia, when the services have no relationship with Georgia other than the lawyer's physical location.

Clients' Security Fund: The Fund Trustees met in February. This Bar year they have considered 30 claims and authorized reimbursement payments of just under \$220,000. They will meet once more this Bar year.

Continuing Legal Education: Lawyers in the office have spoken at 20 continuing legal education programs thus far in the calendar year. Feel free to call upon us if your local bar group would like an ethics update and a CLE hour.

**M E M O R A N D U M**

To: ICLE Advisory Board Members  
From: Julia Neighbors, ICLE Director  
Date: March 12, 2024  
Re: Institute of Continuing Legal Education

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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 – February 29, 2024)**

- 3 Off-Site Programs
  - Update on Georgia Law (Ski LE) in Avon, CO
  - Estate Planning Institute in Athens, GA
  - Ancient Foundations and Modern Equivalents at the Carlos Museum, Emory University
- 15 Bar Center Programs
- 6,205 on demand programs purchased by 4,410 customers/members July 1 – February 29, 2024)
  - March 1 – February 29, 2024: 10,768 on demand products purchased by 7,317 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
- Annual Meeting CLEs – June 6, 2024 – Omni Amelia Island, FL
  - War Stories
  - Leadership for Lawyers

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**HEADQUARTERS**

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Atlanta, GA 30303-2743  
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Fax 404-527-8717  
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P.O. Box 1390  
Tifton, GA 31793-1390  
229-387-0446 · 800-330-0446  
Fax 229-382-7435



- 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

### **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.

### **Pricing Update**

Effective July 1, 2023, ICLE updated the pricing of most programs. Most six (6) hour Bar Center and on-demand programs are now \$225 (previously \$250). Other on-demand programs were discounted by approximately 10%. Alternate venue and off-site programs are not discounted because these programs are priced at cost. The expenses associated with these programs include meeting room rental, food/beverage plus service charge and taxes, audio/visual, MCLE fees, staff travel, signage, and production cost. ICLE along with the Bar's leadership team will continue to monitor program sales and expenses and revisit the pricing structure mid-year.

Additionally, most programs now offer an audit price if CLE credit is not needed.

Media Report

<b>PUBLISHED ARTICLES 2023-2024</b>			
<b>Date</b>	<b>Newspaper</b>	<b>Headline</b>	<b>Circulation</b>
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	DeKalb Champion, Decatur	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 A	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 re-elected 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 state appointment	2,814
8/11/2023	Newnan Times-Herald	Congratulations to DA Cranford on state 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 Chaffin on appointment	2,342
10/29/2023	Morgan County Citizen, Madison	Congratulations to Judge Bradley on state 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

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
		<b>TOTAL CIRCULATION</b>	<b>227,444</b>

