



State Bar
of Georgia

BOG BOARD BOOK

2026 Annual Meeting
Fernandina Beach, FL

This book serves as the agenda and materials for the State Bar of Georgia's 2026 Annual Meeting.



312th BOARD OF GOVERNORS MEETING
&
MEMBERS MEETING AND PLENARY SESSION

Friday, June 12, 2026
9:00 a.m. – 12:00 p.m.

Omni Amelia Island Resort & Spa
Fernandina Beach, Florida

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	Christopher P. Twyman President	1
b) Pledge of Allegiance	M. Brandon Rosenstein YLD Board of Directors	
c) Invocation	Kelsey L. Kicklighter YLD Board of Directors	
d) Security Update	Sgt. Dexter Harden	
e) Recognition of Past Presidents, Judges, and Special Guests	Chris Twyman	
f) Recognition of Retiring Officers and Board Members	Chris Twyman	
<u>Retiring Officers</u> Ivy N. Cadle, Immediate Past President, 9 years on the Board Kenneth Mitchell Jr., YLD Immediate Past President		
<u>Retiring Board Members</u> Hon. Anne Templeton LaMalva; Alcovy Circuit, Post 2; 4 years on the Board Edward B. Krugman; Atlanta Circuit, Post 14; 20 years on the Board Dawn R. Levine; Cobb Circuit, Post 5; 12 years on the Board Janice M. Wallace; Griffin Circuit, Post 1; 14 years on the Board Archibald A. Farrar Jr.; Lookout Mountain Circuit, Post 1; 16 years on the Board Michael A. Prieto; Member-at-Large, Post 3; 4 years on the Board Carl S. Cansino; Ocmulgee Circuit, Post 1; 10 years on the Board J. Anderson Davis; Rome Circuit, Post 2; 14 years on the Board		
g) Roll Call	Shiriki C. Jones Secretary	17

2) ACTION

- | | | |
|---|---------------------|----|
| a) Minutes of the 311 th Meeting of the Board of Governors on March 28, 2026 | Shiriki Jones | 23 |
|---|---------------------|----|

3) PRESIDENT’S ADDRESS

- | | | |
|--|--------------|--|
| a) State Bar of Georgia President’s Address..... | Chris Twyman | |
|--|--------------|--|

4) AWARDS AND PRESENTATIONS

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

5) SPECIAL REPORTS

- | | | |
|--|--|--|
| a) Supreme Court of Georgia..... | Hon. Nels S.D. Peterson
Chief Justice | |
| b) Court of Appeals of Georgia | Hon. Trent Brown
Chief Judge | |
| c) Office of Governor Brian Kemp | Sam Hatcher
Executive Counsel | |
| d) Georgia General Assembly | | |
| (1) House Judiciary Committee | Rep. Matt Reeves, Vice Chair | |
| (2) Senate Judiciary Committee | Sen. Brian Strickland, Chair | |

6) INFORMATIONAL REPORTS

- | | | |
|---------------------------------|---------------------------------------|----|
| a) Young Lawyers Division | Veronica R. Cox.....
YLD President | 28 |
|---------------------------------|---------------------------------------|----|

Topics

Presenter

- b) Memorials.....Chris Twyman
(As listed in Annual Meeting Program.)

7) ADJOURNMENT

The Board of Governors will meet again at 9:00 a.m. on Saturday, June 13, 2026.



313th BOARD OF GOVERNORS MEETING

Saturday, June 13, 2026

9:00 a.m. – 12:00 p.m.

Omni Amelia Island Resort & Spa
Fernandina Beach, Florida

Dress: Business Casual

AGENDA

Topics **Presenter** **Page**

1) ADMINISTRATION

- a) Welcome and Call to Order William C. "Bill" Gentry..... 1
President, 2026-2027
- b) Pledge of Allegiance Alan J. Levine
Cobb Circuit, Post 5
- c) Invocation Ronald E. "Ron" Daniels
YLD Past President
- d) Recognition of Past Presidents, Judges, and Bill Gentry
Special Guests
- e) Welcome to New Officers and Board Members Bill Gentry

New Officers

William C. Gentry, President	Christopher P. Twyman, Immediate Past President
R. Javoyne Hicks, President-elect	Virginia C. Josey, YLD President
Shiriki C. Jones, Treasurer	Kindall E. Browning-Rickle, YLD President-elect
Norbert D. Hummel, IV, Secretary	Veronica R. Cox, YLD Immediate Past President

New Board Members

Hon. Cheveda McCamy, Alcovy Circuit, Post 2
 Emily C. Ward, Atlanta Circuit, Post 14
 Alan J. Levine, Cobb Circuit, Post 5
 Hon. Sonja N. Brown, Cobb Circuit, Post 7
 Hon. Jason B. Thompson, Griffin Circuit, Post 1
 J. Michael Giglio, Lookout Mountain Circuit, Post 1
 Kenneth Mitchell, Jr., Member-at-Large, Post 3
 C. Blayne May, Ocmulgee Circuit, Post 1
 Lee B. Carter, Rome Circuit, Post 2

- f) Roll Call Norbert D. "Bert" Hummel IV 17
Secretary, 2026-2027
- g) Future Meetings Schedule Bill Gentry 33

2) PRESIDENT’S REPORT

- a) 2026-2027 Proposed Program of Activities Bill Gentry

3) ACTION

- a) Approval of the Members of State Bill Gentry
Disciplinary Boards

State Disciplinary Board

- (1) Mariel E. Smith (2029)
- (2) Christopher S. Fairchild (2029)
- (3) Lamar Barnett (2029)

Formal Advisory Opinion Board

- (1) Member-at-Large: Mary A. Prebula (2028)
- (2) Member-at-Large: Jeffrey H. Schneider (2028)
- (3) Member-at-Large: Letitia A. McDonald (2028)
- (4) Georgia Association of Criminal Defense Lawyers: Amanda R. Clark Palmer (2028)
- (5) District Attorney’s Association of Georgia: Jaeson R. Smith (2028)
- (6) Emory University School of Law: Prof. Jennifer M. Romig (2028)
- (7) Georgia State University College of Law: Prof. Tia L. Gibbs (2028)
- (8) Atlanta’s John Marshall Law School: Prof. M. Scott Boone (2027)
- (9) State Disciplinary Review Board: Brandon A. Bullard (2027)

- b) Sunsetting of Standing Committees Bill Gentry

- (1) Attorney Wellness
- (2) Communications

- c) Approval of 2026-2027 Committees Bill Gentry

- (1) Standing Committees
- (2) Special Committees
- (3) Program Committees and Boards

- d) Approval of 2026-2027 Election Schedule Bill Gentry 35

- e) Executive Committee Election Bill Gentry
(Please keep nominations to under 5 minutes. Please keep seconds to under 2 minutes.)

Two-Year Term (2026-2028)

- (1) Expired term of Bert Hummel
- (2) Expired term of R. Gary Spencer
- (3) Expired term of Martin E. Valbuena

- f) Georgia Legal Services Program Appointments Bill Gentry 36

- (1) Kevin M. Pitre (2028)
- (2) Tera L. Reese-Beisbier (2028)
- (3) Kelli J. Spencer (2028)
- (4) Jared T. Williams (2028)

- g) Chief Justice’s Commission on Professionalism Bill Gentry
Appointments

- (1) Hon. Charity Bridgewater (2029)
- (2) Jeff W. Smith (2029)

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
h) Executive Director’s Election	Bill Gentry	

4) INFORMATIONAL REPORTS

a) Executive Director’s Report	Damon E. Elmore Executive Director	
b) Treasurer’s Report	Shiriki C. Jones	37
	Treasurer, 2026-2027	
c) Young Lawyers Division Report	Virginia C. Josey YLD President, 2026-2027	
d) Senior Lawyers Division Report	Elizabeth “Betsy” Hodges.....	55
	SLD President, 2026-2027	
e) Center for Lawyer Wellbeing Report	R. Javoyne Hicks.....	58
	Center Chair	
f) Chief Justice’s Commission on Professionalism Report	Karlise Y. Grier	61
	Executive Director, CJCP	
g) Legislative Report	Jennifer McNeely Director of Governmental Affairs	
h) Suicide Prevention and Awareness Committee Report	Hon. Shondeana Morris Committee Chair	
i) Pro Bono Resource Center Report	Ashley Clark Center Director	

5) WRITTEN REPORTS

a) Committee Activity Report		70
b) State Bar of Georgia Audit Report for Year End 2025		96
	and Related Auditor’s Letter Regarding Governance	
c) Office of the General Counsel Report		125
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e) Law Practice Management Report		133
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	(1) Alternative Dispute Resolution Section	
	(2) Antitrust Law Section	
	(3) Aviation Law Section	
	(4) Bike Law Section	
	(5) Cannabis & Hemp Law Section	
	(6) Child Protection & Advocacy Section	
	(7) Construction Law Section	
	(8) Creditor’s Rights Section	
	(9) E-Discovery & the Use of Technology Law Section	
	(10) Eminent Domain Section	

<u>Topics</u>	<u>Presenter</u>	<u>Page</u>
(11) Energy Law Section		
(12) Entertainment and Sports Law Section		
(13) Environmental Law Section		
(14) Family Law Section		
(15) Franchise and Distribution Law Section		
(16) Health Law Section		
(17) Nonprofit Law Section		
(18) Privacy & Technology Law Section		
(19) Real Property Law Section		
(20) School & College Law Section		
g) Institute of Continuing Legal Education Report		185
h) Unlicensed Practice of Law Report.....		188
i) State Bar of Georgia Satellite Office Reports		191
(1) Coastal Georgia Office		
(2) South Georgia Office		
j) Media Report.....		193

6) CLOSING

- a) Old Business..... Bill Gentry
- b) New Business..... Bill Gentry
- c) Executive Session..... Bill Gentry
- d) Remarks / Q&A / Comments / Suggestions Bill Gentry
- e) Adjournment Bill Gentry
- f) Pictures (Very Important)

Immediately following the meeting, photos will be made of:

- (1) Headshots for new Board of Governors Members*
- (2) Headshots for all Returning Board of Governors Members who want updated photos*
- (3) 2026-2027 Officers and Executive Committee

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



PHOTO COURTESY OF OMNI AMELIA ISLAND RESORT & SPA

2026 State Bar of Georgia

ANNUAL MEETING

*Omni Amelia Island Resort & Spa
Fernandina Beach, Florida*

JUNE 11-14

Hotel Cut-off
May 15

Registration Cut-off
June 5

 State Bar
of Georgia

From the President

JOIN US AT AMELIA ISLAND!



PHOTO: KIMBERLY DUNN, PRESIDENTIAL PRODUCTIONS, LLC

On behalf of the Board of Governors and Executive Committee, I would like to invite you to attend the 2026 Annual Meeting of the State Bar of Georgia to be held June 11-14 at the Omni Amelia Island Resort & Spa in Fernandina Beach, Florida.

I hope you and your family will make plans to join us for a weekend that promises ample opportunity to rest and relax while we as a Bar review and reflect on the achievements and successes of the past year, and look ahead to a year full of opportunities. It is important to acknowledge what has been accomplished in order to move forward to continue to grow and improve our Bar and the legal profession.

The world-class accommodations of the beautiful Omni Amelia Island Resort & Spa will meet every need for an outstanding program, while providing the ideal environment for rejuvenation and leisure. Take time to explore the canopied wonderland of Amelia Island's diverse ecosystems, ranging from ancient forests to sweeping tidal marshes to rolling dunes speckled with sea oats framing sugar crystal sandy beaches where you can soak in the sun.

I encourage you to take advantage of the CLE opportunities that have been planned, along with section programs, business meetings, alumni gatherings and other social functions. The festivities will begin with Thursday evening's Opening Night Festival featuring plenty of carnival-themed activities to keep everyone entertained and a DJ to provide the atmosphere, and will culminate with Saturday night's Presidential Inaugural Gala, where William C. "Bill" Gentry will be sworn in as the 64th president of the State Bar of Georgia.

There will be plenty of time to focus on your family and your wellbeing while at Amelia Island with the number of recreational opportunities available—including golf, tennis, circuit training, yoga, biking or simply relaxing with your family and friends in a beautiful setting. Also, be sure to visit with our law-related vendors in the exhibit area, open daily outside the meeting hall.

Thank you again for the honor and privilege of serving as your 2025-26 State Bar president and for championing the cause of justice for all.

See you at Amelia Island!

A handwritten signature in black ink, appearing to read "C. Twyman". The signature is stylized and fluid.

CHRISTOPHER P. TWYMAN
President, State Bar of Georgia

Opening Night Festival

THURSDAY, JUNE 11 | 6:30 – 9:30 P.M.

Step right up for a night of wonder and whimsy! The State Bar Carnival is coming to town, and you're invited to join the fun.

Marvel at towering stilt walkers as they glide through the crowd, and keep your eyes peeled for the roaming balloon artist, ready to twist up a colorful masterpiece just for you. Want a new look? Visit the face painters to transform into a superhero, a butterfly or your favorite animal.

Test your skills and win big at our classic midway games! Whether you're aiming for the bullseye in balloon darts, perfecting your aim at the milk jug toss or trying your luck at the ring toss, there's a challenge for everyone. Feel the rush of the horse derby or cool off with some high-energy water gun fun.

With a live DJ spinning the perfect soundtrack to keep the energy high, this is one celebration you won't want to miss. Bring the whole family for an evening filled with laughter, prizes and unforgettable memories!



Presidential Inaugural Gala

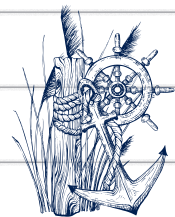
SATURDAY, JUNE 13 | 6 – 11:30 P.M.

The evening begins with a reception honoring the Supreme Court of Georgia justices and Court of Appeals of Georgia judges, followed by the Awards and Inauguration Ceremony where William C. "Bill" Gentry will be sworn in as the 2026-27 State Bar president.

Following the inauguration and the presentation of the Distinguished Service and Employee of the Year awards, head to our "Georgia Bar Beach Royale Gala" and enjoy a cocktail buffet dinner after which you are invited to spend the remainder of your evening in the Dance Club featuring The Heather Hayes Experience led by Heather Hayes, daughter of legendary soul artist Isaac Hayes; escape to the Pour Garden on the Magnolia Terrace and enjoy bourbon and cigars; or sneak away to the State Bar Speakeasy where you can take a break from dancing to relax with friends in an intimate jazzy setting with shades of a bygone era.



PHOTO COURTESY OF THE HEATHER HAYES EXPERIENCE



Schedule of Events

THURSDAY, JUNE 11

8 a.m. – 7:30 p.m.
Registration

8 a.m. – 12 p.m.
Exhibitor Setup

10 a.m. – 3 p.m.
State Disciplinary Board Meeting
(By invitation only)

10:30 a.m. – 12 p.m.
ICLE Board Meeting
(By invitation only)

12:30 – 2:30 p.m.
Commission on Continuing Lawyer
Competency Meeting

12:45 – 1:45 p.m.
Bench and Bar Committee Meeting

1 – 6 p.m.
Legal Exposition Open

2 – 4 p.m.
CLE | Torts in Real Estate:
More Than Just Land

2 – 5:15 p.m.
CLE | Center for Lawyer Wellbeing:
Boundaries Part II

2 – 5:15 p.m.
CLE | War Stories and Georgia
Evidence Update

3 – 5 p.m.
Disciplinary Rules and
Procedures Committee Meeting

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

FRIDAY, JUNE 12

6 a.m. – 8 p.m.
Registration

7 a.m. – 7 p.m.
Legal Exposition Open

7 – 8 a.m.
Mike Monahan Memorial Wellness Hour

9 a.m. – 12 p.m.
Plenary Session
*Awards Presentations, Annual Members' Meeting
and 2025-26 Board of Governors Meeting*

12 – 2 p.m.
Judicial Section Luncheon

12 – 3 p.m.
State Disciplinary Review Board Meeting
(By invitation only)

1 – 2 p.m.
CLE | What's New in Ethics?

2 – 3 p.m.
Life, Liberty and the Pursuit
of Financial Independence Seminar

2 – 3 p.m.
YLD General Session

2 – 5 p.m.
Board of Bar Examiners Meeting

2 – 5 p.m.
CLE | Constitutional Crossroads:
Immigration, Protest and Electoral Integrity
in Modern America

3 – 4:30 p.m.
YLD Leadership Academy Mixer

EXHIBITORS*

- Atlanta Custom Tailors
- ExamWorks
- Fee Arbitration Program, State Bar of Georgia
- Filevine
- Gillsbar
- Joechelle Travel Partners for Life LLC
- Law Practice Management Program, State Bar of Georgia
- Lawgic, LLC
- Lexis Nexis
- Member Benefits, Inc.
- Neuroscience Specialty Centers
- Peach Court
- Pro Bono Resource Center, State Bar of Georgia
- Southern First Bank
- University of Georgia School of Law

*At time of publication

3 – 5 p.m.

Member Benefits Committee Meeting

4:30 – 5:30 p.m.

Senior Lawyers Division Inaugural Reception

5 – 7:30 p.m.

General Practice & Trial Law Section
Tradition of Excellence Awards Ceremony
and Reception

5:30 – 7 p.m.

Atlanta's John Marshall Law School
Alumni Reception

5:30 – 7 p.m.

Emory University School of Law
Alumni Reception

5:30 – 7 p.m.

Georgia State University
College of Law Reception

5:30 – 7 p.m.

Mercer University Walter F. George School
of Law Alumni Reception

5:30 – 7 p.m.

University of Georgia School of Law Alumni
and Cobb County Bar Association Reception
Honoring William C. "Bill" Gentry (JD '86)

7 – 9:30 p.m.

YLD Dinner and Swearing-In Ceremony

SATURDAY, JUNE 13

7 a.m. – 1 p.m.

Registration

7:30 a.m. – 1 p.m.

Legal Exposition Open

7:30 – 8:30 a.m.

New Board Members Coffee
with the President

8 – 8:45 a.m.

SOLACE Committee Meeting

9 a.m. – 12 p.m.

2026-27 Board of Governors Meeting

12 – 1 p.m.

Annual Diversity of Bars Meeting

6 – 6:45 p.m.

Reception Honoring the Supreme Court of
Georgia Justices and Court of Appeals of
Georgia Judges

7 – 11:30 p.m.

Presidential Inaugural Gala
*Installation of 2026-27 State Bar President
William C. "Bill" Gentry; Dinner; Entertainment:
Dance Club with The Heather Hayes Experience;
the Pour Garden Bourbon and Cigar Lounge; State
Bar Speakeasy*

Enhance your stay at Omni Amelia Island Resort & Spa with optional activities. See page 12 of this brochure for more information.

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



Recreation Activities | 10%



Waived Early Check-In and Departure Fees



Spa Services | 10%



Self-Parking | \$10 per vehicle, per night

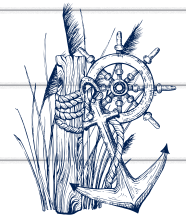


Green Fees and Golf Rentals | 10%



Valet Parking | \$20 per vehicle, per night

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



Continuing Legal Education

TORTS IN REAL ESTATE: MORE THAN JUST LAND

THURSDAY, JUNE 11 | 2 – 4 P.M.

☉ 2 CLE hours

Hosted by the Young Lawyers Division of the State Bar of Georgia

Registration
Free*

Overview

Practitioners in real estate law deal with a number of issues, from fraud to premises liability and even racketeering. Hear from three practicing real estate lawyers about their work with torts in real estate, including stories of actual cases and experiences.

Moderator

Javier A. Trejo
Senior Associate, Guilmette Henderson
Atlanta, Georgia

Panelists

Tim Guilmette
Managing Partner, Guilmette Henderson
Atlanta, Georgia

Erika J. Harris Fritz
Senior Associate, Guilmette Henderson
Atlanta, Georgia

Virginia C. Josey
President-Elect, Young Lawyers Division,
State Bar of Georgia
Founding Partner, Virginia Josey Law
Macon, Georgia

**Registration for this program is complimentary; however, those attendees wishing to claim the CLE credit hours that will be reported and available on their transcript will be required to pay the \$4 per credit hour fee. To check your CLE transcript, log in to your member portal at www.gabar.org and click the Check My CLE Status link under the Education heading.*

CENTER FOR LAWYER WELLBEING CLE | BOUNDARIES PART II

THURSDAY, JUNE 11 | 2 – 5:15 P.M.

☉ 3 CLE hours

Hosted by the State Bar of Georgia Center for Lawyer Wellbeing and the Institute of Continuing Legal Education of the State Bar of Georgia

Registration
\$145 (General) | \$90 (Audit—no CLE credit)
Visit icle.gabar.org for full course information.

Overview

Back by popular demand: because burnout isn't in the Rules of Professional Conduct. Learn practical strategies for lawyers to protect their time, mental health and professional integrity.

Program Chair

R. Javoyne Hicks
Treasurer, State Bar of Georgia
Chair, Center for Lawyer Wellbeing Board,
State Bar of Georgia
Founder/CEO, Magnifying Synergy, LLC
Atlanta, Georgia

Paul E. Knowlton
Partner, Stanton Law, LLC
Atlanta, Georgia

Speakers

R. Javoyne Hicks
Tara Simkins
Life Coach, Soul Shine Labs
Childhood Cancer Philanthropist, Press On
North Augusta, South Carolina



WAR STORIES AND GEORGIA EVIDENCE UPDATE

THURSDAY, JUNE 11 | 2 – 5:15 P.M.

🕒 3 CLE hours, including 1 ethics hour and 1 professionalism hour

Hosted by the State Bar of Georgia Bench and Bar Committee and the Institute of Continuing Legal Education of the State Bar of Georgia

Registration

\$145 (General) | \$90 (Audit—no CLE credit)

Visit icle.gabar.org for full course information.

Overview

Join judges and practitioners as they discuss evidence, hearings, trials and related “war stories.”

Program Chairs

David B. Bell

Co-Chair, Bench and Bar Committee,
State Bar of Georgia
David B. Bell PC
Augusta, Georgia

Hon. C. Michael Johnson

Co-Chair, Bench and Bar Committee,
State Bar of Georgia
Judge, Superior Court, Oconee Judicial Circuit
Eastman, Georgia

Speakers

Michael Scott Carlson

Executive Assistant District Attorney,
Gwinnett District Attorney’s Office
Carlson on Evidence LLC
Lawrenceville, Georgia

Hon. Robert W. Chasteen Jr.

Senior Judge, Superior Court,
Cordele Judicial Circuit
Fitzgerald, Georgia

J. Christopher “Chris” Clark

Principal, Clark Smith & Sizemore LLC
Macon, Georgia

Hon. Verda M. Colvin

Justice, Supreme Court of Georgia
Atlanta, Georgia

Hon. Kelly Lee Ellerbe

Judge, Superior Court,
Atlanta Judicial Circuit
Atlanta, Georgia

Jennifer A. “Jen” Jordan

Principal, The Jordan Firm
Atlanta, Georgia

Darren W. Penn

Penn Law LLC
Atlanta, Georgia

Hon. Arthur L. Smith III

Chief Judge, Superior Court,
Chattahoochee Judicial Circuit
Columbus, Georgia

Michael B. Terry

Partner, Bondurant Mixson & Elmore LLP
Atlanta, Georgia

WHAT’S NEW IN ETHICS?

FRIDAY, JUNE 12 | 1 – 2 P.M.

🕒 1 CLE hour, including 1 ethics hour

Hosted by the State Bar of Georgia Office of the General Counsel

Registration

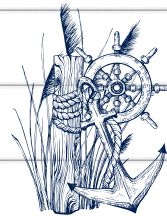
Free

Overview

Come get your ethics hour and catch up on recent changes to the Georgia Rules of Professional Conduct, decisions of note applying the rules and other hot topics in ethics.



PHOTO COURTESY OF GOLF COURSE ARCHITECTURE
DESIGN & BUILD





**CONSTITUTIONAL CROSSROADS: IMMIGRATION, PROTEST
AND ELECTORAL INTEGRITY IN MODERN AMERICA**

FRIDAY, JUNE 12 | 2 – 5 P.M.

🕒 3 CLE hours

Hosted by the State Bar of Georgia Committee to Promote Inclusion in the Profession; the State Bar of Georgia Seeking Equal Justice and Addressing Racism & Racial Bias Committee; the Georgia Association of Black Women Attorneys; and the Institute of Continuing Legal Education of the State Bar of Georgia

Registration

\$145 (General) | \$90 (Audit—no CLE credit)
Visit icfe.gabar.org for full course information.

Program Chairs

Simone N. Hylton
Deputy District Attorney, Fulton County
District Attorney's Office
Atlanta, Georgia

Hon. Rahn L. Gatewood
Judge, Gwinnett County Magistrate Court
Managing Partner, The Gatewood Counsel, LLC
Tucker, Georgia

Speakers

Christopher E. Bruce
The Bruce Firm LLC
Atlanta, Georgia

Cassandra Charles
Senior Staff Attorney, National Immigration
Law Center
Suwanee, Georgia

Mawuli Mel Davis
Founding Partner, Davis Bozeman Johnson Law
Decatur, Georgia

Joyce Gist Lewis
Co-Managing Partner, Krevolin & Horst, LLC
Atlanta, Georgia

Prof. Derrick Alexander Pope
Georgia State University College of Law
Founder and Managing Director, The Arc of
Justice Project
Atlanta, Georgia

R. Gary Spencer

Senior Counsel, NAACP Legal Defense Fund
Atlanta, Georgia

Prof. Emily Torstveit Ngara
Georgia State University College of Law
Atlanta, Georgia

Prof. Tanya Monique Washington
Georgia State University College of Law
Atlanta, Georgia

Overview

This CLE program will explore constitutional issues that have wide-ranging implications (current and future) upon the practice of law, public policy and law enforcement. The session will engage practitioners in a discussion of emerging interpretations, recent case law and the practical implications of constitutional challenges at the local, state and national levels.

Objective

Participants will gain a deeper understanding of evolving constitutional principles, recent Supreme Court and appellate decisions, and practical strategies for navigating these issues in their professional practice and within the greater legal landscape and community.

Young Lawyers Division

YLD CLE | TORTS IN REAL ESTATE: MORE THAN JUST LAND

THURSDAY, JUNE 11 | 2 – 4 P.M.

Practitioners in real estate law deal with a number of issues, from fraud to premises liability and even racketeering. Hear from three practicing real estate lawyers about their work with torts in real estate, including stories of actual cases and experiences. See page 6 for a full description.

YLD GENERAL SESSION

FRIDAY, JUNE 12 | 2 – 3 P.M.

The YLD General Session is open to all Bar members. YLD officers and members of the Executive Council will share reports and provide updates on events and initiatives. They will also take time to celebrate the 2026 YLD Leadership Academy class and present graduation plaques in recognition of their successful completion of the program.

YLD LEADERSHIP ACADEMY MIXER

FRIDAY, JUNE 12 | 3 – 4:30 P.M.

Don't miss this networking opportunity with food, fun and friends. Meet the newest Leadership Academy class and reconnect with other alumni. If you're new to YLD activities, this is your opportunity to introduce yourself to the 2026-27 YLD officers and learn how to get involved. This event is open to all meeting attendees.

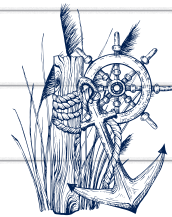
YLD DINNER AND SWEARING-IN CEREMONY

FRIDAY, JUNE 12 | 7 – 9:30 P.M.

Join the Young Lawyers Division for its annual dinner and swearing-in ceremony. The awards ceremony will spotlight the accomplishments of the YLD's many outstanding members as 2025-26 YLD President Veronica R. Cox presents the Awards of Achievement, as well as the Ross Adams Award, which honors a past YLD president, and the 22nd Annual YLD Ethics and Professionalism Award. The evening culminates with the swearing-in of the 2026-27 YLD officers. Incoming YLD President Virginia C. Josey will then highlight her plans for the YLD during the upcoming Bar year. This event is open to all lawyers—members of the YLD and otherwise.



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Sections and Special Events

JUDICIAL SECTION LUNCHEON

FRIDAY, JUNE 12 | 12 – 2 P.M.

Join the members of the Judicial Section for their annual luncheon.

LIFE, LIBERTY AND THE PURSUIT OF FINANCIAL INDEPENDENCE

FRIDAY, JUNE 12 | 2 – 3 P.M.

Hosted by Wheeler Wealth

What can America's founders teach attorneys about money? Discover timeless principles for building, managing and preserving assets across every stage of life and career.

SENIOR LAWYERS DIVISION INAUGURAL RECEPTION

FRIDAY, JUNE 12 | 4:30 – 5:30 P.M.

Sponsored by Bryan D. Wulz, CLU ChFC, Agent, New York Life Insurance Company

Come celebrate the new Senior Lawyers Division and meet the inaugural officers: Betsy Hodges, president; Howard Delashmit, president-elect; James Hyder, treasurer; and Kendall Butterworth, secretary. The officers will share their plans for the upcoming Bar year.

GENERAL PRACTICE & TRIAL LAW SECTION

TRADITION OF EXCELLENCE AWARDS CEREMONY AND RECEPTION

FRIDAY, JUNE 12 | 5 – 7:30 P.M.

Each year, the Tradition of Excellence Awards given by the General Practice & Trial Law Section recognize a plaintiff's attorney, defense attorney, general practitioner and judge who have achieved a career of excellence. Please join the section in celebrating the 2026 recipients, followed by a reception in their honor.

UNIVERSITY OF GEORGIA SCHOOL OF LAW ALUMNI AND COBB COUNTY BAR ASSOCIATION RECEPTION

HONORING WILLIAM C. "BILL" GENTRY

FRIDAY, JUNE 12 | 5:30 – 7 P.M.

Join fellow University of Georgia School of Law alumni and members of the Cobb County Bar Association to honor incoming State Bar President William C. "Bill" Gentry (JD '86).

ANNUAL DIVERSITY OF BARS MEETING

SATURDAY, JUNE 13 | 12 – 1 P.M.

Hosted by the Judicial Council's Standing Committee on Access to Justice

The Annual Diversity of Bars Meeting is a gathering of Georgia's diverse bar associations and organizations where member representatives report on upcoming events and success stories.

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Wellness and Recreation

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

MIKE MONAHAN MEMORIAL WELLNESS HOUR

FRIDAY, JUNE 12 | 7 – 8 A.M.

Hosted by the Young Lawyers Division

Formerly known as the YLD/Pro Bono Fun Run, this annual event has been renamed to memorialize former Pro Bono Resource Center Director Mike Monahan to recognize his courageous fight against cancer and his inspiring commitment to wellness, service and community. The wellness hour will feature two activity choices: a guided 5K run/walk around the resort, or yoga and sound bath meditation.

FITNESS CENTER AT RACQUET PARK

Located under the shady oaks of Racquet Park, the Health & Fitness Center is fully equipped with state-of-the-art exercise equipment, a 20-yard indoor heated lap pool, accessory shop and full-service locker rooms.

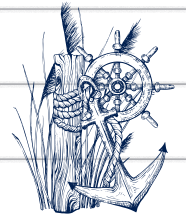
GOLF

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



Oak Marsh Golf Course is one of the truly classic Pete Dye-designed golf courses in the world. The recent renovation led by Beau Welling was completed in 2025 and was thoughtfully planned to protect the architectural feel of Dye's original creation. At par 72, this 6,471-yard course is noted for its tight fairways and small greens, meandering along serpentine salt marsh creeks and through the moss draped heritage oaks for which Amelia Island is famous. With five tee options, the modernized layout was designed to meet the requirements of today's game brought on by technological advancements in equipment, providing a high-quality and consistent playing experience.

To book a tee time, call the Golf Pro Shop at 904-277-5907.



TENNIS AND PICKLEBALL

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

SPA

Step inside The Spa at Omni Amelia Island and enjoy the relaxation area and new outdoor courtyard with water features, perfect for before and after your treatments. Sip on a vast array of herbal teas and infused waters, then rejuvenate with spa treatments that include couple massages, facials and steam showers as well as the signature Quartz Sand Table massage and Tropical Blossom Ritual. Email aispa@omnihotels.com or call 904-432-2220 to make reservations.

Optional Activities

HISTORICAL GROUP TOUR

FRIDAY, JUNE 12 | 10 A.M. – 2:30 P.M.

Only 30 slots available; subject to cancellation if too few registrants.

All aboard the trolley to enjoy the scenic route as we drive up South Fletcher and take in Amelia Island's gorgeous coast line. After passing Ft. Clinch State Park and the lighthouse, we'll head into the downtown historic district to enjoy shopping at local stores and boutiques.

DIVE-IN MOVIE FEATURING "ZOOTOPIA 2"

FRIDAY, JUNE 12 | 8:45 – 10 P.M.

No registration required.

Make it a night to remember with a poolside screening of "Zootopia 2" at the resort. Gather by the main pool with your loved ones, settle into a lounge chair and enjoy the evening breeze during this fun, family-friendly movie under the stars—complete with a complimentary popcorn bar for guests.

MIMOSAS AND MOSAICS (ADULTS ONLY)

SATURDAY, JUNE 13 | 11 A.M. – 1 P.M.

Only 12 slots available; subject to cancellation if too few registrants.

Join us for a guided mosaic crafting experience. Mosaic supplies and sparkling wines are included, as well as non-alcoholic options, fresh juices, and fruit and herb garnishes.

BUILD YOUR OWN BOAT FAMILY COMPETITION

SATURDAY, JUNE 13 | 1 – 3 P.M.

Only 16 slots available; subject to cancellation if too few registrants.

Grab your crew and prepare for launch! Whether you're a master of the high seas or a first-time shipwright, this is your chance to turn a pile of supplies into a floating masterpiece.

Families will work together to design and assemble a custom vessel using provided materials. Once the final touches have been made, we'll test each craft's seaworthiness. The family whose boat stays afloat and crosses the finish line first is the winner!

TANNER THE TURTLE DANCE & POPS

SATURDAY, JUNE 13 | 2 – 3 P.M.

No registration required.

Get ready to get down with Omni Amelia Island Resort's mascot Tanner the Turtle! Grab a lemon ice pop to help beat the summer heat and enjoy lots of fun games in the pool.

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Hotel Information



OMNI AMELIA ISLAND RESORT & SPA

39 Beach Lagoon Road
Fernandina Beach, FL 32034
904-261-6161

Reservation cut-off date is May 15

Omni Amelia Island Resort & Spa will be the Bar's host hotel, offering discounted room rates. A block of rooms has been reserved for the meeting. The room rates are \$385 single/double resort view. Ocean view rooms are \$385, up to \$635 for a three-bedroom ocean view villa. Rooms are subject to a \$21 resort fee per night, plus 12% sales tax. To make reservations online, for the hotel visit bit.ly/amelia_hotel_26, or for the villas visit bit.ly/amelia_villas_26. Or call the hotel at 888-261-6161 and mention you are with the State Bar of Georgia to receive our special rate. Reservations must be made by Friday, May 15, as rooms will be on a space and rate availability basis after this date.

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

What to Pack

Opening Night Festival

Casual summer attire

Daytime Meetings and Events

Casual attire

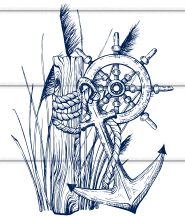
Plenary Session and Board of Governors Meetings

Business casual attire

Young Lawyers Division Dinner

Business casual attire

Supreme Court of Georgia/Court of Appeals Reception and Presidential Inaugural Gala
Semi-formal or formal Beach Royale chic or seersucker "southern tuxedos"



Service Project

The Young Lawyers Division and the Senior Lawyers Division are hosting a donation drive benefiting Rethreaded, an organization which exists for the complete restoration of survivors of human trafficking. They provide a three-to-five-year Survivor Development Program that works with survivors of human trafficking as they restore their lives through employment, career development, mental health counseling and trauma-informed care management.

Please drop off your donations at the State Bar of Georgia registration desk. Questions? Contact YLD Director Jessica Oglesby at jessicao@gabar.org.

*Hygiene Basics**

Toothbrushes with covers
Dental floss
Deodorant (stick preferred)
Bar soap
Feminine hygiene products
Disposable razors
Shaving cream (travel size)

*On-the-Go Care**

Wet wipes/baby wipes
Facial cleansing wipes
Tissues (travel packs)
Lip balm
Sunscreen (travel size)

**not limited to these items*



Visit the Rethreaded pop-up shop at the YLD Leadership Academy Mixer on Friday!

Additional Information

Elevate your escape at Omni Amelia Island Resort & Spa. Whether you're spending a tranquil afternoon in a beach or poolside cabana, kayaking through salt marshes, discovering the local flora and fauna, or enjoying an adventure with the family, the perfect finishing touch is just a click away.

Explore a curated collection of luxury amenities and local experiences at bit.ly/omni-add-ons and tailor your stay into the ultimate island getaway.

Amelia Island Nanny, Inc.

Infant – 4 Years

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

Camp Amelia

Ages 5 – 10 Years

The resort offers Camp Amelia, with a different theme each day, from 9:30 a.m. – 3 p.m., by request only. Evening camps are available from 5:30 – 9 p.m., by request only. Children must be potty trained. Call 904-753-6258.

Amelia Island Transportation

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

Dining on Amelia Island

If you are planning to head off the resort to dine at any of the restaurants around Amelia Island, please take note that some establishments require reservations. Visit www.ameliaisland.com/ restaurants-bars for a directory of dining options.

2026 Annual Meeting Registration Form

Please use this form to register by checking events you plan to attend. Registration is required for all events, including "no charge" functions. Registrations are due June 5. "No charge" functions are limited to two tickets per attendee. One form per registrant. You may also register online at www.gabar.org.

ATTENDEE INFORMATION

(Please print and use one form per registrant.)

BAR NUMBER _____

NAME _____ NICKNAME _____

EMAIL _____

GUEST 1 NAME _____

GUEST 2 NAME _____

GUEST 3 NAME _____

GUEST 4 NAME _____

PHONE _____ FAX _____

SPECIAL NEEDS/DIETARY RESTRICTIONS

ADA: If you are an individual with a disability and require a reasonable accommodation, please contact Gakii Kassamba at 404-527-8713 or gakii@gabar.org at least 10 business days before the event.

REGISTRATION OPTIONS

Registrations are processed on a first-come, first-served basis. Checks and credit cards (VISA/MC/AMEX) are accepted. Make checks payable to the State Bar of Georgia and mail to: State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303. Registrations are due June 5.

REFUND/CANCELLATION POLICY

Cancellation of registration must be received in writing no later than June 5. Cancellations will receive a full refund. Absolutely no refunds will be made after June 5. Requests should be mailed to the State Bar of Georgia, Attn: Meetings Department, 104 Marietta St. NW, Suite 100, Atlanta, GA 30303; faxed to 404-527-8717; or emailed to meetings@gabar.org. Quantity

PACKAGES

- Package for Two\$780
Package includes: two Opening Night Festival tickets, two Supreme Court/Court of Appeals Reception tickets, two Presidential Inaugural Gala tickets.
- Package for One (registrant)\$390
Package includes: one Opening Night Festival ticket, one Supreme Court/Court of Appeals Reception ticket, one Presidential Inaugural Gala ticket.
- YLD* Package\$350
Package includes: one YLD Leadership Academy Alumni Mixer ticket, one YLD Dinner and Swearing-In Ceremony ticket, one Presidential Inaugural Gala ticket.
*YLD applies only to Bar members who are 36 years of age or younger or within their first five years of practice in their first bar.

A LA CARTE EVENTS

- Plenary Session/Board of Governors Meeting (Fri.)N/C
- Board of Governors Meeting (Sat.)N/C
- Opening Night Festival\$160
- Opening Night Festival (ages 5 and under)N/C
- Opening Night Festival (ages 6-20)\$70
- Supreme Court/Court of Appeals Reception and Presidential Inaugural Gala\$250
- Supreme Court/Court of Appeals Reception and Presidential Inaugural Gala (YLD Member*)\$200
*YLD Member applies only to Bar members who are 36 years of age or younger or within their first five years of practice in their first bar.



ALUMNI FUNCTIONS

Quantity

- Atlanta's John Marshall Law School ReceptionN/C
- Emory University School of Law ReceptionN/C
- Georgia State University College of Law ReceptionN/C
- Mercer University Walter F. George School of Law ReceptionN/C
- University of Georgia School of Law and Cobb County Bar Association Reception Honoring William C. "Bill" Gentry (JD '86)N/C

CLE SEMINARS

- Center for Lawyer Wellbeing: Boundaries Part II (with CLE credit)\$145
- Center for Lawyer Wellbeing: Boundaries Part II (no CLE credit)\$90
- Constitutional Crossroads: Immigration, Protest and Electoral Integrity in Modern America (with CLE credit)\$145
- Constitutional Crossroads: Immigration, Protest and Electoral Integrity in Modern America (no CLE credit)\$90
- Torts in Real Estate: More Than Just LandN/C
- War Stories and Georgia Evidence Update (with CLE credit)\$145
- War Stories and Georgia Evidence Update (no CLE credit)\$90
- What's New in Ethics?N/C

WELLNESS AND RECREATION

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

- Mike Monrahan Memorial Wellness HourN/C
- I would like to participate in: 5K Run/Walk Yoga and Sound Bath Meditation

SECTIONS EVENTS

- General Practice & Trial Law Awards Ceremony and Reception\$40
- Judicial Luncheon\$50

YLD EVENTS

- YLD Dinner and Swearing-In Ceremony\$130
- YLD General SessionN/C
- YLD Leadership Academy Mixer\$70

OTHER EVENTS

- Annual Diversity of Bars MeetingN/C
- Life, Liberty and the Pursuit of Financial Independence SeminarN/C
- Senior Lawyers Division Inaugural ReceptionN/C
- SOLACE Committee MeetingN/C

OPTIONAL ACTIVITIES

- Build Your Own Boat Family Competition\$100 per family
Only 16 slots available; subject to cancellation if too few registrants.
- Historical Group Tour\$65
Only 30 slots available; subject to cancellation if too few registrants.
- Mimosas & Mosaics (adults only)\$40
Only 12 slots available; subject to cancellation if too few registrants.

PAYMENT INFORMATION

- I enclose a check in the amount of \$_____.
- Please bill my Visa MC AMEX \$_____.

ACCOUNT NUMBER

EXP. DATE (MM/YY) _____ CSC _____ ZIP CODE _____

NAME (AS IT APPEARS ON CARD, PLEASE PRINT) _____

SIGNATURE

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



State Bar
of Georgia

2026 ANNUAL MEETING
104 Marietta St. NW, Suite 100
Atlanta, GA 30303-2743

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5 Gavel

MB MemberBenefits

Many thanks to our hotel key card sponsor:

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LAW FIRM LLC



PHOTO COURTESY OF GARNI AMELIA LUXURY RESORT & SPA

Board of Governors Attendance Record

	03-2025	06-2025	10-2025	01-2026	03-2026
	Athens	Friday Sawgrass	Saturday Sawgrass	Rising Fawn	Atlanta
					Greensboro
Jonathan Lang Adams	•	u	•	•	•
Keith E. Adams	u	u	u	u	u
Mark W. Alexander	•	•	•	•	•
JaDawnya Cintelle Baker	•	•	•	•	•
Nina M. Baker	e	e	e	•	u
Eric A. Ballinger	•	•	•	•	•
Thua G. Barlay	e	•	e	u	•
Donna G. Barwick	•	•	•	•	u
John C. Bell Jr.	•	•	e	e	u
Tracee R. Benzo	•	•	e	•	•
N. John Bey	u	u	•	u	e
James D. Blitch IV	•	u	u	e	•
Sherry Boston	e	•	•	•	•
Charity Reneatha Bridgewater	•	•	•	e	•
Ashley Mackin Brodie	u	•	•	•	•
Stephanie D. Burton	•	•	e	e	•
Ivy Neal Cadle	•	•	•	•	•
Jerry Neal Cadle	•	•	e	•	•
Neal Joseph Callahan	n/a	n/a	•	•	•
Stacey McSwine Cameron	•	u	e	e	u
Richard D. Campbell	•	u	e	e	•
Tedra L. Cannella	u	•	•	•	•
David L. Cannon	•	•	u	•	•
Carl S. Cansino	u	u	u	u	u
Chris M. Carr	u	u	u	u	u
Kimberly A. Childs	•	•	•	•	•
Amanda Rourk Clark Palmer	•	•	•	u	•
Daniel Jackson Connell III	u	e	u	e	u
Susan P. Coppedge	•	•	e	•	•
John Craig Cotton	•	•	•	u	•
Martin L. Cowen III	•	•	e	•	•

To request an excused absence, please email Secretary Shiriki Jones (shirikijoneseq@gmail.com)

Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

Board of Governors Attendance Record

	03-2025	06-2025	10-2025	01-2026	03-2026	
	Athens	Friday Sawgrass	Saturday Sawgrass	Rising Fawn	Atlanta	Greensboro
Veronica Rogusky Cox	•	•	•	•	•	•
Eric C. Crawford	n/a	n/a	•	•	•	•
Gerald Davidson Jr.	•	•	•	•	•	•
J. Anderson Davis	•	u	•	•	•	•
William T. Davis	•	•	e	•	•	•
Howard Mark Delashmit	•	•	•	•	•	•
Joseph W. Dent	•	•	•	•	•	•
Miguel Angel Dominguez	•	•	•	•	•	•
Thomas V. Duck III	•	•	•	•	u	•
Susan E. Edlein	•	e	•	•	•	•
Otobong Ukpong "Oto" Ekpo	•	•	•	e	•	•
Ryan Welton English	•	•	•	u	•	•
Archibald A. Farrar	•	•	•	•	•	u
Adam Ferrell	n/a	n/a	•	u	•	u
Gillian Brooke Fierer	•	•	•	•	•	e
Amanda Renee Flora	•	•	•	•	e	•
Harold Eugene Franklin Jr.	e	u	•	e	•	•
Keith E. Gammage	•	e	•	•	•	•
William C. Gentry	•	•	•	•	•	•
Patricia A. Gorham	e	e	•	e	•	•
Rebecca Holmes Liles Grist	•	•	•	e	•	•
Paul William Hamilton	•	•	•	•	•	•
Thomas B. "Britt" Hammond	•	•	•	•	•	•
Roger Brent Hatcher Jr.	•	•	•	•	•	•
John Haubenreich	•	•	•	•	•	•
Patrick H. Head	•	u	•	•	•	•
Render M. Heard Jr.	u	•	•	•	•	u
Amanda Nichole Heath	•	•	•	•	•	•
Catherine Harris Helms	n/a	n/a	e	e	•	•
Matthew J. Hennessy	•	•	e	•	•	•
Thomas W. Herman	•	•	•	•	•	u

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Board of Governors Attendance Record

	03-2025	06-2025	10-2025	01-2026	03-2026	
	Athens	Friday Sawgrass	Saturday Sawgrass	Rising Fawn	Atlanta	Greensboro
R. Javoynne Hicks	•	•	•	•	u	•
Kimberly Wilkerson Higginbotham	•	•	•	•	•	e
Norbert D. "Bert" Hummel IV	•	•	•	•	•	•
Stacey K. Hydrick	e	•	•	•	•	e
Shukura L. Ingram	•	•	•	•	•	•
James T. Irvin	e	•	•	•	•	•
Christopher Ross Jackson	•	•	•	•	•	•
Charles Michael Johnson	•	•	•	e	e	•
Lester B. Johnson, III	e	e	e	e	•	e
Shiriki L. Cavitt Jones	•	•	•	•	•	•
Virginia C. Josey	n/a	n/a	•	•	•	•
Maria Christene Mekras Justus	•	e	•	e	•	•
Zahra S. Karinshak	•	•	•	•	•	•
John F. Kennedy	u	u	u	u	•	u
Barry E. King	•	•	•	•	•	•
Judy C. King	•	•	•	•	e	•
Catherine Koura	u	e	e	•	•	u
Rachel R. Krause	•	•	•	•	•	•
Rhonda Bender Kreuziger	•	•	•	e	•	•
Edward B. Krugman	e	e	e	e	e	u
Jeffrey R. Kuester	e	•	•	•	•	e
Anne Templeton LaMalva	•	u	•	•	•	•
Allegra J. Lawrence	•	e	•	•	•	•
Nicole C. Leet	•	•	•	•	•	•
Katie K. Leonard	•	•	•	•	•	e
Dawn Renee Levine	•	•	•	•	•	u
Joyce Gist Lewis	•	•	•	•	•	•
Lisa Katsuko Liang	•	•	•	•	u	e
Thomas Fredrick Lindsay	•	•	•	•	•	•
David S. Lipscomb	•	•	•	•	•	e
John R. B. Long	•	•	•	•	e	•

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Board of Governors Attendance Record

	03-2025	06-2025	06-2025	10-2025	01-2026	03-2026
	Athens	Friday Sawgrass	Saturday Sawgrass	Rising Fawn	Atlanta	Greensboro
Dax Eric Lopez	e	u	u	e	u	u
Lindsey Stephens Macon	e	•	•	•	•	•
John Bell Manly	u	e	e	•	•	e
Troy Windel Marsh Jr.	u	u	•	u	•	•
Edward T. McAfee	e	•	•	•	•	•
Robert Charles McBurney	n/a	n/a	•	•	•	•
Hugh J. McCullough	•	u	•	e	•	u
Letitia A. McDonald	•	•	•	e	•	•
Brad J. McFall	u	e	e	•	•	e
Michael D. McRae	•	•	•	•	e	•
Terry L. Miller	•	•	•	•	•	•
Kenneth Mitchell Jr.	•	•	•	•	•	•
William J. Monahan	•	•	•	•	e	u
Shondeana Crews Morris	•	•	•	•	•	•
Stephen Russell Morris	•	•	•	•	•	•
Joseph Kenneth Mulholland	•	u	•	e	u	u
Samantha Marie Mullis	n/a	n/a	•	•	u	e
Katrell Nash	•	•	•	•	•	•
Paul Wain Painter III	•	u	u	u	u	u
Joy Renea Parks	u	•	•	•	u	•
David Jared Parrish	n/a	n/a	•	•	•	e
Kathryn Drew Parrish Bennett	•	e	e	•	•	•
Kevin Charles Patrick	•	•	•	•	•	•
Tabitha Edwina Payne	u	e	•	u	•	u
Brandon Lee Peak	•	•	•	u	•	•
Edward Piasta	•	•	e	•	•	•
Michael Prieto	u	u	u	u	u	u
Philip Zachary Pritchard	u	u	u	u	•	u
Jill Pryor	e	e	e	e	e	u
Elizabeth Dalia Racine	•	•	•	•	•	•
William M. Ragland	•	•	•	e	•	•

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Board of Governors Attendance Record

	03-2025	06-2025	06-2025	10-2025	01-2026	03-2026
	Athens	Friday Sawgrass	Saturday Sawgrass	Rising Fawn	Atlanta	Greensboro
Tina S. Roddenberry	e	•	•	e	e	•
Carlos Javier Rodriguez	n/a	n/a	•	•	e	u
Kevin W. Roper	•	e	e	•	•	u
Joseph Roseborough	u	•	•	•	•	•
Wesley Charles Ross	•	•	•	•	•	•
Adam Joshua Rozen	n/a	n/a	•	•	•	e
Claudia S. Saari	•	•	•	e	•	•
Bertrice A. Scott	n/a	n/a	•	•	•	•
Amanda Kay Seals	n/a	n/a	•	e	•	•
Alex Musole Shalishali	•	u	u	•	•	•
H. Burke Sherwood	•	•	•	•	•	•
William Murray Shingler	n/a	n/a	•	u	u	u
Mitchell McKinley Shook	•	•	•	•	e	•
Robert H. Smalley, III	•	u	u	•	•	•
Philip C. Smith	•	•	•	•	•	•
R. Rucker Smith	•	•	•	•	•	•
Daniel B. Snipes	•	•	•	u	•	•
R. Gary Spencer	e	•	•	e	•	•
H. Craig Stafford	•	u	u	•	u	u
Lawton E. Stephens	•	e	e	e	u	•
Donna Coleman Stribling	•	•	•	e	•	•
Joseph C. Sumner, Jr.	u	e	e	•	•	•
Anita W. Thomas	•	u	•	•	•	•
Stephen Elliot Tillman	•	•	•	•	u	•
Edward D. Tolley	•	u	u	e	u	•
Clayton Tomlinson	•	•	•	e	•	•
Chris P. Twyman	•	•	•	•	•	•
Martin E. Valbuena	e	•	•	•	•	•
J. Henry Walker	e	•	•	e	u	e
Janice M. Wallace	•	•	•	•	•	•
Amy Carol Walters	•	e	e	•	•	•
Andrew Jackson Welch, III	•	•	•	•	•	•

To request an excused absence, please email Secretary Shiriki Jones (shiriki.jones@q@gmail.com)

Please refer to Standing Board Policy 300 of the State Bar Handbook for the attendance requirements of Board of Governors members.

DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, March 28, 2026, 9:00 a.m.
The Ritz-Carlton Reynolds, Lake Oconee
Greensboro, Georgia

The 311th meeting of the Board of Governors of the State Bar of Georgia was held at the date and time shown above. President Christopher P. Twyman presided and called the meeting to order at 9 a.m.

Pledge of Allegiance

Benjamin A. Torres, YLD Board of Directors, led the pledge of allegiance.

Invocation

Shannon M. Shoultz, YLD Board of Directors, gave the invocation.

Special Recognition

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

Roll Call

Secretary Shiriki Jones circulated the roll for signature. The list of attendees is attached as Exhibit A.

Future Meetings Schedule

President Chris Twyman reviewed the Future Meetings Schedule. He reminded everyone that the Annual Meeting will be held at the Omni Amelia Island Resort, Fernandina Beach, Florida. President-Elect Bill Gentry discussed his upcoming meetings: the 2026 Fall Meeting will be held at the Westin Hilton Head Island Resort & Spa, Hilton Head Island, South Carolina; the 2027 Midyear Meeting will be held at the Omni Hotel at The Battery Atlanta, Atlanta; the 2027 Spring Meeting is currently still pending; and the 2027 Annual Meeting will be held at the Gaylord Palms Resort & Convention Center, Orlando, Florida.

Minutes of the 310th Meeting of the Board of Governors

Secretary Shiriki Jones presented the minutes of the Board of Governors meeting held on January 17, 2026, which were approved as presented by majority vote.

License Fee Approval 2026-2027

Executive Director Damon Elmore presented an overview of the proposed FY 2026–2027 budget, dues recommendation, and unallocated cash. Leadership reported that operations are stable and that the proposed budget reflects rising costs, approved program commitments, targeted staffing needs, and measured compensation adjustments. The Board was advised that dues revenue remains the primary funding source and that limited non-dues revenue, anticipated declines in CLE revenue, and facility-related costs necessitate a dues increase to \$294 for active members and \$147 for inactive/provisional members.

An update was also provided on the status and planned use of unallocated cash, including ongoing and future investments in infrastructure and technology, as well as reserves, with an emphasis on prudent, multi-year planning. The recommendations were reviewed by the Finance and Executive Committees and presented as a balanced approach to maintaining financial stability and fulfilling the Bar’s regulatory and

service obligations. Voting on dues, budget approval, and related financial resolutions followed in separate polls.

After the presentation, the Board of Governors, by majority vote, approved active license fees at \$294 (\$24 increase from fiscal year 2025-2026) and inactive license fees at \$147 (\$12 increase from fiscal year 2025-2026) for fiscal year 2026-2027.

Approval of Other Items to Appear on the License Fee Statement

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

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

2026-2027 State Bar Budget

The Board of Governors approved the Fiscal Year 2026-2027 Proposed Consolidated Budget (Exhibit B), by majority vote.

Financial Resolutions

The Board of Governors approved the following financial resolutions by majority vote:

- 1) That the President be authorized to secure a blanket fidelity bond to cover all officers, employees and other persons handling State Bar funds as is required by Article V, Section 8 of the Bylaws.
- 2) That the State Bar of Georgia and related entities open appropriate accounts with such banks in Georgia, but excluding any bank that does not participate in the IOLTA Program, and other such depositories as may be recommended by the Finance Committee and/or Investment Committee, and designated by the Executive Committee of the Board of Governors of the State Bar of Georgia, and that the persons whose titles are listed below are authorized to sign an agreement to be provided by such banks and customary signature cards, and that the said banks are hereby authorized to pay or otherwise honor any check drafts, or other orders issued from time to time for debit to said accounts when signed by two of the following: the Treasurer, the President, the President Elect, the Immediate Past President, the Executive Director, the Office Manager and the General Counsel, provided either the President or the Treasurer shall sign all checks or vouchers and that said accounts can be reconciled from time to time by said persons or their designees. The authority herein given is to remain irrevocable so as said banks are concerned until they are notified in writing of such revocation of authority and in writing, acknowledge receipt thereof.
- 3) That Mauldin & Jenkins be designated as the independent auditing firm to audit the financial records of the State Bar of Georgia for the fiscal year 2025-2026.

Proposed Changes to the Georgia Rules of Professional Conduct

Following a report by General Counsel Russell Willard, the Board of Governors, by majority vote, took the following action on the proposed amendments to the following rules:

1. Rule 4-221. Hearing Procedures

The proposed revisions to Rule 4-221 clarify and streamline disciplinary hearing procedures while preserving due process, including expressly recognizing the Special Master's authority to manage disruptive conduct through warnings, adjournment, or written submissions. The amendments also update venue provisions by requiring venue at State Bar headquarters for nonresident respondents whose alleged misconduct occurred outside Georgia, while retaining existing options for in-state conduct. Additional provisions address practical venue selection for incarcerated or otherwise restricted respondents and authorize non-final hearings to be conducted by video or telephone, promoting efficiency while maintaining venue requirements for final evidentiary hearings.

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

2. Rule 4-227. Petitions for Voluntary Discipline

The proposed revisions to Rule 4-227 streamline procedures for Petitions for Voluntary Discipline by requiring petitions seeking disbarment or voluntary surrender, when filed after a formal complaint, to be submitted directly to the Supreme Court of Georgia rather than to a Special Master. Procedures for all other voluntary discipline petitions remain unchanged. The amendments also provide a 30-day response period for the Office of the General Counsel and stay proceedings before the Special Master while such petitions are pending.

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

President's Report

President Chris Twyman began his remarks by thanking the Board for its deliberation on the dues and budget, emphasizing the Board of Governors' responsibility to provide oversight and ensure fulfillment of the Bar's mission. He stated that the approved dues and budget support the Bar's mission to foster duty and service to the public, improve the administration of justice, and advance the science of law.

President Twyman addressed recent changes to continuing legal education requirements, noting that while biennial reporting and reduced required CLE hours benefit members, they are expected to reduce CLE-related revenue. He stated that this impact was accounted for during budget deliberations. He also provided updates on the Bar Center at 104 Marietta Street, emphasizing the importance of leasing available space to offset operating expenses. He reported that leases are in progress and that a letter of intent has been signed for nearly 15,000 square feet on the second floor with an anticipated July 1 commencement date, and that discussions continue with other prospective tenants. In addition, he reported that Universal Parking assumed management of the parking deck on March 1, with anticipated reductions in expenses and increased parking revenue over the next year.

President Twyman noted ongoing challenges, including threats to the unified bar structure, improper solicitation, the unauthorized practice of law, increased disciplinary caseloads, and the continued obligation to promote an independent judiciary and the Rule of Law. He also highlighted recent relationship-building efforts with the Georgia Court of Appeals through an Executive Committee-hosted event. President Twyman concluded by thanking Executive Director Damon Elmore and the Bar staff for their exceptional work and stated that, with the leadership of the Board of Governors, the Bar continues to move forward in service to its members, the profession, and the public.

Treasurer's Report

Treasurer Javoyné Hicks reported that, based on her regular review of Bar operations, there have been no significant changes or unexpected issues since the Midyear Meeting and no financial surprises within the approved budget framework. Treasurer Hicks directed the Board to the financial materials in the Board Book, which reflect financial activity through January 2026. She noted that items with variances exceeding \$2,500 are detailed to explain differences between budgeted and actual expenditures. She emphasized that Bar staff closely monitor financial activity to ensure alignment with budgeted expectations. She concluded by expressing appreciation for the Board's continued support and invited members to contact staff with any questions.

Young Lawyers Division Report

YLD President Veronica Cox began by thanking President Twyman for his continued support of the Young Lawyers Division and reported significant growth in YLD programming. Since the Midyear Meeting, YLD has doubled its total number of events, increasing from 20 to more than 40 CLE, networking, and social programs. She highlighted recent initiatives, including the YLD Leadership Academy and other well-attended activities. YLD President Cox also reported on the Signature Fundraiser benefiting Middle Georgia Justice, which raised more than \$35,000 with support from sponsors and volunteers, and thanked the Signature Fundraiser Committee for its efforts. She noted the continued success of the Georgia YLD Podcast and provided updates on upcoming initiatives, including Legal Food Frenzy and the YLD Spring Meeting in Asheville in partnership with the North Carolina Young Lawyers Division, with a focus on pro bono service. She referred to the YLD's written report in the Board Book for additional information.

Executive Director's Report

After leading the license fee and budget discussion, Executive Director Elmore reported that he had no additional updates to present and opened the floor for questions. He requested a personal privilege to note that Executive Committee Member David Lipscomb was unable to attend the meeting due to a funeral. He stated that this was the first Board of Governors meeting he had missed in more than 33 years of service. The Board acknowledged Lipscomb's longstanding service and commitment with a round of applause.

2026 Legislative Report

Director Jenn McNeely reported that the 2026 General Assembly session was nearing adjournment, with rapid end-of-session activity and ongoing work on the FY 2027 budget. She summarized several measures advancing late in the session and noted recent gubernatorial action on the amended FY 2026 budget and tax legislation. Director McNeely thanked Bar leadership and members for their engagement and reported on the launch of The Gold Dome Track, noting that 20 attorneys are now qualified to run for the General Assembly.

Executive Committee Minutes

The Board of Governors received copies of the minutes of the Executive Committee meetings held on December 5, 2025, and February 6, 2026.

Chief Justice's Commission on Professionalism Report

The Board of Governors received a written report on the activities of the Chief Justice's Commission on Professionalism. President Chris Twyman called to attention the Connect with a Colleague Contest that ends April 30, and Law Day 2026 activities, including "The Rule of Law and the American Dream."

Law Practice Management Program

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

Institute of Continuing Legal Education Report

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

Media Report

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

Old Business

President-Elect Bill Gentry reported that the Senior Lawyers Division was officially approved by the Supreme Court of Georgia on December 19, 2025. The officers have been appointed by President Chris Twyman as follows: Elizabeth “Betsy” Hodges, president; Howard Delashmit, president-elect; James Hyder, treasurer; and Kendall Butterworth, secretary.

New Business

There was no new business.

Announcements

President Chris Twyman recognized Board Member Hon. Stacey Hydrick’s birthday.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

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

Adjournment

There being no additional business, the meeting was adjourned at 11:15 a.m.

Shiriki C. Jones, Secretary

Approved:

Christopher P. Twyman, President



June 12, 2026

Dear Board of Governors:

It is my honor to share my final report for the 2025 to 2026 Bar year as the 79th President of the Young Lawyers Division. From the outset of this year, my guiding goal was to "Celebrate the YLD." That theme was rooted in two priorities: bringing young lawyers together across Georgia and spotlighting the YLD's impactful programming.

This year, we were intentional about turning that vision into action. As I have shared throughout the year, the YLD represents a significant and largely untapped opportunity for engagement within our Bar. While thousands of young lawyers are members by virtue of their admission, only a small percentage actively participate in YLD programming and leadership. Increasing that engagement remained a central focus of the YLD. Through expanded communication efforts and a renewed emphasis on meaningful, accessible programming, we worked to create more entry points for involvement and connection.

A key component of that effort was strengthening collaboration across Georgia's diverse legal community. For the first time, the YLD established a Multi Bar Committee, bringing together young lawyer leaders from a wide range of affinity, specialty, and local bar associations. This initiative not only broadened our reach, but also enriched our programming with new perspectives and ideas, reinforcing that the YLD is strongest when it reflects the full diversity of the profession it serves.

We also focused on creating consistency in our programming by ensuring that each quarterly meeting offered a well-rounded experience through education, service, and social connection. At the same time, we were proud to revive successful pre-pandemic events and further establish traditions that will continue to serve the YLD in the years ahead.

Our Spring Meeting in Asheville, held in partnership with the North Carolina Young Lawyers Division, exemplified this year's theme in action. Centered on pro bono service and collaboration, the meeting also provided an opportunity to specifically serve 79 families in need at the Hominy Ministry Crisis Center. It was a meaningful reminder of the role young lawyers play not only within our profession, but in responding to the needs of the public.

Two cornerstone programs this year further highlight the YLD's impact. The 15th Annual Legal Food Frenzy once again demonstrated the legal community's commitment to addressing food insecurity across Georgia. Likewise, the 20th Leadership Academy marked an important milestone, continuing its legacy of developing thoughtful, service-oriented leaders who will shape the future of our profession.

Throughout the year, I have emphasized that the YLD is often the front door to the Bar, where young lawyers first find connection, purpose, and a sense of belonging within the profession. This year's work reflects a continued commitment to fostering that experience by creating opportunities for engagement, encouraging leadership at every level, and ensuring that service remains central to our mission.

In many ways, this year has been about reflection, renewal, and recognition. We have honored the legacy of the YLD, re-energized our membership, and celebrated the extraordinary work of young lawyers across this state.

It has been a true privilege to lead this remarkable group. I am deeply proud of the dedication, creativity, and professionalism demonstrated by our YLD leaders and members, and I am confident the YLD is well-positioned for continued growth and impact for the future.

YLD COMMITTEES

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

YLD Business Litigation Subcommittee

Nathan Miles, Chair

The YLD Business Subcommittee held a joint CLE on Generative AI in Litigation and Alternative Dispute Resolution on May 7, at the State Bar Center. It was co-planned with the State Bar ADR Committee and State Bar E-Discovery & Technology Section.

YLD Child Protection and Advocacy Committee

Ziporah Tillman and Mary Kathryn Vasquez, Co-Chairs

The YLD Child Protection and Advocacy Committee partnered with the YLD Workers' Compensation and YLD Labor and Employment Law committees for the Briefs and Bites, a networking event. It was successful with over 20 attendees.

YLD Criminal Law Committee

Devin Rafus and Erin Wingo, Co-Chairs

The YLD Criminal Law Committee held an "Accountability Court Judges Virtual Q&A" on March 6, 2026. We had two judges - Judge Gallant and Judge Wright - answer questions about their Accountability Courts and their take on what defense attorneys need to know about Accountability Courts as an option. The event was held virtually and 1 CLE credit was given to attendees.

YLD Estate and Elder Law Committee

Chelsey Haun and Benjamin Walker, Co-Chairs

The YLD Estate and Elder Law Committee held a Wills Clinic on April 11 at Peace Baptist Church in Decatur, GA. Committee paired with Atlanta Legal Aid Society to put together a pro bono Wills Clinic for low-income homeowners. We had 15 clients attend for estate planning. We had between 20 and 30 volunteers. All Clients were offered a Last Will and Testament, Financial Power of Attorney, and Advanced Directive for Healthcare free of cost.

YLD Ethics and Professionalism Committee

Meagan Hurley and Meghan Pittman, Co-Chairs

The YLD Ethics and Professionalism Committee continues to actively advance programming and initiatives designed to promote ethical practice, professionalism, and engagement among young lawyers across Georgia.

Ongoing Initiatives Rule of the Month Series: The Committee has officially relaunched its “Rule of the Month” initiative, which highlights key provisions of the Georgia Rules of Professional Conduct and provides practical guidance for application in everyday practice. The Committee plans to continue expanding this series and welcomes member contributions.

CLE Programming Artificial Intelligence CLE (May 29, 2026): The Committee co-hosted a virtual CLE program with the Privacy & Technology Section titled: “Augmented Practice, Unchanged Duties: Professionalism and Ethics in the Age of Artificial Intelligence.” This free program (2.0 CLE hours: 1 ethics / 1 professionalism) will address emerging issues related to AI in legal practice, including competence, confidentiality, supervision, and maintaining independent professional judgment. Confirmed speakers include academic and regulatory perspectives, with participation anticipated from the Office of General Counsel. Lawyers in Public Office CLE (June 25, 2026) In partnership with the Chief Justice’s Commission on Professionalism, the Committee is organizing a second virtual CLE: “Juggling Professionalism, Ethics and Public Office.” This program explored how attorneys balance legal practice with service in public office and will feature a diverse panel of legal professionals serving in various public roles across the state. The program was intended to inform and encourage young lawyers considering public service.

Awards & Recognition YLD Ethics & Professionalism Award Nominations: The Committee will review submissions and select a recipient to be honored at the State Bar Annual Meeting in June. Member Engagement & YLD Programming Committee members remain actively engaged in YLD programming and outreach efforts.

In March, the Ethics & Professionalism Committee co-sponsored the YLD Kickball Tournament as part of the Leadership Academy programming in Savannah. Committee members also attended and participated in additional Savannah-area YLD events, strengthening connections with members across the state. The Committee will continue hosting monthly virtual check-ins, as well.

YLD Judicial Law Clerk Committee

Caleb Grant and Maggie Martin, Co-Chairs

The YLD Judicial Law Clerk Committee held a spring hike together with the Wellness Committee on May 9 at the Ocmulgee Mounds National Historic Park in Macon, Georgia. We are planning on inviting several local judges to the event to make this a relaxed networking opportunity for our committee members. An optional lunch followed in Macon. We are also planning on holding a Clerkship War Stories event where several former law clerks will give advice and tell stories about challenging aspects of the job.

YLD Law School Outreach Committee

Tom Church, Chair

The YLD Law School Outreach Committee held a study break handing out ice cream at UGA Law School on April 7 and giving out cookies to students at Mercer Law School on April 21.

YLD Leadership Academy

James Banter, Matt Caudell and Kelsie Mattox, Co-Chairs

The 2026 Leadership Academy completed our 3rd session March 6th and 7th in Savannah, GA. The session began with a Southern District swearing-in ceremony led by Judge Baker on Friday. The following morning, the Leadership Academy spent several hours volunteering at Harvest Food Bank. Afterward, the group participated in a YLD kickball game, where Judges Colbert, Middleton and Huffman served as referees. To conclude the session, the leadership academy enjoyed a mixer at Starland Yard. Session 4 of Leadership Academy will be in Ashville, NC on April 24th-26th and will be held in conjunction with the YLD Spring Meeting. During session 4, Leadership Academy volunteered at ABCCM Hominy Valley Crisis Ministry, attended a CLE with Ashville Mayor Esther R. Manheimer, and enjoyed a mixer with the North Carolina YLD.

YLD Legal Food Frenzy Committee

Alexa Dato-Caudell and Jack Wareham, Co-Chairs

The Legal Food Frenzy (LFF) competition dates are from April 20th through May 1st! Our goal is \$1 million, or individually, each attorney donates the equivalent of 1 billable hour. You can register a team for your firm, organization, or company at any point during the competition, and resources for fundraising, email templates, etc. can be found at: <https://legalfoodfrenzy.org/>. In the event you do not want to register a team but would still like to participate, we encourage you to donate to your regional food bank's fundraising page and to spread the word regarding LFF amongst your coworkers, colleagues, and local or affiliate bar organizations.

YLD Sports Law Committee

Joy Bonner, Chair

The YLD Sports Law Committee has completed its programming for the Bar year. For the month of March, we collaborated with the Leadership Academy and held two YLD kickball events in Savannah on March 7th and in Atlanta on March 21. We had an amazing turnout and feedback.

YLD AFFILIATES

The YLD currently has seven recognized active affiliates around the state: Young Lawyers of Augusta, Cobb County Younger Lawyers Division, Columbus YLD, Gate City YLD, Glynn County YLD, Houston County YLD, Macon YLD and Savannah YLD. If you know anyone interested in joining the affiliates, please let us know.

YLD MEETINGS

Annual Meeting | Jun. 11-14

Omni Amelia Island Resort
Fernandina Beach, Florida

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

Thank you for the opportunity to serve.

Sincerely,

A handwritten signature in black ink, appearing to read "Veronica R. Cox". The signature is written in a cursive style with a large initial "V" and "C".

Veronica R. Cox
YLD President



Future Meetings Schedule

Executive Committee

August 26 – 28, 2026	Supreme Court/Executive Committee Joint Meeting The Ritz-Carlton Reynolds, Lake Oconee, GA
September 17, 2026	Executive Committee Meeting Thu. Sep. 17 10 a.m. – 3 p.m. Virtual/In-Person Bar Center, Atlanta, GA
December 10, 2026	Executive Committee Meeting 12 – 4 p.m. Cobb County Bar Association Reception 5:30 – 7:30 p.m. Marietta Country Club, Kennesaw, GA
February 18 or 19, 2027	Executive Committee Meeting 12 – 4 p.m. Local Affinity Bar Association Reception 5:30 – 7:30 p.m. Hotel TBD, Albany, GA
April 29 or 30, 2027	Executive Committee Meeting 12 – 4 p.m. Local Affinity Bar Association Reception 5:30 – 7:30 p.m. Location TBD

Board of Governors

Fall 2026	October 15 – 18, 2026	The Westin Hilton Head Island Resort & Spa Hilton Head Island, SC <i>(*Contract Pending)</i>
Midyear 2027	January 14 – 17, 2027	Omni Hotel at The Battery Atlanta Atlanta, GA
Spring 2027	March 12 – 14, 2027	The Ritz-Carlton Reynolds, Lake Oconee Greensboro, GA
Annual 2027	June 10 – 13, 2027	Gaylord Palms Resort & Convention Center Orlando, FL
Annual 2028	June 15 – 18, 2028	Omni Amelia Island Resort Fernandina Beach, FL

Young Lawyers Division

Summer 2026	July 31 – August 2, 2026	YLD Officers & Directors Meeting The Westin Poinsett, Greenville, SC
Fall 2026	October 15 – 18, 2026	The Westin Hilton Head Island Resort & Spa In conjunction with the State Bar Fall BOG Meeting Hilton Head Island, SC <i>(*Contract Pending)</i>

(Updated 5/12/26)

***Contract Tentative** – Tentative: Initial stage; terms and group concessions under negotiation / ***Pending** – Agreement in progress, awaiting final approvals or signatures



Future Meetings Schedule

Young Lawyers Division (contd..)

Midyear 2027	January 14 – 17, 2027	Omni Hotel at the Battery Atlanta In conjunction with the State Bar Midyear Meeting Atlanta, GA
Spring 2027	March 4 – 7, 2027	Fairmont El San Juan Hotel Carolina, Puerto Rico
Annual 2027	June 10 – 13, 2027	Gaylord Palms Resort & Convention Center Orlando, FL
Annual 2028	June 15 – 18, 2028	Omni Amelia Island Resort In conjunction with the State Bar Annual Meeting Fernandina Beach, FL

American Bar Association

Annual 2026	July 29 – August 4, 2026	Hyatt Regency & Swissotel Chicago, IL
Midyear 2027	January 27 – February 1, 2027	Hotel TBD Chicago, IL.
Annual 2027	July 28 – August 3, 2027	Hotel TBD Chicago, IL
Annual 2028	July 26 – August 1, 2028	Hotel TBD Chicago, IL

Southern Conference of Bar Presidents

2026	Alabama	October 22 – 24, 2026	Grand Hotel, Point Clear, AL
2027	Maryland		

(Updated 5/12/26)

***Contract Tentative** – Tentative: Initial stage; terms and group concessions under negotiation / ***Pending** – Agreement in progress, awaiting final approvals or signatures

**State Bar of Georgia
2027 Election Schedule**

2026

June	Deadline for submission of election schedule for publication in the Summer issue of the <i>Georgia Bar Journal</i>
August	Official Election Notice, Summer Issue <i>Georgia Bar Journal</i>
December 1	Nominating petition package emailed to incumbent Board of Governors Members

2027

January 14 - 16	Nomination of Officers at Midyear Board Meeting, Omni Hotel at the Battery Atlanta Atlanta, GA
January 14	Deadline for receipt of nominating petitions for incumbent Board Members including incumbent non-resident (out of state) members
Feb 11	Deadline for receipt of nominating petitions for new Board Members including new non-resident (out of state) members
March 5	Deadline for write-in candidates for Officer to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 1 (c))
March 5	Deadline for write-in candidates for Board of Governors to file a written statement (not less than 10 days prior to mailing of ballots (Article VII, Section 2 (c))
March 15	Ballots mailed
April 16	11:59 p.m. Deadline for ballots to be cast in order to be valid
April 23	Election service submits results to the Elections Committee
May 3	Election results reported and made available



TO: Chris Twyman, President State Bar of Georgia
FROM: Susan Coppedge, Executive Director Georgia Legal Services Program
CC: Julia Sullivan, President Georgia Legal Services Program Board of Directors
RE: Georgia Legal Services Program Board Appointments by the State Bar of Georgia
DATE: May 13, 2026

Pursuant to the GLSP Bylaws, we are requesting the State Bar of Georgia designate the following representatives to serve as members of the GLSP Board for two-year terms from August 2026 – August 2028:

Kevin Pitre, Associate General Counsel, UPS, Atlanta, Georgia

Tera Reese-Beisbier, Reese-Beisbier & Associates, Cumming, Georgia

Kelli J. Spencer, Assistant District Attorney, Office of the District Attorney

Jared T. Williams, Augusta, Georgia

Respectfully submitted,

Susan Coppedge
GLSP Executive Director



State Bar of Georgia

To: Bar Officers/Finance Committee

From: Ron Turner *rwT*

Date: April 29, 2026

Re: March 2026 Financial Statements-Bar Operations and Bar Center

Attached please find the March 2026 financial statements. These financial statements are presented at a summary level for clarity and to convey overall trends. Full departmental details are 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 < **\$2,500** are not explained to conserve your time.

New and revised items are highlighted in bold. Savings may be realized in each department to offset these overages. In many instances unbudgeted items will be covered as part of the use of unallocated cash.

Administration

Membership software license is over budget primarily due to the cost of iMIS membership licenses. While we factored in an increase in the budget for this item, the actual increase was greater than the budgeted increase. In addition, due to the transition of the iMIS database to the cloud there were certain unanticipated costs.

Office of General Counsel

State Disciplinary Board Panel costs are greater than the budget due to a combination of factors, including meeting planning, delivery and design, combined with continued increases in hotel, food and beverage, travel, and related expenses.

High School Mock Trial

Costs for the regional mock trial competition exceed the budget due to an increased emphasis on security and event logistics, resulting in higher than anticipated expenses.

Institute of Continuing Legal Education (ICLE)

Seminars and training are in excess of the budget due to additional expenses associated with the investment in a project management and reporting software (Asana), and timing impacting the current budget period.

Professional fees for ICLE are over budget due to the purchase of Asana, a project management reporting software system. This amount was partially budgeted for in the prior fiscal year and partially in the current fiscal year. No costs were incurred in the prior year, and the project did not start until the current fiscal year.

Fastcase

Fastcase costs have exceeded the budget due to an increase in the costs from the vendor that was greater than the budgeted increase.

Other Bar Center Operations

The Bar Center incurred unbudgeted costs of approximately \$144,100 associated with the audio/video system for both the Presidents' Boardroom and the YLD Presidents' Boardroom. These costs are being incurred to overhaul both boardrooms to allow for better meeting functionality whether the meetings are in-person or hybrid.

The Bar incurred unbudgeted building rehab costs of approximately \$681,400 for the following items: (1) lease buildout costs of approximately \$218,400 for a tenant to enter into a lease renewal for space on the 4th floor and (2) approximately \$21,700 for the replacement of hoist ropes associated with one of the elevators (3) approximately \$46,600 in costs paid for work done on electrical panels in order to replace the old electrical panels (4) approximately \$151,900 for pre-cooling and heating coils associated with the building (5) approximately \$18,600 associated with other building costs (6) approximately \$22,600 associated with architect costs for potential bathroom upgrades and (7) approximately \$200,000 for a generator replacement.

In addition, the Bar incurred unbudgeted tenant improvement costs of approximately \$11,800 for the replacement of an air handler motor in one of the tenant's suites that was found to be defective and not repairable.

Rental

Costs for computer hardware were incurred that were not originally budgeted. These hardware costs were incurred to upgrade the security system associated with the State Bar headquarters building in Atlanta.

Repairs and maintenance for rubbish removal is greater than the budget due to additional garbage pickups that were required during the current fiscal year along with underbudgeting in this area.

Gas costs for the building were over budget due to an estimated over-accrual by our outside property management company. They accrued an amount in excess of the amount that is due. This will be corrected by the property management company during the month of April.

Parking

Signs were over budget due to signage costs incurred by the new parking garage vendor. Changing vendors in 2026 was not anticipated when the budget was originally prepared.

Handheld rental costs are over budget due to an under budget by our outside parking management company. Handheld devices are being used in the current parking operations. When the budget was prepared, these costs were not originally budgeted.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately \$8,400. This is a positive variance. This number will fluctuate.

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
Russ Willard
Sarah Coole

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2026

	Year Ending	Year To Date	Year Ending
	06/30/2025	March 31, 2026	06/30/2026
	Actual	Actual	Annual Budget
Membership Numbers			
Active Members	42,777	43,455	43,700
Inactive Members	7,827	7,598	7,740
Provisional Members	21	14	50
Associates/Affiliates	20	21	13
Foreign Legal Consultants	12	12	133.33 %
Students	491	506	121.93 %
Emeritus	5,095	5,300	105.47 %
Total Membership Numbers	56,243	56,906	99.92 %
Revenue			
Dues Active	11,283,972	11,695,496	99.12 %
Dues Inactive	1,061,172	1,050,339	100.52 %
Dues Provisional	9,900	15,927	235.96 %
Dues Associates	850	1,700	188.89 %
Dues Foreign Legal Consultant	2,508	3,240	133.33 %
Dues Late Fees	244,825	230,450	88.63 %
Dues NSF Check Fee	140	60	42.86 %
Dues Prior Years	11,847	4,368	58.24 %
Total License and Dues	12,615,214	13,001,580	99.09 %
Program Registration Income	4,742,679	4,347,114	90.56 %
Section Expense Reimbursement	320,694	335,385	100.00 %
CSF Expense Reimbursement	73,000	142,500	75.00 %
Advertising and Sales	53,362	45,695	167.14 %
Membership Income	215,977	190,916	108.88 %
Credit Card Processing Fees	131,682	33,354	29.00 %
Interest Income	704,444	621,953	188.47 %
Miscellaneous Revenues	34,896	1,805	8.20 %
Total Bar Revenue	18,891,948	18,720,302	97.93 %
Total Bar Expenses	18,710,206	14,341,960	71.12 %
SBG Net Gain (Loss)	\$ 181,742 \$	4,378,342	(417.84) % \$ (1,047,848)

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

State Bar of Georgia
Consolidated Revenues and Expenditures
Operations and Bar Center Combined
For the Year To Date Period Ending March 31, 2026

	Year Ending	Year To Date		% of Budget	Year Ending
	06/30/2025	March 31, 2026	March 31, 2026		06/30/2026
	Actual	Actual	Actual		Annual Budget
Total Bar Center Operations Revenue	3,409,662	1,901,118	1,901,118	65.44 %	2,904,940
Total Bar Center Operations Expenses	3,984,407	2,882,683	2,882,683	98.32 %	2,931,965
Total Bar Center Operations Net Gain (Loss)	\$ (574,745) \$	(981,565)	(981,565)	3,632.06 % \$	(27,025)
Combined Revenue	22,301,610	20,621,420	20,621,420	93.64 %	22,021,635
Combined Expenses	22,694,613	17,224,643	17,224,643	74.58 %	23,096,508
Total Combined Net Income (Loss)	\$ (393,003) \$	3,396,777	3,396,777	(316.02) % \$	(1,074,873)

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

State Bar of Georgia
Total Bar Center Operations
Revenues and Expenditures - Executive Summary
For the Year To Date Period Ending March 31, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bar Center Income and Cash Receipts							
Gain/Loss Investment Interest Allocation	(35,649)	0.00 %	20,898	0.00 %	0	(20,898)	146,317
CCLC Contributions to Bar Center	0	0.00 %	500,000	35.97 %	1,390,000	890,000	1,358,389
Interest and Dividend Income	72,640	52.64 %	190,521	138.06 %	138,000	(52,521)	183,425
Bar Center Income and Cash Receipts	\$ 36,991	2.42 %	\$ 711,419	46.56 %	\$ 1,528,000	\$ 816,581	\$ 1,688,131
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	2,883	24.02 %	6,977	58.14 %	12,000	5,023	11,053
Investment Service Fees	8,897	37.07 %	22,549	93.96 %	24,000	1,451	27,376
Conference Center Renovations	0	0.00 %	0	0.00 %	9,500	9,500	0
Audio Video, Furniture and Equipment	96	0.28 %	172,321	506.83 %	34,000	(138,321)	64,498
Building Rehabilitation	0	0.00 %	681,383	0.00 %	0	(681,383)	1,275,625
Tenant Improvements	0	0.00 %	11,814	0.00 %	0	(11,814)	0
President's Boardroom	0	0.00 %	0	0.00 %	0	0	1,109
Bar Center Expenses and Cash Disbursements	\$ 11,876	14.94 %	\$ 895,044	1125.84 %	\$ 79,500	\$ (815,544)	\$ 1,379,661
Bar Center Combined Net Cash Flow	\$ 25,115	1.73 %	\$ (183,625)	(12.68) %	\$ 1,448,500	\$ 1,632,125	\$ 308,470
Conference Center Income and Expenses							
Room Rentals and Various Charges	1,670	12.37 %	13,812	102.31 %	13,500	(312)	16,415
Conference Center Operating Expenses	43,015	8.73 %	373,098	75.72 %	492,708	119,610	469,343
Conference Center Combined Net Cash Flow	\$ (41,345)	8.63 %	\$ (359,286)	74.97 %	\$ (479,208)	\$ (119,922)	\$ (452,929)
Rental Income and Expenses							
Rental Income	63,956	8.50 %	634,431	84.37 %	752,000	117,569	983,600
Building Operating Expenses	167,489	8.42 %	1,338,099	67.26 %	1,989,330	651,231	1,792,395
Rental Combined Net Cash Flow	\$ (103,533)	8.37 %	\$ (703,668)	56.87 %	\$ (1,237,330)	\$ (533,662)	\$ (808,795)
Parking Income and Expenses							
Parking Income	54,637	8.94 %	541,456	88.55 %	611,440	69,984	721,517
Parking Deck Operating Expenses	42,819	11.56 %	276,442	74.63 %	370,427	93,985	343,008
Parking Combined Net Cash Flow	\$ 11,818	4.90 %	\$ 265,014	109.96 %	\$ 241,013	\$ (24,001)	\$ 378,509
Total Bar Center Operations Net Gain (Loss)	\$ (107,946)	399.43 %	\$ (981,565)	3,632.06 %	\$ (27,025)	\$ 954,540	\$ (574,745)

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

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2026

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 11,695,496	\$ 11,799,000	99.12 %	\$ 11,283,972
Dues - Inactive	1,050,339	1,044,900	100.52 %	1,061,172
Dues - Provisional	15,927	6,750	235.96 %	9,900
Dues - Misc. Types	4,940	3,330	148.35 %	3,358
Dues - Late Fees	234,878	267,640	87.76 %	256,812
Total Dues & Licenses	13,001,580	13,121,620	99.09 %	12,615,214
Program Registration Income	4,347,114	4,800,000	90.56 %	4,742,679
Section Expense Reimbursement	335,385	335,385	100.00 %	320,694
CSF Expense Reimbursement	142,500	190,000	75.00 %	73,000
Advertising and Sales	45,695	27,340	167.14 %	53,362
Membership Income	71,891	84,150	85.43 %	94,477
Pro Hac Vice	518,825	480,000	108.09 %	535,200
Pro Hac Vice Contra	(399,800)	(388,800)	102.83 %	(413,700)
Credit Card Processing Fees	33,354	115,000	29.00 %	131,682
Interest Income	621,953	330,000	188.47 %	704,444
Miscellaneous Revenues	1,805	22,000	8.20 %	34,896
Total Revenues	18,720,302	19,116,695	97.93 %	18,891,948
Expenses				
Administration	2,115,333	2,988,568	70.78 %	2,846,592
General Counsel	4,056,428	5,633,355	72.01 %	5,133,157
Communications	637,960	958,061	66.59 %	1,061,121
Lawyer's Assistance Program	116,250	155,000	75.00 %	154,674
Fee Arbitration	421,801	626,996	67.27 %	571,668
Law Practice Management	322,343	573,367	56.22 %	458,571
Sections	251,097	335,385	74.87 %	323,193
Savannah Office	240,693	325,224	74.01 %	310,494
Tifton Office	138,064	203,515	67.84 %	209,899
Young Lawyers	341,365	470,224	72.60 %	435,031
Unauthorized Practice of Law	575,763	862,268	66.77 %	904,586
Law Related Education	345,007	464,994	74.20 %	438,473
High School Mock Trial	128,062	185,155	69.16 %	187,023
ICLE	3,455,033	4,530,379	76.26 %	3,935,703

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

State Bar of Georgia
Income Statement YTD - Operations
For the Year To Date Period Ending March 31, 2026

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	159,162	212,216	75.00 %	212,216
Fastcase	486,539	480,000	101.36 %	462,428
Officers' Expenses	39,123	99,470	39.33 %	73,857
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	465,185	1,005,200	46.28 %	1,104,541
Unallocated Services	(8,415)	0	0.00 %	(168,187)
Total Expenses	14,341,960	20,164,543	71.12 %	18,710,206
Net Income	\$ 4,378,342	\$ (1,047,848)	(417.84) %	\$ 181,742

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

Created on 04/24/2026
State Bar of Georgia

State Bar of Georgia
Supporting Schedule of Other Expenses - YTD
For the Year To Date Period Ending March 31, 2026

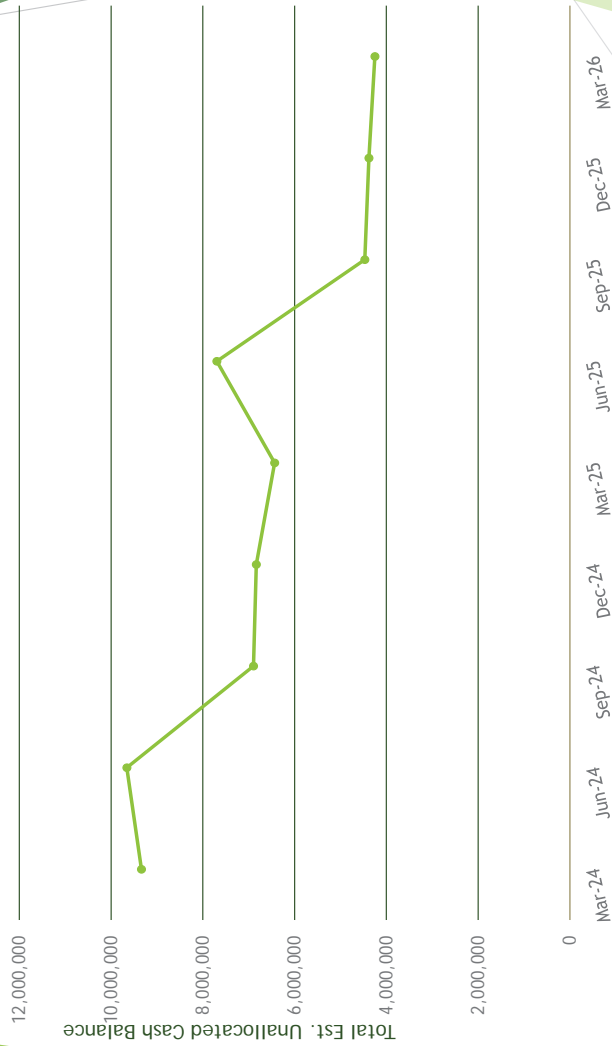
	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Other Expenses				
BOG and Member Meetings	\$ 224,731	\$ 597,500	37.61 %	\$ 651,918
Supreme Court Meetings	68,267	79,000	86.41 %	81,230
Executive Committee Meetings	23,154	62,000	37.35 %	56,444
Court of Appeals Meetings	5,417	20,000	27.08 %	24,814
State Disciplinary Board Lawyers	25,500	34,000	75.00 %	31,500
Electronic Ballots	11,998	18,000	66.66 %	16,646
Dues Notice	5,348	38,000	14.07 %	32,984
Letters of Good Standing	1,220	2,400	50.86 %	2,033
Bar Membership Cards	10,694	12,500	85.55 %	12,442
50 Year Certificates	2,749	6,300	43.64 %	4,823
Membership Database Project	0	0	0.00 %	110,713
State Bar Committees	8,051	20,000	40.25 %	16,486
Georgia Diversity Program	10,000	10,000	100.00 %	10,000
ABA Delegate Breakfast	2,254	3,000	75.14 %	2,413
1st Floor Painting	0	6,000	0.00 %	0
Commitment to Equality Awards	7,500	7,500	100.00 %	2,500
Bond Premium Amortization	6,575	23,000	28.59 %	11,688
Investment Service Fees	21,728	36,000	60.35 %	28,407
Access to Justice/Pro Bono	30,000	30,000	100.00 %	7,500
Total Other Expenses	\$ 465,186	\$ 1,005,200	46.28 %	\$ 1,104,541

State Bar of Georgia
 Status and Use of Cash and Investments
 For the Current Period Ending March 31, 2026

Current Month (March 2026)	Ending of Prior Fiscal Year (June 2025)	Dollar Change	% Increase/ Decrease
Cash and Investments - Bar			
\$ 38,278,751			
Less:			
Georgia Bar Foundation Cash Included in Above Amount	(1,700)		
CCLC Cash and Investments Included in Above Amount	(7,073,559)		
Unrealized (Gain)/Loss in Investments	(942,977)		
Net Cash Available for State Bar	30,260,515		
Use of Cash:			
Less:			
Board Designated - See Separate Schedule Attached	(8,785,995)		
Donor Temporarily Restricted - See Separate Schedule Attached	(3,479,208)		
Total Board Designated and Temporarily Restricted	(12,265,203)		
Other - Cash Allocated:			
Collection of Outstanding Accounts Receivable	149,845		
Payment of Accounts Payable	(593,414)		
Payment of Accrued Vacation	(526,460)		
Deferred Income	(3,490)		
Payment of Credit Card Bill	(289,700)		
Payment of Accrued Salary	(672,573)		
Payment of Accrued Taxes	(51,452)		
Payment of Other Accrued Expenses (primarily pension)	(507,110)		
Payment to Client Security Fund	(3,162,270)		
Operational Expenses for Remaining Bar Year	(5,318,469)		
Additional Revenue for Bar Operations (Excluding Bar Center)	396,393		
Net Amount to be paid to Related Entities	(511,399)		
Total Other - Cash Allocated	(11,090,099)		
Anticipated Use of Unallocated Cash - Bar Operations	0		
Estimated Cash and Investments - June 30, 2026 - Bar	8,379,251	(1,474,038)	-18%
Cash and Investments - Bar Center			
140,447			
Other Cash Allocated - Bar Center:			
Collection of Outstanding Accounts Receivable	38,107		
Payment of Accounts Payable	(90,993)		
Deferred Income	(34,808)		
Payment of Other Accrued Expenses	(52,905)		
Additional Revenue for Bar Center Operations	111,345		
Total Other - Cash Allocated - Bar Center	(29,254)		
Anticipated Use of Unallocated Cash - Bar Center Operations	(2,765,358)		
Estimated Cash and Investments June 30, 2026 - Bar Center	(683,890)	(2,081,468)	-304%
Estimated Cash and Investments June 30, 2026 - Bar Center	(2,654,165)	(10,349,526)	-134%
Total Estimated Cash Balance at June 30, 2026	\$ 7,695,361	(10,349,526)	-134%

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 2025 - 2026 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, 2026 to equal 100% of the total budgeted revenue. (3) Bar Center would contribute additional cash flow or pay additional expenses through June 30, 2026 to equal their budget.

SBG Unallocated Cash



For the Period Ending

State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Year To Date Period Ending March 31, 2026

	June 30, 2023	June 30, 2024	June 30, 2025	March 31, 2026
Board Designated				
Board Designated - General Operations - Bar	\$ 2,750,000	\$ 2,750,000	\$ 2,750,000	\$ 2,750,000
Board Designated - General Operations - Bar Center	2,000,000	2,000,000	2,000,000	2,000,000
Litigation	300,000	300,000	300,000	115,685
Board Designated - Sections	3,664,312	3,745,183	3,608,573	3,933,831
YLD Meetings	77,999	49,795	5,091	(13,521)
Total Board-Designated excludes ICLE	\$ 8,792,311	\$ 8,844,978	\$ 8,663,664	\$ 8,785,995
Donor Temporarily Restricted				
Legislative	\$ 1,806,483	\$ 2,423,119	\$ 2,825,925	\$ 2,864,246
Law Related Education/Marshall fund	207,599	192,396	162,382	127,547
High School Mock Trial	15,299	17,481	27,719	26,306
Basics Program	116,951	121,963	125,851	115,666
Younger Lawyers	87,199	126,603	135,410	181,234
Lawyers Assistance	31,863	33,229	34,352	33,459
Georgia Diversity Program	13,555	6,374	165	399
Bar Media Conference	3,115	1,523	943	635
Law Day	6,212	6,317	5,610	5,712
Access to Justice	3,175	19,993	22,150	46,931
Promote Inclusion	8,701	5,924	12,649	20,223
Military Vet Pro Bono	14,481	15,101	15,582	15,865
Justice Portraits	1,022	1,066	1,100	1,121
Center for Lawyer Well-Being	0	0	1,195	39,864
Total Donor Temporarily Restricted	\$ 2,315,655	\$ 2,971,089	\$ 3,371,033	\$ 3,479,208
Net Board Designated and Donor Temporarily Restricted	\$ 11,107,967	\$ 11,816,068	\$ 12,034,697	\$ 12,265,203

State Bar of Georgia
Sections End of Period Balances
For the Year To Date Period Ending March 31, 2026

	2023	2024	2025	2026
	June 30	June 30	June 30	March 31
Administrative Law	5,415	3,650	1,033	(187)
Agricultural Law	15,245	15,081	16,199	17,398
Animal Law	6,859	7,960	8,417	8,999
Anti-Trust Law	13,595	13,768	12,615	12,783
Appellate Practice Law	28,338	31,423	18,675	21,559
Aviation Law	11,198	8,446	5,856	(707)
Bankruptcy Law	83,998	84,451	38,833	54,009
Bike Law	3,854	4,797	5,439	6,235
Business Law	241,256	266,886	293,867	309,150
Cannabis and Hemp Law	15,274	20,322	25,922	28,346
Child Protection and Advocacy Law	6,976	8,745	10,845	10,627
Class Action Law	4,734	4,058	4,982	7,525
Constitutional Law	27,877	29,732	35,359	40,668
Construction Law	26,054	29,142	33,089	36,463
Consumer Law	51,659	53,548	57,389	60,532
Corporate Counsel Law	127,444	94,180	102,052	103,196
Creditor's Rights Law	46,899	49,363	35,810	41,151
Criminal Law	174,486	188,475	180,029	196,841
Dispute Law	49,926	62,1924	73,039	84,604
E-Discovery and Use of Technology Law	34,558	55,788	47,202	49,205
Elder Law	146,843	159,997	155,265	147,589
Eminent Domain Law	65,781	57,060	53,055	52,116
Employee Benefits Law	36,540	38,182	41,262	44,181
Energy Law	0	198	1,721	3,903
Entertainment and Sports Law	72,629	77,275	75,947	54,552
Environmental Law	96,921	101,910	104,838	105,818
Equine Law	6,868	7,141	7,394	8,228
Family Law	365,473	350,651	220,110	351,850
Fiduciary Law	224,980	248,744	244,240	257,479
Franchise and Distribution Law	8,242	9,729	9,446	9,743
General Practice and Trial Law	65,181	60,571	102,820	159,361
Government Attorney Law	32,990	35,038	36,136	38,423
Health Law	37,353	42,765	27,631	40,806
Immigration Law	41,920	46,813	51,056	54,268
Intellectual Property Law	206,892	227,554	209,102	187,514
International Law	86,953	85,732	91,214	95,029
Judicial Law	18,222	18,212	18,149	23,179
Labor Law	102,539	104,105	93,255	91,478

State Bar of Georgia
Sections End of Period Balances
For the Year To Date Period Ending March 31, 2026

	2023	2024	2025	2026
	June 30	June 30	June 30	March 31
Legal Economics Law	6,671	7,023	7,248	7,379
Local Government Law	56,744	59,979	58,702	60,826
Military and Veterans Law	18,403	20,281	21,440	11,838
Nonprofit Law	21,472	26,782	28,142	31,875
Privacy and Technology Law	36,345	(6,082)	48,183	63,362
Product Liability Law	117,187	128,385	137,714	145,216
Professional Liability Law	17,313	20,063	19,469	17,197
Real Property Law	403,493	414,763	348,879	401,922
Religious Liberty Law	1,325	2,933	4,219	5,335
School and College Law	40,768	42,856	41,733	43,883
Senior Lawyers Law	12,024	12,702	8,635	(284)
Taxation Law	36,464	35,026	37,828	43,866
Tort and Insurance Law	104,254	77,521	131,488	140,062
White Collar Law	0	295	2,198	22
Worker's Compensation Law	199,877	188,240	163,390	147,418
Total	\$ 3,664,312	\$ 3,745,183	\$ 3,608,573	\$ 3,933,831

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through March 31, 2026

Dues	2025-26 Dues Season	2024-25 Dues Season	2023-24 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	50,592	50,114	49,695
Active - Number Paid	44,769	43,317	42,632
Inactive - Number Paid	7,919	8,074	8,237
Total Number of Members With Dues Paid	52,688	51,391	50,869
Percent of Total Members With Dues Paid	104.1%	102.5%	102.4%
Number of Members Who Made A Contribution	4,493	8,649	9,091
Percent of Members Who Made A Contribution	8.5%	16.8%	17.9%
Total Contribution Amount	\$ 386,115	\$ 820,248	\$ 862,990
Average Amount Paid	\$ 86	\$ 95	\$ 95

Legislative Contribution Amounts by Dues Year

2025 - 2026	<u>\$ 386,115</u>
2024 - 2025	<u>\$ 820,248</u>
2023 - 2024	<u>\$ 862,990</u>
2022 - 2023	<u>\$ 803,415</u>
2021 - 2022	<u>\$ 760,350</u>
2020 - 2021	<u>\$ 766,123</u>
2019 - 2020	<u>\$ 322,708</u>
2018 - 2019	<u>\$ 494,906</u>
2017 - 2018	<u>\$ 546,905</u>
2016 - 2017	<u>\$ 557,991</u>

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

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

State Bar of Georgia
Summary of Members and Voluntary Contributions to Georgia Legal Services Program (GLSP)
With Contributions Paid Through March 31, 2026

Dues	2025-26 Dues Season	2024-25 Dues Season	2023-24 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	50,592	50,114	49,695
Active - Number Paid	44,769	43,317	42,632
Inactive - Number Paid	7,919	8,074	8,237
Total Number of Members With Dues Paid	52,688	51,391	50,869
Percent of Total Members With Dues Paid	104.1%	102.5%	102.4%
Number of Members Who Made A Contribution	2,062	3,460	3,575
Percent of Members Who Made A Contribution	3.9%	6.7%	7.0%
Total Contribution Amount	\$ 231,377	\$ 485,947	\$ 490,605
Average Contribution Amount	\$ 112	\$ 140	\$ 137

GLSP Contribution Amounts by Dues Year

2025 - 2026	\$ 231,377
2024 - 2025	\$ 485,947
2023 - 2024	\$ 490,605
2022 - 2023	\$ 483,850
2021 - 2022	\$ 478,287
2020 - 2021	\$ 436,815
2019 - 2020	\$ 366,674
2018 - 2019	\$ 295,454
2017 - 2018	\$ 312,251
2016 - 2017	\$ 276,487

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
For the Current Period Ending March 31, 2026**

Beginning Balance	\$ 2,825,925
Income:	
Interest and Dividend Income	56,224
Gain/Loss Investment Interest Allocation	6,427
Miscellaneous Income	385,515
Total Income	<u>448,166</u>
Expenditures:	
Staff and Contract Lobbyists	353,051
Grassroots Efforts	7,157
Travel	6,655
Shared Office Allocation	16,244
Computer Software	175
Miscellaneous	26,564
Total Expenditures	<u>409,846</u>
Net Donor Temporarily Restricted Balance	\$ <u>2,864,246</u>

State Bar of Georgia
Summary of Client Security Fund Activity
For the Year To Date Period Ending March 31, 2026

	2023 June 30	2024 June 30	2025 June 30	March 31, 2026
Fund Balance, Beginning of Year	\$ 1,634,260	\$ 2,212,202	\$ 2,782,908	\$ 2,715,520
Income:				
Interest and Dividend Income	33,117	44,364	60,224	61,060
Gain/Loss Investment Interest Allocation	19,577	92,242	47,344	5,762
Client Security Fund Assessments	751,680	760,050	767,625	770,820
Restitution Income	18,445	821	13,207	612
Total Income	\$ 822,819	\$ 897,477	\$ 888,400	\$ 838,254
Expenses:				
Restricted Expenses	73,000	73,000	73,000	142,500
Client Security Fund Claims Payments	159,879	239,968	870,020	239,542
Bond Premium Amortization	4,288	5,737	3,704	2,238
Investment Service Fees	7,710	8,066	9,064	7,224
Total Expenses	\$ 244,877	\$ 326,771	\$ 955,788	\$ 391,504
Net Income	\$ 577,942	\$ 570,706	\$ (67,388)	\$ 446,750
Fund Balance, End of Period	\$ 2,212,202	\$ 2,782,908	\$ 2,715,520	\$ 3,162,271



June 13, 2026

Dear Board of Governors:

As a Past President of the Young Lawyers Division (YLD) of the State Bar of Georgia, I am particularly honored to make the first report of the newly created Senior Lawyers Division (SLD). At the outset, I would like to thank Bill Gentry for supporting me and Chris Twyman for appointing me as the inaugural President of the Division. I would also like to recognize my Officers and Executive Committee.

I am President (Atlanta).
Howard Mark Delashmit (Cartersville) is President-Elect.
James Davis Hyder, Jr. (Augusta) is Treasurer.
S. Kendall Butterworth (Smyrna) is Secretary.

YLD liaison (appointed by YLD President) 1-year term - Kindall Browning-Rickle (Eastman)
Bar EC liaison (appointed by Bar President) 1-year term - Joyce Gist Lewis (Atlanta)
EC Member 1 (appointment by Bar President) 1-year term - Jack J. "Jeff" Helms Jr. (Homerville)
EC Member 2 (appointment by SLD President) 2-year term - William R. Jenkins (College Park)
EC Member 3 (appointment by SLD President-elect) 2-year term - J. Anderson "Andy" Davis (Rome)

Howard, James, Kendall and I have already been working together and planning for the upcoming Bar year when we will have dues paying members who will be able to vote, hold offices and chair committees we create. On February 26, we held the first meeting of the Division Officers virtually. On March 2, we met with State Bar Staff and Damon Elmore to get an overview and lay of the land. We promptly started brainstorming and planning events even before the Annual Meeting. Jessica Oglesby has been working with us, and we couldn't have gotten as much done so far without her!

Immediately after Chris appointed the inaugural officers of the SLD, I reached out to the YLD Past Presidents who are now SLD members and encouraged them to participate and become dues paying members. I also reached out to the SLD Working Group and made the same plea. We held an SLD Working Group meeting on April 2, where I updated them on the events we had planned for the coming months.

We have already been very busy and active with planning and hosting several events.

On April 11, members of the SLD participated in a Wills Clinic sponsored by Alanta Legal Aid and the YLD.

On April 23, my law firm, Kilpatrick Townsend & Stockton LLP, hosted a reception for the SLD to recognize and congratulate the new Officers and to encourage SLD members to become dues paying members of the Division. We had a wonderful turnout, as approximately 140 lawyers attended, including Justice Bethel (who said a few words after I welcomed and spoke to the group), State Bar Past Presidents Robin Frazer Clark and Pat O'Connor, Executive Committee Member Gary Spencer. We also had several YLD Past Presidents attend: me, James, Kendall, Stan Brading, Henry Walker, Damon

Elmore and Elena Kaplan. Of course, Board of Governor Member Howard was there too. I saw many new faces and many folks I haven't seen for years. It was so much fun, and we got some rave reviews!

We had a reception on June 12, 2026, at the State Bar's Annual Meeting from 4:30 – 5:30 p.m. sponsored by Bryan D. Wulz, CLU ChFC Agent, New York Life Insurance Company.

We have planned an SLD night at the Braves v. Reds game on September 24 at 7:15 p.m.

James Hogan and Kendall Butterworth are planning a Fall CLE Program at the State Bar that will focus on succession planning, retirement planning and identifying signs of cognitive impairment.

By the time of this meeting, I hope to have a meeting of the SLD Executive Committee, and I will provide an update live at the Annual Meeting.

Thank you for the opportunity to serve.

Sincerely,

A handwritten signature in blue ink that reads "Betsy". The signature is written in a cursive, flowing style.

Elizabeth "Betsy" Hodges
SLD President



State Bar of Georgia

SENIOR LAWYERS DIVISION

The Senior Lawyers Division (SLD) of the State Bar of Georgia was established to create a community of experienced legal professionals to support continued professional engagement, address cognitive decline, promote pro bono work, provide mentorship to younger lawyers and foster social connection among Bar members who are aged 55 and older.

2026-27 SLD Officers

President

Elizabeth “Betsy” Hodges, Atlanta

President-Elect

Howard Delashmit, Cartersville

Treasurer

James Hyder, Augusta

Secretary

Kendall Butterworth, Atlanta

SLD Executive Committee YLD

Liaison

Kindall Browning-Rickle, Eastman

Bar EC Liaison

Joyce Gist Lewis, Atlanta

EC Member

Jack J. “Jeff” Helms Jr., Homerville

EC Member

William Jenkins, College Park

EC Member

J. Anderson “Andy” Davis, Rome



Scan the QR code to learn more about the mission of the SLD and become a voting member.

For questions, please email Jessica Oglesby at jessicao@gabar.org.

**State Bar of Georgia
Center For Lawyer Wellbeing
Report to the Board of Governors
June 12, 2026**

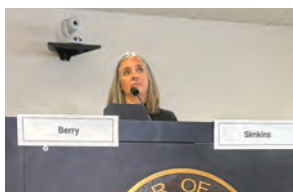
Introduction

During its inaugural year, the Center for Lawyer Wellbeing (the Center) moved with intention and momentum toward its purpose of advancing and advocating for the physical and mental health of lawyers through increased awareness, programming, policy development and research. The response across the State Bar of Georgia has been both strong and encouraging, with the Center growing to 1,212 members in its first year.

This early engagement reflects a shared recognition that lawyer wellbeing is essential not only to individual health, but also to professional competence and the long-term sustainability of the practice of law.

Programming and Engagement

In September 2025, the Center hosted its signature continuing legal education program, *Attorney Pro Tips, Truths and Hacks You Need to Know*. This program provided practical tools to help attorneys manage stress, embrace an abundance mindset, navigate change, and build lasting personal and professional success. The program offered five CLE hours, including one hour of professionalism credit.



2025 Signature CLE



2025 Signature CLE



2025 Signature CLE

The Center also supported wellness-focused engagement opportunities connected to Bar activities. During the Fall Meeting at Cloudland, members participated in a Young Lawyers Division-sponsored wellness walk.

Community Impact and Partnership

In November, the Center participated in the annual Out of the Darkness Walk, organized by the American Foundation for Suicide Prevention. The State Bar of Georgia Lawyers Living Well team raised \$6,481, exceeding its \$3,000 goal.



2025 Fall Meeting | Wellness Walk

Building the Foundation

The Center dedicated significant time to building a strong internal foundation, including bylaws, structure and member engagement strategies. The first official meeting was held Feb. 23, 2026, with ongoing monthly meetings.

2025 Out of the Darkness Walk | State Bar of Georgia Wellness Team



Why we walk.

Leadership and Structure

The Center’s work is guided by its Executive Committee, led by Chair Javoyne Hicks, Vice Chair Hon. Shondeana Morris, Secretary Ronald E. Daniels and Treasurer Mark Alexander.

2026-2027 Leadership Team Elected—Chair Paul Knowlton, Vice Chair Hon. Shondeana Morris, Secretary Hon. Sonja Brown and Treasurer Mark Alexander.

Expanding the Conversation

The Center participated in the South Carolina Bar Annual Meeting, engaging in a wellness track to share best practices.



South Carolina Bar Annual Meeting



South Carolina Bar Annual Meeting



South Carolina Bar Annual Meeting

Financial Overview and Future Growth

Membership dues of \$40 resulted in approximately \$39,864 in revenue. In addition, the Board of Governors approved a full-time director for the upcoming year.

Looking Ahead

The Center remains committed to supporting the overall health and resilience of attorneys and will continue to expand programming and engagement opportunities.

Join the Center for Lawyer Wellbeing

All members of the State Bar of Georgia are encouraged to join the Center and participate in its ongoing work. Scan the QR code for more information and consider joining us. Come hang out with Denny—the best wellbeing dog ever!





CHIEF JUSTICE’S COMMISSION ON PROFESSIONALISM

Members

The Honorable Nels S.D. Peterson (Chair)
Chief Justice, Supreme Court of Georgia
Atlanta, Georgia

Mr. M. Lamar Barnett, Jr.
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

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

Mrs. Veronica Rogusky Cox
Federal Government
Atlanta, GA

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

Mr. Jeffrey William DeLoach
Epps Holloway DeLoach & Hoipkemier LLC
Watkinsville, GA

Ms. Anissa D. Floyd
Smurfit Westrock
Atlanta, 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

The Honorable Jeffrey B. Hanson
Bibb County State Court
Macon, GA

Professor Tonja Jacobi
Emory University School of Law
Atlanta, Georgia

Mr. Francys Johnson
Davis Bozeman Johnson Law
Statesboro, GA

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

Mrs. Rizza O’Connor
Bryant & O’Connor Law Firm
Vidalia, Georgia

Mr. David M. “Dave” Paule
Our Fundraising Search
Atlanta, Georgia

The Honorable Benjamin S. Richardson
Chattahoochee Circuit Superior Court
Columbus, Georgia

Ms. Lauren Shabov
Atlanta Circuit Public Defender’s Office
Atlanta, Georgia

Mr. Christopher P. Twyman
Cox Byington Twyman LLP
Rome, GA

Ms. LaToya Simone Williams
Georgia Public Defender Council
Atlanta, Georgia

Supreme Court of Georgia Advisor
The Honorable Shawn Ellen LaGrue
Supreme Court of Georgia
Atlanta, Georgia

Staff
Ms. Karlise Y. Grier
Executive Director

TO: Board of Governors of the State Bar of Georgia
FROM: Karlise Yvette Grier
Executive Director, Chief Justice’s Commission on Professionalism
DATE: June 13, 2026
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 with the primary charge to enhance professionalism among Georgia’s lawyers and judges. **Chief Justice Nels S.D. Peterson** serves as the current Chair of the Commission. Other judges who serve on the Commission are as follows: **Judge Elizabeth Gobeil** for the Court of Appeals of Georgia; **Judge Benjamin S. Richardson** (Chattahoochee Judicial Circuit) for the Council of Superior Court Judges; and **Chief Judge Jeffrey B. Hanson** (State Court of Bibb County) for the Council of State Court Judges. **Judge Steven D. Grimberg** serves on the Commission for the federal judiciary. **Justice Shawn Ellen LaGrue** is the Supreme Court of Georgia advisor to the Commission. You may find a complete list of Commission members, advisors, and liaisons at the Commission’s website at <https://cjcpga.org/commission-members-2025-2026/>. A brief update of some of the Commission’s activities as of May 5, 2026, is as follows.

VIDEO CLE OF FORMER STATE BAR PRESIDENT A. JAMES ELLIOTT (1941-2024)

The Commission, in partnership with the Georgia Legal History Foundation, is finalizing the production of an approximately one-hour video of former President of the State Bar of Georgia and Emory Law School Dean A. James Elliott that was filmed on July 21, 2023. In the video, Dean Elliott is interviewed by the late Attorney Thomas G. Sampson Sr., Attorney W. Terence Walsh, Emory Law School Dean Richard D. Freer, Former State Bar President John C. Sammon, and Georgia Legal History Foundation President John C. Bell, Jr. The Commission will apply for one professionalism CLE credit for the video CLE, and offer the professionalism CLE to Georgia lawyers via Zoom during the summer. For more information about the upcoming Dean A. James Elliott video CLE, visit: https://cjcpga.org/emory_dean_a_james_elliott_interview_video_cle/.



SERVE AS A GROUP LEADER FOR THE 2026 LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), which is chaired by **Mr. Carlos Vilela**. **Ms. J. Maria Waters** is the Vice Chair. As staff support for the Committee, the Commission funds in part and supports the Committee’s work on the Law School Orientations on Professionalism. The sub-committee that is planning the 2026 law school orientation programs is chaired by **Ms. Samantha Beskin-Schemer**, with **Ms. Margaret Riley Schweizer** serving as Vice Chair. The orientations are designed to provide incoming first year law students with their first introduction to professionalism. Georgia judges and lawyers are invited to apply 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. **Please visit the Commission’s website to apply to serve as a Group Leader for the 2026 Law School Orientations on Professionalism.** Group Leaders will be notified if they are selected to serve in mid-July 2026. The dates (and **APPROXIMATE** times for the 2026 Law School Orientations on Professionalism are as follows:

- Atlanta’s John Marshall Law School Saturday, August 8, 2026, 9:00 am – 12:35 pm
- Emory University School of Law Thursday, August 13, 2026, 11:00 am – 5:00 pm
(with a reception to follow)
- Georgia State University School of Law Tuesday, August 11, 2026, 3:30 pm – 7:30 pm
(with a reception to follow)
- Mercer University School of Law Friday, August 7, 2026, 1:30 pm – 3:30 pm
- University of Georgia School of Law **Wednesday, August 19, 2026, 12:30 pm – 4:30 pm**
(yes Wednesday, not Friday, lunch may begin at 12:30 pm)

For updates and additional 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-2026/>.



COMMISSION 2026 CONVOCAION ON PROFESSIONALISM AND THE RULE OF LAW

The Commission will hold a Convocation on *Professionalism and The Rule of Law* on **October 30, 2026**, at the State Bar of Georgia’s Atlanta Headquarters. **Ms. Lauren Shubow**, Founder, Shubow Law, is the Program Chair. Chief Justice Nels S. D. Peterson has agreed to give remarks during the program. Other speakers will be announced in the coming months. **SAVE THE DATE of October 30, 2026**, and additional details will follow soon.

REPORT REGARDING VIDEO REPLAY OF THOUGHTS ON LIVING AND PRACTICING WITH PROFESSIONALISM: AN INTERVIEW WITH ATTORNEY THOMAS G. SAMPSON

During February 2026, through March 31, 2026, the Commission offered, in partnership with the Commission on Continuing Lawyer Competency, a *No Registration Fee Self Report Video Reply of 02-27-25 Thoughts on Living and Practicing with Professionalism: An Interview with Attorney Thomas G. Sampson* by Hon. Herbert E. Phipps (Retired). A total of **254 Georgia lawyers** applied to the Commission for the link to watch the video replay CLE. The Commission thanks Ms. Dee Dee Worley for her assistance in making this pilot project a great success!

THE 26TH ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Commission, in partnership with the Georgia Legal History Foundation (GLHF), hosted the 26th Annual Justice Robert Benham Awards for Community Service (CSA26) on April 14, 2026, at 11:00 a.m., at the Nathan Deal Judicial Center. **Ms. LaToya Simone Williams**, Senior Attorney, TDE Criminal Defense Attorneys, and **Mr. David M. "Dave" Paule**, Principal and Managing Director, Our Fundraising Search, co-chaired the Benham Awards Planning Committee. **Mr. Michael D. Hobbs, Jr.**, Partner, Troutman Pepper Locke, chaired the Commission's Benham Awards Selection Committee.

The District Award Recipients were as follows: **Mr. Frank W. "Sonny" Seiler**, *Savannah, GA*; (Posthumously); **Hon. Willie E. Lockette**, *Albany, GA*; **Ms. Alyssa Baskam**, *Decatur, GA*; **Mr. Joseph Bruce Alonso**, *Atlanta, GA*; **Ms. Alina Lee**, *Atlanta, GA*; and **Ms. Dorothy "Dodie" Sachs**, *Buford, GA*.

Mr. Virgil L. Adams, *Macon, GA*, was the CSA26 Lifetime Achievement Award Recipient.

The Commission does not use any Bar dues or mandatory professionalism fee money to pay for the expenses of the Benham Awards, and the program would not be possible without the support of our sponsors. The Benham Awards Planning Committee thanks the Sponsors for CSA26 who are as follows:

DIAMOND

GREENBERG TRAURIG, LLP

GOLD

Malone Law

Troutman Pepper Locke LLP

SILVER

Guilmette Henderson, LLC
Nelson Mullins Riley & Scarborough LLP
Smith, Gambrell & Russell, LLP

BRONZE

Alston & Bird Akerman LLP	Johnson & Freeman, LLC Kilpatrick Townsend & Stockton LLP
The Barnes Law Group Epps, Holloway, DeLoach & Hoipkemie, LLC	Adria L. Perez Adwoa Ghartey-Tagoe Seymour

BRONZE (NON-PROFIT AND GOVERNMENT)

Georgia Defense Lawyers Association

PATRON

Ann Baird Bishop June Rowan Bishop Jena G. Emory Anissa D. Floyd Karlise Yvette Grier	Nekia S. Hackworth Hope Jamison Patrick T. O'Connor Kevin Patrick Law	Brad Marsh and Betty Obenshain David M. "Dave" Paule C. L. Scarver & Associates, LLC Darrell L. Sutton
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For more information regarding the 26th Annual Justice Robert Benham Awards for Community Service, visit: <https://cjcpga.org/benhamcsa26/>



CLE PROGRAMS AND EVENTS BY THE STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM AND STAFFED BY THE COMMISSION

The Commission staffs the State Bar of Georgia Committee on Professionalism (Committee), which is chaired by **Mr. Carlos Vilela** for the 2025-2026 Bar year. **Ms. J. Maria Waters** serves as the Vice-Chair of the 2025-2026 Committee. Some of the Committee's initiatives are summarized below.

SPEAKERS AND WRITERS BUREAU

The Speakers and Writers Bureau sub-committee of the State Bar of Georgia's Committee on Professionalism is currently co-chaired by **Mr. Kevin Patrick** and **Mr. Michael Perez**. One of the sub-committee's activities is as follows.

JOINT CLE PROGRAM WITH STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM AND STATE BAR OF GEORGIA YOUNG LAWYERS DIVISION

The Commission, the State Bar of Georgia Committee on Professionalism, and the Young Lawyers Division of the State Bar of Georgia will hold a CLE on **June 25, 2026, from 2:30 p.m. – 4:30 p.m.** via Zoom entitled **Mastering Professionalism, Ethics and Public Office** to encourage Georgia Lawyers to consider public service in all branches and at all levels of government. **State Rep. Soo Hong**; **Judge Mike Jacobs**; **Ms. Cathy Cox**; and **Mr. Christopher S. Cohilas** are currently confirmed panelists. **Mr. Edward Lindsey** is currently confirmed to moderate. The Program Chairs are **Kevin Patrick**, **Meghan Golden**, and **Meagan Hurley**. Commission member and YLD President, **Victoria Cox**, is also providing leadership for the program.

For more information about the upcoming **Mastering Professionalism, Ethics and Public Office CLE**, visit <https://cjcpga.org/mastering-professionalism-ethics-and-public-office-cle-presentation-on-06-25-26/>



LAW DAY 2026

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 2026 Law Day Theme is *The Rule of Law and the American Dream***. The leaders for the State Bar's 2026 Law Day initiative are **the Honorable Ashley Palmer**, Judge, State Court of Cobb County; **Attorney Denise Warner**, Senior Staff Attorney to the Honorable Brian E. Lake, Superior Court of DeKalb County; and **Attorney Marlan J. Eller**, Staff Attorney to Judge Howard C. Kaufold, Jr., Oconee Judicial Circuit. The Commission will provide a more detailed written report regarding the sub-committee's 2026 Law Day initiatives for the Fall Board of Governors meeting.

CONNECT WITH A COLLEAGUE CONTEST

The Committee's Connect With A Colleague Sub-Committee is co-chaired by **Ms. Cathy Hampton** and **Mrs. Samantha M. Mullis** with staff support from the Commission. The Connect With A Colleague sub-committee held its 3rd Connect With A Colleague Contest from March 1, 2026, through April 30, 2026, to encourage attorneys to make new connections with their colleagues to advance professionalism in our legal community. The Committee anticipates selecting contest winners on May 20, 2026. The Commission will provide a more detailed written report regarding the Connect With A Colleague contest for the Fall Board of Governors meeting.

LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM

Please see the call for 2026 Group Leaders above.

PROFESSIONALISM PAGE ARTICLES

The Commission communicates with lawyers and judges through the Professionalism Page that appears in each issue of the Georgia Bar Journal, which is published four times per year. The Winter 2026 Georgia Bar Journal Professionalism Page entitled *An Inspiration for More Aspiration* written by Derrick A. Pope is attached as “Exhibit A.” Many of the Commission’s Professionalism Page articles are available on the Commission’s website at the link here: <https://cjcpga.org/georgia-bar-journal-articles/>.

COMMISSION 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, Karlise Y. Grier, via e-mail at kygrier@cjcpga.org if you would like assistance in planning a professionalism CLE program or if you would like to have her to make a professionalism presentation to your organization.



Pictured from left to right: Hon. William S. Duffey, Jr., Judge (Retired), United States District Court, N.D.G.A.; Commission Member, Ms. Lauren Shubow, Founder, Shubow Law; Ms. Karlise Y. Grier, Executive Director, Chief Justices Commission on Professionalism.

Thursday, March 5, 2026

State Bar of Georgia

PROFESSIONALISM, ETHICS AND MALPRACTICE

An opportunity for in-person attendance and access to comply with State Bar of Georgia ethics process.

3 CLE HOURS INCLUDING 1 (1) ETHICS HOUR | 00-1 PROFESSIONALISM HOUR

TIME	TOPIC	PRESENTER
8:30	REGISTRATION AND BREAKFAST	
9:00	INTRODUCTION State Bar Staff TBD	
9:05	WELCOME AND PROGRAM OVERVIEW	Jeffrey M. Smith
9:15	PROFESSIONALISM PANEL (1H) Moderator: Karlise Y. Grier, Executive Director, Chief Justices Commission on Professionalism, Atlanta, GA Panelists: Hon. William S. Duffey, Jr., Former Judge, United States District Court, Northern District of Georgia, Atlanta, GA Lauren B. Shubow, Founder & Principal Attorney, Shubow Law LLC, Atlanta, GA Jeffrey M. Smith	
10:30	ETHICS RULES INVOLVED IN AI AND GAMBLING ADDICTION (1H) David M. Long-Savely, Partner, Reed Smith, LLP, Atlanta, GA Jeffrey M. Smith	
11:30	LEGAL MALPRACTICE UPDATES: ARBITRATION, ATTORNEY-CLIENT PRIVILEGE, AND MORE (1H) Michael J. King, Shareholder, Secretary, Secretary, L.P., Atlanta, GA Jeffrey M. Smith	
12:30	ADJOURN	

10:15 BREAK

Notwithstanding to our confidence, we do not warrant the accuracy or completeness of the information provided herein. We do not assume any liability for any errors or omissions. The information is provided for informational purposes only and is not intended to constitute an offer of insurance or any other financial product. The information is provided for informational purposes only and is not intended to constitute an offer of insurance or any other financial product. The information is provided for informational purposes only and is not intended to constitute an offer of insurance or any other financial product.

ICLE provides only digital class materials.

ICLE In-Person/Livestream Series

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 (now known as X): <https://x.com/CJCPGA>

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

Instagram: <https://www.instagram.com/CJCPGA/>

Facebook: <https://www.facebook.com/cjcpga2/>

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



Exhibit A

GBJ | Professionalism Page

An Inspiration for More Aspiration

Georgia lawyers and judges volunteer each year to take part in professionalism orientations held at each of the law schools across the state. The orientations help students learn the meaning of professionalism at the beginning of their education. This article celebrates those efforts and highlights a distinctive effort by a group of law students involving the Aspirational Statement on Professionalism.

BY PROF. DERRICK ALEXANDER POPE



GETTYIMAGES.COM/ANIBOSTRANCI

At the beginning of each school year, the State Bar of Georgia Committee on Professionalism, in partnership with the Chief Justice's Commission on Professionalism, holds an orientation at each of Georgia's five law schools. These programs are designed to provide first year law students with an introduction to professionalism, "the ultimate hallmark of the practice of law."¹

Since 1992, Georgia lawyers and judges have been recruited and 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. During this time, the Commission and its countless volunteers have given to thousands of would-be lawyers their first understanding of what it means to be a "professional." I have had the pleasure on occasion to be in that number.

High among the items used to foster this understanding are A Lawyer's Creed and the Aspirational Statement of Professionalism.² These documents help stimulate thought and discussion on how the

Georgia legal community's aspirational goals for the profession apply to law students. Various hypothetical situations are posited to get the students thinking about how each can be a guiding source for working through sticky situations. At present, lawyerly well-being is a pressing concern. One aspect of the Creed addresses that very matter.

"To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship." This part of the creed was used in one recent orientation, where students were asked to consider how the knowledge that one student had resorted to taking non-prescription pills to "give her an edge through finals" and how that affects professionalism.⁶ Taking a cue from the Orientations, I have used the Creed and the Aspirational Statement in The Reflective Lawyer, a professional identity formation course I teach at Georgia State University College of Law. A recent exercise involved the specific aspirational ideals.

Our Aspirational Statement of Professionalism is a first-of-its-kind and stands as a beacon for others. These ideals are what "help bind us together in a professional community."⁴ As set forth, our aspirational ideals are designated as either of the *general* or *specific* variety. The general ideals are what we as lawyers will aspire to. One of my personal favorites in this category says that, as lawyers, we will aspire "to achieve the excellence of our craft, especially those that permit me to be the moral voice ... in advocacy ... [and] counseling. Good lawyering should be a moral achievement for both the lawyer and the client."⁵

We also have aspirational ideals that are *specific* and which are aimed at an exact segment of our professional offerings. The specific ideal addresses clients, opposing parties and their counsel, courts and other tribunals, colleagues in the practice of law, the profession, and the public and our systems of justice.

A Lawyer's Creed and the Aspirational Statement on Professionalism

A LAWYER'S CREED

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 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.

To the profession, I offer assistance. I will strive to keep our business 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, to make the law and the legal system available to all, and to seek the common good through the representation of my clients.

ASPIRATIONAL STATEMENT ON PROFESSIONALISM

The Court believes there are unfortunate trends of commercialization and loss of professional community in the current practice of law. These trends are manifested in an undue emphasis on the financial rewards of practice, a lack of courtesy and civility among members of our profession, a lack of respect for the judiciary and for our systems of justice, and a lack of regard for others and for the common good. As a community of professionals, we should strive to make the internal rewards of service, craft and character, and not the external reward of financial gain, the primary rewards of the practice of law. In our practices we should remember that the primary justification for who we are and what we do is the common good we can achieve through the faithful representation of people who desire to resolve their disputes in a peaceful manner and to prevent future disputes. We should remember, and we should help our clients remember, that the way in which our clients resolve their disputes defines part of the character of our society and we should act accordingly.

As professionals, we need aspirational ideals to help bind us together in a professional community. Accordingly, the Court issues the following Aspirational Statement setting forth general and specific aspirational ideals of our profession. This statement is a beginning list of the ideals of our profession. It is primarily illustrative. Our purpose is not to regulate, and certainly not to provide a basis for discipline, but rather to assist the Bar's efforts to maintain a professionalism that can stand against the negative trends of commercialization and loss of community. It is the Court's hope that Georgia's lawyers, judges and legal educators will use the following aspirational ideals to reexamine the justifications of the practice of law in our society and to consider the implications of those justifications for their conduct. The Court feels that enhancement of professionalism can be best brought about by the cooperative efforts of the organized bar, the courts and the law schools with each group working independently, but also jointly in that effort.

Each avowal respectively begins with the phrase, “As to [the particular group], I will aspire to,” followed by the listing of the specified aspiration. These six very distinct centers of attention are widely familiar to Georgia lawyers.

But students at Georgia State University College of Law have taken the matter farther. With an emphasis on the relationship between well-being and professional competence, a viewpoint stressed by the American Bar Association’s Well-Being Toolkit for Lawyers, the students thought a perspective directed *specifically* to the lawyer would be a welcome addition to the aspirational statement. Their offerings, I thought, were of such insight, that it deserved sharing with the Georgia legal community.

Here is what they came up with:

As to myself, I will aspire:

- (a) To lead a life of vitality that invigorates my work and benefits society.
- (b) To avoid making my profession the totality of my identity;
- (c) To be vigilant and safeguard my well-being. In this regard, I should:
 - (1) Avoid the sinister and subtle encroachment of burnout;
 - (2) Maintain confidence that my efforts are worthwhile;
 - (3) Practice gratitude daily so I can serve from a place of abundance and not depletion;
 - (4) Protect my peace and sense of self just as fiercely as I protect the interests of my clients;
 - (5) Replace the urge to become overly engrossed in outward productivity with dedicated energy reserved for:

- i. Quiet reflection;
 - ii. Time with family and friends; and
 - iii. Immersion in the beauty and wonder of nature; and,
- (6) Remember that self-advocacy for my needs is a necessary component to being an advocate for the needs of others.
- (d) To remember that law is a discipline with its own moral worth that, when practiced and observed honorably, refines those who serve and who are served by it.
- (e) To remain true to the values that first drew me to law, even when the demands of my craft and the pressures of legal practice would otherwise tempt me to set them aside.⁶

The Chief Justice’s Commission on Professionalism and the State Bar of Georgia Committee on Professionalism deserve a hearty thank you for the work they do and their Law Student Orientations. Clearly, it has the students thinking. ●



Prof. Derrick Alexander Pope teaches seminars on Legislative Drafting and Legislative Advocacy, and the course The Reflective Lawyer at Georgia State University College of Law. He is the founding director of The Arc of Justice Foundation and host of its critically acclaimed podcast, “Hidden Legal Figures.” He has been a member of the *Georgia Bar Journal* Editorial Board since 2020 and is the current editor-in-chief.

Endnotes

1. Rule 9-101, Professionalism, Part IX of the Rules and Regulations of the State Bar of Georgia.
2. A copy of A Lawyer’s Creed and the Aspirational Statement on Professionalism is available at Chief Justice’s Commission on Professionalism, *A Lawyer’s Creed and the Aspirational Statement on Professionalism*, <https://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> (Last visited Dec. 5, 2025). Both the Creed and the Aspirational Statements were adopted by order of Supreme Court of Georgia, Oct. 9, 1992, nunc pro tunc July 3, 1990; Part IX of the Rules and Regulations of the State Bar of Georgia, as amended Sept. 10, 2003, and April 26, 2013.
3. Problem 5, Parts A and B, *Student Materials for Law School Orientation*, available at Chief Justice’s Commission on Professionalism, Law School Orientations Student Materials 2024 – Chief Justice’s Commission on Professionalism (Last visited Dec. 5, 2025).
4. Aspirational Statement on Professionalism, Part IX of the Rules and Regulations of the State Bar of Georgia.
5. General Aspirational Ideals, (h), Part IX of the Rules and Regulations of the State Bar of Georgia.
6. The aspirational ideal directed to the lawyer is a composite of the submissions of each student in the Fall 2025 Reflective Lawyer course. Notable contributions to the final ideal were made by John Bush, Troy Davis, Claire Seelinger Devey, Natalia Dutra, Isaac Mazur and Angelina Uddullah.

Report of the 2025-2026 State Bar of Georgia Committee Activity

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Report of the 2025-2026 State Bar of Georgia Committee Activity

Access to Justice Committee

2025-2026 Committee Activities

- The Committee has published articles in the Georgia Bar Journal highlighting the pro bono work of attorneys around the state: “Be Like Mike: The Inaugural ‘Michael Monahan Law School Excellence in Access to Justice Award’ and State Bar of Georgia Honor Roll Listing (for volunteer lawyers).
- We have created a newsletter for organizations and voluntary bars to share pro bono opportunities.
- We have begun conversations with Georgia’s law schools regarding having a law student pro bono honors distinction available to all Georgia law students.
- We hosted the Pro Bono Awards and recognized law students, attorneys, non-attorneys, and legal departments demonstrating an extraordinary commitment to pro bono work.
- We began a statewide survey of the State of Pro Bono in Georgia that we will be presenting to the BOG in June.

2026-2027 Goals/Projects

- We will take the findings from the State of Pro Bono survey and create a strategic plan for the next 5-10 years.
- Palladin funding and marketing will be a priority for next year.
- Finalizing the student pro bono honors distinction will also be a priority.

Additional Information

This is a phenomenal committee whose members really care and are invested in its mission. It is sometimes a little hard to reach out to all corners of the state, and I would like to have more involvement from rural areas.

Artificial Intelligence and Emerging Technologies

2025-2026 Committee Activities

The Committee continued its efforts to advocate for amendments to Georgia Rules of Professional Conduct 1.1, 1.6, and 5.3. The Committee continues its dialogue with various stakeholders about the proposed amendments to Rule 1.1 and 1.6 and stands ready to further develop amendments to both of those rules based upon the input from these stakeholders. The amendment to Rule 5.3 has been provided to the Disciplinary Rules and Procedures Committee, with work to further develop a version of that Rule satisfactory to the DRPC ongoing.

In addition, the Committee, in conjunction with the Law Practice Management Program and the Office of General Counsel, completed the development and launch of the AI Toolkit. The

toolkit is a comprehensive resource for any Georgia lawyer interested in implementing an artificial intelligence platform as part her or his practice.

The Committee also created additional subcommittees to advance additional projects. Among these is a subcommittee tasked with solving problems related to the use of artificial intelligence within the courts. In conjunction with the Administrative Office of the Courts, the subcommittee developed and issued a survey, gauging the extent to which judicial stakeholders are encountering artificial intelligence within Georgia courts. The survey results will guide the development of various solutions to the issues identified by it.

A second subcommittee, AI Platforms for Lawyers and Law Firms, began a comprehensive assessment of the prominent artificial intelligence platforms used by Georgia lawyers and law firms. This assessment will be integrated with the AI Toolkit and will provide Georgia lawyers a basic understanding of the functions, benefits, and drawbacks to various AI platforms, which Georgia lawyers can use to determine the platform(s) appropriate for use within their practices.

2026-2027 Goals/Projects

The Committee is poised to be a thought and action leader for solving issues related to the growing use of artificial intelligence within the Georgia court system and among Georgia lawyers and law firms. Properly motivated and devoted to their work, the two subcommittees mentioned in response to question no. 1 can provide essential support to Georgia courts and Georgia lawyers and law firms as they navigate the increasing prevalence of artificial intelligence within the profession.

Additional Information

This Committee is composed of members who possess a unique combination of substantive knowledge and work ethic. They remain the finest collection of bar leaders I have encountered, willing to sacrifice themselves and their time for the betterment of our profession. It's been the highlight of my professional career so far to serve with them, and I look forward to the many accomplishments that lie ahead for them.

Audit

2025-2026 Committee Activities

As described on the State Bar's website, the Audit Committee "will assist the treasurer, Executive Committee and Board of Governors in fulfilling their oversight responsibilities for the accounting, financial, and internal control process of the Bar's audits of its financial statements." We usually meet once or twice each year to review the draft audit and meet separately with the auditors.

2026-2027 Goals/Projects

None. Our role is purposefully focused and limited.

Additional Information

None.

Bar Center

2025-2026 Committee Activities

The committee met most recently at the Mid -year meeting of the SBOG on January 15, 2026. Attendance was good. A robust discussion was held about present operations and future potential of the Bar Center.

2026-2027 Goals/Projects

The mission of the Bar Center Committee is to monitor operations of the facility and to make recommendations to the officers and executive committee about future operations. The level of committee activity varies from year to year, depending on needs and opportunities presented. In some years, no significant problems arise, and in other years, the committee may be called upon to deal with multiple issues.

Additional Information

Committee membership includes members with institutional knowledge of the acquisition, management and operation of the facility. This institutional knowledge is important when problems arise.

BASICS

2025-2026 Committee Activities

The purpose and mission of the BASICS Committee, which the committee continues to do, is to “monitor and render advice to the staff, Executive Committee, and Board of Governors with respect to the rules, procedures, policies and operations of the BASICS program.” The committee met five times in the 2025-2026 Bar year, in July, October, December, March and April. At those meetings, among other agenda items, the committee received a report from Southeastern Management, Inc., which manages the program in the different facilities across Georgia.

BASICS is a ten-week semester of business and life skills education that inspires motivation and personal development to students. The program offers workshops to residents of the Georgia Department of Corrections, as well as employment counseling to BASICS graduates. Students learn how to start their own business, secure capital/finance, use effective communication skills, use electronic and other communication devices effectively, market themselves to potential employers, market their business, access educational and community-based resources, including housing and healthcare, and guard against recidivism.

2026-2027 Goals/Projects

- The committee will continue to work with Southeastern Management, Inc. to pursue additional funding from a variety of grant sources, with the goal of expanding the number of correctional facilities served by the program. Currently, BASICS receives a \$50,000 grant from the Georgia Bar Foundation; however, historical funding levels

have been significantly higher, ranging from \$140,000 to \$180,000, depending on the funding source.

- The committee is looking to expand the BASICS program to the Department of Juvenile Justice and the DeKalb County Jail.
- Committee members will continue to attend and support the BASICS graduations at the correctional facilities.

Additional Information

For nearly 50 years, BASICS has provided structured workforce development, life-skills training, and career-readiness programming to justice-involved individuals across Georgia, serving nearly 15,000 participants to date. The program's longevity and impact are rooted in a consistent, relationship-centered approach that emphasizes accountability, discipline, and real-world preparation. The committee will continue to oversee the program and undertake the work needed to ensure its success.

Bench & Bar

2025-2026 Committee Activities

The committee has two standing meetings every year: at the Annual Meeting in June and in January in Athens at the Winter Meeting of the Council of Superior Court Judges. The Annual Meeting consists of the regular committee meeting and the annual War Stories component in conjunction with an Evidence Update, an hour of Professionalism, and an hour of Ethics. Subcommittees meet throughout the year on various topics, most recently a subcommittee for updating and modernizing the Civil Practice Act.

2026-2027 Goals/Projects

The Civil Practice Act review subcommittee has more than enough to keep the committee busy for the next fiscal year.

Additional Information

No response provided.

Business Court Committee

2025-2026 Committee Activities

The State Bar of Georgia Business Court Committee has continued its efforts to support the Metro Atlanta Business Court and the Georgia State-wide Business Court. That included following up on efforts to obtain additional funding/sources for another full-time law clerk for the Metro Atlanta Business Court and alternative opportunities for additional support for its judges through the offer of potential externships with law students from Georgia State University Law School and the University of Georgia Law School. We also followed the efforts in the Georgia Legislature to pass a bill to expand the Statewide Business Court's jurisdiction to include the filing of additional shareholder claims in the State-wide Business

Court. The bill (HB 1185) did pass both the House and the Senate and is awaiting the Governor's signature.

2026-2027 Goals/Projects

The committee should continue its work with the Metro Atlanta Business Court to obtain additional funding from Fulton County for a full-time law clerk(s) to assist the judges. This is a significant, ongoing need and would provide a much-needed resource for the judges on this court. The committee should also work with Judge Bill Hamrick and Judge Kelly Ellerbe to assist as needed to support these courts that provide expedited service to the citizens and businesses of the State of Georgia.

Additional Information

The State Bar Business Court Committee is a valuable resource for the state and for the business courts. Many of our members have served on the Business Court Committee for several years, and they have significant institutional knowledge of Georgia's Business Courts. The committee members also have litigation experience in many different areas of practice in different parts of the state, which helps them understand how courts should function and how to make perceptive suggestions to solve problems and improve the functionality of Georgia's business courts. The committee members also care deeply about ensuring the long-term success of these important courts that help not only Fortune 500 companies but also smaller businesses.

Children and the Courts

2025-2026 Committee Activities

We meet once a month via Zoom. Our attendance sheet is attached. Throughout the year, our committee considers legislative proposals that will benefit children in the judicial system. We consider legislation impacting both delinquent and dependent children. We strive to meet the purpose of this committee and make a difference.

2026-2027 Goals/Projects

We should continue to work on the issues impacting children in need, including identifying resources for family reunification and clarifying the juvenile code.

Additional Information

I think the committee can be even more active.

Disciplinary Rules and Procedures

2025-2026 Committee Activities

Over the past year, the Disciplinary Rules & Procedures Committee remained actively engaged in reviewing and improving the rules and procedures that govern Georgia's attorney disciplinary system. The committee met regularly, considered proposed

amendments, heard stakeholder input, and worked through both procedural and emerging issues affecting the profession.

Key accomplishments included approving multiple rule amendments, including:

- Rule 4-203.1: Updated service provisions in disciplinary matters.
- Rule 4-221: Expanded special masters' authority regarding hearing management, remote proceedings, and venue when a respondent is incarcerated or otherwise unable to attend in the usual forum.
- Rule 4-227: Approved procedural changes allowing certain petitions for voluntary surrender to be filed directly with the Supreme Court.

The committee also adopted internal operating rules and devoted significant time to thoughtful review of complex issues, including proposed Rule 4.2 changes following *Maxwell v. State* and the ethical implications of attorneys' use of generative artificial intelligence. After full consideration, the committee declined to recommend changes to Rule 4.2 and continues studying technology-related issues through a subcommittee process.

2026-2027 Goals/Projects

One important area for continued attention is how the Georgia Rules of Professional Conduct should address emerging technologies, including attorneys' use of generative artificial intelligence. The Rule 1.1 subcommittee reported that many current concerns may already be addressed by existing rules, but additional guidance or broader updates may still be appropriate as technology evolves.

The committee may also wish to continue monitoring national trends in attorney regulation, including modernization, technology competence, disciplinary transparency, procedural fairness, and emerging risks to the public and profession. Awareness of those developments can help Georgia remain proactive and well-positioned as similar issues arise locally.

The committee should also review the implementation of recently approved amendments involving hearing procedures, venue, service, public reprimand proceedings, trust accounts, and voluntary discipline procedures to ensure they are working as intended.

Additional Information

The committee serves an important role in maintaining a fair, effective, and credible attorney disciplinary system in Georgia. Its work is often technical, but the impact is significant for the profession, the public, and the administration of justice.

The past year reflects the value of a thoughtful and measured approach—addressing immediate procedural needs while also studying broader issues such as technology and evolving regulatory trends.

Continued success will depend on maintaining that balance, ensuring the rules remain clear, practical, and responsive to modern legal practice, and continuing the strong engagement and thoughtful participation of committee members.

Elections

2025-2026 Committee Activities

No response provided.

2026-2027 Goals/Projects

No response provided.

Additional Information

Our committee is primarily reactive in nature. We are available for disputes, etc. I remain concerned about the level of participation in State Bar uncontested elections, given challenges to the mandatory bar structure, so I continue to look for opportunities for our committee to support increased participation.

Fee Arbitration Program

2025-2026 Committee Activities

The Committee on Arbitration of Attorney Fee Disputes has communicated primarily through email, and we have met on Zoom, to address Fee Arbitration case status, post case activity and requests for reconsideration. We have also discussed the negative impact that the January 28, 2022, Fee Arbitration Program Rules change has caused to the Program.

2026-2027 Goals/Projects

The Committee should continue addressing a much-needed Fee Arbitration Rule change so that public is protected.

Additional Information

We remain committed to ensuring that the Fee Arbitration Program operates effectively, while providing a necessary resource for both the public and member of the Bar.

Georgia Bar Journal Editorial Board

2025-2026 Committee Activities

The committee has met diligently to discharge its principal function of approving scholarly legal articles for the Georgia Bar Journal. In addition, the committee has begun making preparations for two (2) initiatives relating to the Journal.

2026-2027 Goals/Projects

No.

Additional Information

I have no comments or advice about this committee at this time.

Georgia Diversity Program

2025-2026 Committee Activities

We had our annual High School Pipeline and Summer Associates & Judiciary Reception last summer. We also had several meetings.

2026-2027 Goals/Projects

We are gearing up for our Spring CLE this month, and we hope to publish more articles in the *Georgia Bar Journal* this year.

Additional Information

We are doing really good work.

Committee to Promote Inclusion in the Profession

2025-2026 Committee Activities

CPIP has been intentional about planning impactful programming that meets the needs of attorneys, judges, and aspiring lawyers from across our state. Below is a highlight of our success this Bar year.

Annual Meeting CLE Subcommittee

This subcommittee organizes a CLE program at the State Bar's Annual Meeting. The subcommittee's primary duties include selecting a topic, receiving State Bar approval for the topic, choosing speakers, creating a comprehensive CLE program, and coordinating logistics with speakers, ICLE, and the State Bar. This subcommittee, in conjunction with the Seeking Equal Justice Committee of the State Bar and the Georgia Association of Black Women Attorneys (GABWA), is hosting a CLE titled "Constitutional Issues in a Changing Legal Landscape" at the June 2026 Annual meeting. Subject matter experts will presenting on timely and informative issues that impact many in our profession.

Commitment to Equality ("CTE") Awards Subcommittee

- This subcommittee oversees the awards ceremony that recognizes lawyers and organizations demonstrating sustained efforts to advance diversity and inclusion within the profession. Its responsibilities include soliciting nominations, reviewing and selecting award recipients, coordinating with winners and vendors to produce videos and trophies, and planning the in-person award ceremony.
- The CTE subcommittee is currently in the planning phase and will host the CTE Awards Ceremony in the fall of 2026 to honor attorneys who are carrying out the mission of CPIP.

Diversity and Inclusion CLE Subcommittee

- This subcommittee assists with planning CLEs that align with our mission. The main objective of this subcommittee is to ensure that the Committee's influence extends

beyond the metro Atlanta area by collaborating with local affinity or geographically-based Bar associations to co-sponsor events.

- The Diversity and Inclusion CLE subcommittee is partnering with local Bar associations in the Albany, Georgia area to host a program titled The Life and Legacy of C.B. King, which highlights the legacy of this prominent civil rights leader and attorney whose career began in the 1950s. This event will take place in October 2026 and is currently in the planning stages.

Undergraduate and Law School Outreach Subcommittee

- This subcommittee supports the Committee's efforts to strengthen the pipeline of future lawyers by engaging with students at colleges, universities, and law schools across the state.
- The subcommittee develops programs and resources that introduce students to the legal profession, promote professional development, and encourage early involvement with the Bar.
- During this Bar year, we continued the Roadmap to Law School initiative, which is hosted at various Historically Black Colleges and Universities across the state to spark interest in the legal profession. Events were held at Clark Atlanta University, Savannah State University, Fort Valley State University, and Albany State University.
- This subcommittee also partnered with the University of Georgia's Office of Pre-Professional Advising to host an event focused on careers in public interest law.
- In addition, this subcommittee organized a panel discussion and networking event in collaboration with Mercer Law's First-Generation Law Student Association.

2026-2027 Goals/Projects

CPIP is interested in opportunities for cross-committee programming that strengthen collaboration and broaden the reach of its initiatives.

Additional Information

CPIP plays a vital role in strengthening the pipeline of aspiring lawyers while also celebrating the achievements of practicing attorneys and judges. This Committee's impact reaches across our state and promotes learning, growth, and support for attorneys throughout the profession. CPIP's mission is essential to fostering engagement, mentorship, and long-term professional development within the Bar.

Indigent Defense Committee

2025-2026 Committee Activities

The State Bar Indigent Defense Committee is an engaged and active committee. Our mission is to provide advice, expertise and advocacy to ensure that the State's constitutional obligation to provide effective counsel for indigent persons accused of a crime is realized. This bar year, we held 7 meetings, both virtual and in-person, with approximately 14 members in attendance at each meeting. We have full agendas for each meeting with occasional special guests who present on indigent defense topics.

An important role we have is to track and offer feedback on pending legislation that impacts indigent defense in Georgia. A highlight this year was our committee's support of the Georgia Resource Center's proposal requesting the State Bar's support for their legislative appropriations request.

We also monitor and advocate for necessary funding for the Georgia Public Defender Council. We receive reports on leadership changes, as well as successes or challenges within public defender offices. This year we emphasized the need for pay parity between prosecutors and defenders, the continued problem of pay inequality with SPCR employees, and challenges with indigent defense in specific judicial circuits.

We have robust discussions regarding local, statewide, and national issues that impact indigent defense. This year we called attention to the funding crisis that affected Federal Defender Offices and to the mentor program created by the 11th Circuit for attorneys on the CJA list.

We devote time at all our meetings to inform members of important announcements such as the change to CLE requirements, the AI page on the State Bar's website, all judicial openings in our state, and the Unified Court Data project. We encourage all our members to share this news with their networks.

2026-2027 Goals/Projects

Future projects our committee hopes to work on are the following:

- Propose and initiate a comprehensive evaluation of the Indigent Defense System in Georgia
- In response to several concurring opinions in Supreme Court cases, be involved with reevaluating conflict rules for public defenders and study possible changes to claims of ineffectiveness of counsel and habeas corpus.
- Collaborate with State Bar leadership, the Advisory Committee on Legislation, and other colleagues to address the excessive workload experienced by public defenders across the state. One possible fix is legislation that updates the statutory number of positions for Assistant Public Defenders and Assistant District Attorneys.

Additional Information

Our committee members have diverse practice areas and are all deeply committed to promoting excellence in indigent defense in Georgia. The important work of this committee assisted with the development of our current statewide indigent defense system. The State Bar Indigent Defense Committee continues to inform, support, and advocate for the constitutional right to effective counsel in criminal cases.

Insurance Committee

2025-2026 Committee Activities

The primary function of the committee is to provide a recommendation to the State Bar regarding its insurance coverage for the coming year. To accomplish this task, there is an

initial meeting with the insurance broker Grayling, wherein the recommendations of the broker are presented and discussed. Following the meeting there were three follow-up issues, which were addressed via email vote, in accordance with the Insurance Committee's Internal Rules of Procedure. As reported over the course of the last few years, no other insurance-based issue has required the committee to meet, but in the not-too-distant past, the committee has met to address insurance inquiries in order to make a recommendation to the State Bar.

2026-2027 Goals/Projects

At present there no specific issues or projects to address. We are in the process of working with Grayling on insurance coverage renewal. We asked Grayling to proceed with a limited marketing approach with respect to the renewal of the professional liability coverage. In this approach Grayling will approach the existing insurer (Munich Re) and three to five competing insurers for renewal proposals.

Additional Information

Again, the focus of this committee is to assist the State Bar in securing the proper insurance coverage to protect the Bar and its members and doing so in the most cost-effective way possible. Overall, the committee has been pleased with the work of Grayling and assesses the work periodically to ensure that The State Bar continues to receive the desired service and the best possible coverage at the most reasonable cost.

International Trade in Legal Services

2025-2026 Committee Activities

The Committee met twice: May 6, 2025 and October 7, 2025

2026-2027 Goals/Projects

1) Admission requirements for foreign legal consultants (FLCs) in Georgia

The Committee is studying barriers to licensing FLCs to assess which are truly necessary to protect the public. The barriers under review include:

- For at least five of the seven years immediately preceding his or her application, the FLC applicant must have been a member in good standing of the legal profession in their home country and engaged in the practice of law in that foreign country or elsewhere substantially involving or relating to the rendering of advice or the provision of legal services concerning the law of the said foreign country.
- The FLC applicant must obtain "a letter of recommendation from one of the members of the executive body of such professional body or public authority or from one of the judges of the highest law court or court of original jurisdiction of such foreign country." This requirement is in addition to obtaining "a certificate from the professional body or public authority in such foreign country having final jurisdiction over professional discipline, certifying as to the applicant's admission to practice and the date thereof, as to his or her good standing as such attorney or counselor at law or the equivalent, and as to whether any charge or complaint has

ever been filed against the applicant with such authority, and, if so, the substance of each charge or complaint and the adjudication or resolution thereof.”

- The applicant must also obtain “a letter of recommendation from at least two (2) active members of the State Bar of Georgia setting forth the length of time, when, and under what circumstances they have known the applicant, and their appraisal of the applicant’s moral character.”
- The applicant is subject to “a review of the moral character and fitness of an applicant for a license to practice law as a foreign law consultant.”
- The applicant must pay a \$1,000 application fee.

2) Monitor an initiative to amend the ABA Model Rules of Professional Conduct Rule 5.5:

The ABA’s Standing Committee on Ethics and Professional Responsibility continues to study a proposal to amend Rule 5.5 to essentially allow lawyers licensed in one state to provide legal services in other states, subject to disclosing where they are admitted to practice. The ABA Working Group developed an Issues Paper in January 2024, and several organizations and individuals have submitted comments, including the National Organization of Bar Counsel (NOBC). The comments can be viewed on the ABA website. The proponents are aiming to present the proposal to the ABA House of Delegates during the August 2025 meeting.

3) Implementation of Hague Choice of Court Convention:

The Hague Convention on Choice of Court Agreements provides a framework of rules relating to choice of court agreements (also known as forum selection clauses) in civil and commercial matters, as well as the subsequent recognition and enforcement of a judgment given by a court of a contracting state designated in the choice of court agreement. The Convention aims to create a system of recognition of court decisions with the same level of predictability and enforceability as arbitral awards under the UN Convention on the Recognition and Enforcement of Foreign Arbitral Awards (the New York Convention). The United States signed the Convention in 2009, but ratification has been held up by a debate over whether it should be implemented through federal law (as with Chapter 2 of the Federal Arbitration Act) or a uniform state law adopted by the various states (a so-called “cooperative federalism” approach). That impasse seems to have been broken with a July 2024 resolution from the Uniform Law Commission (which had led the charge against federal implementation of the Convention) stating:

“The Study Committee recommends that the ULC endorse ratification of the Hague Judgments Convention as long as the United States preserves the ability of litigants to seek recognition and enforcement of money judgments rendered in another country under existing state law — including the 2005 Uniform Foreign-Country Money Judgments Recognition Act, the 1962 Uniform Foreign Money Judgments Recognition Act, and the law of those states enacting neither uniform act — in cases where applying state law would produce results that are consistent with the requirements of the Convention. The Committee understands that “results that are consistent with the requirements of the Convention” conveys the sense of what must be accomplished (i.e., an assurance that the implementation approach taken by

the United States will ensure compliance with its international obligations), but the necessary language will have to be developed by the State Department in consultation with the ULC (and other relevant stakeholders). In practice, the Study Committee understands this will usually mean that state law will be available unless application of that law would result in the non-recognition of a judgment that the Convention would recognize.”

The State Department supports this approach, which effectively allows for federal implementation with the possibility of parallel state legislation (much like the state international arbitration statutes, such as Georgia’s, that supplement Chapter 2 of the Federal Arbitration Act). Thus, it is expected that the State Department will seek to push ratification through the Senate. Of interest to this committee, Article 19 of the Convention provides that “[a] State may declare that its courts may refuse to determine disputes to which an exclusive choice of court agreement applies if, except for the location of the chosen court, there is no connection between that State and the parties or the dispute.” The State Department has previously indicated that upon acceding to the Convention, it would make an Article 19 declaration with respect to state courts (but not the federal courts). Thus, if the Convention is ratified by the Senate, the Article 19 election will be made by each U.S. state.

The question is whether this committee, along with other stakeholders, such as the Atlanta International Arbitration Society (Atlas), can or should start laying the groundwork for Georgia to allow cases that are not connected to this state to be brought in our courts (or perhaps more specifically the Business Court).

Parties sometimes choose the courts of a jurisdiction with which neither they nor the facts of the case have any connection. Neither party wants to be home-cooked in the courts of the other party’s jurisdiction, so they choose the courts of a neutral forum. This is big business in some jurisdictions. In 2023, only 32% of the litigants in London’s Commercial Court were from the UK. A number of jurisdictions have created international commercial courts for the specific purposes of attracting foreign disputes and the associated economic windfall.

Additional Information

No response provided.

Investment

2025-2026 Committee Activities

The committee met regularly with Ron Turner and our Financial Advisor Andy Harbour to ensure our investments were balanced with the current state of the economy.

2026-2027 Goals/Projects

Providing an education update to the BOG.

Additional Information

I think it would be helpful to have the Executive Committee and BOT get a short overview once a year of our investments. We could do this at a BOG meeting or just offer a Zoom call for any member interested in learning more about our investments.

Judicial Procedure and Administration

2025-2026 Committee Activities

- The Council of Superior Court Judges of Georgia meet twice a year (July and January) and during those meetings it decides on proposed amendments to the Uniform Superior Court Rules. This committee meets in response to those meetings and provides written feedback on the proposed amendments. The response to the Council is time sensitive so that the Council can consider the Judicial Committee's input before finalizing changes to the USCR.
- The Judicial Procedures Committee met on November 5, 2025 to discuss the Council of Superior Court Judges' approved proposed amendments to USCR 4, 10, and 21 (from the Council's July 2025 meeting). The Judicial Procedures Committee voted and agreed upon its recommendations to the Council. The recommendations were timely reduced to a memorandum and submitted to the General Counsel's office for approval.

2026-2027 Goals/Projects

No response provided.

Additional Information

No response provided.

JQC Nominating Committee

2025-2026 Committee Activities

Our committee meets on an as needed basis whenever there is an opening on the JQC. I believe we met once in the past year to make recommendations to the Lt. Governor.

2026-2027 Goals/Projects

No, but only because our jurisdiction is quite narrow and focused.

Additional Information

We have operated well and our recommendations and nominations have been well-received received in the past by the Governor, Speaker, and LG.

Law Practice Management Advisory Committee

2025-2026 Committee Activities

- Our committee met this year on the following dates – 8/22/25, 10/24/25, 1/16/26, 2/27/26, and we are scheduled to have a meeting on 4/17/26 in preparation for our upcoming Webinar to be held on 4/24/26.
- 8/22/25 – We discussed practical ways to enhance visibility of LPM’ programs (including the upcoming Take Charge! Summit, and support and accessibility for Georgia Lawyers including lawyers outside the Metro Atlanta area. We also reviewed and discussed the newly updated digital edition of Starting a Georgia Law Practice Guide. In addition, we discussed LPM program highlights and challenges, expansion of online resources, and potential nonCLE webinars to be presented by this committee.
- 10/24/25 – At this meeting, the Committee reviewed the recent Take Charge! Conference, and upcoming, shorter conferences in Macon and Tifton. We also discussed the upcoming State Bar Midyear Meeting, as well as ways to help get the word out about the many resources offered by the LPM office such as securing invitations for Sheila Baldwin to attend various organization meetings and be able to speak/present about LPM resources. In addition, we talked about preparing our Hot Tips Webinar including the date, format, and potential topics and presenters. Finally, we considered the possibility of inviting internal Bar leaders to some of our meetings to inform committee awareness about related matters (such as the Special Committee on Artificial Intelligence).
- 1/16/26 – This meeting took place at the Omni Hotel at the Battery Atlanta (with some members attending virtual) as part of the State Bar Mid -Year Meeting. The discussion included the recent acquisition of Fastcase/vLex by Clio and the introduction of new AI tools for legal professionals, as well as some of the results of an ongoing AI Tool Survey. We discussed changes to the CLE rules, considered potential topics and speakers for our upcoming Hot Tips Webinar, and what additional preparation may be needed before that webinar. We also revisited the AI tools survey and discussed the potential for building an AI tool repository to help attorneys narrow the search through so many new programs becoming available. The LPM Members updated the committee about the 2026 Take Charge! Summit Roadshow going to Macon in April to help spread information about available resources and important information to attorneys outside of the Metro Atlanta area, and speakers still needed to travel to that in -person -only program. We learned about which meetings Sheila Baldwin has been able to attend so far to help spread the word about the LPM resources and discussed facilitating additional introductions for her to program chairs so she can continue to attend and speak at similar meetings. Our committee also talked about other ways the LPM could help support lawyers beyond technology tools, such as career direction, where to find potential legal talent to hire, and where to find firms who may be interested in hiring (possibly revamping the idea of a virtual job board/bulletin board/network connection tool) with consideration of confidentiality concerns.

- 2/27/26 – At this meeting, our focus was primarily about topics and presenters for our upcoming Hot Tips Webinar, and speakers that are still needed for the upcoming Take Charge! Summit Roadshow in Macon. We committed to the intended number of speakers and time allotment for each at our Hot Tips Webinar, as well as scheduling an additional meeting the week before the program to coordinate presentations and address any logistical matters. We also discussed LPM outreach opportunities including additional meetings Sheila Baldwin had been able to attend and speak at due to being put in touch by committee members, and additional meetings she may be able to be invited to. In addition, we learned more about the Fastcase/vLex changes under Clio, including the docket alarm library and the optional upgrade to the Vincent AI tools.

2026-2027 Goals/Projects

- Expanding the reach of LPM resources to underserved geographic areas within the state.
- Providing guidance to members on the practical and ethical use of emerging technologies, including AI.
- Enhancing collaboration with other Bar sections and committees (including AI-related initiatives) to avoid duplication and maximize impact.
- Exploring tools and initiatives to support attorney hiring, retention, and career development.

Additional Information

- It has been a privilege to serve in a leadership role on this advisory committee, and to get to work with such a wonderful group of people including the committee members, as well as Kim, Nkoyo and Sheila. The strength of this group lies in its willingness to share practical insights and collaborate in support of fellow attorneys across Georgia.
- Continued support for innovation—particularly in the areas of technology, AI, and evolving practice models—will be critical, but equally important is ensuring that these resources remain accessible, practical, and relevant to attorneys at all stages of their careers and across all regions of the state.
- As leadership transitions, maintaining a collaborative, forward-thinking approach—while continuing to focus on practical solutions and broad accessibility—will hopefully ensure that the committee remains a valuable resource to the Bar.

Lawyers Assistance Program (LAP)

2025-2026 Committee Activities

Over the past year, the LAP Committee has been working with our current service provider, CuraLinc, to make the transition between providers that happened at the end of the last Bar year as seamless as possible. We identified issues specific to our members and CuraLinc was more than willing to fix any issues and make the service they provide more tailored to our needs. The Committee also looked into other service providers, to make sure State Bar members were being given the highest quality service.

2026-2027 Goals/Projects

The LAP Committee has been working to revamp the Lawyers Helping Lawyers program, which is a peer support service. This is an ongoing process and we hope to have it completed by the end of the next bar year. The Committee has also worked on outreach, which will be an ongoing project.

Additional Information

The mission of this Committee is to make sure the LAP is functioning properly and providing the necessary and needed resources to State Bar members. This Committee is essential to the health, safety, and well-being of State Bar members. The legal profession has a much higher rate of self-harm than most other professions. Having a safe place to turn when in crisis, and having a person to speak to 24/7 if in crisis, is vital. Additionally, the services offered through LAP cover a wide range of issues and concerns State Bar members deal with in both their personal and professional lives.

Legislation, Advisory Committee on

2025-2026 Committee Activities

We have had several meetings in 2025, specifically on 9/30/25 and 12/11/25, all in advance of the Session. We have not had the need to have a meeting with Session is occurring.

2026-2027 Goals/Projects

Jenn McNeely has us on a good path in my opinion. I would also defer to the Bar's lobbying team.

Additional Information

- I have served on this committee since 2015, with one two-year hiatus therein. The committee has always felt big, though it has been shrunken a tad in its present form, but it remains unclear to me the extent to which a chunk of the members are engaged or involved materially. I would be interested in seeing the list of members who failed to attend both of the virtual meetings we held 2025, and would suggest consideration of those individuals removal.
- Bert Hummel's comments: I want to highlight Graham's assessment that the committee would benefit from a review of members based on attendance and engagement. The lack of participation at times is concerning given the subject matter, but more importantly a lack of preparation by some members leads to a "rubber stamp" for some proposed legislation without proper vetting. In preparing for next year's committee roster, I am here to provide feedback on membership to the degree it is helpful. Thanks to everyone for their ongoing support and assistance on one of the most important functions of our Bar.
- Damon's comments: I would strongly encourage that we consider Graham for another year as chair. He has offered. He has done a great job. He will do a really good job, especially in partnership with Jenn. There's no doubt I am a fan of Bert, but

considering he will have secretary duties next year and support the Bench and Bar committee, this feels like a lot.

Local and Voluntary Bars

2025-2026 Committee Activities

The Committee met virtually on Feb. 4 to discuss the upcoming Local and Voluntary Bars Awards. Once submissions are received and compiled, the Committee will vote on submissions electronically to determine winners in the various categories. Winners will receive their awards at the Annual Meeting in Amelia Island in June 2026.

2026-2027 Goals/Projects

No response given.

Additional Information

No response given.

Member Benefits

2025-2026 Committee Activities

Oversight of the Law Practice Management Program

- **Activities:** During the reporting period, the Committee supported the Law Practice Management Program by overseeing member engagement, reviewing resource utilization, and monitoring educational programming and consultations to ensure activities remained responsive to member needs and aligned with the Bar's mission of promoting effective and ethical law practices.
- **Achievements:** The Committee's oversight of the Law Practice Management Program supported continued member engagement through review of consultations, practice management resources, vendor participation, and CLE programming, reinforcing services that promote effective and sustainable law practices.

Oversight of Bar Member Benefits Programs: vLex Fastcase Legal Research, Member Benefits, Inc. Recommended Broker Programs and Reliaguide Enhance Membership Directory.

- **vLex Fastcase Legal Research Activities:** The Committee oversaw the transition from Fastcase to vLex Fastcase and subsequently to Clio Library, ensuring uninterrupted access for members throughout platform changes. The Committee monitored the integration of Docket Alarm, tracked available and outstanding content — particularly certain Georgia appellate materials affected by external court fee structures — and continued discussions with vendors regarding content clarity. The Committee also evaluated emerging AI enhancements, including Vincent AI, and promoted member awareness of optional tools and available pricing options.

- **Achievements:** As a result of these efforts, the Committee successfully supported a seamless platform transition with no disruption to member access, expanded available content through the inclusion of Docket Alarm, and increased access to court dockets, filings, and litigation analytics as content continues to grow. The Committee worked with vLex Fastcase leadership to review usage, address access issues, and support training resources following platform upgrades. Additionally, the Committee successfully advocated for discounted member pricing for Vincent AI, securing a reduction from \$399 to \$239 per month, and ensured continued continuity and branding clarity following Clio's acquisition of vLex Fastcase.

Member Benefits, Inc. Recommended Broker Programs

- **Activities:** Collaborated with Member Benefits, Inc. to explore, vet, and expand valuable benefits for members including access to a private insurance exchange and a range of group rate insurance offerings designed specifically for lawyers and their families. Through the Member Benefits platform, members can explore health, dental, vision, life, disability, long-term care, and professional liability insurance options for individuals, families, and employer groups, supported by licensed benefits counselors who assist with plan selection and enrollment.
- **Achievements:** During the reporting period, Member Benefits, Inc., in collaboration with the Member Benefits Committee, expanded access to health insurance options through Georgia Access, advanced evaluation of a proposed MEWA health plan, reviewed group and excess liability coverage options, and supported retirement and financial planning education through vendor partnerships. Most recently, the broker launched a Financial Management program, delivering a one-hour CLE program with an additional session planned for the Annual Meeting.

Reliaguide Enhanced Membership Directory

- **Activities:** During the reporting period, the Committee supported the expansion of Reliaguide through the launch of the Lawyer Referral Network, a lawyer only, bar affiliated platform designed to facilitate referrals and strengthen professional connections across jurisdictions. Built on the existing public directory, the network extends the reach of a member profile to attorneys in participating bars nationwide through a single, streamlined interface.
- **Accomplishments:** This enhancement strengthens Reliaguide's value as a member benefit by promoting cross-state collaboration and expanding referral opportunities for Georgia lawyers. By leveraging a bar-affiliated platform trusted by consumers and attorneys alike, members can promote their practices, connect with potential clients, and increase access to legal services for the public—at a price point designed to be attractive and accessible for solo and small firm practitioners.

2026-2027 Goals/Projects

- **Future Projects:** The Law Practice Management Program will continue to develop and expand practical resources, education, and guidance focused on technology,

trust accounting, and emerging practice management issues and expand its outreach through increased use of social media and strengthened connections with local and state bar associations to raise awareness of available resources, programs, and services.

- Clio vLex Fastcase: The Committee will continue to monitor Clio vLex Fastcase platform changes, expanded Docket Alarm content, and emerging AI driven research tools to ensure continued member access, value, and effective use of the benefit.
- Member Benefits, Inc.: Member Benefits, Inc. is focused on future projects that include continued evaluation of a proposed Health Insurance MEWA and assessment of a Group Excess Liability Program, both intended to expand coverage options and address emerging needs of Bar members.
- Reliaguide: The Committee will continue to monitor Reliaguide engagement, directory enhancements, and vendor quality while supporting efforts to improve member awareness and effective use of the platform.

Additional Information

No response given.

Military Legal Assistance Program

2025-2026 Committee Activities

- We met jointly in person with the Military Law Section at the State Bar Annual Convention. (Minutes and roster maintained by the Mil Law Committee).
- We also had scheduled phone calls to conduct specific business such as selecting a recipient of the Marshall Tuttle Award and working on implementation of the MOU with the Warrior Alliance. Meetings were held in person and by phone with the Executive Director of the State Bar and Bar staff members to navigate the changes resulting from the passing of Mike Monahan, the program's connection with Georgia Legal Services.

2026-2027 Goals/Projects

- First and foremost, we need to continue to navigate the changes to the receipt and delivery of legal services to active-duty personnel and veterans. Until Mike's passing, they went through him. Now inquiries come to the staff at the Bar, who coordinate with the Warriors Alliance and volunteer lawyers. Since its inception, MLAP has connected service personnel with thousands of Georgia lawyers. Now with our MOU with the Warrior Alliance, we are able to provide even more services.
- We are presently soliciting nominations for the Annual Marshall Tucker Award.
- The committee drafted the Veteran's Court Legislation, provided remote service bases in South Georgia (provided by a grant from the ABA), worked with forming and providing assistance to Veterans Clinics at the Georgia Law schools, helped staff legal clinics at the VA Hospital and much more. MLAP is a very active program.

Additional Information

There are many dedicated people who have volunteered numerous hours to assist active-duty personnel and veterans. It is a hard-working and valuable program.

Professionalism Committee

2025-2026 Committee Activities

- Under my first year as Chair, the committee has maintained a high level of engagement and momentum, hosting two well-attended full committee meetings. Our initial session on September 10, 2025, brought together 19 members, advisors, and liaisons, and we saw participation grow to 22 members, advisors, and liaisons by our second meeting on March 4, 2026. As requested, the attendance lists for both meetings is attached to this Memorandum. This consistent turnout reflects a committee that is both active and growing in its commitment to the Bar's mission. To ensure year-round productivity, our work is distributed across four distinct subcommittees, each of which operates in a continuous cycle of preparation, execution, and review.
- In addition to attending the three full Committee meetings, Committee members are highly encouraged to join one of our standing subcommittees, which meet an additional three to six times per year. Depending on the work of the subcommittee, members might spend an additional five to twenty hours during the year working on subcommittee-specific projects such as: formulating and revising law school orientation professionalism hypotheticals, planning for Continuing Legal Education events, preparing for activities such as April's Legal Professionalism Month and May's "Law Day." We also have opportunities for leadership within our Committee, as each subcommittee is staffed with two co-chairs or with a chair and a vice chair. Our Committee offers unique and exciting opportunities to collaborate with judges, attorneys, law school faculty and administrators, and law students to advance professionalism in the legal field.
- Our outreach efforts are currently headlined by the Connect with a Colleague subcommittee, led by Co-Chairs Cathy Hampton and Samantha Mullis. This spring, the team is working toward a significant expansion of the program, targeting triple-digit participation across the entire state—a bold increase from the 48 participants we saw last year. To support this growth, we have utilized a robust blend of social and traditional media. Additionally, we have strategically housed the gubernatorial proclamation for "Legal Professionalism Month" within this subcommittee. By navigating the Bar's ACL process in the fall, we ensure that the month of April is officially recognized well before the subcommittee shifts its full focus to executing its core networking event. See <https://cjcpga.org/cwac/>.
- Educational outreach remains a pillar of our work through the Law School Orientations on Professionalism subcommittee, chaired by Samantha Beskin - Schemer, with Margaret Schweizer serving as Vice Chair. This program serves as a critical bridge between the Bar and Georgia's five law schools. It is a dual-phase operation: in the fall, winter, and spring, the subcommittee meticulously drafts and evaluates the ethical problems presented to incoming students, in the summer, we

recruit group leaders, and in the fall, we host the professionalism orientations at all five Georgia law schools. In August 2025 (during this Bar year), we successfully mobilized over 165 Group Leader attorney and judge volunteers to lead small groups of 10 -15 for 1,166 law students at all of Georgia's five (5) law schools, ensuring the next generation of Georgia lawyers enters the profession with a firm grasp of professionalism. See (link). Information regarding the Fall 2026 orientations (which will take place during the 2026-2027 Bar year) is progressing, and we will post it once it becomes available at <https://cjcpga.org/law-school-orientations-on-professionalism-2026/>.

- Similarly, our Law Day subcommittee, led by Chair Denise Warner and Vice Chair Marlan Eller, continues to cultivate public understanding of the legal profession. For the past several years, the Committee on Professionalism's Law Day subcommittee has partnered with the Local and Voluntary Bars subcommittee on Law Day projects. In May 2025, aligning with the ABA theme, The Constitution's Promise: Out of Many, One, we encouraged lawyers in every judicial district to engage with their local communities. In addition, in May 2025, for the first time, with the assistance of Hon. Cheveda D. McCamy, Superior Court Judge, Alcovy Judicial Circuit, the Law Day Committee held a social media pilot project for Newton High School students.
- For 2026, the Law Day subcommittee is again asking lawyers and judges to speak about Law Day in their communities. See <https://www.gabar.org/law-day>. Ms. Warner has drafted talking points that lawyers and judges may use for Law Day 2026 based on the American Bar Association's theme, "The Rule of Law and the American Dream." Attorneys may sign up to organize and give a presentation for Law Day 2026 by visiting: <https://www.gabar.org/law-day>.
- In addition, the Law Day Committee expanded the social media contest pilot project to a second high school for 2026 – Dodge County High School. Therefore, both Newton High School and Dodge County High School will participate in the social media contest in 2026. Mr. Marlan Eller has taken the lead on this initiative. Having two different school districts in two different parts of the state is helping the Committee to develop plans to slowly scale the social media contest up to a statewide contest. Educators from both schools have worked cooperatively to help develop the contest in a way that is most appropriate for each school. Drafts of the 2026 materials the Law Day Committee and the educators have developed for the social media contest are available in Dropbox.
- Finally, the Speakers' and Writers' Bureau, co-chaired by Kevin Patrick and Michael Pérez, continues to serve as a vital resource for thought leadership. Beyond maintaining a deep bank of qualified speakers, the subcommittee has prioritized timely and relevant programming. A prime example is our recent panel of General Counsel who participated in the subcommittees' Artificial Intelligence: Innovation without Regulation CLE. This session alone drew significant interest, demonstrating our ability to provide the membership with high-value, forward-looking content. The CLE was approved for 1 hour of professionalism CLE credit. According to the Zoom report generated for the CLE, the CLE was attended by 707 "Unique Viewers." The Chief Justice's Commission on Professionalism, which staffed the program, reported CLE attendance for 685 Georgia lawyers during March 2026.

2026-2027 Goals/Projects

- Looking ahead, we are committed to aligning our subcommittee efforts with the State Bar's strategic initiative to increase the number of attorney-public officials within our state. We are currently in the planning stages for a featured event designed to highlight the unique and essential work performed by lawyer - legislators, as well as the vital contributions of attorneys serving in other elected or appointed public offices. By showcasing these roles, we hope to inspire more members of the Bar to bring their legal expertise to public service. We will hold his program in partnership with the Young Lawyers Division. The CLE is currently scheduled to take place via Zoom on June 25, 2026, from 2:30 p.m. to 4:30 p.m.
- Simultaneously, we will continue to prioritize the evolving role of Artificial Intelligence in the legal field. While our recent programming demonstrated the high level of interest in AI's potential, our future initiatives will focus heavily on the professionalism risks and the professional dangers of over-reliance on these tools. Our goal is to ensure that Georgia practitioners are not only tech-savvy but also fully aware of the pitfalls AI can create for their practices and their duties to their clients.

Additional Information

- The Committee continues to perform its core functions at a high level, and I am incredibly proud of the dedication shown by our members. As I look toward the future, one of my primary observations has been the longevity of our subcommittee leadership. While this experience is invaluable, I have challenged our current subcommittee chairs to continue identifying and mentoring potential successors to ensure a healthy infusion of new energy and perspectives.
- As the responsibility for recruitment and retention ultimately rests with the Chair, beginning with the 2025 -2026 Bar year, Michael Herskowitz and I began actively working to diversify the Committee's membership. We noted a growing concentration of litigation-heavy practitioners, and focused on recruiting attorneys with transactional side backgrounds to ensure our committee reflected the full breadth of the Georgia Bar. For the 2026 -2027 Bar year, we successfully onboarded two new members with transactional backgrounds. I hope to continue this trend and I intend to recruit several more before the conclusion of my tenure.
- The success of this year would not have been possible without the partnership of my Vice Chair, J. Maria Waters. We have maintained a highly collaborative relationship, and I have made it a priority to keep her fully integrated into every development and decision. This deliberate transparency is designed to ensure a seamless transition when she assumes the Chair role for the 2027-2028 Bar year, providing the committee with the stable, long -term leadership it deserves.
- Finally, the Committee is very proud of its work so far this year, which resulted from the collaborative efforts of its members, subcommittee co-chairs, as well as the staff support provided by the Chief Justice's Commission on Professionalism under the leadership of its Executive Director, Karlise Y. Grier.

Programs

2025-2026 Committee Activities

The Committee met once to review requests for new/additional funding and addressed them. I believe we have settled into the current budget framework well and can complete the review efficiently with just 1-2 meetings each year. In any year when there is a request for the Committee to look at a specific program or funding level, that can be easily accomplished; otherwise, the current process works well.

2026-2027 Goals/Projects

Not that I can think of, but the Bar should always be mindful of each program's budget and ensure that the program effectively meets its mission and goals with the appropriate funding. To that extent, if the president or officers want the Programs Committee to examine a particular program in more depth, we can accomplish that.

Additional Information

Nothing more to add.

Seeking Equal Justice

2025-2026 Committee Activities

The committee held one CLE in November. The committee met 5 times, with an average of 9 attendees.

2026-2027 Goals/Projects

No response provided.

Additional Information

No response provided.

SOLACE

2025-2026 Committee Activities

We met January 17 and June 7. We also have periodic calls, for instance one last month. A major achievement was creating two groups to work on disaster planning, preparation and execution in the event of disasters that impact the legal community.

2026-2027 Goals/Projects

SOLACE will continue to work on disaster planning, preparation and execution – including getting the plan ready for prime time. We will also continue to work on ways to spread the word about SOLACE so that those eligible know about us and can turn to us in their times of need.

Additional Information

Since I first heard of this committee, I have known how important it is. The committee provides support and non-monetary resources to those who are used to being there for everyone else, sometimes at one of the hardest times of their lives.

Statewide Judicial Evaluation

2025-2026 Committee Activities

The committee has convened meetings to review and rate applicants for judicial appointments for State and Superior Court vacancies. The committee has provided the Judicial Nominating Commission (JNC) with summaries of the committee members' discussions and judicial applicant ratings on behalf of the members of the State Bar of Georgia.

2026-2027 Goals/Projects

The committee will continue to evaluate judicial candidates as requested by the JNC.

Additional Information

- The JEC Committee would like to keep Sarah Coole as our staff liaison. Sarah has provided invaluable assistance to the committee and has improved the process for our ratings votes, which has streamlined the committee's work considerably. Sarah's staffing partnership and process changes have also allowed the committee to seamlessly achieve the mission of documenting and communicating ratings and other information to the JNC.
- On behalf of the JEC Committee members, I would like to thank the President and the JNC for allowing bar members to weigh in and provide insight and feedback for the judicial appointment process.

Suicide Awareness and Prevention Committee

2025-2026 Committee Activities

In 2025, the committee had one meeting in March. The committee did participate in the annual Out of the Darkness Walk.

2026-2027 Goals/Projects

Not applicable.

Additional Information

Not applicable.

GOING FURTHER

STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2025



STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2025

STATE BAR OF GEORGIA
COMBINED FINANCIAL REPORT
JUNE 30, 2025

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INDEPENDENT AUDITOR'S REPORT

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

Opinion

We have audited the accompanying combined financial statements of the **State Bar of Georgia** and related entity (collectively the "State Bar") (a nonprofit organization), which comprise the combined statements of financial position as of June 30, 2025 and 2024, and the related combined statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the combined financial statements.

In our opinion, the combined financial statements referred to above present fairly, in all material respects, the financial position of State Bar as of June 30, 2025 and 2024, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Combined Financial Statements section of our report. We are required to be independent of the State Bar and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Combined Financial Statements

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

In preparing the combined financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern within one year after the date that the combined financial statements are available to be issued.

Auditor's Responsibilities for the Audit of the Combined Financial Statements

Our objectives are to obtain reasonable assurance about whether the combined financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the combined financial statements.

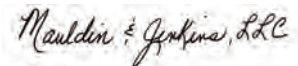
In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the combined financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the combined financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the State Bar's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the combined financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the State Bar's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Report on Supplemental Information

Our audit was conducted for the purpose of forming an opinion on the combined financial statements as a whole. The supplemental information on pages 20 through 23 is presented for purposes of additional analysis and is not a required part of the combined financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined financial statements or to the combined financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated in all material respects in relation to the combined financial statements as a whole.



Atlanta, Georgia
December 9, 2025

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2025 AND 2024

	2025	2024
ASSETS		
Cash and cash equivalents	\$ 25,228,732	\$ 25,085,480
Accounts receivable, net	140,562	121,100
Receivable from related parties	736,830	696,257
Receivable from employees	11,081	16,450
Accrued interest receivable	147,767	112,008
Prepaid and other assets	613,143	435,786
Investments, at fair value	20,538,427	19,373,716
Bar Center building and improvements, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,105,616	6,214,287
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,546,411	935,975
Right-of-use assets - operating	242,630	354,796
	\$ 55,311,199	\$ 53,345,855
LIABILITIES AND NET ASSETS		
Liabilities		
Accounts payable	\$ 2,139,328	\$ 2,451,045
Accrued salary and retirement plan expense	1,009,326	938,939
Payable to Clients' Security Fund	2,952,050	2,782,908
Payable to related parties	297,429	238,996
Accrued vacation	526,460	593,724
Deferred income - dues and sections	11,460,354	9,454,962
Lease liability - operating	243,351	353,219
Total liabilities	18,628,298	16,813,793
Net assets		
Without donor restrictions		
Undesignated	7,017,812	6,576,020
Board-designated	26,294,056	26,984,953
Total without donor restrictions	33,311,868	33,560,973
With donor restrictions	3,371,033	2,971,089
Total net assets	36,682,901	36,532,062
Total liabilities and net assets	\$ 55,311,199	\$ 53,345,855

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2025

	Without Donor Restrictions		With Donor Restrictions	Total
	Undesignated	Board- Designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,615,215	\$ -	\$ -	\$ 12,615,215
Advertising	53,363	-	-	53,363
Membership	347,659	-	-	347,659
Total fees	<u>13,016,237</u>	<u>-</u>	<u>-</u>	<u>13,016,237</u>
ICLE				
Program revenues	4,742,670	-	-	4,742,670
Total ICLE	<u>4,742,670</u>	<u>-</u>	<u>-</u>	<u>4,742,670</u>
Other revenues				
Contributions	-	1,248,949	1,188,660	2,437,609
Section dues	-	1,707,039	-	1,707,039
Convention and meeting fees	-	47,500	-	47,500
Law practice management fees	25,109	-	-	25,109
Young lawyers division fees	4,600	-	-	4,600
High school mock trial fees	48,301	-	-	48,301
Investment income	806,917	412,996	-	1,219,913
Rental income	-	983,600	-	983,600
Other	868,977	-	-	868,977
Total other revenues	<u>1,753,904</u>	<u>4,400,084</u>	<u>1,188,660</u>	<u>7,342,648</u>
Net assets released from restrictions	<u>-</u>	<u>788,716</u>	<u>(788,716)</u>	<u>-</u>
Total revenues and other support	<u>19,512,811</u>	<u>5,188,800</u>	<u>399,944</u>	<u>25,101,555</u>
EXPENSES				
Program services				
Counsel	5,059,238	-	-	5,059,238
Communications	948,804	-	-	948,804
Membership	1,181,911	-	-	1,181,911
Unauthorized practice of law	905,483	-	-	905,483
Law practice management	484,275	-	-	484,275
Law related education	439,185	-	-	439,185
Fee arbitration	568,102	-	-	568,102
Sections	2,011,854	-	-	2,011,854
Young lawyers division	653,363	-	-	653,363
ICLE	3,925,991	-	-	3,925,991
Other programs	143,518	2,032,055	-	2,175,573
Total program services	<u>16,321,724</u>	<u>2,032,055</u>	<u>-</u>	<u>18,353,779</u>
Supporting services				
Management and general	2,844,085	3,752,852	-	6,596,937
Total expenses	<u>19,165,809</u>	<u>5,784,907</u>	<u>-</u>	<u>24,950,716</u>
CHANGE IN NET ASSETS	347,002	(596,107)	399,944	150,839
NET ASSETS, BEGINNING	<u>6,576,020</u>	<u>26,984,953</u>	<u>2,971,089</u>	<u>36,532,062</u>
TRANSFERS	<u>94,790</u>	<u>(94,790)</u>	<u>-</u>	<u>-</u>
NET ASSETS, ENDING	<u>\$ 7,017,812</u>	<u>\$ 26,294,056</u>	<u>\$ 3,371,033</u>	<u>\$ 36,682,901</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2024

	Without Donor Restrictions		With Donor Restrictions	Total
	Undesignated	Board- Designated		
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,308,061	\$ -	\$ -	\$ 12,308,061
Advertising	45,389	-	-	45,389
Membership	273,218	-	-	273,218
Total fees	<u>12,626,668</u>	<u>-</u>	<u>-</u>	<u>12,626,668</u>
ICLE				
Program revenues	4,790,571	-	-	4,790,571
Total ICLE	<u>4,790,571</u>	<u>-</u>	<u>-</u>	<u>4,790,571</u>
Other revenues				
Contributions	-	1,234,693	1,249,254	2,483,947
Section dues	-	1,678,774	-	1,678,774
Convention and meeting fees	-	47,500	-	47,500
Law practice management fees	20,222	-	-	20,222
Young lawyers division fees	4,980	-	-	4,980
High school mock trial fees	52,230	-	-	52,230
Investment income	212,543	878,861	-	1,091,404
Rental income	-	939,928	-	939,928
Other	761,509	-	-	761,509
Total other revenues	1,051,484	4,779,756	1,249,254	7,080,494
Net assets released from restrictions	-	593,820	(593,820)	-
Total revenues and other support	<u>18,468,723</u>	<u>5,373,576</u>	<u>655,434</u>	<u>24,497,733</u>
EXPENSES				
Program services				
Counsel	4,695,043	-	-	4,695,043
Communications	934,436	-	-	934,436
Membership	1,114,314	-	-	1,114,314
Unauthorized practice of law	947,824	-	-	947,824
Law practice management	479,364	-	-	479,364
Law related education	423,214	-	-	423,214
Fee arbitration	545,228	-	-	545,228
Sections	1,782,184	-	-	1,782,184
Young lawyers division	569,112	-	-	569,112
ICLE	3,854,346	-	-	3,854,346
Other	214,423	1,891,044	-	2,105,467
Total program services	15,559,488	1,891,044	-	17,450,532
Supporting services				
Management and general	2,514,676	3,842,160	-	6,356,836
Total expenses	<u>18,074,164</u>	<u>5,733,204</u>	<u>-</u>	<u>23,807,368</u>
CHANGE IN NET ASSETS	394,559	(359,628)	655,434	690,365
NET ASSETS, BEGINNING	<u>6,065,703</u>	<u>27,460,339</u>	<u>2,315,655</u>	<u>35,841,697</u>
TRANSFERS	115,758	(115,758)	-	-
NET ASSETS, ENDING	<u>\$ 6,576,020</u>	<u>\$ 26,984,953</u>	<u>\$ 2,971,089</u>	<u>\$ 36,532,062</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2025

	Program services											Supporting Services		
	Counsel	Communications	Membership	Unauthorized Practice of Law	Law Practice Management	Law-Related Education	Fee Arbitration	Sections	Young Lawyers Division	ICLE	Other Programs	Total Program Services	Management and General	
													Total	
Personal costs	\$ 3,037,354	\$ 304,342	\$ 310,746	\$ 544,646	\$ 243,275	\$ 239,048	\$ 252,482	\$ 192,588	\$ 137,936	\$ 1,160,334	\$ 209,375	\$ 6,631,566	\$ 1,778,712	\$ 8,410,278
Payroll taxes	222,483	22,483	23,208	44,322	18,042	17,627	18,344	14,683	10,016	89,042	13,739	483,989	133,917	627,906
Employee benefits	777,481	111,521	133,340	167,652	93,159	114,103	127,689	40,217	38,900	267,708	49,420	1,941,170	513,404	2,454,574
Officer expenses	-	-	-	-	-	-	-	-	58,211	-	-	36,211	73,857	110,068
Shared administrative expenses	562,856	76,320	95,000	114,480	76,320	57,240	76,320	65,015	38,160	381,600	38,160	1,581,871	224,659	1,806,530
Rent and utilities	-	-	-	-	-	-	-	-	-	-	-	-	611,713	611,713
Office expenses	34,735	2,831	3,823	2,261	2,495	784	4,138	6,352	1,935	15,503	2,329	76,346	69,720	146,066
Printing and publications	20,662	5,190	1,150	832	4,343	180	1,240	728	3,950	79,711	990	118,976	10,494	129,470
Subscription and books	16,014	405	68,927	1,202	944	135	300	-	6,540	6,640	687	97,407	3,074	100,481
Dues and memberships	14,928	1,230	-	2,269	390	-	390	-	613	4,997	365	24,782	16,659	41,441
Seminars and training	87,685	17,621	-	1,233	11,144	1,517	2,331	1,904	19,066	14,123	10,592	167,216	70,738	237,954
Travel	4,053	51	122	58	100	-	689	-	133,704	6,001	837,362	988,120	19,012	1,007,132
Meetings and lunches	131,015	30,365	-	7,650	-	-	72,000	-	-	1,020	182,888	700,224	469,172	1,169,396
Professional services and contract labor	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Professional legal fees	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Membership software license	-	-	114,711	-	-	-	-	-	-	-	182,888	114,711	-	297,600
Membership database	-	-	110,713	-	-	-	-	-	-	-	-	110,713	-	221,426
Website redesign	-	55,995	-	-	-	-	-	1,689,656	-	1,734,114	-	35,995	-	3,423,772
Program expenses	-	-	-	-	-	-	-	-	-	-	267,382	267,382	-	534,764
Contributions	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Festacase	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Insurance	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Computer software	9,056	1,458	874	-	5,496	-	-	-	729	-	384	18,706	202,005	220,711
Credit card discount and fees	-	884	303,675	-	152	-	-	-	35	-	63	407,010	8,622	415,832
Building rental costs	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Building parking costs	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Other	58,079	73,365	1,817	4,701	15,572	310	1,245	-	201,571	8,379	100,942	471,781	143,953	615,733
Depreciation	80,857	10,954	13,726	16,446	10,954	8,223	10,954	-	5,482	54,818	2,741	215,164	974,835	1,189,999
	\$ 5,052,238	\$ 946,804	\$ 1,161,914	\$ 905,468	\$ 484,275	\$ 493,165	\$ 568,102	\$ 2,011,854	\$ 653,383	\$ 3,925,981	\$ 2,175,573	\$ 16,833,779	\$ 6,596,937	\$ 24,950,716

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENT OF FUNCTIONAL EXPENSES
FOR THE YEAR ENDED JUNE 30, 2024

	Program services											Supporting Services	
	Counsel	Communications	Membership	Unauthorized Practice of Law	Law Practice Management	Law-Related Education	Fee Adm. / Sections	Young Lawyers Division	ICLE	Other Programs	Total Program Services	Management and General	Total
Personal costs	\$ 2,019,937	\$ 289,165	\$ 302,958	\$ 566,639	\$ 267,385	\$ 226,032	\$ 246,379	\$ 176,905	\$ 1,099,472	\$ 110,174	\$ 6,296,495	\$ 1,172,515	\$ 7,949,010
Payroll taxes	203,189	21,405	22,625	42,932	19,571	16,561	19,630	13,624	84,755	6,171	460,143	125,837	595,980
Employee benefits	732,458	100,532	123,385	197,448	84,656	110,102	100,934	35,391	233,438	37,792	1,817,440	526,288	2,338,228
Officer expenses	-	-	-	-	-	-	-	-	33,792	-	33,792	79,022	112,814
Shared administrative expenses	586,400	79,511	99,390	119,268	79,511	59,633	79,511	65,391	397,804	18,626	1,592,802	212,239	1,795,041
Rent and utilities	-	9,933	-	2,136	-	1,343	7,966	4,689	25,073	365	89,187	581,362	673,003
Printing and publications	36,430	273,976	4,569	-	2,512	-	-	1,222	-	385	273,976	82,446	273,036
Subscription and books	23,482	3,904	1,198	669	2,798	385	1,415	2,874	77,831	1,496	117,609	10,321	128,330
Dues and memberships	10,918	405	67,933	610	720	300	310	135	4,705	150	85,886	2,752	88,638
Seminar and training	69,684	3,088	-	977	5,861	2,038	3,145	4,793	18,333	4,863	135,980	69,324	205,304
Travel	3,338	-	290	1,928	-	-	1,889	1,232	5,166	645,032	78,158	17,576	788,734
Meetings and luncheons	28,575	30,456	675	-	-	-	72,000	-	-	264,255	284,255	437,709	749,960
Professional legal fee license	-	-	-	-	-	-	-	-	-	117,490	-	-	117,490
Membership software license	-	-	117,490	-	-	-	-	-	-	-	117,490	-	234,980
Website redesign	-	-	57,912	-	-	-	-	-	-	-	57,912	-	115,824
Program expenses	-	29,300	-	-	-	-	-	1,476,619	1,797,289	273,083	3,694,164	-	29,300
Contributions	-	-	-	-	-	-	-	-	-	267,382	267,382	-	267,382
Fastcase	-	-	-	-	-	-	-	-	-	-	-	297,470	297,470
Insurance	-	-	-	-	-	-	-	-	-	-	-	87,616	87,616
Computer software	8,305	1,458	-	-	4,706	-	-	729	-	-	-	144,146	153,344
Credit card discount and fees	-	-	-	-	-	-	-	-	-	-	-	7,952	7,952
Building rental costs	-	321	303,676	-	345	-	-	29	105,793	95	410,249	-	418,201
Building parking costs	-	-	-	-	-	-	-	-	-	-	-	437,793	437,793
Other	99,558	77,051	905	4,259	690	377	1,430	-	7,218	24,995	216,363	28,799	245,162
Depreciation	63,354	8,990	10,728	12,886	8,590	6,443	8,590	-	36,667	2,148	164,291	1,147,097	1,311,388
	\$ 4,695,043	\$ 994,436	\$ 1,114,314	\$ 947,824	\$ 479,864	\$ 423,214	\$ 545,228	\$ 1,792,164	\$ 3,854,346	\$ 2,105,467	\$ 17,450,532	\$ 6,356,856	\$ 23,807,388

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
COMBINED STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

	2025	2024
OPERATING ACTIVITIES		
Change in net assets	\$ 150,839	\$ 690,365
Adjustments to reconcile change in net assets to net cash and cash equivalents provided by operating activities		
Depreciation	1,189,999	1,311,388
Net realized and unrealized (gains) on investments	(538,637)	(560,204)
Loss on disposal of fixed assets	-	461
(Increase) decrease in accounts receivable	(19,462)	19,009
(Increase) decrease in receivables from related parties	(40,573)	107,702
Decrease in receivables from employees	5,369	1,982
(Increase) in accrued interest receivable	(35,759)	(44,260)
(Increase) in prepaid and other assets	(177,357)	(46,213)
(Decrease) increase in accounts payable	(311,717)	548,609
Increase in employee benefits payable	70,387	70,837
Increase (decrease) in payables to related parties	58,433	(26,331)
(Decrease) increase in accrued vacation	(67,264)	18,558
Increase (decrease) in deferred income - dues and sections	2,005,392	(701,305)
(Decrease) in other deferred income	-	(23,596)
Increase in payable to Clients' Security Fund	169,142	565,706
Decrease (increase) in right-of-use assets - operating	112,166	(15,539)
(Decrease) increase in lease liability - operating	(109,868)	20,504
Total adjustments	<u>2,310,251</u>	<u>1,247,308</u>
Net cash and cash equivalents provided by operating activities	<u>2,461,090</u>	<u>1,937,673</u>
INVESTING ACTIVITIES		
Purchases of building improvements, furniture, fixtures, and equipment	(2,158,481)	(1,151,749)
Purchases of investments	(10,871,517)	(6,538,885)
Proceeds from sale and maturity of investments	<u>10,712,160</u>	<u>4,979,424</u>
Net cash and cash equivalents (used in) investing activities	<u>(2,317,838)</u>	<u>(2,711,210)</u>
Net increase (decrease) in cash and cash equivalents	143,252	(773,537)
Cash and cash equivalents, beginning	<u>25,085,480</u>	<u>25,859,017</u>
Cash and cash equivalents, ending	<u>\$ 25,228,732</u>	<u>\$ 25,085,480</u>
SUPPLEMENTAL CASH FLOW INFORMATION		
Operating right-of-use assets obtained in exchange for new operating lease liabilities	<u>\$ -</u>	<u>\$ 88,335</u>

See Notes to Combined Financial Statements.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 1 – Summary of significant accounting policies

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 1 – Summary of significant accounting policies (Continued)

Cash and Cash Equivalents – For purposes of the combined statements of cash flows, the State Bar considers all highly liquid debt instruments with original maturities of three months or less to be cash equivalents. Cash equivalents were \$12,440,861 and \$13,599,761 at June 30, 2025 and 2024, respectively, consisting of money market funds. These funds are not insured.

At June 30, 2025 and 2024, in addition to the money market deposits above, the State Bar maintained bank deposits in excess of federally insured limits of \$11,566,195 and \$10,643,019, respectively.

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

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

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

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

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

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

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

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 1 – Summary of significant accounting policies (Continued)

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

Accounts Receivable – Accounts receivable are reported net of an allowance for credit losses. As of both June 30, 2025 and 2024, the allowance for credit losses was zero. Management determines the allowance for credit losses using the aging of accounts in addition to historical experience with various payors.

Revenue Recognition – The State Bar follows Financial Accounting Standards Board ("FASB") Topic 606, *Revenue from Contracts with Customers*. Membership dues, annual license fees, ICLE seminar fees and Bar Center assessments are recorded as revenue in the applicable year when received. Any amounts collected prior to and including June 30 applicable to the subsequent year's membership dues, assessments, or seminars are recorded as deferred income in the combined statements of financial position, and totaled \$11,460,354 and \$9,454,962 as of June 30, 2025 and 2024, respectively. The State Bar recognizes the associated revenue over the membership period. During the year ended June 30, 2025, the State Bar recognized \$9,454,962 of revenue that was included in the deferred revenue balance as of July 1, 2024. Annual license fee and Bar Center assessment notices for the fiscal years ended June 30, 2025 and 2024 were sent out in April 2024 and April 2023, respectively.

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

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

Income Taxes – The State Bar was established as an instrumentality of the state of Georgia, and its income is therefore exempt from income tax under Internal Revenue Code Section 115, per the Internal Revenue Service determination letter dated May 11, 1965. Under Section 115, net income from an activity other than an essential governmental function can be subject to taxation. In management's opinion, the State Bar did not have any such net income during the years ended June 30, 2025 and 2024.

The State Bar has evaluated the effect of generally accepted accounting principles guidance for Accounting for Uncertainty in Income Taxes. Management believes that the State Bar continues to satisfy the requirements of a tax-exempt organization and therefore had no uncertain income tax positions at June 30, 2025 and 2024.

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

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

The CSF is funded by an annual assessment of \$15 per dues-paying lawyer. The Board of Trustees shall not spend more than received through the annual assessment in a single year. The Board of Governors may from time to time adjust the fund's maximum annual assessment to advance the purposes of the fund or to preserve the fiscal integrity of the fund.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 2 – Liquidity and availability of financial assets

The following reflects the State Bar's financial assets as of the combined statements of financial position date as of June 30, 2025 and 2024, reduced by amounts not available for general use within one year of the combined statements of financial position date of June 30, 2025 and 2024 because of contractual or donor-imposed restrictions or internal designations.

	2025	2024
Cash and cash equivalents	\$ 25,228,732	\$ 25,085,480
Accounts receivable	888,473	833,807
Accrued interest receivable	147,767	112,008
Investments	20,538,427	19,373,716
	46,803,399	45,405,011
Less: Donor-imposed restricted cash and cash equivalents	(3,371,033)	(2,971,089)
Less: Board-designated cash and cash equivalents, accounts receivable, accrued interest receivable, and investments	(19,985,398)	(20,401,231)
Total financial assets without donor restriction or other restrictions available for general use within one year	\$ 23,446,968	\$ 22,032,691

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

Note 3 – Membership

Membership in the State Bar totaled 56,243 and 55,390 at June 30, 2025 and 2024, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 4 – Investments

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

As of June 30, 2025 and 2024, investments at fair value are summarized as follows:

	<u>2025</u>	<u>2024</u>
Money market funds	\$ 1,213,619	\$ 2,476,541
Equities	3,798,498	3,415,295
Fixed income	6,079,067	5,249,832
Government securities	<u>9,447,243</u>	<u>8,232,048</u>
Total investments	<u>\$ 20,538,427</u>	<u>\$ 19,373,716</u>

For the years ended June 30, 2025 and 2024, total investment income are summarized as follows:

	<u>2025</u>	<u>2024</u>
Interest and dividends	\$ 681,276	\$ 531,200
Net realized and unrealized gains	<u>538,637</u>	<u>560,204</u>
Total investment income	<u>\$ 1,219,913</u>	<u>\$ 1,091,404</u>

Note 5 – Fair value measurements

As required by FASB's fair value measurements and disclosure guidance, assets and liabilities are classified in their entirety based on the lowest level of input that is significant to the fair value measurement. The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2025:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Investments:				
Money market funds	\$ 1,213,619	\$ -	\$ -	\$ 1,213,619
Equities	3,798,498	-	-	3,798,498
Fixed income	6,079,067	-	-	6,079,067
Government securities	<u>9,447,243</u>	-	-	<u>9,447,243</u>
Total	<u>\$ 20,538,427</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 20,538,427</u>

The following is a summary of the levels within the fair value hierarchy for the State Bar's assets and liabilities measured at fair value as of June 30, 2024:

	<u>Level 1</u>	<u>Level 2</u>	<u>Level 3</u>	<u>Total</u>
Investments:				
Money market funds	\$ 2,476,541	\$ -	\$ -	\$ 2,476,541
Equities	3,415,295	-	-	3,415,295
Fixed income	5,249,832	-	-	5,249,832
Government securities	<u>8,232,048</u>	-	-	<u>8,232,048</u>
Total	<u>\$ 19,373,716</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 19,373,716</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 6 – Building, furniture, fixtures, and equipment

The Bar Center building, furniture, fixtures, and equipment as of June 30, 2025 and 2024 are summarized as follows:

	2025	2024
Building and improvements	\$ 27,948,353	\$ 27,414,492
Furniture and office equipment	3,066,876	3,072,530
Computer and electronic equipment	1,284,244	1,216,851
Software	119,775	119,775
Construction in process	185,187	72,663
	32,604,435	31,896,311
Less accumulated depreciation	(26,498,819)	(25,682,024)
	\$ 6,105,616	\$ 6,214,287

Land, furniture, fixtures, and equipment other than the Bar Center as of June 30, 2025 and 2024 are summarized as follows:

	2025	2024
Furniture and office equipment	\$ 1,060,685	\$ 999,098
Computer and electronic equipment	373,611	342,255
Leasehold and building improvements	456,292	122,157
Software	1,116,383	1,498,078
Assets not yet in service	88,463	358,815
	3,095,434	3,320,403
Less accumulated depreciation	(1,549,023)	(2,384,428)
	\$ 1,546,411	\$ 935,975

Note 7 – Retirement plan

The State Bar has a money purchase pension plan that covers substantially all employees. State Bar contributions to this plan for the years ended June 30, 2025 and 2024 were \$558,160 and \$550,059, respectively.

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 8 – Leases

Lessor – The State Bar leases office space to both related and nonrelated parties. Rental income totaled \$983,600 and \$939,928 in 2025 and 2024, respectively. These amounts included receipts of \$61,420 and \$60,893 in 2025 and 2024, respectively, from related parties. Certain of the leases have extension period expiration dates through December 2034 and certain of the leases are renewable annually or cancelable at the request of the lessee.

As of June 30, 2025, approximate future minimum annual lease payments for the leases that are not renewable annually or cancelable are as follows:

For the year ending June 30,	2026	\$	205,196
	2027		174,774
	2028		190,147
	2029		165,387
	2030		169,411
	Thereafter		<u>352,894</u>
	Total	\$	<u>1,257,809</u>

Lessee – The State Bar has entered into various noncancelable operating lease agreements for the rental of photocopiers and mailing equipment. These lease agreements expire on various dates through September 2029.

In addition, the State Bar entered into a lease on November 1, 2008 for its Coastal Georgia office space in Savannah. The lease expired on October 31, 2013 with two five-year options available to renew through 2023. The State Bar renewed the lease under its second option during 2018, with expiration on October 31, 2022. The State Bar then entered into a new lease at a new location in which the lease term commenced on January 1, 2023, that expires on December 31, 2027.

The State Bar also maintains a lease for its satellite office in Tifton, Georgia. The initial lease expired on September 30, 2021, and was then month-to-month through September 30, 2022. The lease was renewed on September 30, 2022, expiring on September 30, 2025. Upon expiration, a new lease was entered into and expires on September 30, 2028.

The following summarizes the carrying value of the related right-of-use assets - operating as of June 30:

	<u>2025</u>	<u>2024</u>
Accumulated basis	\$ 485,138	\$ 485,138
Less – accumulated amortization	<u>(242,508)</u>	<u>(130,342)</u>
	<u>\$ 242,630</u>	<u>\$ 354,796</u>

The following summarizes the weighted-average discount rate as of June 30:

	<u>2025</u>	<u>2024</u>
Weighted-average discount rate	3.57%	3.60%

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 8 – Leases (Continued)

The following is a schedule by years of minimum future rentals on the operating leases and the amortization of the net present value (NPV) of the lease liability as of June 30, 2025:

<u>Year Ending June 30:</u>	<u>Minimum Annual Lease Payments</u>	<u>Amortization of NPV of Lease Liabilities - Operating</u>
2026	97,866	90,506
2027	86,860	82,715
2028	54,939	53,741
2029	16,545	16,389
	<u>\$ 256,210</u>	<u>\$ 243,351</u>

Rental expense charged to operations amounted to \$177,290 and \$167,010 for the years ended June 30, 2025 and 2024, respectively.

Note 9 – Related-party transactions

The Commission on Continuing Lawyer Competency contributed \$1,358,390 and \$1,393,988 to the State Bar in 2025 and 2024, respectively. These amounts represent approximately 5% of the total amount of State Bar's revenue and other support for 2025 and 2024.

The State Bar was also reimbursed by related organizations for their share of salary and operating expenses for the years ended June 30, 2025 and 2024 as follows:

	<u>2025</u>	<u>2024</u>
Commission on Continuing Lawyer Competency	<u>\$ 572,952</u>	\$ 509,393
Chief Justice's Commission on Professionalism	<u>224,238</u>	193,763
Georgia Bar Foundation, Inc.	<u>127,167</u>	97,653
	<u>\$ 924,357</u>	<u>\$ 800,809</u>

The following represents a summary of amounts due from related parties as of June 30, 2025 and 2024:

	<u>2025</u>	<u>2024</u>
Commission on Continuing Lawyer Competency	<u>\$ 717,708</u>	\$ 692,795
Georgia Bar Foundation, Inc.	<u>19,122</u>	3,462
	<u>\$ 736,830</u>	<u>\$ 696,257</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 9 – Related-party transactions (Continued)

The following represents a summary of amounts due to related parties as of June 30, 2025 and 2024:

	<u>2025</u>	<u>2024</u>
Chief Justice's Commission on Professionalism	\$ 297,429	\$ 238,996
	<u>\$ 297,429</u>	<u>\$ 238,996</u>

Note 10 – Board-designated net assets

The State Bar had Board-designated net assets available for the following purposes at June 30, 2025 and 2024:

	<u>2025</u>	<u>2024</u>
Bar Center	\$ 13,211,179	\$ 13,554,369
General Operations	4,750,000	4,750,000
Litigation	300,000	300,000
Sections	3,608,575	3,745,184
Conventions	5,090	49,795
Operating Contingencies – ICLE	144,435	144,435
Replacement of Equipment – ICLE	58,607	225,000
ICLE Operations	4,216,170	4,216,170
	<u>\$ 26,294,056</u>	<u>\$ 26,984,953</u>

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

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 11 – Net assets with donor restrictions

Net assets with donor restrictions at June 30, 2025 and 2024 were available for the following purposes and are included in cash and cash equivalents:

	<u>2025</u>	<u>2024</u>
Legislative Program	\$ 2,825,925	\$ 2,423,119
Law-Related Education/Marshall Fund	162,382	192,396
High School Mock Trial	27,719	17,481
BASICS Program	125,851	121,963
Young Lawyers Division	135,410	126,603
Lawyer Assistance Program	34,353	33,229
Georgia Diversity Program	164	6,374
Bar Media Conference	943	1,523
Center for Lawyer Wellbeing	1,194	-
Justice Portraits	1,100	1,066
Law Day	5,612	6,317
Promote Inclusion	12,649	5,924
Access to Justice	22,149	19,993
Military Vet Pro Bono	15,582	15,101
	<u>\$ 3,371,033</u>	<u>\$ 2,971,089</u>

Note 12 – Net assets released from restrictions

Net assets were released from donor restrictions in 2025 and 2024 by incurring expenses satisfying the restricted purposes or by occurrence of other events specified by donors as follows:

	<u>2025</u>	<u>2024</u>
Legislative Program	\$ 515,232	\$ 367,215
BASICS Program	75,515	50,584
Young Lawyers Division	118,013	65,269
Law-Related Education/Marshall Fund	36,329	24,431
Georgia Diversity Program	30,571	52,192
Promote Inclusion	2,276	14,925
Bar Media Conference	1,217	1,709
Lawyer Assistance Program	1,085	159
High School Mock Trial	648	10,999
Other Programs	7,830	6,337
	<u>\$ 788,716</u>	<u>\$ 593,820</u>

STATE BAR OF GEORGIA
NOTES TO THE COMBINED FINANCIAL STATEMENTS
FOR THE YEARS ENDED JUNE 30, 2025 AND 2024

Note 13 – Contingencies

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

Note 14 – Subsequent events

The State Bar has evaluated subsequent events occurring through December 9, 2025, the date on which the combined financial statements were available to be issued.

SUPPLEMENTAL INFORMATION

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2025

	SBGF and SDBG	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 24,980,496	\$ 248,236	\$ -	\$ 25,228,732
Accounts receivable, net	140,562	-	-	140,562
Receivable from related parties	736,830	-	-	736,830
Receivable from employees	11,081	-	-	11,081
Accrued interest receivable	147,767	-	-	147,767
Prepaid and other assets	613,143	-	-	613,143
Investments, at fair value	17,963,432	2,574,995	-	20,538,427
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,105,616	-	-	6,105,616
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	1,546,411	-	-	1,546,411
Right-of-use assets - operating	242,630	-	-	242,630
	<u>52,487,968</u>	<u>2,823,231</u>	<u>-</u>	<u>55,311,199</u>
Total assets	<u>\$ 52,487,968</u>	<u>\$ 2,823,231</u>	<u>\$ -</u>	<u>\$ 55,311,199</u>
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 2,139,328	\$ -	\$ -	\$ 2,139,328
Accrued salary and retirement plan expense	1,009,326	-	-	1,009,326
Payable to Clients' Security Fund	2,952,050	-	-	2,952,050
Payable to related parties	297,429	-	-	297,429
Accrued vacation	526,460	-	-	526,460
Deferred income - dues and sections	11,460,354	-	-	11,460,354
Lease liability - operating	243,351	-	-	243,351
Total liabilities	<u>18,628,298</u>	<u>-</u>	<u>-</u>	<u>18,628,298</u>
Net assets				
Without donor restrictions				
Undesignated	4,397,623	2,620,189	-	7,017,812
Board-designated	26,091,014	203,042	-	26,294,056
Total without donor restrictions	<u>30,488,637</u>	<u>2,823,231</u>	<u>-</u>	<u>33,311,868</u>
With donor restrictions	3,371,033	-	-	3,371,033
Total net assets	<u>33,859,670</u>	<u>2,823,231</u>	<u>-</u>	<u>36,682,901</u>
Total liabilities and net assets	<u>\$ 52,487,968</u>	<u>\$ 2,823,231</u>	<u>\$ -</u>	<u>\$ 55,311,199</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF FINANCIAL POSITION
JUNE 30, 2024

	SBG and SBGF	ICLE	Elimination	Total
ASSETS				
Cash and cash equivalents	\$ 24,837,272	\$ 248,208	\$ -	\$ 25,085,480
Accounts receivable, net	121,100	-	-	121,100
Receivable from related parties	696,257	-	-	696,257
Receivable from employees	16,450	-	-	16,450
Accrued interest receivable	112,008	-	-	112,008
Prepaid and other assets	435,786	-	-	435,786
Investments, at fair value	16,893,483	2,480,233	-	19,373,716
Bar Center building, furniture, fixtures, and equipment, at cost, less accumulated depreciation	6,214,287	-	-	6,214,287
Furniture, fixtures, and equipment, at cost, less accumulated depreciation	935,975	-	-	935,975
Right-of-use assets - operating	354,796	-	-	354,796
	<u>\$ 50,617,414</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 53,345,855</u>
Total assets				
LIABILITIES AND NET ASSETS				
Liabilities				
Accounts payable	\$ 2,451,045	\$ -	\$ -	\$ 2,451,045
Accrued salary and retirement plan expense	938,939	-	-	938,939
Payable to Clients' Security Fund	2,782,908	-	-	2,782,908
Payable to related parties	238,996	-	-	238,996
Accrued vacation	593,724	-	-	593,724
Deferred income - dues and sections	9,454,962	-	-	9,454,962
Lease liability - operating	353,219	-	-	353,219
Total liabilities	<u>16,813,793</u>	<u>-</u>	<u>-</u>	<u>16,813,793</u>
Net assets				
Without donor restrictions				
Undesignated	4,217,014	2,359,006	-	6,576,020
Board-designated	26,615,518	369,435	-	26,984,953
Total without donor restrictions	<u>30,832,532</u>	<u>2,728,441</u>	<u>-</u>	<u>33,560,973</u>
With donor restrictions				
	<u>2,971,089</u>	<u>-</u>	<u>-</u>	<u>2,971,089</u>
Total net assets	<u>33,803,621</u>	<u>2,728,441</u>	<u>-</u>	<u>36,532,062</u>
	<u>\$ 50,617,414</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 53,345,855</u>
Total liabilities and net assets				

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2025

	SBG and SBGF	ICLE	Eliminations	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,615,215	\$ -	\$ -	\$ 12,615,215
Advertising	53,363	-	-	53,363
Membership	347,659	-	-	347,659
Total fees	<u>13,016,237</u>	<u>-</u>	<u>-</u>	<u>13,016,237</u>
ICLE				
Program revenues	4,742,670	-	-	4,742,670
Total ICLE	<u>4,742,670</u>	<u>-</u>	<u>-</u>	<u>4,742,670</u>
Other revenues				
Contributions	2,437,609	-	-	2,437,609
Section dues	1,707,039	-	-	1,707,039
Convention and meeting fees	47,500	-	-	47,500
Law practice management fees	25,109	-	-	25,109
Young lawyers division fees	4,600	-	-	4,600
High school mock trial fees	48,301	-	-	48,301
Investment income	1,114,127	105,786	-	1,219,913
Rental income	983,600	-	-	983,600
Other	868,977	-	-	868,977
Total other revenues	<u>7,236,862</u>	<u>105,786</u>	<u>-</u>	<u>7,342,648</u>
Total revenues and other support	<u>24,995,769</u>	<u>105,786</u>	<u>-</u>	<u>25,101,555</u>
EXPENSES				
Program services				
Counsel	5,059,238	-	-	5,059,238
Communications	948,804	-	-	948,804
Membership	1,181,911	-	-	1,181,911
Unauthorized practice of law	905,483	-	-	905,483
Law practice management	484,275	-	-	484,275
Law related education	439,185	-	-	439,185
Fee arbitration	568,102	-	-	568,102
Sections	2,011,854	-	-	2,011,854
Young lawyers division	653,363	-	-	653,363
ICLE	3,925,991	-	-	3,925,991
Other programs	2,175,573	-	-	2,175,573
Total program services	<u>18,353,779</u>	<u>-</u>	<u>-</u>	<u>18,353,779</u>
Supporting services				
Management and general	6,585,941	10,996	-	6,596,937
Total expenses	<u>24,939,720</u>	<u>10,996</u>	<u>-</u>	<u>24,950,716</u>
CHANGE IN NET ASSETS	56,049	94,790	-	150,839
NET ASSETS, BEGINNING	<u>33,803,621</u>	<u>2,728,441</u>	<u>-</u>	<u>36,532,062</u>
NET ASSETS, ENDING	<u>\$ 33,859,670</u>	<u>\$ 2,823,231</u>	<u>\$ -</u>	<u>\$ 36,682,901</u>

STATE BAR OF GEORGIA
COMBINING STATEMENT OF ACTIVITIES
FOR THE YEAR ENDED JUNE 30, 2024

	SBG and SBGF	ICLE	Elimination	Total
REVENUES AND OTHER SUPPORT				
Fees				
License	\$ 12,308,061	\$ -	\$ -	\$ 12,308,061
Advertising	45,389	-	-	45,389
Membership	273,218	-	-	273,218
Total fees	<u>12,626,668</u>	<u>-</u>	<u>-</u>	<u>12,626,668</u>
ICLE				
Program revenues	4,790,571	-	-	4,790,571
Total ICLE	<u>4,790,571</u>	<u>-</u>	<u>-</u>	<u>4,790,571</u>
Other revenues				
Contributions	2,483,947	-	-	2,483,947
Section dues	1,678,774	-	-	1,678,774
Convention and meeting fees	47,500	-	-	47,500
Law practice management fees	20,222	-	-	20,222
Young lawyers division fees	4,980	-	-	4,980
High school mock trial fees	52,230	-	-	52,230
Investment income	965,240	126,164	-	1,091,404
Rental income	939,928	-	-	939,928
Other	761,509	-	-	761,509
Total other revenues	<u>6,954,330</u>	<u>126,164</u>	<u>-</u>	<u>7,080,494</u>
Total revenue and other support	<u>24,371,569</u>	<u>126,164</u>	<u>-</u>	<u>24,497,733</u>
EXPENSES				
Program services				
Counsel	4,695,043	-	-	4,695,043
Communications	934,436	-	-	934,436
Membership	1,114,314	-	-	1,114,314
Unauthorized practice of law	947,824	-	-	947,824
Law practice management	479,364	-	-	479,364
Law related education	423,214	-	-	423,214
Fee arbitration	545,228	-	-	545,228
Sections	1,782,184	-	-	1,782,184
Young lawyers division	569,112	-	-	569,112
ICLE	3,854,346	-	-	3,854,346
Other programs	2,105,467	-	-	2,105,467
Total program expenses	<u>17,450,532</u>	<u>-</u>	<u>-</u>	<u>17,450,532</u>
Supporting services				
Management and general	6,346,430	10,406	-	6,356,836
Total expenses	<u>23,796,962</u>	<u>10,406</u>	<u>-</u>	<u>23,807,368</u>
CHANGE IN NET ASSETS	574,607	115,758	-	690,365
NET ASSETS, BEGINNING	<u>33,229,014</u>	<u>2,612,683</u>	<u>-</u>	<u>35,841,697</u>
NET ASSETS, ENDING	<u>\$ 33,803,621</u>	<u>\$ 2,728,441</u>	<u>\$ -</u>	<u>\$ 36,532,062</u>



December 9, 2025

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

We have audited the combined financial statements of State Bar of Georgia (the "State Bar") for the year ended June 30, 2025, and we will issue our report thereon dated December 9, 2025. Professional standards require that we provide you with information about our responsibilities under generally accepted auditing standards, as well as certain information related to the planned scope and timing of our audit. We have communicated such information in our letter to you dated October 1, 2025. Professional standards also require that we communicate to you the following information related to our audit.

Significant Audit Matters

Qualitative Aspects of Accounting Practices

Management is responsible for the selection and use of appropriate accounting policies. The significant accounting policies used by State Bar of Georgia are described in Note 1 to the combined financial statements. No new accounting policies were adopted and the application of existing policies was not changed during June 30, 2025. We noted no transactions entered into by the State Bar during the year for which there is a lack of authoritative guidance or consensus. All significant transactions have been recognized in the combined financial statements in the proper period.

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

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

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

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

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

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

Difficulties Encountered in Performing the Audit

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

Disagreements with Management

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

Management Representations

We have requested certain representations from management that are included in the management representation letter dated December 9, 2025.

Management Consultations with Other Independent Accountants

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

Other Audit Findings or Issues

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

Other Matters

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

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

A handwritten signature in cursive script that reads "Mauldin & Jenkins, PLLC". The signature is written in dark ink on a light-colored background.



RUSSELL D. WILLARD
General Counsel

Memorandum to: State Bar of Georgia Board of Governors
From: Russell Willard
Date: May 8, 2026
Re: Report of the General Counsel

I am pleased to update you on the activity of the Office of the General Counsel during the 2025-2026 Bar Year.

The Office of the General Counsel has received 3,073 grievances from the start of this Bar Year through the end of April. This reflects a 24% increase over the number of grievances received at this time in the 2024-2025 Bar Year. After screening by Grievance Counsel, 192 grievances were determined to merit consideration by the State Disciplinary Board and were forwarded to the State Disciplinary Board for additional investigation. An additional 22 grievances were administratively mooted after an order of disbarment was entered by the Georgia Supreme Court.

This Bar Year the Supreme Court has entered public orders in 40 cases, and the State Disciplinary Board has imposed confidential discipline in an additional 35 cases.

Since the last report of the General Counsel, the Supreme Court has entered orders approving the following revisions to the Bar Rules:

- An amendment to Part VII of the Georgia Rules of Professional Conduct, which deals with lawyer advertising and solicitation (Rules 7.1, 7.2, and 7.3 along with the repeal of Rules 7.4 and 7.5), which became effective March 1, 2026.
- An amendment adding an email address as a supplemental form of service of disciplinary process and clarifying the service rules, including as to out-of-state lawyers (Rule 4-203.1), which became effective April 30, 2026.
- An amendment modifying the trust accounting rules when an attorney is handling funds in a fiduciary capacity that does not involve an attorney-client relationship or the practice of law (Rule 1-15(II)), which became effective February 5, 2026.

- An amendment clarifying that Review Board Reprimands are to be administered during a portion of the State Disciplinary Review Board open to the public (Rule 4-220), effective February 5, 2026.
- An amendment removing duplicative language and clarifying that reports and recommendations from the Special Master in reciprocal discipline are to be filed with the Clerk of the Disciplinary Boards who will then file the entire record with the Supreme Court of Georgia (Rules 4-102 and 9.4), which became effective July 10, 2025.
- An amendment modifying Part VIII of the State Bar Rules, governing mandatory continuing legal education, to provide for a biennial compliance period and setting the hours to be obtained to remain in compliance, which became effective December 4, 2025.
- An amendment creating the Senior Lawyers Division (Rule 1-707), which became effective February 5, 2026.
- An amendment to the rules governing the Client Security Fund to add the death or disability of a lawyer to suspension, disbarment, or voluntary surrender of a license to the conditions that allow for the filing of a CSF claim (Rule 10-106), which became effective July 10, 2025.
- An amendment to the rules governing the Client Security Fund to allow the trustees to spend funds that carried over as unspent from prior Bar Years (10-101), which became effective April 30, 2026.

Receiverships: The Office of the General Counsel staff is currently serving as receiver in 29 matters. State Bar members are handling another 28 receiverships for deceased or disbarred lawyers.

Clients' Security Fund: The Fund Trustees have reviewed 50 claims thus far this Bar Year. The Trustees have approved 18 claims for a total of \$333,430.

**FORTY-SIXTH ANNUAL REPORT TO
THE HONORABLE JUSTICES OF THE SUPREME COURT
AND THE HONORABLE MEMBERS
OF THE BOARD OF GOVERNORS
OF THE STATE BAR OF GEORGIA
BY
THE COMMITTEE ON THE ARBITRATION OF ATTORNEY FEE DISPUTES**

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

1. Committee Membership.

- Ms. Judy C. King, an attorney in Lawrenceville, has continued to serve as the Committee Chairperson.
- Mr. Mark C. Bips, an attorney in Decatur
- Hon. John M. Defoor II, an Atlanta attorney and judge in Fulton County
- Mr. Wesley Charles Ross, an attorney in Lawrenceville
- Ms. Rosalind A. Rubens-Newell, an attorney in Atlanta
- Mr. Darrell Lee Sutton, an attorney in Marietta

The above-mentioned members are our returning Bar members.

- Mr. Alan Granath and Mr. Vince Clanton are our current lay members; however, we need an additional lay member.
- Mr. David Lipscomb, an attorney in Lawrenceville, continues to serve as our Executive Committee Liaison.
- Ms. Donna Davis is the Director and our Staff Liaison.

- Mr. Bill NeSmith is our in-house Bar Counsel.

2. The Fee Arbitration Program Staff.

The staff enjoys working with each other and they are committed to ensuring that the Program is run timely, effectively and professionally.

- Ms. Donna Davis is the Director of the Fee Arbitration Program. Ms. Davis began her career at the Bar in the Fee Arbitration Program in August 1996, then assisted several departments on the Administrative side of the Bar. She worked in the Client Assistance Program of the Office of the General Counsel for 25 years, before returning to the Fee Arbitration Program as Director, in 2023.
- Ms. Guianina Sherridan is the Senior Coordinator; she has worked in the Fee Arbitration Program since May 2017.
- Ms. Jodi Lewis Lipsitz is our Coordinator. She worked at the Bar for several years, beginning in the Transition into Law Practice Program, then transferring to the Institute on Continuing Legal Education department. She resigned but was rehired by the Fee Arbitration Program in October 2022. Jodi is scheduled to retire June 30, 2026.
- Ms. Shermaine Hutchinson is our Administrator. She is new to the Bar and joined the Fee Arbitration Program in June 2025.

3. Participation.

Most Petitions for Fee Arbitration are downloaded from our website, so we are unable to determine how many are accessed each month; however, we received 722 Petitions between May 1, 2025, and April 30, 2026, including Petitions filed by attorneys and/or law firms. This averages to sixty (60) Petitions per month. The Program's staff also handles a large volume of incoming and outgoing correspondence via United State Postal Service, FedEx, email, and phone each month.

4. Current Activity.

Fee Arbitration works. Our staff, and Committee, resolved 761 cases between July 1, 2023, and April 30, 2026; however, in our current cases, we continue to find that the January 2022 Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted, has negatively impacted the Program. In calendar year 2025, sixty-one percent (61%) of Respondents served did not agree to be bound by the results of the arbitration or failed to respond after being served and notified multiple times. This failure to respond resulted in Petitions being dismissed, even in cases where jurisdiction appeared to be proper, because the attorney's lack of response is tantamount to declining to be bound by the results of the arbitration.

Additionally, we have found a direct correlation between the 2022 Fee Arbitration Program Rule change that required respondent attorneys to be bound by the result of the arbitration for jurisdiction to be accepted and the drastic reduction in number of hearings held each year. We held approximately 100 hearings per year prior to the January 2022 Rule change. In fiscal year 2023, July 1, 2022, through June 30, 2023, we held forty (40) hearings. In fiscal year 2024, July 1, 2023, through June 30, 2024, we only held twenty-two (22) hearings. There was a continued decline in the number of hearings in fiscal year 2025, July 1, 2024, through June 30, 2025, that resulted in twelve (12) hearings being held.

The Fee Arbitration Program staff continues to receive complaints from the public about Rule 6-204(h), which requires respondent attorneys to consent to arbitration, especially when cases are dismissed and/or jurisdiction is declined. It is important to note that jurisdiction is accepted and hearings are scheduled only if there appears to be merit and the dispute is within the jurisdiction that the Supreme Court of Georgia gives the Program through its Rules, even when both the Petitioner and Respondent agree to be bound by the results of the arbitration. We do not hold hearings on cases where jurisdiction does not appear to be proper.

5. *Hearings.*

The Fee Arbitration Program has continued to provide both in-person and virtual hearings via Zoom for cases in which jurisdiction was accepted. Providing virtual

hearings allows parties who reside out of town or are traveling, at work, incarcerated and/or otherwise incapacitated the opportunity to present their cases and answer the arbitrators' questions. Arbitrators are required to appear in-person for hearings so the Oath and Award form can be notarized.

In fee disputes involving attorneys and clients, cases are heard by a panel of three (3) volunteer arbitrators. These arbitration panels consist of two active members of the Bar, who are in good standing, with no disciplinary history and no history of cases before the Committee on the Arbitration of Attorney Fee Disputes. This service is offered at no charge to members of the Bar and the public, no matter who initiates the Petition.

In fee disputes involving attorney parties as it relates to joint fees or the dissolution of a law firm or practice, the hearing is held by a panel of three (3) arbitrators who are all active members of the Bar, who are in good standing, with no disciplinary history and no history of cases before the Committee on the Arbitration of Attorney Fee Disputes. There is a nominal fee paid by the parties for the arbitrators' time in arbitrating the attorney/law firm versus attorney/law firm fee disputes.

In all hearings, we offer small tokens of gratitude, lapel pens and a letter of appreciation, to each arbitrator. Additionally, we provide a light lunch for arbitrators who appear in-person for hearings.

6. *Appreciation.*

The Committee is appreciative of the staff's work and is forever grateful for the attorneys and public members who have served as volunteer arbitrators for the Fee Arbitration Program; the success of this Program depends on them.

We also wish to thank the Supreme Court of Georgia Justices and the State Bar of Georgia's Board of Governors for their time and consideration in these matters. The Committee hopes that all who read this report will understand the importance of the Fee Arbitration Program and its desire to renew and strengthen the trust the public has in Georgia's legal system and members of the State Bar of Georgia.

Respectfully submitted,

Judy C. King,



Chairperson

Committee on the Arbitration of Attorney Fee Disputes

Law Practice Management Program

(Abbreviated report for the 2025-2026 Bar Year)

Total Number of Members Served – 376

July 1, 2025 – May 1, 2026

The program has successfully engaged a total of 376 members and their staff from July 1, 2025, to May 1, 2026. During this period, we made contact with 119 existing members, 248 new members, and 9 law firm staff.

Resource Requests

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

- **Starting a Law Practice** – 125 copies of the [Starting a Georgia Law Practice Guide](#) were distributed to our members by request, including 26 via email, 91 through web store orders, and 8 during office visits to the Bar Center. Additionally, we received 6 inquiries by phone regarding resources for opening a law practice.
- **Software Recommendation/Technology Advice** – We received 3 inquiries from members seeking law office software recommendations via email and/or phone.
- **LPM Resources Assistance** – The program has responded to 563 phone and email inquiries, assisting members with resources on opening a law practice, program events, bar member services, library resources, form requests, and more. Of these, 51 inquiries specifically focused on best practices for various practice management topics, including effective client communication, streamlined workflow efficiency, optimized billing practices, secure and organized document management, sound financial management, proper trust account management, leveraging technology for practice improvement, and strategic succession planning.

Consultations

A total of 32 [virtual consultations](#) were completed during this period. Our program have completed 21 general consultations and 11 corrective action consultations to address law firm practice management matters.

Resource Library

The [LPM Lending Library](#) offers 1,445 books, CDs, and DVDs available for checkout by members and their staff, with convenient options for on-site pickup at the Bar Center or mailing. During this reporting period, 80 members registered for library access. The library also recorded 21 in-office visits from 19 members, with 16 members checking out a total of 68 materials. In addition, the Resource Library handled 120 email inquiries and 7 phone calls for library assistance and resource requests during this period.

Social Media Outreach

Members can stay connected with LPM by following the GA Law Practice Advisor on [LinkedIn](#) and [Instagram](#) and subscribing to our newsletter, *The LPM Insider*, for practice tips and the latest updates on LPM events and programming. Since launching our social media channels, we have gained 238 Instagram followers, 117 LinkedIn followers, and 576 *LPM Insider* subscribers, totaling 931 followers—and growing.

Speaking Engagements and LPM Seminars

A total of 16 programs were completed and scheduled during this period. The Program's staff have given 13 continuing legal education and special presentations to Georgia lawyers and other related groups nationally and locally. 3 programs are scheduled for a future date. See list of events below:

Date	Event Name	Presentation(s)
July 16, 2025 September 19, 2025 November 19, 2025	vLex Fastcase Training CLE, State Bar of Georgia Conference Center, Atlanta, GA	<i>How to Effectively Use and Navigate vLex Fastcase</i> , Speaker: T.J. Diggins and Sheila Baldwin
September 18-19, 2025	Take Charge! Conference CLE , State Bar of Georgia Conference Center, Atlanta, GA	Program Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program

November 6, 2025	Women of The Cobb County Bar Section Meeting , Piastra Restaurant, Marietta, GA	<i>Law Practice Management Program Resources</i> , Speaker: Sheila Baldwin
January 6, 2026	Georgia General Assembly Continuing Legal Education Seminar, Atlanta, GA	<i>AI for Government Lawyers</i> , Speaker: Nkoyo-Ene Effiong Lewis
January 20, 2026	The Gold Dome Track: Answering the Call to Capital , State Bar of Georgia Conference Center, Atlanta, GA	Sponsored by the State Bar's Governmental Affairs, Law Practice Management Program and Young Lawyers Division
February 18, 2026	Georgia State School of Law Seminar, Atlanta, GA	<i>How to Start Your Legal Career on a Solid Foundation</i> Speaker: Nkoyo-Ene Effiong Lewis
February 23, 2026	GAWL's The Leader Within CLE: Lifestages of a Solo Practice , State Bar of Georgia Conference Center, Atlanta, GA	<i>Launching a Solo Practice</i> , Speakers: Nkoyo-Ene Effiong Lewis and JoAnna Smith
February 24, 2026	2026 Beginning Lawyers Program , State Bar of Georgia Conference Center, Atlanta, GA	<i>Law Practice Management and Ethics: Starting Your Career on a Strong Foundation</i> , Speakers: Nkoyo-Ene Effiong Lewis and Russ Williard
February 24, 2026	The Gold Dome Track: Part II - A Virtual Workshop , Online	<i>Sustaining Your Law Practice While Running for Office</i> , Speaker: Nkoyo-Ene Effiong, Sponsored by the State Bar's Governmental Affairs, Law Practice Management Program and Young Lawyers Division
February 26, 2026	One-Hour Financial Management Lunch & Learn Virtual CLE , Online	<i>From First Case to Final Hoorah: Financial Planning for Attorneys</i> , Speaker: Price Wheeler, Sponsored by the State Bar's Law Practice Management Program
April 24, 2026	From Busy to Better: Hot Tips for Lawyers Webinar , Online	Program Chair: Traci Weiss, Sponsored by the State Bar's Law Practice Management Advisory Committee
April 30, 2026	Staying Current and Competent: Ethics, Emerging Technology and Practice Updates for Georgia Lawyers CLE	<i>Law Practice Management</i> , Speaker: Nkoyo-Ene Effiong; <i>AI</i> , Speakers: Nkoyo-Ene Effiong, Russell Willard and Andreea Morrison
May 11, 2026	AI in the Courts Municipal Court Judges Training , State Bar of Georgia Conference Center, Atlanta, GA	<i>AI in the Courts</i> , Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management
May 21, 2026	Law in Motion: AI, Security & Client Growth Take Charge! One-Day Virtual Summit CLE Webinar , Online	Program Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program
June 12, 2026	Life, Liberty and the Pursuit of Financial Independence Register here to attend CLE during the 2026 State Bar Annual Meeting at the Omni Amelia Island Resort & Spa, Fernandina Beach, FL	Hosted by Wheeler Wealth, a member benefit by the State Bar Recommended Insurance Broker, Member Benefits, Inc.

vLex Fastcase Platform Report

Clio / vLex Fastcase Update

Clio recently announced that Clio Work, which includes Vincent AI tools powered by the vLex legal research database, is now available as a standalone, paid subscription for legal professionals who are not Clio practice-management customers. Within the broader Clio ecosystem, legal research will live inside [Clio Work](#) (which includes [Clio Library](#), [Clio Docket](#), and Vincent AI).

This announcement does not affect the State Bar of Georgia's vLex Fastcase member benefit. Bar members will continue to access [vLex Fastcase through the Bar website](#), and users will still be routed directly to the vLex platform via the existing single sign-on process.

The Clio announcement reflects a commercial expansion of its AI products and pricing model and does not represent a change to the Bar's legal research access, branding, or delivery at this time. Members may encounter Clio or Vincent branding in external communications, but Bar-provided access remains unchanged.

[Vincent AI](#) is an AI legal assistant that analyzes questions, searches U.S. legal databases, and provides relevant case law and statutes. It costs \$299/month or \$269/year for annual subscribers, includes a guided tutorial, and should be used as a starting point, not a final authority.

**Fastcase Reported Issues and Usage Report
Partner Usage Report for State Bar of Georgia
July 1, 2025-January 30, 2026**

	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Total
First Time Logins	66	58	46	38	25	35	31	299
Total Logins	9,554	10,382	6,001	8,695	7,070	5,820	6,686	54,208
Total Users Who Logged In	2,580	2,662	2,087	2,108	1,835	1,808	1,870	14,950
Searches Conducted	34,453	36,840	21,447	12,613	3,610	3,854	3,619	116,436
Documents Viewed	125,030	123,216	72,683	40,295	13,007	17,668	16,545	408,444
Documents Printed	27,966	59,940	19,020	21,713	2,634	3,872	2,875	138,020
Total Transactions	199,649	233,098	121,284	85,462	28,181	33,057	31,626	732,357

vLex Fastcase Reported Issues/Problems (July 2025-March 2026)

vLex Fastcase Reported Issues / Problems	
Issue Reported to Member Benefits Coordinator (MBC)	Response
MBC Access to site. (07/01/25 - 08/31/25) Members were unable to access vLex Fastcase due to their computers holding old data.	Fastcase (Bar Staff) Responses Staff assisted 9 members access members access vLex Fastcase by various methods, most often helping them clear old data.
MBC General Assistance Request with access and navigation help. (07/01/2025 - 08/31/25) Members called needing help with logging in, navigating the system, locating specific data, etc.	Fastcase (Bar Staff) Responses Staff were able to assist 13 with their needs.
MBC: Request related to User Experience (07/01/25 - 08/31/25) Members requested assistance finding content, understanding Vincent AI, researching historic data, and formatting queries.	Fastcase (Bar Staff) Responses Staff or T.J. Diggins assisted 4 members with these tasks or questions.
MBC: Request related to User Experience (09/01/25 - 02/10/26) Members requested assistance finding content, understanding Vincent AI, and researching historic data.	Fastcase (Bar Staff) Responses (09/01/25- 02/10/26) Staff were able to assist 8 members with their need
MBC: Member unable to Access FC Account (11-21-25 - 11-26-25) Member had gotten 403 Error.	Fastcase (Bar Staff) Responses FC support and the Bar's IT Director resolved the issue after much research. The problem was on the user side due to a flagged IP address. Member will resolve the issue.

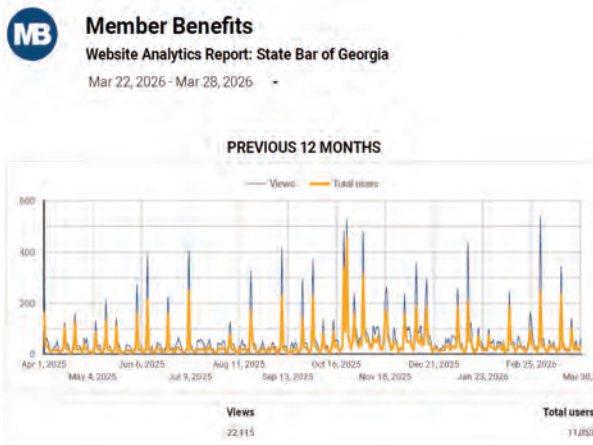
<p>MBC: Request for assistance on Vincent AI (12/12/25) Member was trying to sign up for a Vincent AI account but the payment link didn't work</p>	<p>Fastcase (Bar Staff) Responses (12/13/25) Staff was able to put her in touch with someone at Fastcase who assisted her. She loves it!</p>
<p>MBC: Request for assistance with his login experience. (12/13-19/25) A member had an issue on his end with an IP address that was blocked</p>	<p>Fastcase (Bar Staff) Responses (12/13-19/25) Staff was able to work with the member to identify and direct him to address the issue.</p>
<p>MBC: Request for assistance with his login experience. (01/01/26 - 03/19/26) Several members were unable to access their account.</p>	<p>Fastcase (Bar Staff) Responses (01/01/26 - 03/19/26) Bar staff was able to determine where the source of the problem lay and were able to get the members online. Most issues were related to first time users who were unfamiliar with the process.</p>

CloudLawyer/ReliaGuide Report

The [Find a Lawyer directory](#) continues to demonstrate steady, measurable growth across all key performance indicators. A positive measure of that growth is that around fifty percent of traffic in the directory is from organic searches. Profile completions and updates are also on the rise, improving the overall quality and value of listings. Additionally, lead generation has shown sustained upward trends, reflecting stronger user trust and platform effectiveness. Together, these metrics indicate a healthy, expanding ecosystem that is gaining momentum and delivering increasing value to both listed professionals and end users.

Statistic Updates Through January 1st - April 27th

- 190,935 interactions with member profiles (views, clicks, and contact requests)
- 28,086 profile views
- 2,542 completed contact form requests
- 4,125 clicks on lawyer's email
- 5,877 clicks on lawyer's phone number
- 2,482 total sign ins
- 454 Profile Plus subscriptions
- 19 analytics products purchased
- 11 website products purchased
- 18 Lawyer Referral Network subscriptions



State Bar of Georgia
Private Health Insurance Exchange
April 9, 2026

INDIVIDUAL ENROLLMENTS	
Total Enrollments	9,137
• Medical	3,029
• Medicare	56
• Dental	1,325
• Vision	603
• Telehealth	573
• ID Theft Protection	50
• Life / AD&D	3,119
• Disability	301
• Critical Illness	11
• Long-Term Care Enrollments	70
EMPLOYER ENROLLMENTS	
Total Enrollments	4,773
• Medical	1,817
• Ancillary	2,538
• Professional Liability	416
• Cyber Security	2

Sections Department

Events

Since the beginning of the 2025-26 Bar year, the Sections Department has remained dedicated to supporting our members through daily administrative responsibilities while facilitating an extensive schedule of Continuing Legal Education (CLE) programs. Since July 1, we have successfully organized **65 CLE events, delivering a total of 78 CLE credit hours to 4,165 members.**

Notably, we hosted **sixteen** comprehensive CLE programs exceeding five hours, including:

Construction Law Section | Joint Georgia Tennessee Construction Law Conference
Creditor's Rights Law Section | 2026 Seminar
E-Discovery & the Use of Technology Law Section | 2025 Legal Technology Showcase
Elder Law Section | Basics to Advanced Practice CLE
Eminent Domain Law Section | CLE Re-Watch
Entertainment & Sports Law Section | CLE Bootcamp
Family Law Section | 2026 Nuts & Bolts Seminar
General Practice & Trial Law Section | 2026 Jury Trial Seminar
Government Attorneys Law Section | 2026 CLE
Intellectual Property Law Section | 2026 Annual Seminar
Military Veterans Law Section | VA Accreditation CLE | Midyear Meeting
Privacy & Technology Law Section | 2026 Forum Day 1 In-Person
Privacy & Technology Law Section | 2026 Forum Day 2 Virtual
Professional Liability Law Section | Legal Update on Various Areas of Professional Liability
Real Property Law Section | 2025 Commercial Real Estate Seminar
Real Property Law Section | 2025 Residential Real Estate Seminar

Our role in organizing these events includes setting up registration through the Bar's database—either in iMIS or Affinipay, based on section preferences. We also coordinate event promotions via the Bar's website, email campaigns and other marketing initiatives, ensuring maximum reach and engagement. Additionally, we assist with cross-promotion of events across various sections and obtain CLE credit approval for event materials.

Our team manages logistical and operational tasks such as registering speakers, confirming attendee sign-ins for CLE eligibility and processing CLE credit by recording attendance in our CLE portal. Furthermore, we prepare detailed financial reports for the Accounting Department to facilitate accurate allocation of CLE-related expenses. As a token of appreciation, we work closely with section chairs to select and present appropriate gifts to event speakers.

Beyond CLE events, all sections hold at least one annual meeting, while several also conduct regular monthly meetings, fostering ongoing engagement within their practice areas.

Many of our Continuing Legal Education (CLE) programs are recorded and subsequently made available on the respective section webpages on the State Bar's website. Over the past Bar year,

we have added more than 35 CLE recordings, which have collectively generated over 2,500 views.

Additionally, the Sections Department recently established a partnership with the CLE Department to sponsor the Beginning Lawyers Program for newly admitted attorneys across the state. This initiative is designed to introduce new lawyers to the Sections and highlight the resources and opportunities they provide.

Newsletters & Creative Content

We have published multiple newsletters, with additional editions planned for the coming months. While some sections distribute newsletters exclusively via email, others continue to utilize traditional print and mail distribution. In addition, we design promotional materials such as invitations, save-the-date announcements and other graphics to enhance event marketing efforts.

Sponsorships, Scholarships & Donations

The Sections Department plays a crucial role in coordinating sponsorships for various events, ensuring that sponsorship materials and packages are effectively prepared and distributed. We also manage the accurate processing and allocation of sponsorship payments.

Additionally, multiple sections award scholarships annually, and we oversee all related paperwork to ensure a seamless and efficient process.

Sections also actively contribute to charities of their choice, demonstrating a strong commitment to community engagement. We facilitate these charitable efforts by ensuring that all donations are properly processed and documented.

The Sections Department remains committed to providing essential support for our members, ensuring the success of CLE programs, sponsorship initiatives and community outreach efforts. Our continued focus on administrative excellence and engagement strengthens the impact of our sections, benefiting both the legal profession and the broader community.

Alternative Dispute Resolution Section 2025-2026 Annual Report

Section Chair: Joyce Klemmer

The Alternative Dispute Resolution (ADR) Section is pleased to report its activities for the 2025-2026 Bar year. It has been my honor to serve as Chair of the Section this year. The Board met monthly and every Board member has participated in planning Section events.

General Overview

The ADR Section currently has 706 members, up from 694 in 2025. Our section is primarily composed of active or retired lawyers who practice in the fields of mediation and arbitration. The Section offers members a platform to network and stay informed about trends and legal developments related to mediation and arbitration. We offer numerous opportunities to earn continuing legal education (CLE) credits through regular virtual and in-person programs.

The Section also partners with the Georgia Office of Dispute Resolution (GODR) to co-host GODR's Annual ADR Institute, a full-day, in-person CLE program that brings together neutrals, mediators, arbitrators, attorneys, and other dispute resolution professionals.

Leadership - Officers and Executive Committee

The ADR Section strives to maintain leadership continuity and to seek leaders from different areas in Georgia. To that end three current officers, Doug Witten (Atlanta), G. Grant Greenwood (Macon), and David (BoBo) Mullens III (Savannah) are expected to move into the roles of Chair, Vice Chair, and Chair-Elect, respectively. Gino Brogden, Sr. has been nominated and is willing to serve as Treasurer. The nominations slate will be voted on at the **Section's upcoming annual meeting on May 7, 2026.**

Next year's Executive Committee will include past Georgia Bar ADR Section Chairs - Joyce B. Klemmer, Shan Momin, Erika Birg, Scott Zucker and Sasan Nematbakhsh. Sam Sparks (currently Atlanta Bar ADR Section Chair) will also continue as a member of the Executive Committee.

We are grateful for the participation of Mark Dehler and Ray Chadwick this year and in past years, but they are stepping down next year. They will be missed.

Financials

We began this term with a balance of **\$73,840.44** available for programming and events. We currently have a balance of approximately **\$84,000.00**.

Programming

We have hosted, co-hosted, and invited participation of our members at events and CLE programs almost every month during the 2025-2026 Bar year. Registration for events has ranged from approximately 30 to 235 people per event. Our virtual Lunch and Learn series—recorded and

published on the Section's webpage for later viewing—remains an effective way to engage members by covering diverse and timely topics relevant to ADR practice.

We are especially grateful for the support of the State Bar, particularly Lane Sosebee, Challie Smith and Mary Jo Sullivan, in helping coordinate these events.

October 2025 - 10/16/25 *International Conflict Resolution Day Program* (virtual, 234 registrants). This was a half-day program. A roster of distinguished panelists spoke on the topics of: Understanding Early Dispute Resolution: Why It Works and How It Works; A Study of International Conflict Resolution Through World Peace Centers; Mediating with Emotional Intelligence; and AI in the Mediator's Toolbox: Practical Tools to Improve Your Practice.

November 2025 - 11/19/2025 - *Co-hosted (with GODR) the 32nd Annual ADR Institute* (Atlanta, in-person), held at State Bar Headquarters. Topics including negotiations, mediations, working with parties with behavior health challenges, effective preparation for Med./Arb. Proceedings and professionalism and the role of civility. On behalf of the Georgia Office of Dispute Resolution, we sent our members GODR's request for proposals for the 2026 ADR Institute to be held 11/26/26

December 2025 - We invited our members to attend the 12/3/25 Augusta Bar Association program on Ethics.

January 2026 - *United Nation's Mediation Support* (virtual) Topic - how the United Nations, through its Mediation Support Unit of the Department of Political and Peacebuilding Affairs plays a central role in the UN's efforts to prevent and resolve conflict around the world. Speaker: Eiko Ikegaya, Chief of the Mediation Support Unit with over 25 years of experience working for the United Nations

March 2026 - *Drafting ADR Clauses* (virtual). Topics included: contractual right to compel arbitration; cost considerations and drafting ADR clause tips; discovery dispute resolution mechanics; dispositive motions; Georgia Arbitration Code vs. Federal Arbitration Act; and joinder rights of parties to the arbitration agreement.

March 2026 - Invited our members to attend 3/31/26 program sponsored by the Family Law Section: *Jury Trials in Divorce* (including panel discussion of Jury Trial v. Arbitration); and

Invited our members to attend the 3/20/2026 **ICLE ADR in the Workers' Compensation Arena** including the topics Preparation for Successful Mediation and Burning Questions for ALJs and Mediators.

April 2026 - 4/22/2026 - *Using CoCounsel in your ADR Practice* (virtual) Topic: how using artificial intelligence for research and drafting can enhance your arbitration and mediation practice, including a demonstration of Thomson Reuters' AI program, Co-Counsel, that integrates with other platforms.

Upcoming:

May 7, 2026 *AI in Litigation and ADR* (in-person, Atlanta Georgia Bar Headquarters) To be presented jointly with the E-Discovery & the Use of Technology Law Section and the Young Lawyer's Division, this program will explore how artificial intelligence is reshaping the practice of law, with a focus on its growing role in litigation and alternative dispute resolution. Reception to follow event.

May 2026 - Savannah (in-person, Savannah Georgia Bar Headquarters) - Topics: value, benefits, and/or drawbacks of mediation from the perspective of the judiciary. Reception to follow event.

Pro Bono Participation

On April 28, 2026, we invited members of ADR section of the Georgia Bar to participate in and attend pro bono mediation program training. The Atlanta Bar ADR Section is restarting the pro bono mediation program with mediators from the [Atlanta Bar ADR Section](#) and the [State Bar of Georgia's Alternative Dispute Resolution Section](#). Mediators with five or more years of experience in mediation may also volunteer to mentor by observing a newer mediator and providing feedback. This program will lend support to [Atlanta Legal Aid](#) and possibly other organizations in Atlanta and throughout Georgia.

Antitrust Law Section 2025-2026 Annual Report

Section Chair: Patricia Gorham

The Antitrust Law Section proudly honored Charles C. (“Chuck”) Murphy, Jr. with the 1890 Award for Excellence in Antitrust at its December holiday party in Atlanta. Happily, Chuck’s son, Charles C. Murphy, III, joined the celebration honoring his father.

The Awards Committee, chaired by Katie L. Balthrop (Koch Industries), recognized Chuck for his leadership in the state antitrust bar for nearly 50 years. Chuck, a former Section Chair, began practicing law at the Federal Trade Commission before moving to the DOJ’s Antitrust Division in Atlanta. After 8 years in government service, Chuck co-founded Vaughan & Murphy where he has practiced for more than 40 years. Throughout his career, Chuck’s work has focused on representing companies and individuals in civil and criminal antitrust matters including, for example, defending the president of an international construction company accused of rigging bids on USAID-funded infrastructure projects in Egypt, representing a producer of chicken broiler meat in a complex warren of actions, and prosecuting securities firms and highway road contractors.

Chuck is a well-known CLE speaker and an important mentor for his colleagues at the bar. Jeff Berhold, who along with Bill Dillon nominated Chuck, commented:

“He is always in command of the law and the facts and thirsty to learn more.” Beyond this, Chuck is a gracious and collegial practitioner who has earned universal respect over his government and private career.

Many thanks to the law firms that co-sponsored the holiday party: Dillon Law Group, LLC; Bondurant, Mixson and Elmore LLP; Smith Gambrell & Russell, LLP; Bryan Cave Leighton Paisner LLP; and Eversheds Sutherland (US) LLP.

Chuck is the third recipient of the Section’s highest award, which was presented in 2024 to Emmet Bondurant of Bondurant Mixson & Elmore LLP and in 2023 to Jim McGibbon of Eversheds Sutherland (US) LLP. The award is named for the year in which President Benjamin Harrison signed the Sherman Antitrust Act into law and recognizes Georgia attorneys who demonstrate excellence in the field of antitrust law over the course of their careers. To be eligible, the recipient must be licensed or practicing in Georgia, have at least 20 years of outstanding achievement in antitrust law, have made a significant contribution to CLE or Bar activities in antitrust law, have a record of community service, and have a personal commitment to excellence.

The Section also hosted a very successful and substantial CLE developed by Program Committee Chair Frank Lowrey. The well-received March seminar featured a combination of sitting and former regulators, as well as attorneys in private practice involved in the developing litigation over information exchanges and algorithmic pricing.

Section Chair Patti Gorham gathered at the figurative fireside for a chat with David Shaw, the Principal Deputy Director of the FTC's Bureau of Competition. Mr. Shaw discussed trends and priorities for the FTC, including current priorities in healthcare, agriculture, labor markets, and everyday staples. Mr. Shaw highlighted the effort to align the missions of the FTC and DOJ, pointing to adjustments in merger enforcement and joint efforts like the agencies' request for comments on updating guidance around competitor collaborations. The impact of accelerating technological changes on enforcement, including, for example, the impact of technology on competitor collaborations was explored. Mr. Shaw outlined the FTC's enforcement efforts related to on-line subscriptions and the FTC's launch of a task force to address deceptive, unfair, or anticompetitive conduct in the labor market.

Julia Tarver Wood of the DOJ Antitrust Division and the lead litigator for the United States in the Google ad tech trial joined David B. Schwartz, who led the FTC's investigation into Amazon's e-commerce practices, in a panel discussion focusing on the latest developments in those litigations. The Google ad tech trial is at the remedies phase, and the panel discussed the dueling proposals in that case as well as the larger question of whether conventional litigation timelines are too slow for effective relief challenging platform dominance in the digital age. The panel then turned to the Amazon case, which has recently generated discovery issues arising from the intersection of technology and litigation. What are the litigation implications for a company's use of "ephemeral messages" (that disappear on a short time frame) to conduct discussions related to competition or other litigation-sensitive topics?

A lively discussion of enforcement and litigation trends related to algorithmic pricing tools and digital benchmarking services featured Liam Phibbs, who is currently representing an agricultural benchmarking firm in a lawsuit filed by the Department of Justice, Will Barnette, and Lee Peifer. The panel, moderated by Kaitlin Carreno, explored the quickly evolving legal landscape for businesses using algorithmic pricing and benchmarking tools and included a discussion of the federal antitrust agencies' joint public inquiry seeking public input on competitor collaborations, information and data sharing, and algorithmic pricing.

The program concluded with an expert panel addressing evolving trends in injury and damages analysis. As liability theories have increasingly challenged vertical integration and two-side markets, expert analysis of injury and damages has kept in stride. David Shwartz moderated the panel with Dr. Romy Abrantes-Metz of BRG and Dr. Juliette Camindade of Analysis Group, who provided their expert insights into econometric analysis in the era of two-sided market and monopolization cases.

Other highlights of the Section's year included a fall social for the Antitrust and White Collar Sections hosted by Smith Gambrell & Russell and a Section-sponsored breakfast at the Spring meeting of the American Bar Association's Antitrust Law Section in Washington D.C. The Section welcomes this collaboration with our colleagues specializing in the adjacent practice of white-collar crime, and it plans to identify other bar sections for similar events in the coming year.

The Section thanks inaugural Board of Trustees for their guidance. Members include the current Executive Committee members (Patti Gorham, Chair; Frank Lowrey, Vice Chair; Ed Konieczny, Secretary/Treasurer; Parker Sanders, Immediate Past Chair) along with former Section Chairs Lindsay Sklar Johnson, Patrick Watson, Jeffrey Berhold, and Jim McGibbon.

Aviation Law Section 2025-2026 Annual Report

Section Chair: Alan Armstrong

THE AVIATION SECTION'S ANNUAL MEETING

2026 has been an exciting year for the members of the Aviation Section of the State Bar of Georgia. Our annual meeting was conducted on Thursday, January 22, 2026, and our guest speaker was Captain Randy Ball. An airline pilot by profession, Captain Ball performs aerobatics and air combat maneuvers on the air show circuit in a Soviet-designed MiG-1 7F fighter jet. Captain Ball has flown 2,000 hours in Russian jet fighters, has over 21,000 flight hours, and has flown 46 different types of aircraft manufactured in nine different countries. Captain Ball is a Level I (unlimited) jet aerobatic day and night demonstration pilot and is the only pilot qualified to fly jet fighters at night in North America in aerial demonstrations. Captain Ball has flown the MiG-17 as an aggressor pilot against U.S. Air Force F-4 Phantoms and has served as a functional test pilot on a number of MiG fighter aircraft. He is an A.C.E. (Aerobatic Competence Examiner) and initiated the requirements that now exist for an Extraction Manual for aircraft that perform in air shows. He co-authored the FAA guidance material for operating limitations on former military jet aircraft. He co-authored the FAA maintenance requirements and limitations for civilian operations of aircraft with operational ejection seats. He is a former International Council of Airshows Safety Board member.

During his remarks, Captain Ball employed a video of his airshow performances. The video included night performances of aerobatics in the MiG-1 7F aircraft which were truly extraordinary. Captain Ball discussed the physiological demands on pilots who perform these maneuvers and the rigorous discipline and training that is required to perform in high-performance jet aircraft which possess remarkable speeds and extraordinary maneuverability. Captain Ball was accompanied by his wife Tina, who is a physician. Without question, the attendees at the annual meeting found Captain Ball's remarks enthralling and extremely interesting.

THE SEMINAR CONDUCTED BY THE AVIATION SECTION

On Friday, March 13, 2026, the Aviation Section of the State Bar of Georgia conducted an ICLE Seminar on Aviation Law. William D. NeSmith, III, Deputy General Counsel for the State Bar of Georgia gave a presentation on Ethics. Alan Kozarsky, M.D., a Senior Medical Examiner for the FAA gave a presentation on Medical Procedures and Changes for Pilots. Ivy N. Cadle, Esq., past President of the State Bar of Georgia gave a presentation on Professionalism. David I. Katzman Esq., a partner in the law firm of Katzman, Lampert & Stoll gave a presentation on Constructing a Plaintiffs Product Liability Case Circa 2026. Caroline M. Henriksen, an associate with the firm of Mozley, Finlayson & Loggins, LLP gave a presentation on Litigating with a Party Acting Pro Se. Finally, the author of this Memorandum gave a presentation on the Design and Certification of Transport Category Aircraft -- A Study of Catastrophic Failures. All comments about the content and presentations at the Seminar have been positive.

The Aviation Section of the State Bar of Georgia continues to maintain cohesion, communication, and cooperation by the circulation of a quarterly newsletter. Our editor is Mary Newton who does a splendid job.

It has been a privilege of the undersigned to serve as Chair of the Aviation Section of the State Bar of Georgia since approximately 1999. We have 184 members, and our treasury balance is \$228.94.

On a personal note, the undersigned was sworn into office by Governor Brian Kemp on December 18, 2025, to serve on the Board of Directors of the Georgia Aviation Hall of Fame.

Bike Law Section 2025-2026 Annual Report

Section Chair: Bruce Hagen

The Bike Law Section of the State Bar of Georgia continued to grow in 2025-26. We remain committed to promoting the enjoyment of life on two wheels, whether on an E-bike or conventional pedal bicycle.

The highlight of the year was once again the annual “Lawyer Ride” held during the Atlanta Cycling Festival. Dozens of people from the legal community joined in a friendly paced ride from the Fulton County Courthouse through some of Atlanta’s historic neighborhoods and culminating at the Dekalb County Courthouse. The 2026 ride will be held on May 15.

In the coming year, we hope to have some input into the proper regulation of what has become an increasingly important issue from a safety perspective as well as a consumer protection issue. Specifically, the influx of electric motorcycles (or “E-Motos”) into the Georgia market. Over the last year, the proliferation of these out-of-class motor vehicles has created problems for pedestrians, law enforcement, educators and consumers, to name a few. Hopefully, the Bike Law section can help the Legislature craft proper and responsible legislation to address this emerging technology.

The Bike Law section welcomes the opportunity for social events with any other section members, particularly if the event is bicycle related. Please contact Bruce@Hagen-Law.com if you’re interested in some “Sweatworking” on 2 wheels.

Cannabis & Hemp Law Section 2025-2026 Annual Report

Section Chair: Jill Cohen

It has been my honor to serve as Chair of the Cannabis & Hemp Law Section of the State Bar of Georgia. With this section being fairly new, our goals for 2025-2026 were to increase our interaction with our members, join with other sections for opportunities to network, and to provide opportunities for our members to become educated in this emerging area of law related to legal regulated cannabis and hemp markets.

We started the year off with a new slate of officers as follows:

Chair: Jill Cohen

Vice Chair: Mike Williams

Secretary: Ashley Hollan

Treasurer: Julian Fortuna

With an honorable mention to our hard-working Events Committee Chair: Kristy Caron

We have 183 section members representing a variety of practice areas.

This year we developed an identity and logo for our section and purchased branded items to promote and identify our section at our events.

We held a Zoom meeting for our section members on September 23, 2025, that was well attended by attorneys from numerous practice areas with varying perspectives on Cannabis & Hemp Policy.

We held a social event at the State Bar on December 8, 2025, co-sponsored by the Taxation Law Section and the Atlanta Bar Tax Section. We had a nice group of attendees engaging in networking and discussion of the intersection of tax law and cannabis/hemp law.

We held an informative Zoom meeting on March 17, 2026, for our section members and hosted two leading cannabis industry consultants, Erik Gundersen (Maine's inaugural regulator of the Office of Cannabis Policy) and Shawn Collins (Massachusetts Cannabis Control Commission inaugural regulator). This meeting was informative and well attended.

We were represented at the State Bar TILPP orientation by two members of our leadership team who introduced our section to young lawyers.

The section supported the Pro Bono Partnership of Atlanta through a financial donation that was matched by the Nonprofit Law Section.

We expect to have a social event this summer to round out the year.

Again, it has been an honor and a pleasure to serve the Bar through our work in developing a new section in an emerging area of law. We look forward to continuing to grow our membership and our involvement with the legal community in the coming years.

Child Protection & Advocacy Section 2025-2026 Annual Report

Section Chair: Jill Roth

This report covers CPAS activities occurring between April 2025 and April 2026.

Section balance: \$10,597.17

Member count: 553

Section Officers

- **January 2025-January 2026:**¹
 - Chair: Laurie Thomas Williams
 - Vice Chair: Tonya Boga
 - Treasurer: Randee Waldman
 - Secretary: Jill Roth
 - Immediate Past Chair – John Paul (JP) Berlon

- **January 2026-current:**
 - Chair: Jill Roth
 - Vice Chair: Anissa Patton
 - Treasurer: Randee Waldman
 - Secretary: Danielle Simpson
 - Immediate Past Chair: Laurie Thomas Williams

CPAS Scholarships/Sponsorships 2025-2026 State Bar Year

- **Sponsorships:**
 - \$1,500 Bronze Sponsorship for the 9th Annual Summit, Georgia’s Child Welfare Conference, held in December 2025. The Summit brings together child welfare professionals throughout the state and is designed for child advocates, judges, attorneys, GALs, court staff, child protective investigators, case managers, community-based providers, juvenile justice professionals, law enforcement professionals, mental health and medical providers, and other affiliated persons.
 - \$2,000 sponsorship for The Gault Center: 2026 Southern Regional Summit, an annual conference that brings together youth defense attorneys and advocates from across the South.
 - \$400 sponsorship for Transition into Law Practice Beginning Lawyers Program for CPAS Section Table held in February 2026.
 - \$500 sponsorship for the 19th Annual Youth and the Law Summit being held on April 18, 2026.

¹ Per the current bylaws, CPAS officers are elected at the annual CLE and section meeting, which is typically held in January each year. Accordingly, CPAS officer terms run from Jan-Jan rather than coinciding with the State Bar year.

- **Scholarships:**

- \$750 scholarship for Chris Hempfling to attend the American Public Human Services Association’s 2025 Education Conference. Chris Hempfling wrote an article about the experience, which was published in the Winter 2026 Edition of the *Kids Matter: Child Protection and Advocacy Section* newsletter.
- \$180 scholarships for the CPAS Annual Meeting & CLE held in January 2026 and \$822 allocated to cover CLE credits for all attendees.
- \$93.80 scholarship for Anissa Patton to attend the Summit 2025 Child Welfare Conference held in December 2025.

CPAS Kids Matter Newsletter:

- Fall 2025 Edition
- Winter 2026 Edition
- Spring 2026 Edition (under review – anticipate publication before June 1, 2026)

CLE Events and Details

- **June 2025 State Bar Annual Meeting – Willie Lovett Award** – CPAS EC representative Ira Foster assisted with presenting the 2025 Willie Lovett Award to Douglas County Juvenile Court Judge Talia Johnson Nurse.
- **October 2025 - CPAS/YLD CPAC - Virtual CLE**
 - CPAS partnered with YLD CPAC to present a CLE for new attorneys to educate them on the opportunities available in pro bono child welfare work. The event featured speakers from the Office of the Child Advocate, Georgia Appleseed, the Safety Valve Project, the Truancy Intervention Project (TIP), and Kids in Need of Defense (KIND).
- **December 2025 Child Welfare Summit Presentations**
 - CPAS EC member Danielle Simpson presented with Sydney Royes, Director of Behavioral Health at HEALing Community Health, “Too Much Medicine Can Make You Sick: Rethinking the Overservicing of Children in Crisis,” which examined how well-intentioned but excessive, uncoordinated, or duplicative services can overwhelm youth and families rather than stabilize them.
 - CPAS EC member Amber Walden presented on “Pulling Back the Curtain on Myths and Urban Legends in Juvenile Court Proceedings,” taking a deep dive into commonly misunderstood, misinterpreted, and misapplied statutes and practices in juvenile courts.
 - CPAS EC members Chris Hempfling, Jill Roth, and Danielle Simpson presented “The Intersection Dilemma: Dependency, Delinquency, and the Children in Between” exploring the complex realities faced by youth who straddle both dependency and delinquency proceedings and providing practitioners with tools and resources to use creatively across systems to improve outcomes for youth and families, and reminding

attendees of their shared responsibilities to create a community of healthy children and families.

- **Jan. 2026 CPAS Annual Meeting and CLE**

- Hold at the State Bar of Georgia, featuring breakfast bar and lunch catered by Henri's Bakery (\$988.94).
- EC Treasurer and Director of the Barton Juvenile Defender Clinic at Emory University Rande Waldman presented on "Appropriate and Ethical Use of Artificial Intelligence."
- Section Chair and Managing Partner at Reed Thomas Law Group Laurie Thomas Williams presented on "Artificial Intelligence in Practice."
- The event also featured an art exhibit showcasing artwork created by youth experiencing or formerly in foster care through the Georgia Appleseed – Hear Me See Me Exhibit.
- Elections were held, and the following officers were elected with terms to begin following the January 2026 annual meeting: Jill Roth, Chair; Anissa Patton, Vice Chair; Rande Waldman, Treasurer; Danielle Simpson, Secretary.

CPAS Outreach and Community Events

- **April 2025 18th Annual Youth and the Law Summit:** Fulton County Juvenile Court, in partnership with the State Bar of Georgia Child Protection and Advocacy Section, Gate City Bar Association, YouthSpark, Atlanta's John Marshall Law School, and Constangy, Brooks, Smith & Prophete, LLP, hosted the 18th Annual Youth and the Law Summit. The theme was "The Power of CommYOUity – I am because we are!" CPAS Chair Laurie Thomas Williams and EC Member Quintin Lewis engaged youth in a spirited discussion about the importance of choosing our words carefully and provided youth with education on disorderly conduct and terroristic threats statutes. CPAS Secretary Jill Roth volunteered for the event.
- **CPAS/YLD CPAC – May 2025 "May the Wellness be with You: Caring for the Caregivers"** event – brought volunteers from CPAS and the YLD Child Protection and Advocacy Committee together to assemble and deliver wellness care packages to over one hundred frontline professionals across ten organizations in seven counties.
- **23rd Annual Girls Lead in the Law Program – June 16-17, 2025**
 - Hosted in partnership with GAWL, GAWL Foundation, and the Girl Scouts of Greater Atlanta – CPAS members engaged Girl Scouts by providing an opportunity for them to interact with women in various legal careers through a Q&A panel. Attorney volunteers, including CPAS Secretary Jill Roth, CPAS EC Member Anissa Patton, and CPAS Chair Laurie Thomas-Williams served as mock trial coaches and mentors. The event culminated in a mock trial before CPAS Member and Fulton County Juvenile Court Judge Elizabeth Higgins-Brooks.
- **February 24, 2026: Beginning Lawyers Program Section Table**– CPAS Chair Jill Roth, along with CPAS Executive Committee Members Ira Foster and Michael Waller hosted a table

at the Beginning Lawyers Program, educating new Bar members about CPAS and encouraging participation.

- **19th Annual Youth and the Law Summit – April 18, 2026** – CPAS Past-Chair Laurie Thomas Williams assisted with securing Sade Wise, an experienced school social worker and therapist, to present to youth on “The Power of Self-Awareness: Recognize. Reflect. Rise.” CPAS Chair Jill Roth volunteered and hosted a table featuring information from GA Appleseed on educational advocacy and safe housing.

Construction Law Section 2025-2026 Annual Report

Section Chair: Peter Crofton

The Construction Law Section (the “Section”) had a great year. Since its formation on November 2, 2018, Section membership has grown to 593 members, and the Section has collected \$36,368.25 in our account with the Bar. Our significant projects this year are discussed below.

1. Construction 101

The Construction Law Section joined with the Atlanta Bar Association Construction Law Section to present a series of 15 CLE programs covering fundamental concepts in construction law. The faculty for the programs was drawn from the cadre of highly experienced construction practitioners in the State of Georgia. In addition to providing current CLE programming on relevant topics; this CLE series allowed the Section to compile a library of “core” construction related programs that any section member can access on demand. The on-demand aspect allows law firms and in-house legal departments to train new construction lawyers with programs presented by some of the best construction lawyers in the county and do so at the cost of Section membership. There series is almost complete, and the videos of the programs will be posted to the Section’s website once post-production processing is finished.

2. Georgia/Tennessee Joint Construction Conference

On October 9-10, 2025, the Construction Law Section of the Georgia Bar partnered with the Construction Law Section of the Tennessee Bar Association to present an all-day CLE program that focused on similarities and differences in applicable state laws. The program was held in Chattanooga where many lawyers are admitted to practice in both states. We are currently planning a follow-up conference.

3. Holiday Party

The Construction Law Section joined with the Energy Law Section to hold a Holiday Party. The event, hosted by King & Spalding on its rooftop event space, allowed the members of both sections to mingle and enjoy conversing in a relaxed and festive environment. The party was enjoyed by all who attended (as demonstrated by smiles on the faces of the people in the photo below).

4. Conclusion

This has been a year of growth for the section and its leadership. We are well positioned to continue to expand the programs and socials that we offer our members.

Creditor's Rights Law Section 2025-2026 Annual Report

Section Chair: Adam Cleveland

The Section officers for the 2025-26 period remain: Chair – Adam Cleveland, Vice-chair – Jacob Maurer, Secretary – Shenika Collier, Treasurer – Bryan Kaplan. The Section sponsored and attended the Emory Public Interest Committee Inspiration Awards. The Section held its annual Luncheon on October 23, 2025. Tashia Zeigler, former Chair of the Consumer Law Section of the State Bar of Georgia, gave a presentation on Legal Professionalism for one (1) hour of Professionalism CLE credit. The Section presented a five (5) hour CLE seminar online and in-person on February 27, 2026, which included information on sovereign citizens, ethics in collections, personal and real property foreclosures including confirmations of sale. The Creditor's Rights Forum for online updates on what's happening in our section, recent updates in Georgia law, and national landscape received a makeover and is now fully operational. The Section also sponsored a booth at the new lawyer orientation seminar. The Section's goal for 2026-27 is to increase its outreach to new and younger attorneys.

E-Discovery & the Use of Technology Law Section 2025-2026 Annual Report

Section Chair: Alex Khoury

The E-Discovery & the Use of Technology Section (the “Section”) had one of its most active years in 2025. The Section added three new members to its executive committee, successfully hosted our largest-ever Legal Technology Showcase, offered two webinars, and continued our partnership with the Atlanta chapters of Women in eDiscovery (WiE) and the Association of Certified eDiscovery Specialists (ACEDS). We also kicked off a bylaws revision to make our bylaws more consistent with the Bar’s model section bylaws. At present, our Section has 267 members and has \$49,504.65 in our account with the Bar.

More details on our accomplishments this year are below.

1. Legal Technology Showcase

The Section’s signature program during this period was the 2025 Legal Technology Showcase, which was held on September 9, 2025, at King & Spalding LLP. The Showcase featured the following panels:

- Document Review Evolutions: Human Review vs. Predictive Coding vs. GenAI
- Ethical Considerations for E-Discovery in Government Investigations
- Legal Technology in Depositions and Hearings
- Legal Technology in Pro Bono Cases
- Judicial Panel Discussion

The Showcase was highlighted by a judicial panel featuring the Hon. Leigh May, Hon. Stan Baker, Hon. Bill Hamrick, and Hon. Andrew Peck (Ret.). The event offered five hours of CLE credit to members, including one hour of professionalism and one hour of ethics.

2. Zoom Webinars

The Section offered two Zoom delivered webinars during the reporting period. On March 19, 2025, the Section presented a webinar on Secrets to a Strong Corporate-Outside Counsel Partnership, and on April 30, 2025, the Section presented a webinar on eDiscovery From the Plaintiffs’ Bar: Success Stories & Guidance to Help Your Practice.

3. Holiday Party

For the third consecutive year, the Section co-hosted the Atlanta E-Discovery Holiday Gathering: Casino Night with ACEDS and WiE on Thursday, December 4, 2025, at Bar Peri (Dunwoody). The Holiday Gathering was very well attended and included a gift drive in support of Ronald McDonald House Charities.

4. Joint CLE Programs

The Section has recently begun partnering with other Bar groups to deliver joint programming to its members, including the upcoming AI in Litigation and ADR CLE Program & Social Hour on May 7, 2026, co presented with the Alternative Dispute Resolution Section and the Young Lawyer's Division at the State Bar Conference Center. The Section is also partnering with the Georgia Tech Bar Association to present AI for Everyone – A Multi-part CLE for Beginners and Experts, which will be hosted at Smith, Gambrell & Russell on June 4, 2026.

5. Bylaws Revision

During this period, the Section undertook a bylaws modernization effort led by a bylaws committee. A final draft of the revised bylaws will be submitted to the Board of Governors for approval in 2026.

6. Executive Committee Changes

In March of this year, the Executive Committee selected Alex Khoury to serve as Chairperson, Lori Burton to serve as Vice Chairperson, Nima Adabi to serve as Secretary, and Nirav Shaw to serve as Treasurer. Past Co Chairs Marc Efron and MaryBeth Gibson have moved into the Immediate Past Chair position, and Elliot Bienenfeld will continue as a member at large. The Executive Committee is currently considering candidates for additional at large positions.

7. Conclusion

The Section had an incredibly successful year in 2025 by any measure. We have another busy year lined up in 2026. We are currently planning our 2026 Showcase, which will be held in October, finalizing our bylaw revisions, recruiting new leadership, and working with other sections to offer education content to our members.

Eminent Domain Law Section 2025-2026 Annual Report

Section Chair: Matt Reeves

The Eminent Domain Section has 183 members, up from 181 members last year and 163 members the year before that. The Eminent Domain Section has \$52,780.94 cash on hand, compared to \$56,934.49 last year.

Camesha Mitchell is the Vice-Chair, Elizabeth Story is the Secretary-Treasurer, and Warren Tillery is the Past Chair. Subject to formal approval at our next meeting, which is being planned, the officers recommend promoting Camesha Mitchell to Chair, Elizabeth Story to Vice-Chair, and Ruthie Snell to Secretary-Treasurer.

The Eminent Domain Section held a video replay CLE of the 2024 Savannah CLE at the State Bar headquarters in September of 2025, with a Braves game social following the CLE. The Braves won, and attendees learned about recent condemnation court decisions and legal issues. The slight decrease in our balance was devoted to the Braves, which no doubt contributed to their success so far this season.

Secretary-Treasurer Elizabeth Story organized a well-attended ALI Eminent Domain CLE with multi-state attendees in Savannah in January of 2026, and our State Bar Eminent Domain CLE will be held in the latter half of 2026 due to this large recent eminent domain CLE.

Eminent Domain Section officers and frequent CLE speakers had several trials in 2025 and 2026 which will no doubt form the basis of CLE topics and war stories during upcoming Eminent Domain section CLE's and meetings.

The officers are working on the Charles Pursley Award nomination and next CLE and meeting scheduling presently and are considering an Eminent Domain essay contest and/or scholarship with the accumulated cash on hand, in addition to continuing traditional continuing education and social events.

With population and traffic growth in Georgia, the Eminent Domain Section anticipates continued practice area engagement and growth, and this section provides substantive law and relationship benefits to our litigation bar and bench in the area of condemnation, due process, and just compensation for takings for public purposes.

The Section's bylaws were updated in 2025 under the initiative of past Chair Warren Tillery and Bar Counsel at that time, Bill Nesmith.

The Eminent Domain Section is grateful for the excellence that Mary Jo Sullivan, Lane Sosebee and Challie Smith provide to this and many other sections of the State Bar.

Energy Law Section 2025-2026 Annual Report

Section Chair: Peter Crofton

The Energy Law Section (the “Section”) had a great year. Since its formation on October 28, 2023, Section membership has grown to 155 members, and the Section has a balance of \$3,893.37 in our account with the Bar. Our significant projects this year are discussed below.

1. Social Events

The Energy Law Section held a wine tasting on April 30, 2025, with thirty-four registered guests. The Energy Law Section joined with the Construction Law Section to host a Holiday Party in November 2025. The social events are an important part of what the Section’s recruiting efforts are as well as a good opportunity to build stronger relationships between energy law practitioners.

2. Education

The Section completed the CLE series begun last year and presented by Prof. Buford Pollett, the Energy Law Professor for the University of Tulsa. Mr. Pollett is a member of the Energy Law Section and a Georgia native. The first program was an overview of renewable energy nationwide, while the two subsequent programs with focus on solar energy in Georgia and other alternative energy source and carbon management in Georgia. The Section also invited the students in Emory’s 2025 Energy Law Class to attend the three presentations.

The Section is working with Georgia Power to set up a series of CLE’s on various topics concerning recent changes in the energy industry such as the growth of data centers as large consumers of electric power.

3. Conclusion

The Energy Law Section is positioned to help the many lawyers who work or will work in the expanding energy sector in Georgia. We look forward to continuing to grow the Section and to increase the professionalism, comradery, and skills of our members.

Entertainment & Sports Law Section 2025-2026 Annual Report

Section Chair: Nancy Prager

I. INTRODUCTION

It is my privilege to submit this Annual Report on behalf of the Entertainment and Sports Law Section of the State Bar of Georgia. This past year was marked by meaningful engagement, professional development, and a spirit of community among our members. Under my leadership as Section Chair, the Section organized and hosted a series of events designed to foster collegiality, advance members' legal knowledge, and give back to the broader Atlanta community. The following report summarizes the Section's activities and accomplishments for the 2025–2026 bar year.

II. SECTION ACTIVITIES

A. Kickoff Event – Pickleball Evening

The Section launched the bar year with an energetic and well-attended kickoff event centered around an evening of pickleball. The event provided members with an informal and engaging opportunity to reconnect with colleagues and welcome new members to the Section. The pickleball format proved to be a tremendous success, encouraging participation across all skill levels and generating significant enthusiasm for the year ahead. The event reinforced the Section's commitment to building a vibrant and collegial professional community within the entertainment and sports law bar.

B. Holiday Celebration and Charitable Toy Drive – The Four Seasons

The Section hosted a year-end celebration at the Four Seasons in Atlanta. The evening brought together members for a festive holiday celebration while also serving a meaningful charitable purpose. We collected toys and gifts for the Children's Healthcare of Atlanta (CHOA) to be distributed by CHOA to patients and families throughout the year. The event was a testament to the generosity of our members and the Section's dedication to making a positive impact in the Atlanta community beyond the practice of law.

C. Continuing Legal Education Program

The Section hosted *Entertainment & Sports CLE Bootcamp: Gen AI, NIL, Contracts and More*, followed by post-event cocktails and light bites at the Glenn Hotel. The program drew strong attendance and received excellent feedback from participants, featuring cutting-edge panels with leading entertainment, sports, and business law practitioners offering expert insights and practical strategies across the following topics:

- **AI & Music: The Good, the Bad and the Ugly** — Stacy Epps, Bryan Calhoun, Sean Glover of SoundExchange, and Bernie Lawrence-Watkins explored the emerging legal questions surrounding the use of AI in music creation, licensing, and distribution, including

issues of copyright ownership, artist rights, and the implications of AI-generated content for the music industry and its stakeholders.

- **Name, Image and Likeness (NIL): What's New Since 2024** — Nadia Moore, Dr. Jamil Northcutt, Andy Schwarz, and Donald Woodard examined the evolving legal landscape governing NIL rights for student-athletes, including recent regulatory developments, deal structures, and compliance considerations for practitioners advising clients in collegiate and professional sports.
- **Film Finance: Legal and Business Issues** — Chiquita Banks, Esq., Marissa Crespo, Esq., Anthony Short, P.G.A., Keisha Perry Walker, Esq., and Steve Weizenecker addressed the legal and business framework surrounding film financing, from deal structuring to production agreements.
- **Music Distribution in 2026** — Aurielle Brooks, Matt Buser, Chelsea Mitchell, and John Seay examined the current and emerging landscape of music distribution, including the legal and business issues practitioners and their clients face in today's rapidly evolving marketplace.
- **The State of Copyright Licensing in the United States, and Beyond** — Brianna Smith, Shane Sanders, Rick McMurtry, and Becki C. Lee provided a comprehensive overview of the current state of copyright licensing, including domestic and international developments affecting entertainment and sports practitioners.
- **Ask the State Bar Counsel Anything: Legal Ethics for Entertainment and Sports Attorneys** — Nancy Prager and Bill NeSmith, Deputy General Counsel of the State Bar of Georgia discussed practical and interactive forum to address ethical issues unique to entertainment and sports law practice.

The breadth and quality of the CLE programming reflected the Section's commitment to keeping its members at the forefront of legal developments in entertainment and sports law.

III. CONCLUSION

The 2025–2026 bar year was an outstanding one for the Entertainment and Sports Law Section. Through our kickoff event, holiday celebration and charitable drive, and substantive CLE programming, the Section fulfilled its mission of professional development, member engagement, and community service. I am grateful to the members of the Section's leadership, the event organizers, our CLE panelists, and all Section members whose participation and support made this year a success.

Environmental Law Section 2025-2026 Annual Report

Section Chair: Wyatt Kendall

The Environmental Law Section (“ELS” or the “Section”) had another successful and productive year over 2025-2026. Under the ELS leadership, the ELS engaged with members, offered meaningful networking and learning opportunities, and provided annual student scholarships. The ELS remains in a strong financial condition and continues to see growth and participation among Georgia lawyers.

I. General Overview

According to the current bylaws, which we are reviewing for updates consistent with the State Bar’s new model, the purpose of the Environmental Law Section is to promote the goals of the State of Georgia within the field of environmental law. The Section provides its members with a unique opportunity to get to know other lawyers from industry, federal and state government, public interest organizations, and private law firms who practice environmental law day to day. Membership in the Section also enables members to stay informed on current environmental subjects. The Section sponsors varied programs providing opportunities for Continuing Legal Education (CLE) credit as well as social events.

The Environmental Law Section currently has nearly 350 members. Current ELS officers are Wyatt Kendall, Chair; Stephen Smith, Chair Elect; Jack Devine, Secretary; Andrea Hartung, Treasurer; Laura Benz, Member-At-Large; and Charlie Denton, Immediate Past Chair. As of the date of this Report, the ELS remains in a very strong financial position, with over \$106,000 in ELS funds.

II. Activities

Over the past year, the ELS has offered Georgia lawyers multiple educational and networking opportunities. In April 2025, the ELS hosted a full-day environmental conference at King & Spalding in Atlanta. Over 75 lawyers attended. The conference included six (6) general and one (1) professionalism credit hours. The conference kicked off with remarks from Kevin McOmber, the EPA Regional Administrator, and then covered important environmental law topics, including energy and infrastructure and PFAs. After the conference, the ELS hosted a reception to facilitate networking among attendees.

Later in November 2025, the ELS hosted a virtual CLE on the changing federal environmental landscape. The webinar had strong attendance and received positive feedback. The Virtual CLE was offered free of charge.

Finally, the ELS hosted a holiday gathering at Boqueria at Colony Square in early December. The holiday gathering had over 40 lawyers in attendance. Because of the ELS’s strong financial position, the event was held free of charge for section members.

More recently, the ELS Board has played a key role in planning the upcoming Tri-State Environmental Conference in conjunction with the North and South Carolina environmental sections. The Tri-State Environmental will be held in Asheville, North Carolina, on May 29th and May 30th and offer attendees seven (7) CLE hours. The conference will cover a variety of important environmental issues, ranging from data centers to endangered species. It will offer attendees a unique opportunity to learn from and meet other lawyers from across the Southeast. Over 100 lawyers are expected to attend the Tri-State Conference.

III. Annual Awards and Student Scholarships

During the annual environmental conference last April, the ELS awarded Doug Henderson with the James H. Bratton, Jr Annual Lifetime Achievement Award. Doug received this award for his longstanding contributions to the ELS and the practice of environmental law in Georgia.

Our Section also proudly awarded scholarships to four (4) law students who excel in environmental law. Scholarships were granted in the amount of \$750 to law students at the University of Georgia, Georgia State, Emory University, and Mercer University. These scholarships were based on law professor feedback and awarded to students who demonstrated leadership and a strong interest in environmental law.

Family Law Section 2025-2026 Annual Report

Section Chair: Jeremy Abernathy

Executive Summary:

The Family Law Section experienced a productive and successful year. The year began with a summer retreat in August, when the Executive Committee outlined goals designed to strengthen the Section's impact and operations. From September 2025 through April 2026, the Executive Committee met consistently, focusing on our continuing legal education programs (Nuts and Bolts 2026, Mid-Year CLE 2026, and Family Law Institute 2026), planning for future Family Law Institutes (2027), improving the Section's digital presence, exploring legislative initiatives, engaging in community service, and maintaining a sound financial position.

Meetings:

Throughout the reporting period, the Section maintained a regular meeting schedule, convening on the second Tuesday of each month. Attendance remained strong, with consistent in-person participation and quorum achieved at every meeting. In addition to monthly meetings, the Section held two (2) retreats.

Budget:

The Section has a current balance of \$353,443.86. We have also implemented a Treasurer position, Sean Ditzel, to enhance financial oversight and accountability.

Continuing Legal Education Events:

The Section's continuing legal education programming continued to be a cornerstone of its success. The "Nuts and Bolts" program was chaired by Secretary Roslyn Grant Holcomb. The Midyear Meeting, held January 9–12, 2025, in Atlanta at the Omni Battery Hotel, was chaired by Sean Ditzel and concluded with a reception involving judges, attorneys, and panelists.

Planning for the 2026 Family Law Institute is well underway under the leadership of Vice Chair Jamie Perez. The program promises a diverse and engaging lineup of speakers addressing key issues relevant to family law practitioners. The Section has also begun preparing for the 2027 Institute, ensuring continuity and long-term success of its flagship event.

Family Law Review:

The Family Law Review, under the direction of Kem Eyo, continues to be published in a timely and professional manner, offering informative and valuable content that reflects the Section's work and priorities.

Legislation:

On the legislative front, Legislative Liaison Erik Chambers reported a relatively quiet year in terms of new family law legislation. This provided an opportunity to focus on proactive initiatives, including the formation of a subcommittee tasked with drafting a proposed attorney's fees statute.

Community Engagement:

Community engagement remained a priority throughout the year. The Inclusion Committee, led by Nilu Abdi-Tabari, hosted its second successful annual event and launched a popular book club series, with additional programming planned for the upcoming Family Law Institute. Emily Long, the YLD representative, also was instrumental, with her efforts to bridge the gap between our section and YLD through events such as Supreme Cork.

Facebook and Technology:

The Section also continued to expand its outreach and digital presence, with Kevin Rubin and Roslyn Grant Holcomb leading efforts to develop a new website.

Looking Ahead:

Looking ahead, the 2026 Family Law Institute is scheduled for May 29–31, 2026, with continued planning focused on delivering an outstanding educational and networking experience.

Conclusion:

In conclusion, the Family Law Section is thriving. The Section has demonstrated consistent engagement, strong financial management, successful educational programming, meaningful community involvement, and effective long-term planning.

Franchise & Distribution Law Section 2025-2026 Annual Report

Section Chair: Anne H. Baroody

The Franchise and Distribution Law Section is pleased to report on its activities for the past year.

Membership and Finance

At the time of this report, the Section membership is 168 members. Additionally, as of April 8, 2026, the Section has a balance of \$9,718.43. The Section is in a sound financial position to fund our programming for the next fiscal year.

Section Officers

Chair: Anne H. Baroody

Vice Chair: Carol Terry

Treasurer: Kitt Shipe

Secretary: Linda Yang

Immediate Past Chair: Amy T. Andrews

Section Events

On July 23, 2025, the Section held its annual meeting, at which the current slate of officers was elected. During the annual meeting, the Section hosted a one-hour CLE presenting an update on legislation and litigation impacting franchisees and franchisors. The event was held at the corporate headquarters of GoTo Foods. The Panelists included Annie Caiola, Partner at Caiola & Rose, and Ella Vacca, Associate at Caiola & Rose.

On December 4, 2025, the Section hosted a holiday party and a one-hour CLE on the topic of Fundamentals of Trademark Law for Franchise Lawyers. The event was held at the offices of Clark Hill. The panelists included David Gorski, Partner at Clark Hill, Becki Lee, counsel with IHG Hotels and Resorts, and Michelle Wilco, of Kilpatrick Townsend & Stockton LLP.

On February 18, 2026, the Section hosted a one-hour lunch and learn CLE on the topic of Financial Statements for Lawyers. The event was held at the offices of Bradley Arant Boult Cummings LLP. The panelists included Rebecca Greco, Senior Director at Kroll, and Elan Mishael, Managing Director at Kroll.

On May 12, 2026, the Section will co-host a one-hour lunch and learn CLE with the Real Property Law Section on the topic of the 20 Most Overlooked Issues in Commercial Leases. The event will be held at the corporate headquarters of Chicken Salad Chick. The panelists will include Abe Schear, Partner at Arnall Golden Gregory LLP, and Alan Betus, Senior Counsel at Seyfarth Shaw LLP. An invitation to this event was sent to Section members on April 16, 2026.

Currently, the Section is planning its annual meeting and last CLE event to take place in July 2026. We are planning to present a legal update, with two speakers confirmed to discuss nationwide legislative updates in the area of franchising and legal updates related to the use and enforcement of non-competes in franchising. At this meeting, the new slate of officers for the Section for 2026-2027 will be selected.

Health Law Section 2025-2026 Annual Report

Section Chair: Wade Pearson Miller

The Health Law Section, with over eight hundred members, is pleased to report on its activities for the past year.

The officers of the section are Wade Miller (Chair), and Brittany Jones (Vice-Chair), Dawn Benson (Treasurer), and Scott Grubman (Secretary).

We held our annual Advanced Law Seminar on October 8, 2025, with over one hundred attendees. The Seminar included timely topics such as Certificate of Need, Healthcare Enforcement, Life Sciences Arrangements and AI. We also provided an hour of ethics CLE with an informative discussion with Georgia State School of Law Professor Allison Whelan.

The Section put out its Fall Newsletter featuring Health Law Developments. The Newsletter included six informative articles on topics such as AI Scribes, the Landscape of AI Regulation and Vaccination in Georgia. Our Spring Newsletter is anticipated to be published in May 2026 and will feature timely articles on Avoiding Pitfalls in HIPAA Compliance, AI Automation and Medical Necessity, and Navigating the Regulatory Landscape of AI in Healthcare.

On December 5, 2025, we hosted a sold-out Lunch-n-Learn entitled: State of AI in Healthcare: A Review of the Current Landscape and What to Expect in 2026.

The Section awards the Alan Rumph Memorial Fellowship to provide summer funding to law students with an interest in health law and a commitment to pursuing a career in health law in Georgia. This year, we awarded three \$6,000 fellowships to students at Georgia State University and Emory University.

Finally, the Section will host its Annual Business Meeting and Lunch and Learn on May 14, 2026. The Section will receive an update from the Chair and finalize elections of new Executive Committee Members and enjoy a one-hour CLE featuring hot topics in healthcare.

It has been my honor and pleasure to lead this Section over the past year. We are proud of the work we have done and look forward to much more in the coming year.

Nonprofit Law Section 2025-2026 Annual Report

Section Chair: Jonathan R. Poole

Membership and Initiatives

The Nonprofit Law Section had 356 members as of April 29, 2026. The Section has seen an increase in membership over the last few years and is committed to additional membership outreach. In particular, the Section is interested in reaching newer lawyers and to partnering with the Georgia law schools to provide law students a chance to attend some of our programming.

The Section also hopes to partner with other Sections and pursue pro bono activities supporting non-profit organizations in the coming year.

Account Balance

The balance of our operating account is \$24,015.32 as of April 29, 2026. Our annual expenses were slightly higher than our annual revenues due to hosting an in-person CLE and making a larger donation to Pro Bono Partnership of Atlanta.

2025-2026 Officers and Executive Committee Members

Officers:

- Chair– Jonathan R. Poole, Emory University
- Vice-Chair– Lauren Bellamy, Grady Health System
- Secretary/Treasurer—Allison Thompson, Boys & Girls Clubs of America

Additional Executive Committee Members:

- Claire Oates, Boys & Girls Clubs of America
- Joel Arogeti, Kitchens Kelley Gaines P.C.
- Karen Bemis, Habitat for Humanity International
- Julie McGhee Howard, Nowack Howard Law Firm
- Garrett Brown, Arnall Golden Gregory, LLC
- Kelly Bray, Georgia Lawyers for the Arts
- Kristin Bernhard, Georgia Early Education Alliance for Ready Students

Section Activities

Continuing Legal Education (“CLE”)

This fiscal year, with the help of the State Bar, the Section organized seven (7) hours of CLEs for Section members.

- December 15, 2025 (2 hours)
 - *Navigating Recent Executive Orders Impacting Grant Funding*
- January 29, 2025 (1 hour)
 - *When Good Boards Go Bad: Nonprofit Governance and Risk Management*
- March 19, 2026 (4 hours)
 - *Ethics*

- *Roundtable: Navigating Your Career Path | A panel of distinguished nonprofit leaders and General Counsel*
- *What Is a Lawyer's Duty to the Rule of Law?*
- *Overview of Updates to the Nonprofit Code*

Officers Elected at Annual Meeting for 2025-2026 Fiscal Year

- Chair – Lauren Bellamy, Grady Health System
- Vice Chair – Allison Thompson, Boys & Girls Clubs of America
- Secretary/Treasurer – Karen Bemis, Habitat for Humanity

In addition, the Section's bylaws allow for up to two (2) additional members to join the 2026-2027 Fiscal Year Executive Committee. We are in the process of reaching out to the Section members to gauge interest in those positions and look forward to new representation on next year's Executive Committee.

Privacy & Technology Law Section 2025-2026 Annual Report

Section Chair: Toni Igbenoba

I. General Overview

Number of Members: In July 2025 (at the start of the bar year), the Section had **922** members; as of April 2026, membership has grown to **959**.

Finances: In July 2025, the Privacy & Technology Law Section (PTLS) had approximately **\$72,072.98** in its account; as of April 2026, the balance is **\$65,582.89**. While the balance has decreased, the PTLS intentionally used its budget to support its mission, including making substantial donations to nonprofit and legal service organizations, sponsoring law school events, and covering CLE registration costs for Section members, reflecting careful, purposeful stewardship of Section funds.

II. Leadership

- **Chair:** Toni Igbenoba
- **Vice Chair:** Alexa Limeres
- **Secretary:** Dorian Simmons
- **Executive Committee:** Expanded our eighteen-member executive committee (now twenty-two) during the bar year with the addition of four new stellar privacy leaders, Drew Sheridan, Keimani Harvey, Alexis Hall, and Nimi Joshi, each bringing strong leadership, creativity, and commitment to the Section.
- **Committee Development:** Launched a new Generative AI Committee to address emerging legal, ethical, and regulatory issues surrounding AI technologies.

III. Goals for the 2025–2026 Bar Year

1. **Increase section visibility and engagement** by offering flexible, innovative, and engaging programming across Georgia; this goal has been advanced through **29** programming opportunities during the 2025–2026 bar year, with **50+** attendees at each CLE event (virtual or in-person).
2. **Increase membership** by growing the number of Section members year over year; this goal is already tracking positively, with membership increasing from **922** members in July 2025 to **959** members as of April 2026.
3. **Expand LinkedIn presence** to grow professional visibility, membership engagement, and outreach; this goal has delivered measurable results, with LinkedIn membership growing from approximately **600** members in March 2025 (following PTLF 2025) to **775** members as of April 2026 (an increase of 100+).
4. **Achieve recognition as Section of the Year** through substantive programming, service, collaboration, and leadership.

IV. Year-in-Review Highlights

Continued to engage a dynamic statewide community of **900+** privacy, cybersecurity, and technology professionals, including law firm attorneys, in-house counsel, students, and new practitioners.

- Hosted **29** relevant and engaging events during the 2025–2026 bar year, reflecting our commitment to moving the Section forward, increasing statewide visibility, and consistently creating practical learning and networking content for our 900+ members to consume.
- Launched a refreshed mentorship program (November 2025), pairing mentors and mentees and supporting law students and young lawyers through career-focused programming, including the “How to Get Into” series and Happy Hours.
- Delivered **AI-focused programming** aligned with the rapid growth of AI to ensure our lawyers are knowledgeable and competent in building solutions for their organizations, including AI Series, separate 101/201/301 sessions with top speakers in AI, a roadshow on AI and legal ethics, and an AI certification training in partnership with BDO, the organization responsible for delivering Artificial Intelligence Governance Professional (AIGP) certification training for the International Association of Privacy Professionals (IAPP). The two-day CLE trained approximately sixty-five individuals.
- **40th Annual Privacy & Technology Law Forum (PTLF)**: celebrated 40 years of community building with in-person and virtual two-day programming featuring national thought leaders on privacy, cybersecurity, AI, and tech transactions. Keynotes included Leila Golchehreh (Relyance AI) on AI governance and reimagining privacy compliance and Chris Hoofnagle (UC Berkeley) on the EU’s evolving, risk-based cybersecurity framework. The Forum also honored **Vanguard Award** recipient Amanda Witt and expanded member connection through in-person networking and a virtual “coffee chat.”
- Advanced the Section’s commitment to **service and generosity**, donating a total of \$13,948 to legal and community organizations, and our section members, including \$1,500 each to the Pro Bono Partnership of Atlanta, Atlanta Volunteer Lawyers Foundation, Georgia Lawyers for the Arts, and Emory Law Public Interest Committee. Supported nonprofits through PTLF speaker-honor donations totaling \$1,360 across eight organizations, including Big Brothers Big Sisters of Metro Atlanta, Georgia Appleseed, Trees Atlanta, and others. Promoted **access to education** by covering \$6,588 in CLE registration costs for our members.
- Deepened direct community impact through hands-on service, including collaborating with **World Changers Church International** to provide free legal services and aid over **two hundred** individuals. Partnered with **Campbellton Community Gardens** to support community gardening efforts addressing food desert issues and transforming an empty lot into a food-producing green space. Supported families and community partners through a holiday gift drive with **Best Academy** and the **Boys & Girls Clubs of Metro Atlanta** and partnered with **Emerging 100 of Atlanta** to distribute care packages to Atlanta residents.
- Had a highly **collaborative year**, partnering with local bar associations across Georgia—including **Columbus, Macon**, and the **Chattahoochee Bar Association**—to host programs

outside of Atlanta and increase statewide visibility of the State Bar’s Privacy & Technology Law Section. We also began planning a May 2026 CLE in partnership with the State Bar **Young Lawyers Division**, reflecting our commitment to working with and promoting other sections and divisions.

- Strengthened communications and member engagement by refreshing the Section’s **website** and inviting members to share photos and updates for future newsletters and Section communications.
- Fostered connection and well-being through **social and wellness events**, including pickleball, happy hours, trivia, gaming nights, and book clubs—making the July 2025–July 2026 bar year one of strong momentum, innovation, and statewide engagement.

V. Events and Programming

2025 Events

- September 10 – Book Club Session
- September 25 – Flight Club Social & Networking Event
- September 27 – Campbellton Community Garden Volunteer Project
- October 12 – Pickleball Academy Social Event
- October 20 – AI Series: AI 201 Tech Talk (CLE)
- October 25 – PTLs Data Breach Competition at GSU College of Law
- October 27 – How to Get into Technology Transactions (Non-CLE)
- November 10 – How to Get into Cybersecurity (Non-CLE)
- November 11 – Virtual Privacy Trivia Night
- November 17 – How to Get into Data Privacy (Non-CLE)
- November 20 – AI & Legal Ethics Roadshow (Co-sponsored with Chattahoochee Bar Association)
- December 9–10 – AI Certification Training (CLE)
- December 11 – Annual Holiday Party & Toy Drive

2026 Events

- January 20 – A Day in the Life of an AI Lawyer (Emory University School of Law)
- January 29 – Data Privacy Day Happy Hour
- February 6 – Student Networking & Mock Interview Program
- February 12 – Diversity & Inclusion AI Discussion Dinner
- February 25 – AI Literacy Series: AI Literacy 301 (CLE)
- February 26 – Beyond the Résumé: Building an Authentic Legal Brand on LinkedIn
- March 3–4 – 40th Annual Privacy & Technology Law Institute (PTLI)
- March 6 – AI & Legal Ethics CLE (Macon, GA – with Macon Bar Association)
- March 20 – PTLs-Sponsored GSU Data Breach Competition
- April 4 – Navigating the Digital Age: Community Library Program
- April 23 – Navigating In-House Workshop (CLE)

- April 30 – Section Happy Hour
- May 29 – Augmented Practice, Unchanged Duties: Ethics & Professionalism in the Age of AI in partnership with the Young Lawyers Division (CLE) (*Formalization in Progress*)
- June – Book Club (*Formalization in Progress*)

Real Property Law Section 2025-2026 Annual Report

Section Chair: Tenise C. Chung

Year In Review

The 2025-2026 was a year of adapting to changes for the Real Property Section, including adapting to the new CLE requirements adopted January 1, 2026. We sponsored the following CLEs this year:

1. Commercial Real Estate Seminar on November 13, 2025, with one hundred attendees
2. Residential Real Estate Seminar on January 21, 2026, with ninety-four attendees
3. Title Standards Seminar on February 12, 2026, and February 26, 2026, totaling 191 attendees over the 2-part event
4. Upcoming Real Property Institute May 7-9, 2026

The Section also co-sponsored the upcoming May 12, 2026, Leasing Seminar with the Franchise & Distribution Law Section.

This year, the Real Property Institute changes from the traditional 12-hour format to 9 hours, including 1 hour of Ethics and 1 hour of Professionalism credit. This format will satisfy half of the Bar's biennial requirement, while giving attendees more time to enjoy the venue and network with fellow attorneys. The Institute is also offering a new breakout session where attendees can bring problem files to discuss with experts. On the social side of the Institute, the Section is adding a bike-riding option to our annual 5K and a new pickleball tournament to complement our already existing Golf Tournament. Following the conclusion of the Institute, a family friendly pool party will be held to close out the event.

In addition to the seminars, the Section also held our annual Banquet on November 13 to honor our speakers from the Commercial Seminar, as well as recipients of our five law school student scholarships. These scholarships are awarded to outstanding Georgia law school 2nd and 3d year students who intend to pursue a career in Real Property law following graduation. The Section also co-sponsored a joint happy hour networking event with the Atlanta Real Estate Bar on October 29th.

Throughout the year, our Section's Executive Committee subcommittees have actively engaged in their respective duties. The sub-committees were:

1. Commercial Real Estate;
2. Communication;
3. Ethics and Professionalism;

4. Legislative and Governmental Relations;
5. Litigation;
6. Pro Bono Initiatives;
7. Recognition;
8. Residential Real Estate;
9. Real Property Law Institute; and
10. Title Standards.

The Communication subcommittee continued the push to expand our presence on social media, and the section contracted with a new liaison to assist in efforts to increase engagement from the Section members. This subcommittee also disseminated newsletters to the section on a quarterly basis with judicial updates, upcoming CLE opportunities, and other items of interest to our membership.

The Legislative and Governmental Relations subcommittee spent a considerable amount of time researching proposed bills to identify those that affect real property and sent regular updates related to these items to the Section membership. This subcommittee also coordinated with the State Bar's legislative staff regarding proposed bills, including proposing our own bill, which gained Bar Sponsorship, to expand access to Special Masters. Although this proposed Bill did not pass through this session, the Section will continue to push for this item on next year's agenda. Lastly, this subcommittee monitored a proposed Formal Advisory Opinion on third-party funds handling in real estate closings.

The Litigation subcommittee reported on appellate decisions affecting real property, including cases on equitable subrogation, equitable partition, and homeowner's association covenants.

The Recognition subcommittee oversaw the nomination and awarding of scholarships to law school students from each of the 5 Georgia law schools in the amount of \$2,000.00 each. This subcommittee also oversees the nomination and awarding of the George A. Pindar Award, recognizing lifetime service to the Real Property Section.

The Section continued its push to attract new attorneys to the Section. The Section sponsored a table at the Beginning Lawyer's Transition into Law Practice CLE to discuss section offerings to new lawyers.

The Section also continued its commitment to supporting and assisting Georgia residents who experience challenges to accessing legal assistance. The Pro Bono Initiatives subcommittee awarded each of the following organizations with donations to support their efforts:

1. Middle Georgia Justice- \$6,500

2. Pro Bono Partnership of Atlanta- \$3,100
3. Atlanta Volunteer Lawyers Foundation- \$3,100
4. DeKalb Pro Bono- \$2,100
5. Georgia Heirs Property Law Center, Inc.- \$2,100
6. Atlanta Legal Aid Society, Inc.- \$2,100

Further, the Section awarded stipends to six attorneys working at non-profits or public interest organizations so that they could attend the upcoming Real Property Law Institute. The overall goal of these initiatives is to encourage attorneys to enter the real property field and become involved in the Section and State Bar. As the largest section of the Bar, the Real Property Section continues to strive for unparalleled education offerings, networking opportunities and support for our members, as well as providing assistance to Georgia residents needing access to our services.

INDIVIDUAL COMMITTEE REPORTS:

Commercial Real Estate Sub-Committee

Co-Chairs: Kyle J. Levstek and Paula Rothenberger

This committee is responsible for overseeing the annual commercial real estate seminar, which was held on November 13, 2025, at the State Bar of Georgia headquarters in Atlanta. (Details under “Seminars”)

Communication Sub-Committee

Chair: Kelsea Laun

In 2025, the communications sub-committee fulfilled its goal of keeping section members well-informed of section-sponsored events and industry-related news through social media posts, newsletters, and listserv communications. Midway through the year we engaged the services of a new social media manager who assists with the creation and distribution of our updates across LinkedIn, Facebook, and Instagram, in furtherance of our communication efforts. Our listserv remains active with approximately ten emails and responses per day, which is reflective of the collegiality within our membership.

We continued efforts to engage with other sections of the State Bar and Atlanta Bar, co-hosting mutually beneficial networking events throughout the year.

2025 saw participation by volunteers working directly with the communications sub-committee helping to plan networking events and manage the creation and distribution of information to our members. One of these volunteers will be serving as a full member of the Executive Committee beginning in 2026.

Legislative and Governmental Relations Sub-Committee

Chair: Matthew F. Totten

Committee Member: Joey Strength

During the recently concluded second year of the two-year legislative session of the Georgia General Assembly, the Legislative Subcommittee of the Real Property Law Section collaborated with many attorneys, realtors, title company representatives, as well as representatives of many interest groups including the Georgia Association of Realtors, Georgia Real Estate Closing Attorneys Associations, and the Georgia Commercial Real Estate Coalition.

Notably, the Subcommittee – in consultation with members of the section – drafted proposed legislation to expand the potential pool of special masters within the statutory quiet title process. This bill, if passed, would authorize special masters to be appointed within a federal judicial circuit for all statutory quiet title matters, greatly expanding the potential pool of qualified special masters and increasing accessibility and speed of quiet title proceedings throughout the state.

This proposed legislation was endorsed by several State Bar committees and was ultimately part of the State Bar’s legislative package this most recent session. While the bill (originally introduced as HB 1042 and, post-Cross Over Day, HB 1344) was not passed this session, it was well-received by many legislators and we anticipate continued favorable reception in the upcoming two-year legislative session.

Additionally, the Subcommittee continued to serve as an educational resource to the section, regularly updating section members of pertinent legislative actions throughout the session, as well as a resource for legislators as they considered bills relating to the practice of real property law in Georgia.

While the State Bar provided regular legislative updates to its membership, we were able to provide regular updates during the session to the section’s membership.

Litigation Sub-Committee

Chair: Larry Evans

Our Litigation sub-committee periodically informs the board and section on any pending or completed suits during the year. Two of the most recent cases are below.

- *Estate of John Lewis, Sr.*, No. A25A1921 (Ga. Ct. App. December 19, 2025)
 - *General Overview*: This case involves a dispute between the estate of John Lewis, Sr. and Montra McKenzie (“McKenzie”) who operated a non-profit charity called Veterans Excelling for Life Foundation (“VELF”). This charity assisted veterans in transitional housing situations. John Lewis, Sr. (“Lewis”) owned property that he rented to McKenzie and VELF. At some point after Lewis passed away in 2020, McKenzie stopped making rental payments and Lewis’ estate (the “Estate”) filed a

dispossessory action. McKenzie answer and proffered a contract she had entered into with Lewis which purported to transfer the property to her and VELF upon his death. She also filed counterclaims for specific performance, declaratory judgment, and attorney fees.

- McKenzie filed a motion to compel and for sanctions after the Estate failed to respond to discovery. The Estate failed to appear at a subsequent hearing. The trial court dismissed the dispossessory and instructed McKenzie to brief her counterclaims. In her brief, McKenzie argued that the property transferred to her upon Lewis' death under the express terms of the contract and as a transfer on death deed under O.C.G.A. §44-17-2. She also maintained that the contract satisfied all requirements for a will. In support of her position, she submitted an affidavit from one of the witnesses to the contract attesting that she witnessed the parties sign the document. The Estate did not move to dismiss the counterclaims, respond to the brief, or submit any evidence in response.
 - The trial court treated the brief as a motion for summary judgment and found that the contract was void because it was indefinite, contained errors and typographical mistakes, and used different font styles. The trial court also noted a dispute over the amount of the rent with the contract showing \$750 per month, but the dispossessory listing \$1500 per month. The trial court also struck the transfer on death provision in the contract for failure to adhere to the requirements of § 44-17-2. Lastly, the trial court found that McKenzie failed to make rent payments totaling \$42,750 and ordered McKenzie to vacate the property and deposit the arrearage into the Court registry if she wanted to remain in the property during the pendency of the appeal. McKenzie appealed arguing that the trial court erred in determining that the contract was void and in ordering her to vacate the property when the dispossessory action was no longer pending and the Estate submitted no evidence.
 - *Holding*: The Court of Appeals found that the trial court erred by ordering McKenzie to vacate the property and pay the alleged arrearage into the registry of the Court. The Court of Appeals also concluded that there remains a question of fact as to the validity of the contract and remanded with direction that the trial court apply the proper rules for contract formation. As to the trial court's finding that the transfer on death provision should be stricken from the contract, the Court of Appeals noted that the statute went into effect after Lewis' death and instructed the trial court determine whether §44-17-2 applies retroactively.
- *Berryhill v. Lopez*, 2026 WL 42793 (Ga. Ct. App. Jan. 7, 2026)
 - *General Overview*: This case involves a dispute over title to real property in Gwinnett County and the enforceability of a first-position security deed which allegedly lacked consideration. The property was jointly owned by Chandani Patel

and Roshni Patel. In August of 2014, Chandani and Roshni executed an unsecured promissory note in the amount of \$187,151 in favor of Sanderwala, LLC (the “Unsecured Loan”). On September 3, 2018, Chandani executed a promissory note for \$240,000 in favor of Sanderwala, LLC (the “First Note”). The First Note was secured by a first-position security deed on the property (the “First-Position Deed”) which was recorded on October 9, 2018. On September 6, 2018, Chandani executed a second \$240,000 note in favor of Sanderi Productions, LLC (the “Second Note”), which was secured by a second-position security deed (the “Second-Position Deed”). That deed was recorded a few minutes after the First-Position Deed. In September of 2020, Appellee Michael Lopez purchased an interest in the property at a foreclosure sale after Sanderi Productions, LLC foreclosed on the Second-Position Deed. In April of 2021, Sanderwala, LLC assigned its First-Position Deed to Appellant Niveda Dave. Dave then sought to foreclose under the First-Position Deed. Lopez filed this action seeking to quiet title and enjoin the foreclosure. Lopez alleged that the First Note and First-Position Deed were void because the underlying debt lacked consideration.

- Although Lopez obtained a temporary restraining order preventing the foreclosure, Dave foreclosed anyway in July of 2021 and conveyed the property interest to Appellant Tyler Berryhill through a deed under power. The trial court granted Lopez’s motion for partial summary judgment and concluded that the First Note was void for lack of consideration because no money changed hands when it was executed. Therefore, the First-Position Deed and Berryhill’s deeds under power were unenforceable. Dave and Berryhill appealed.
- *Holding*: The Court of Appeals reversed. The Court held that the trial court erred in ruling as a matter of law that the First Note and First-Position Deed were void for lack of consideration. The Court emphasized that promissory notes are unconditional promises to repay and cannot be invalidated by imposing conditions not apparent on the face of the note. Both the Unsecured Loan and the First Note contained clear promises to repay and were valid debts on their face. The Court also explained that even if no new money was exchanged in 2018, the First Note could still be supported by consideration because it was issued as security for an antecedent obligation. The record included evidence that the 2014 Unsecured Loan was “converted to a secured loan” through the First Note and First-Position Deed. Under OCGA § 11-3-303(a)(3), no new consideration is required where an instrument is given in payment of, or as security for, a pre-existing debt. Because there was evidence that the First-Position Deed secured an earlier valid loan, the trial court erred when it ruled that the deed was void. The Court noted that its decision was narrow and did not address Lopez’s other claims. It also declined to

reach Berryhill's argument that he was a bona fide purchaser because the trial court had not ruled on that issue.

Pro Bono Initiatives Sub-Committee

Sub-Committee Chairs: Jennifer Rentenbach and Ellen Smith

During the 2025-2026 session, the Pro Bono Sub-Committee of the Real Property Law Section of the State Bar of Georgia contributed to the Section through the following efforts.

Donations and Pro Bono Opportunities:

The Pro Bono Sub-Committee reached out to a number of non-profit organizations that directly or indirectly provide services to indigent Georgia individuals and families. Donations totaling \$20,000 were distributed among six non-profit organizations throughout the state. These funds will support Georgia families in various real property related legal matters, including, landlord/tenant issues, foreclosure prevention assistance, tangled title and heirs property issues, home purchase and ownership education, and preserving property rights through estate planning. Pro bono service opportunities with each of these non-profit organizations will be highlighted in an upcoming RPLS newsletter.

RPLI Public Interest Scholarships:

The Pro Bono Sub-Committee accepted applications from nine members of the Georgia Bar for public interest scholarships that include the 2026 Real Property Law Institute registration fee, three nights hotel accommodations at the conference hotel, and a small travel stipend. The recipients of six scholarships practice in a public interest area with an emphasis on real property law matters either through public service or are employed by a non-profit organization.

Recognition Sub-Committee

Co-Chairs: Crystal C. Baker and Josh Huckaby

The Recognition sub-committee continued to focus on ensuring that bar members understand the work that our section does. In addition, we continued recognizing individuals for their legal efforts that focus on real property law through the Pindar Award and through law school scholarships.

Pindar Award: The George A. Pindar Award is granted by our section to a member of the section whose lifetime contribution has been significant to the real estate bar. The main objective of the award is to honor a member who unselfishly gives of him or herself the benefit of the bar. For 2025, the Pindar award winner was J. Michael Campbell.

Mike teamed up with Camille Brannon in 1998 to form what is today known as Campbell & Brannon. Mike has graciously served as a mentor to many attorneys and paralegals over the 50 years in which he has practiced. He is simply known as the man who always has an answer, and

because of his knowledge, his practice is focused on all matters related to real estate. Mike is a founding member of the Georgia Real Estate Closing Attorneys Association and a member of the State Bar of Georgia. He served as President of GRECAA from 1992 to 1995 and on the Vanderbilt Law School Board of Advisors from 2008 to 2014. Mike has been a speaker and panelist at a number of seminars throughout his career.

Scholarships: For the 2025-2026 year, the section awarded scholarships to students from all 5 Georgia law schools. At our annual awards dinner, the section recognized these students. The awarded students were Kyndall Smith (Emory University School of Law), Brantley Swindell (Mercer University School of Law), Keira Waites (Georgia State College of Law), Brooke Raniere (University of Georgia School of Law), and Yajaira Vanegas (Atlanta's John Marshall Law School). Each recipient received a \$2,000 scholarship in recognition of their academic achievement and commitment to the future of real property practice. The Section is proud to support these outstanding students as they pursue careers in real estate law.

Residential Real Estate Sub-Committee

Co-Chairs: Tamara Brooks & Kirsten Howard

The Residential Sub-Committee hosts an annual Residential Seminar to provide CLE hours to members of the State Bar. (Details under "Seminars")

Real Property Law Institute Sub-Committee

Chair: Beth Jones

This committee oversees the annual Real Property Law Institute which is held in May every year. (Details under "Seminars")

Title Standards Sub-Committee

Co-Chairs: Aimee Latourette and Susan McNamara

The Title Standards committee's activities for the year involved hosting a two-part title standards seminar which included a networking event. (Details under "Seminars")

In addition to the annual CLE, the committee worked on reviewing and revising the Title Standards. Updates will be presented to the membership of the section at our annual meeting in May.

SEMINARS

RPLS sponsored the following CLE seminars for members of the Section and State Bar:

1. Commercial Real Estate Seminar on November 13, 2025.
2. Residential Real Estate Seminar on January 21, 2026.
3. Title Standards Seminar Parts I and II on February 12 and February 26, 2026.

4. The Real Property Law Institute on May 7-9, 2026.

Commercial Real Estate Seminar

Approximately 100 veteran attorneys, young lawyers, paralegals, and legal assistants attended the Commercial Real Estate Seminar. The seminar included five hot topics in real estate law: foreign ownership, layered capital stacks, FINCEN regulations, fraud trends and distressed assets as well as an ethics component. The seminar concluded with an annual banquet to honor the speakers at the seminar and the recipients of the law school scholarship winners.

Residential Real Estate Seminar

The Residential Real Estate Seminar included such topics as transfer on death deeds, expert witnesses in litigation cases and FINCEN regulations, as well as an underwriting panel from leading title insurance companies and an update on the economy. The seminar had 99 attendees.

Title Standards Seminar

This year's CLE was presented in two segments, held on February 12 and February 26 at the State Bar of Georgia, and included presentations on a variety of topics applicable to both residential and commercial real estate practitioners. The February 12 session began with breakfast, then Aimee LaTourette presented "Affidavits of Truthiness" on the dos and don'ts surrounding the use of affidavits of real estate transactions. Patrick Hagler followed with a presentation on common underwriting issues in title and how to resolve them, and Matt Mashburn closed out the morning with a presentation on the *Groundfloor* decision and its potential impacts on Title Standard 2.2. The February 26 session was held in the afternoon and began with a timely presentation from Kenny Stroud on the ethical use of artificial intelligence in title. LaShay Callaway then updated attendees on the current law on transfer on death deeds, and the status of pending legislation on the topic. Carol Clark ended the day with a presentation on ethics in title entitled "What is Your Name," in which she dove into the intersection of the Rules of Professional Conduct and the Title Standards. The seminar had 91 and 100 attendees respectively over the two-day event. The seminar was provided in person and virtually. A social hour followed the program, giving attendees the chance to network and further discuss the topics. The CLE was presented both in person and virtually, so that section members across the state could have the opportunity to attend.

Real Property Law Institute

The Real Property Law Institute will be held at Sawgrass Marriott in Ponte Vedra Beach, Florida. The Institute will include a variety of residential and commercial presentations which meet the annual requirements for CLE hours for attendees. In addition to the seminars, attendees will have the opportunity to network, play golf and pickleball, and run in the annual 5k.

School & College Law Section 2025-2026 Annual Report

Section Chair: Randall Farmer

This letter is the School and College Law Section's annual report for 2025-2026. The Section held its last Annual Meeting in August 2024, and Section officers remained in office. The undersigned remained Chair of the Section, Sonya Sallis, Esq., remained as Vice Chair, and Andrea Jolliffe, Esq., remained as Treasurer. The 2024 Annual Meeting also included two hours of presentations: a Legal Update on Recent Caselaw Impacting Educational Institutions presented by me, and the ADA regulations by Dan Murphy. In January 2025, the Section sponsored a two-hour CLE on the First Amendment presented by Frank LoMonte. The leadership team is having ongoing discussions of future events as well as the scheduling of the upcoming annual meeting. We meet on September 15th, 2026, to appoint/elect new officers and have two presentations. Sonya Sallis has agreed to become the Chair. Jenna Rubin has agreed to become the Vice Chair. The leadership team is trying to fill the Treasurer position. Currently, the Section's budget is in excellent condition, and the Section has 304 members.



MEMORANDUM

To: ICLE Advisory Board Members
From: Julia Neighbors, ICLE Director
Date: May 5, 2026
Re: Institute of Continuing Legal Education

I am pleased to present the following report for your review of the Institute of Continuing Legal Education's activities.

ICLE cannot 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 (February 15, 2026 – April 30, 2026)

- Bar Center and Off Site Programs
 - Fundamentals of Health Care Law
 - Medical Malpractice Bootcamp
 - Beginning Lawyers
 - Trial and Error
 - Premises Liability
 - Defense of Drinking Drivers Institute
 - Professionalism, Ethics and Malpractice
 - Restrictive Covenants and Trade Secrets
 - Special Needs Trusts
 - Secured Lending
 - Aviation Law
 - Plaintiff's Personal Injury
 - ADR in the Workers' Compensation Arena
 - Litigation Under 42 USC Section 1983
 - Succeeding in Family Law Hearings and Trials
 - Post Judgment Collection
 - Georgia Auto Insurance Claims
 - Abusive Litigation
 - Professional and Ethical Dilemmas in Litigation

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Fax 229-382-7435

- Jury Trials in Divorce
- Zoning Law
- Institutes and Off-Site Programs
 - General Practice & Trial Institute – March 12-14, 2026 –Hilton Head, SC
 - Basic Fiduciary Law 101 – March 18, 2026 – Macon, GA
 - Agriculture Law – March 20, 2026 – Macon, GA
- On Demand Programs
 - 12,842 on demand products purchased by 8,597 customers (July 1, 2025 – March 31, 2026)
 - 7,246 on demand products were purchased between February 1 – March 31, 2026
 - 14,437 on demand products purchased by 9,295 customers (April 1, 2025 – March 31, 2026)

Writing Series Webinars

ICLE partnered with Ryan Standill, Founder of Write to Excite, to deliver three one-hour webinar CLE sessions on March 3, March 10, and March 24

- Clarity in Legal Writing- March 3, 2026
- Email Best Practices for Legal Professionals – March 10, 2026
- Using AI to Accelerate Your Writing – March 24, 2026

Spring 2026 Complimentary CLE for Members

- ICLE offered a six-credit hour CLE that included 1 professionalism hour and 2 ethics hours on April 30, 2026, that was held in-person at the Atlanta Bar Center, as well as live-streamed
 - In-person registrants paid no registration fee, while live-stream attendees paid a nominal fee of \$24 to cover the MCLE fee
- The CLE will be available as a rebroadcast to Bar members for a nominal fee of \$24 on the following dates:
 - Wednesday, May 20, 2026
 - Wednesday, July 29, 2026
 - Wednesday, August 19, 2026
 - Wednesday, September 23, 2026
 - Wednesday, October 28, 2026

Upcoming Off-Site Programs and Institutes (as of May 5, 2026)

- 2026 Real Property Law Institute – May 7-9, 2026 – Ponte Vedra Beach, FL
- 2026 Family Law Institute – May 29-31, 2026 – Fernandina Beach, FL
- Annual Meeting CLEs

- BACK BY POPULAR DEMAND: BOUNDARIES PART II: Because Burnout Isn't in the Rules of Professional Conduct: Practical Strategies for Lawyers to Protect Their Time, Mental Health and Professional Integrity – June 11, 2026
- War Stories and Georgia Evidence Update – June 11, 2026
- Constitutional Crossroads: Immigration, Protest, and Electoral Integrity in Modern America – June 12, 2026
- 60th Annual Fiduciary Law Institute – July 23-25, 2026 - Fernandina Beach, FL
- 2026 Institute for City and County Attorneys – September 10-11, 2026 – Athens, GA
- 2026 Take Charge! Solo and Small Firm Conference – September 17-18, 2026 – Atlanta, GA
- 2026 Workers' Compensation Law Institute – October 22-23, 2026 – Jekyll Island, GA
- 2026 Insurance Law Institute – October 22-24, 2026 – Ponte Vedra Beach, FL (contract pending)
- 2026 Corporate Counsel Institute – Dec. 10-11, 2026 – Atlanta, GA

Program Chair Support and Training

ICLE will conduct a Program Chair Orientation later this summer, to provide essential support and guidance to both new and returning program chairs. The orientation provided our volunteer leaders with the tools and information necessary to deliver high-quality educational programming. We also continue to offer one-on-one meetings with new and returning chairs who want a deeper dive into program planning.

In addition to the nuts and bolts of CLE program planning, new program formats will be discussed (9 hours v. 12 hours for institutes) as well as the timing of programs (scheduling programs during a two-year compliance period).

On-Demand Learning Expansion (One Hour Spotlight Programs)

We are continuing to build the catalog of one-credit hour on-demand programs which now includes 10 programs primarily focusing on ethics and professionalism from the Real Property Institute, Georgia Auto Insurance Claims Law, Agriculture Law, Defense of Drinking Drivers Institute, Corporate Counsel Institute, Fiduciary Law Institute, VA Accreditation and Update on Georgia Law. We will continue to expand the on-demand catalog by extracting key content from our full-length programs, providing members with flexible, targeted learning opportunities.

Innovation in Program Delivery

Beyond our established lecture and panel discussion formats, we are witnessing increased adoption of interactive methodologies, including breakout sessions and audience engagement activities. ICLE actively encourages program chairs to incorporate these dynamic formats while we continue exploring innovative approaches to enhance educational content delivery and member engagement.

To: Board of Governors
State Bar of Georgia

From: John G. Marty
UPL Director

Date: May 5, 2026

Re: UPL Update

Operating under the Office of the General Counsel, the Unlicensed Practice of Law (UPL) Department acts at the direction of a statewide Standing Committee and ten District Committees representing each of the judicial districts in Georgia. UPL committees are appointed directly by the Supreme Court of Georgia and are charged with the consideration of complaints received, processed, and thoroughly investigated by the UPL Department. We are grateful to all our attorney and nonattorney volunteers who serve on these important committees.

Over the past year, the department has continued to strengthen its investigative capacity and operational effectiveness. We welcomed two new investigators and a new Assistant Director, additions that have contributed to our continued commitment to prompt and thorough responses. Alongside these team developments, we have streamlined several internal procedures, resulting in a more efficient workflow and markedly faster investigative turnaround times. Our district committees meet and/or receive updates on a quarterly basis, ensuring that all matters are reviewed, evaluated, and addressed without unnecessary delay.

An online complaint portal may be found on the Bar's website under the UPL program page: <https://www.gabar.org/programs/unlicensed-practice-of-law>. Please do not hesitate to contact our office if we may ever be of assistance.

Attached please find statistics from our most recent reporting period for your review.

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STATE BAR OF GEORGIA INVESTIGATIONS REGARDING
THE UNLICENSED PRACTICE OF LAW

Reporting period May 1, 2025, through April 30, 2026

Informal Investigations Initiated in 2025	232
Informal Investigations Initiated in 2026	67
Informal Investigations Pending	24
Formal Investigations Initiated	124
<i>Nature of Formal Investigation:</i>	
Nonlawyer	108
Disbarred/Suspended/Inactive Lawyer	10
Domestic/Foreign Lawyer	6
<i>Source of Formal Investigation:</i>	
Lawyer	44
State Bar of Georgia	39
Public	35
Judge	5
State Agency	1
<i>Judicial Districts:</i>	
District 1	4
District 2	3
District 3	3
District 4	12
District 5	50
District 6	10

District 7	20
District 8	3
District 9	13
District 10	6
Formal Investigations Closed	87
<i>Disposition:</i>	
Subject Agreed to Comply	58
Subject Referred to Prosecutor	11
Further Action Unnecessary	7
Subject Not Found	6
Subject Warned of Investigation	3
Entity Out of Business	2
Formal Investigations Pending	66

State Bar of Georgia- Coastal Georgia Office Statistics

2025-2026 Fiscal Year

Month	Client/Misc Meetings	Depositions	Mediation/ Arbitration	Walk-ins		CLE Training	Total Events	Total Number of People Using Facility	Telephone Engagement ^c	
				Attorney ^A	Public ^B				Inbound	Answered
Jul-25	8	6	2	1		17	106	101	83	
August	2	4	2	2	1	11	70	100	92	
September	6	4	3	2	2	17	90	51	48	
October	10	4	2			16	72	81	65	
November	5	1	4	2	2	13	45	28	25	
December	3	2	5	2	2	13	66	32	30	
Jan-26	5		6	1	2	15	60	37	35	
February	2	1	1		1	5	46	44	35	
March	3	2	2	3		10	40	63	56	
April	5		4		1	10	73	59	58	
May										
June										
Year Total:	49	24	31	9	9	127	668	506	527	

Attorney Locations: Savannah, Atlanta, Duluth, Hinesville, Rincon, Brunswick, Columbus, Vidalia, Dunwoody, Marietta, Macon, Valdosta, Augusta, Milledgeville, Alpharetta, Tucker, Peachtree Corners, Gainesville, Statesboro, Richmond VA, Dallas TX, Lancaster SC, New Orleans LA, Browns Summit NC

Definitions:

^A Attorney Walk-in: An attorney who comes to the office without a prior appointment to utilize office space or resources, including but not limited to copies, workspace, phone calls, or meetings.

^B Public Walk-in: A member of the public who comes into the office without an appointment to ask questions or request information about legal services or resources, such as attorney names, grievances, fee arbitration, or general legal inquiries.

^C Inbound: A count of all calls received at the office, answered and missed.

Answered: A call that is picked up and the interaction is 45-seconds or longer. The 45-second call length criterion is intended to exclude automated and telemarketing calls.

State Bar of Georgia - South Georgia Office Statistics

July 2025 - April 2026

Month	Client & Misc Meetings		Depositions	Mediation/ Arbitration	Walk-ins		CLE Training	Total Events	Total Number Using Facility	Telephone Engagement ^C (Inbound/Answered)
	Misc	Client			Attorney ^A	Public ^B				
July	2	1	11	1	0	5	0	19	71	87/63
August	1	0	4	0	0	6	0	11	26	73/47
September	0	2	2	5	1	5	0	13	47	84/57
October	1	0	5	0	2	8	0	16	49	74/57
November	4	7	7	0	1	2	0	14	49	55/38
December	0	3	3	1	0	3	0	7	18	86/65
January	2	0	0	1	0	14	1	18	35	91/60
February	2	1	1	4	2	9	0	18	61	62/48
March	2	0	0	4	0	8	0	14	37	65/52
April	3	1	1	1	0	8	0	13	34	62/58
May										
June										
Year Total:	17	34	34	17	6	68	1	143	427	612/435

Attorney Locations: Adel, Albany, Alpharetta, Ashburn, Atlanta, Brunswick, Cedartown, Cobb, Columbus, Cordele, Decatur, Johns Creek, Jonesboro, Homerville, Lawrenceville, Leesburg, Lenox, Macon, Marietta, Moultrie, Norcross, Ocala, Pooler, Savannah, Sylvester, Thomasville, Tifton, Valdosta, Vienna, Waycross

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Media Report

PUBLISHED ARTICLES 2025-2026			Headline	Circulation
Date	Newspaper			
6/10/2025	Rome News-Tribune		Twyman Installed as 63rd President of State Bar of Georgia	6,515
6/15/2025	Marietta Daily Journal		William C. Gentry Installed as President-Elect of State Bar of Georgia	9,821
6/19/2025	Americus Times-Recorder		Judge Rucker Smith reelected to Board of Governors of State Bar of Georgia	1,252
6/19/2025	Coastal Courier, Hinesville		McCullough reelected to Board of Governors of State Bar of Georgia	3,100
6/23/2025	Albany Herald		Thomas Duck elected to State Bar's Board of Governors	3,763
6/25/2025	Monroe County Reporter, Forsyth		Adams reelected to Georgia Bar Board of Governors	3,788
6/30/2025	Jackson Herald, Jefferson		King reelected to State Bar of Georgia board	3,307
7/1/2025	Metter Advertiser		Cadle Re-elected to Board of Governors of State Bar of Georgia	1,347
7/2/2025	Fayette County News, Fayetteville		Kreuziger Reelected to State Bar of Georgia Board of Governors	1,694
7/2/2025	Cordele Dispatch		Craig Cotton reelected to Board of Governors of State Bar of Georgia	1,590
7/2/2025	Forest-Blade, Swainsboro		Jerry Cadle Re-Elected to Board of Governors of State Bar of Georgia	3,963
7/2/2025	Times, Gainesville		Opinion: Georgia legal community mourns loss of John Cromartie	26,000
7/3/2025	Clayton Tribune		Judge Irvin re-elected to Board of Governors of State Bar of Georgia	4,306
7/8/2025	Waycross Journal-Herald		Former Chief Justice Boggs receives award	4,940
7/10/2025	Gwinnett Daily Post, Lawrenceville		State Bar of Georgia honors Ashley Stinson with Hines Child Advocacy Aw	63,740
7/10/2025	Rome News-Tribune		Jackson reelected to State Bar of Georgia board	6,515
7/16/2025	Miller County Liberal, Colquitt		William Shingler Elected to Board of Governors of State Bar of Georgia	1,500
7/16/2025	Statesboro Herald		Troy Marsh re-elected to Board of Governors of State Bar of Georgia	4,429
8/1/2025	Champion, Decatur		Local attorneys elected to bar board	413
9/17/2025	Barrow News-Journal, Winder		Congratulations to new Barrow County Solicitor General Kyle Thompson	2,038
9/19/2025	Times-Georgian, Carrollton		Congratulations to new State Court Judge Kevin Drummond	2,176
10/9/2025	Clayton News, Jonesboro		Georgia legal community mourns loss of Judge Michael Baird	643
11/26/2025	Coastal Courier, Hinesville		State Bar congratulates Jones on honor	3,100
12/17/2025	Jackson Herald, Jefferson		Congratulations to GEFA Executive Director Trey Bennett	3,169
2/7/2026	Times, Gainesville		State Bar remembers Weymon Forrester, influential Gainesville attorney	17,906
2/11/2026	Augusta Chronicle		Letter: Kristi Cornell named Superior Court judge for Augusta circuit	5,966
4/22/2026	Upson Beacon, Thomaston		Congrats to New Superior Court Judge Matt McCord	7,905
			TOTAL CIRCULATION	194,886

