



State Bar
of Georgia

BOG BOARD BOOK

2026 Fall Meeting
Hilton Head Island, SC

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



State Bar of Georgia

314th BOARD OF GOVERNORS MEETING

Saturday, October 17, 2026

9 a.m. – 12 p.m.

The Westin Hilton Head Island Resort & Spa

Hilton Head Island, SC

Dress: Business Casual

AGENDA

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
1) ADMINISTRATION		
a) Welcome and Call to Order	William C. "Bill" Gentry President	
b) Pledge of Allegiance	Kelsie J. Mattox YLD Secretary	
c) Invocation	James D. Hyder Jr. SLD Treasurer	
d) Recognition of Special Guests.....	Bill Gentry	
e) Future Meetings Schedule.....	Bill Gentry	1
f) Roll Call	Norbert D. "Bert" Hummel IV .. Secretary	3
2) ACTION		
a) Board of Governors Meeting Minutes	Bert Hummel	
(1) June 12, 2026		8
(2) June 13, 2026		12
b) Proposed Rules Changes	Russell D. Willard..... General Counsel	18
(1) Rule 4-211. Formal Complaint; Service.....		21
(2) Rule 4-215. Powers and Duties of the State Disciplinary Review Board		22
(3) Rule 4-216. Proceedings Before the State Disciplinary Review Board		23
(4) Rule 4-221. Hearing Procedures		27

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d) Proposed Changes to Sections Bylaws	Bill NeSmith	32
	Deputy General Counsel	
(1) Elder Law Section		34
(2) Child Protection and Advocacy Section		41
e) Appointments to the Commission on	Bill Gentry	
Continuing Lawyer Competency (CCLC)		
(1) Reappointment of LaToya Williams (2029)		
(2) Appointment of Christopher Sutton Connelly (2029)		
 3) LEGISLATION		
a) Advisory Committee on Legislation	Jenn McNeely	
New Legislative Proposals (action)	Director of Governmental Affairs	
(1) Support for a Resolution of the General Assembly Recognizing		
April 2027 as Legal Professionalism Month – <i>Professionalism Committee</i>		
b) Legislative Update	Jenn McNeely	
 4) INFORMATIONAL REPORTS		
a) President’s Report	Bill Gentry	
b) Treasurer’s Report	Shiriki C. Jones	47
	Treasurer	
c) Young Lawyers Division Report	Virginia C. Josey	106
	YLD President	
d) Senior Lawyers Division Report	Elizabeth “Betsy” Hodges ...	113
	SLD President	
e) Executive Director’s Report	Damon Elmore	
	Executive Director	
f) Access to Justice Project:	Hon. Ana Maria Martinez ...	115
Unlocking Georgia’s Pro Bono Potential	Chair, Access to Justice Committee	
 5) WRITTEN REPORTS		
a) State Bar of Georgia Annual Report		122
b) Institute of Continuing Legal Education Report		184

<u>Topics</u>	<u>Presenter</u>	<u>Page No.</u>
c) Law Practice Management Report		186
d) Chief Justice’s Commission on Professionalism Report.....		190
e) Media Report		201

6)CLOSING

- a) Old Business Bill Gentry
- b) New Business Bill Gentry
- c) Announcements Bill Gentry
- d) Executive Session Bill Gentry
- e) Remarks / Q&A / Comments / Suggestions
- f) Adjournment



Future Meetings Schedule

Executive Committee

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, 2027	Executive Committee Meeting 12 – 4 p.m. Local Affinity Bar Association Reception 5:30 – 7:30 p.m. St. Nicholas Hotel, Albany, GA (Contract Tentative)
April 29, 2027	Executive Committee Meeting 12 – 4 p.m. Local Affinity Bar Association Reception 5:30 – 7:30 p.m. Hotel Indigo, Columbus, GA (Contract Tentative)
August 25 – 27, 2027	Supreme Court/Executive Committee Joint Meeting The Ritz-Carlton Reynolds, Lake Oconee, GA (Contract Tentative)

Board of Governors

Midyear 2027	January 14 – 16, 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
Annual 2029	May 31 – June 3, 2029	Omni Amelia Island Resort Fernandina Beach, FL
Annual 2030	June 6 – 9, 2030	Omni Amelia Island Resort Fernandina Beach, FL

(Updated 9/15/26)

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



State Bar of Georgia

Future Meetings Schedule

Young Lawyers Division

Midyear 2027	January 14 – 16, 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
Annual 2029	May 31 – June 3, 2029	Omni Amelia Island Resort In conjunction with the State Bar Annual Meeting Fernandina Beach, FL
Annual 2030	June 6 – 9, 2030	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	October 20 – 22, 2027	Four Seasons Hotel, Baltimore, MD

(Updated 9/15/26)

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

Board of Governors Attendance Record

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

To request an excused absence, please email Secretary Bert Hummel (bert@hummeltriallaw.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

	06-2025 Friday Sawgrass	06-2025 Saturday Sawgrass	10-2025 Rising Fawn	01-2026 Atlanta	03-2026 Greensboro	06-2026 Friday Amelia Island	06-2026 Saturday Amelia Island	
William T. Davis	•	•	•	•	•	•	•	William T. Davis
Howard Mark Delashmit	•	•	•	•	•	•	•	Howard Mark Delashmit
Joseph W. Dent	•	•	•	•	•	•	•	Joseph W. Dent
Miguel Angel Dominguez	•	•	•	•	•	u	•	Miguel Angel Dominguez
Thomas V. Duck III	•	•	•	u	•	•	•	Thomas V. Duck III
Susan E. Edlein	e	e	•	•	•	•	•	Susan E. Edlein
Otobong Ukpong "Oto" Ekpo	•	•	e	•	•	•	•	Otobong Ukpong "Oto" Ekpo
Ryan Welton English	•	•	u	•	•	•	•	Ryan Welton English
Adam Ferrell	n/a	•	u	u	u	•	•	Adam Ferrell
Gillian Brooke Flierer	•	•	•	•	e	e	e	Gillian Brooke Flierer
Amanda Renee Flora	•	•	•	e	•	•	•	Amanda Renee Flora
Harold Eugene Franklin Jr.	u	•	e	•	•	u	u	Harold Eugene Franklin Jr.
Keith E. Gammage	e	•	•	•	•	u	•	Keith E. Gammage
William C. Gentry	•	•	•	•	•	•	•	William C. Gentry
John Michael Giglio	n/a	n/a	n/a	n/a	n/a	n/a	•	John Michael Giglio
Patricia A. Gorham	e	e	•	e	•	•	•	Patricia A. Gorham
Rebecca Holmes Liles Grist	•	•	e	•	•	•	•	Rebecca Holmes Liles Grist
Paul William Hamilton	•	•	•	•	•	u	u	Paul William Hamilton
Thomas B. "Britt" Hammond	•	•	•	•	•	e	e	Thomas B. "Britt" Hammond
Roger Brent Hatcher Jr.	•	•	•	•	•	•	•	Roger Brent Hatcher Jr.
John Haubenreich	•	•	u	•	•	•	•	John Haubenreich
Patrick H. Head	u	u	e	•	•	•	•	Patrick H. Head
Render M. Heard Jr.	•	•	u	•	u	•	•	Render M. Heard Jr.
Amanda Nichole Heath	•	•	e	u	•	•	•	Amanda Nichole Heath
Catherine Harris Helms	n/a	•	e	•	•	•	•	Catherine Harris Helms
Matthew J. Hennessy	•	•	e	•	•	•	•	Matthew J. Hennessy
Thomas W. Herman	•	•	u	•	u	u	•	Thomas W. Herman
R. Javoyne Hicks	•	•	•	u	•	•	•	R. Javoyne Hicks
Kimberly Wilkerson Higginbotham	•	•	•	•	e	•	•	Kimberly Wilkerson Higginbotham
Norbert D. "Bert" Hummel IV	•	•	•	•	•	•	•	Norbert D. "Bert" Hummel IV
Stacey K. Hydrick	•	•	•	•	e	•	•	Stacey K. Hydrick
Shukura L. Ingram	u	u	•	•	•	•	•	Shukura L. Ingram
James T. Irvin	•	•	•	•	•	•	•	James T. Irvin
Christopher Ross Jackson	•	•	•	•	•	•	•	Christopher Ross Jackson
Charles Michael Johnson	•	•	e	e	•	•	•	Charles Michael Johnson

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Board of Governors Attendance Record

	06-2025 Friday	06-2025 Saturday	10-2025 Rising Fawn	01-2026 Atlanta	03-2026 Greensboro	06-2026 Amelia Island	06-2026 Saturday
	Sawgrass	Sawgrass	e	•	e	•	•
Lester B. Johnson, III	•	•	•	•	•	•	•
Shiriki L. Cavitt Jones	n/a	•	•	•	•	•	•
Virginia C. Josey	e	•	e	•	•	•	•
Maria Christine Mekras Justus	•	•	•	•	•	•	•
Zahra S. Karinshak	u	•	•	•	•	•	•
John F. Kennedy	•	•	•	•	•	•	•
Barry E. King	•	•	•	•	•	•	•
Judy C. King	•	•	•	•	•	•	•
Catherine Koura	e	•	e	•	•	•	•
Rachel R. Krause	•	•	•	•	•	•	•
Rhonda Bender Kreuziger	•	•	e	•	e	•	•
Jeffrey R. Kuester	•	•	•	•	•	•	•
Allegra J. Lawrence	e	•	•	•	•	•	•
Nicole C. Leet	•	•	•	•	•	•	•
Katie K. Leonard	•	•	•	•	e	•	•
Alan Jeffrey Levine	n/a	n/a	n/a	n/a	n/a	n/a	•
Joyce Gist Lewis	•	•	•	•	•	•	•
Lisa Katsuko Liang	•	•	•	•	e	•	•
Thomas Fredrick Lindsay	•	•	•	•	•	•	•
David S. Lipscomb	•	•	•	•	e	•	•
John R. B. Long	•	•	•	e	•	•	•
Dax Eric Lopez	u	•	e	•	•	•	•
Lindsey Stephens Macon	•	•	•	•	•	•	•
John Bell Manly	e	•	•	•	e	•	•
Troy Windel Marsh Jr.	u	•	•	•	•	•	•
Christian Blayne May	n/a	n/a	n/a	n/a	n/a	•	•
Edward T. McAtee	•	•	•	•	•	•	•
Robert Charles McBurney	n/a	•	•	•	•	•	•
Cheveda McCamy	n/a	n/a	n/a	n/a	n/a	•	•
Hugh J. McCullough	u	e	e	•	•	•	•
Leitia A. McDonald	•	e	e	•	•	•	•
Brad J. McFall	e	•	•	•	e	•	•
Michael D. McRae	•	•	•	e	•	•	•
Terry L. Miller	•	•	•	•	•	•	•
Kenneth Mitchell Jr.	•	•	•	•	•	•	•

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Board of Governors Attendance Record

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William J. Monahan	•	•	•	e	u	•	•	William J. Monahan
Shondeana Crews Morris	•	•	•	•	•	•	•	Shondeana Crews Morris
Stephen Russell Morris	•	•	•	•	•	•	•	Stephen Russell Morris
Joseph Kenneth Mulholland	u	•	e	u	u	u	•	Joseph Kenneth Mulholland
Samantha Marie Mullis	n/a	•	•	u	e	•	•	Samantha Marie Mullis
Katrell Nash	•	•	•	•	•	•	•	Katrell Nash
Paul Wain Painter III	u	u	u	u	u	•	•	Paul Wain Painter III
Joy Renea Parks	•	•	•	u	•	•	•	Joy Renea Parks
David Jared Parrish	n/a	•	•	•	e	•	•	David Jared Parrish
Kathryn Drew Parrish Bennett	e	e	•	•	•	•	•	Kathryn Drew Parrish Bennett
Kevin Charles Patrick	•	•	•	•	•	•	•	Kevin Charles Patrick
Tabitha Edwina Payne	e	•	u	•	u	u	•	Tabitha Edwina Payne
Brandon Lee Peak	•	•	u	•	•	u	•	Brandon Lee Peak
Edward Piasta	•	e	•	•	•	e	e	Edward Piasta
Philip Zachary Pritchard	u	u	u	•	u	u	u	Philip Zachary Pritchard
Jill Pryor	e	e	e	e	u	u	u	Jill Pryor
Elizabeth Dalia Racine	•	•	•	•	•	•	•	Elizabeth Dalia Racine
William M. Ragland	•	•	e	•	•	•	•	William M. Ragland
Tina S. Roddenberry	•	•	e	e	•	•	•	Tina S. Roddenberry
Carlos Javier Rodriguez	n/a	•	n/a	e	u	•	•	Carlos Javier Rodriguez
Kevin W. Roper	•	e	•	•	u	•	•	Kevin W. Roper
Joseph Roseborough	e	•	•	•	•	•	•	Joseph Roseborough
Wesley Charles Ross	•	•	•	•	•	•	•	Wesley Charles Ross
Adam Joshua Rozen	n/a	•	•	•	e	•	•	Adam Joshua Rozen
Claudia S. Saari	•	•	e	•	•	•	•	Claudia S. Saari
Betrice A. Scott	n/a	•	•	•	•	•	•	Betrice A. Scott
Amanda Kay Seals	n/a	•	e	•	•	•	•	Amanda Kay Seals
Alex Musole Shalishali	u	u	•	•	•	u	•	Alex Musole Shalishali
H. Burke Sherwood	•	•	•	•	•	•	•	H. Burke Sherwood
William Murray Shingler	n/a	•	u	u	u	u	u	William Murray Shingler
Mitchell McKinley Shook	•	•	•	e	•	•	•	Mitchell McKinley Shook
Robert H. Smalley, III	u	u	•	•	•	u	u	Robert H. Smalley, III
Philip C. Smith	•	•	•	•	•	•	•	Philip C. Smith
R. Rucker Smith	•	•	•	•	•	•	•	R. Rucker Smith
Daniel B. Shipes	•	•	u	•	•	•	•	Daniel B. Shipes

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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

[illegible]

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DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Friday, June 12, 2026, 9:00 a.m.
Omni Amelia Island Resort & Spa
Fernandina Beach, Florida

The 312th meeting of the Board of Governors of the State Bar of Georgia was held on the date and location shown above. President Christopher P. Twyman presided.

Pledge of Allegiance

M. Brandon Rosenstein, YLD Board of Directors, led the Pledge of Allegiance.

Invocation

Kelsey L. Kicklighter, YLD Board of Directors, gave the invocation.

Security Update

Sergeant First Class Dexter Harden gave a security update to the Board of Governors.

Special Recognition

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

Recognition of Retiring Executive Committee Members and Retiring Board Members

President Chris Twyman recognized the following retiring Executive Committee and Board of Governors members: Ivy Cadle, Immediate Past President, 9 years on the Board; Kenny Mitchell, YLD Immediate Past President, 3 years on the Board; Hon. Anne LaMalva, Alcovy Circuit, Post 2, 4 years on the Board; Edward Krugman, Atlanta Circuit, Post 14, 20 years on the Board; Dawn Levine, Cobb Circuit, Post 5, 12 years on the Board; Janice Wallace, Griffin Circuit, Post 1, 14 years on the Board; Arch Farrar, Lookout Mountain Circuit, Post 1, 16 years on the Board; Mike Prieto, Member-at-Large, Post 3, 4 years on the Board; Carl Cansino, Ocmulgee Circuit, Post 1, 10 years on the Board; Andy Davis, Rome Circuit, Post 2, 14 years on the Board.

Roll Call

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

Minutes of the 306th Meeting of the Board of Governors

The minutes of the Board of Governors meeting held March 22, 2025, were approved by majority vote as presented.

President's Report

President Chris Twyman delivered the President's Address (Exhibit B).

Awards and Presentations

The following awards and presentations were made:

Marshall-Tuttle Award

Jay Elmore, chair of the Military Legal Assistance Program Committee, presented the Marshall-Tuttle Award posthumously to Michael Leo Monahan (1961-2025) of Dallas, Georgia.

Judge Willie Lovett Award for Advancing the Field of Juvenile Law

Supreme Court Justice Charles Bethel and Child Protection and Advocacy Section member Ira Foster presented the Judge Willie Lovett Award for Advancing the Field of Juvenile Law to Danielle Simpson Alford, founder and managing attorney, Georgia Teen Legal Defense.

Chief Justice Harris Hines Awards for Outstanding Advocacy for Children in Dependency Proceedings

Supreme Court Justice Charles Bethel and Child Protection and Advocacy Section member Ira Foster presented the Chief Justice Harris Hines Awards for Outstanding Advocacy for Children in Dependency Proceedings to Keosha T. Pettigrew, Rockdale County DFCS (case manager) and Andrew Powell, Juvenile Court of Whitfield County (lawyer).

Chief Justice Thomas O. Marshall Professionalism Awards

President Chris Twyman presented the 25th Chief Justice Thomas O. Marshall Professionalism Awards to Hon. Willie E. Lockette, Superior Court, Dougherty Judicial Circuit, Albany (judge), and Joel O. Wooten Jr., Columbus (attorney).

Check Presentation to Georgia Legal Services Program (GLSP)

President Chris Twyman presented a \$231,522 check to Susan Coppedge, GLSP Executive Director, representing Bar members' contributions to the 2026 GLSP "And Justice for All" Campaign.

Recognition of Corporate Sponsors

President Chris Twyman recognized the Bar's Five-Gavel Corporate Sponsors, i3 Verticals and Member Benefits, Inc., and other section and company sponsors.

President Chris Twyman presented the following Local and Voluntary Bar Awards:

Thomas R. Burnside Jr. Excellence in Bar Leadership Award: R. Gary Spencer, nominated by the Gate City Bar Association.

2026 Award of Merit: DeKalb Lawyers Association (Under 50 members); Walton County Bar Association (51 to 100 members), Gwinnett County Bar Association (101 to 250 members), Gate City Bar Association (251 to 500 members), Georgia Association of Black Women Attorneys (501 members or more).

2026 Law Day Award of Achievement: Gwinnett County Bar Association (101 to 250 members), Cobb County Bar Association (501 members or more).

2026 Best New Entry Award: Gate City Bar Association.

2026 Best Newsletter Award: Gwinnett County Bar Association (100 to 150 members), Georgia Association of Black Women Attorneys (501 members or more).

2026 Best Website Award: Walton County Bar Association (51 to 100 members), Gwinnett County Bar Association (101 to 250 members), Gate City Bar Association (251 to 500 members), Georgia Association of Black Women Attorneys (501 members or more).

2026 President's Cup Award: Georgia Association of Black Women Attorneys.

President Chris Twyman presented the following Section Awards:

Section of the Year: Privacy & Technology Law, Toni Igbenoba, chair
Award of Achievement: Construction Law, Peter Crofton, chair

State of the Supreme Court of Georgia

Hon. Nels S.D. Peterson, Chief Justice of the Supreme Court of Georgia, delivered the State of the Supreme Court of Georgia address.

State of the Court of Appeals of Georgia

Hon. Trent Brown, Chief Judge of the Court of Appeals of Georgia, delivered the State of the Court of Appeals of Georgia address.

State of the Office of the Governor

Executive Counsel Sam Hatcher delivered the State of the Office of the Governor on behalf of Gov. Brian Kemp.

Office of the Attorney General

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

Georgia General Assembly

Rep. Matt Reeves, Vice Chair of the House Judiciary Committee, reported on the activities of the House Judiciary Committee. Sen. Brian Strickland, Chair of the Senate Judiciary Committee, reported on the activities of the Senate Judiciary Committee.

Young Lawyers Division

Young Lawyers Division President Veronica R. Cox reported on the activities of the YLD (Exhibit C).

Memorials

President Chris Twyman presented the Memorials report.

Old Business

There was no old business.

New Business

There was no new business.

Announcements

There were no announcements.

Executive Session

There was no executive session.

Remarks / Q&A / Comments / Suggestions

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

Adjournment

There being no additional business, the meeting was adjourned at 11:05 a.m.

Shiriki C. Jones, Secretary

Approved:

Christopher P. Twyman, President

DRAFT
STATE BAR OF GEORGIA
BOARD OF GOVERNORS
MEETING MINUTES
Saturday, June 13, 2026, 9:00 a.m.
Omni Amelia Island Resort & Spa
Fernandina Beach, Florida

The 313th meeting of the Board of Governors of the State Bar of Georgia was held on the date and location shown above. President William C. “Bill” Gentry presided.

Pledge of Allegiance

Board of Governors Member Alan J. Levine, Cobb Circuit, Post 5, led the Pledge of Allegiance.

Invocation

YLD Past President Ronald E. “Ron” Daniels gave the invocation.

Security Update

Sergeant First Class Dexter Harden gave a security update to the Board of Governors.

Special Recognition

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

Welcome to New Officers and Board Members

President Bill Gentry recognized the new officers and Board of Governors members.

Roll Call

Secretary Bert Hummel circulated the roll for signature. (Exhibit A)

Future Meetings Schedule

President Bill Gentry reviewed the Future Meetings Schedule.

President’s Address

President Bill Gentry delivered the President’s Address (Exhibit B).

Approval of President’s Appointments to the State Disciplinary Board

The Board of Governors approved the following presidential appointments to the State Disciplinary Board by majority vote:

State Disciplinary Board

Marisel E. Smith (2029)

Christopher S. Fairchild (2029)

Lamar Barnett (2029)

Noemi de Miguel Mota (2029)

Approval of President’s Appointments to the Formal Advisory Opinion Board

The Board of Governors approved the following presidential appointments to the Formal Advisory Opinion Board by majority vote:

Formal Advisory Opinion Board

Member-at-Large: Mary A. Prebula (2028)
Member-at-Large: Jeffrey H. Schneider (2028)
Member-at-Large: Letitia A. McDonald (2028)
Ga. Association of Criminal Defense Lawyers: Amanda R. Clark Palmer (2028)
District Attorneys' Association of Georgia: Jaeson R. Smith (2028)
Emory University School of Law: Prof. Jennifer M. Romig (2028)
Georgia State University College of Law: Prof. Tia L. Gibbs (2028)
Atlanta's John Marshall Law School: Prof. M. Scott Boone (2027)
State Disciplinary Review Board: Brandon A. Bullard (2027)

Sunsetting of Standing Committees

The Board of Governors approved sunsetting the Attorney Wellness Committee and the Communications Committee by majority vote.

Approval of 2026-2027 Standing, Special & Program Committees and Boards

The Board of Governors approved the proposed 2026-2027 Standing, Special & Program Committees and Boards by majority vote.

Election Schedule 2026-2027

The Board of Governors approved the proposed 2026-2027 Election Schedule (Exhibit F) by majority vote.

Executive Committee Election

The Executive Committee election was held with the following results:

Two-Year Term 2026-2028

Results:

Candidate: John R.B. "Jack" Long	Elected by majority vote for two-year term
Nominator: Hon. Amanda Nicole Heath	
Seconded: Katie Leonard	

Candidate: Lindsey Macon	Was not elected
Nominator: Rebecca Grist	
Seconded: Dax Lopez	

Candidate: Gary Spencer	Elected by majority vote for two-year term
Nominator: Amanda Clark Palmer	
Seconded: Lester Johnson III	

Candidate: Martin Valbuena	Elected by majority vote for two-year term
Nominator: Ivy Cadle	
Seconded: Will Davis	

Georgia Legal Services Program Appointments

By majority vote, the Board of Governors approved the appointments of Kevin M. Pitre (2028), Tera L. Reese-Beisbier (2028), and Kelli J. Spencer (2028) to the GLSP Board of Directors.

Chief Justice's Commission on Professionalism Appointments

By majority vote, the Board of Governors approved the appointment of Hon. Charity Bridgewater and Jeff W. Smith for three-year terms to the Chief Justice's Commission on Professionalism.

Executive Director Election

The Board of Governors elected Damon Elmore as executive director for the 2026-2027 Bar year by majority vote.

Executive Director's Report

Executive Director Damon Elmore delivered remarks expressing appreciation to the Court, Board, and leadership, and thanked the Board for its continued confidence in extending his term. He emphasized that the work of the Bar is a collective effort and reaffirmed the organization's enduring mission to support the profession, improve the administration of justice, and serve the public. He noted optimism as the Bar concludes the current year and prepares for the next.

He reported that the Bar remains operationally strong, with continued focus on financial stewardship, asset management, and staff support amid recent transitions. He highlighted appreciation for departing staff, recognized internal advancements and new hires, and affirmed readiness to support incoming leadership in the 2026–2027 Bar year. He concluded by expressing gratitude to President Twyman, the Executive Committee, and Supreme Court liaisons for their leadership and partnership, and extended confidence in the incoming President.

Treasurer's Report

Treasurer Shiriki C. Jones reported on the Bar's finances and investments. She referred to the financials through March 31, 2026, presented in the Board Book along with the combined audit, which contained no audit adjustments.

The Board of Governors received copies of the Consolidated Revenues and Expenditures, Operations and Bar Center Combined, for the year-to-date period ending March 31, 2026; Total Bar Center Operations Revenues and Expenditures Executive Summary for the year-to-date period ending March 31, 2026; Operations Income Statement for the year-to-date period ending March 31, 2026; Supporting Schedule of Other Expenses for the year-to-date period ending March 31, 2026; Status and Use of Cash Investments as of March 31, 2026; SBG Unallocated Cash chart; Board-Designated and Donor Temporarily Restricted Net Assets as of March 31, 2026; Summary of Members and Voluntary Legislative Contributions paid through March 31, 2026; Summary of Members and Voluntary Contributions to GLSP paid through March 31, 2026; Legislative Activity Report through March 31, 2026; and Summary of Clients' Security Fund Activity for the year-to-date period ending March 31, 2026.

Young Lawyers Division President's Report

YLD President Virginia Josey addressed the Board for the first time in her capacity as president of the YLD. She expressed gratitude to those who have supported and mentored her as she prepared for this new role. She acknowledged the importance of the YLD's work as both a service arm of the Bar and a place where the next generation of legal leaders can begin and develop their leadership journeys.

YLD President Josey reported on the year ahead, including plans to start a book club, a podcast highlighting the services the Bar offers, and a guidebook for young lawyers. She highlighted this year's YLD Signature Fundraiser, which will support Stepping Stone Advocacy Services and will feature an '80s-themed celebration honoring the YLD's 80th anniversary. The event is scheduled for Jan. 30 at the Georgia Theatre in Athens.

Senior Lawyers Division Report

SLD President Elizabeth "Betsy" Hodges expressed her enthusiasm and gratitude for the opportunity to serve as the first president of the Senior Lawyers Division. She introduced the Division's officers and

Executive Committee members: President-Elect Howard Delashmit, Treasurer James Hyder, Secretary Kendall Butterworth, Andy Davis, Jeff Helms, William Jenkins, EC Liaison Joyce Gist Lewis, and YLD Liaison Kindall Browning-Rickle. The Committee will soon hold its first meeting at the Bar Center on August 14.

SLD President Hodges emphasized the five pillars of the SLD: social engagement, mentorship, succession planning, pro bono opportunities, and cognitive health initiatives. She reported that the recently held Welcome Reception was well attended and provided a great opportunity for members to connect and build momentum for the Division's future work. She also highlighted the SLD's first joint service project with the YLD, a collection drive for basic hygiene products benefiting the Rethreaded initiative, supporting survivors of human trafficking. The drive was taking place during the Annual Meeting, and she encouraged Board members and attendees to donate to the effort. Upcoming activities of the SLD include a Braves game, a succession planning seminar, and an event in conjunction with the Fall Board of Governors meeting.

Center for Lawyer Wellbeing Report

Center Chair Javoyne Hicks reported on the recent and future activities of the Center for Lawyer Wellbeing. She clarified that the Attorney Wellness Committee was sunsetted because the work of the committee has been consolidated into the Center and will continue under that umbrella. She thanked the 1,212 inaugural members of the Center and encouraged both current and prospective members to join as they submit their Bar dues for the upcoming year or separately via the Bar website. Chair Hicks reported that the Center held its annual institute in September and participated in the Out of the Darkness Walk last year in partnership with the American Foundation for Suicide Prevention. She noted that this year's walk is scheduled for November 1 and encouraged support for the event and the broader cause of suicide prevention and awareness. Chair Hicks emphasized the vital role of the Center as the hub for the Bar's lawyer wellness initiatives and programs. She announced that Paul Knowlton will succeed her as Chair of the Center, noting his significant contributions to its development and ongoing success. Hon. Shondeana Morris will continue to serve as vice chair, Mark Alexander will remain treasurer, and Hon. Sonja Brown will assume the role of secretary.

Chief Justice's Commission on Professionalism Report

Executive Director Karlise Grier reported on the Chief Justice's Commission on Professionalism (CJCP), expressing her gratitude to Chief Justice Nels S.D. Peterson for his leadership, and congratulating newly appointed Commission members Hon. Charity Bridgewater and Jeff Smith. Executive Director Grier, along with Professionalism Committee members Kevin Patrick, Samantha Mullis, and Hon. Stephanie Burton, provided updates on recent and upcoming initiatives, including a CLE program on professionalism and the legislature, the Connect with a Colleague Contest, Law Day events for students, and other professionalism-focused programs. Executive Director Grier also highlighted the recipients of the Chief Justice Robert Benham Awards for Community Service and recognized the volunteers whose efforts contributed to the program's success. She encouraged Board members to review the materials included in the Board Book for additional information regarding the Commission's events, initiatives, and ongoing activities.

Legislative Report

Director of Governmental Affairs Jennifer McNeely began her report on the legislative activities of the Bar by thanking outgoing President Chris Twyman for his work and support over the last year. In addition to the items on the Bar's legislative agenda that were passed, one of the most significant initiatives was the Gold Dome Track. The program was launched in partnership with the Young Lawyers Division and the Law Practice Management Program as an effort to educate, prepare, and support lawyers who are interested in public service, particularly in the Georgia General Assembly. Director McNeely emphasized the importance of lawyer-legislators and noted encouraging participation in the current election cycle. She

shared that additional programming is planned for the coming year, including sessions at the Midyear Board of Governors Meeting and outreach efforts focused on middle and south Georgia. She also announced that, beginning in spring 2027, the Bar will partner with the Georgia State University College of Law to offer a legislative externship program. Director McNeely highlighted opportunities for attorneys who wish to engage in the legislative process without seeking public office, including legislative newsletters, Day at the Capitol experiences featuring committee hearings and meetings with legislators, legislative receptions, and other educational and engagement opportunities. Director McNeely concluded by reporting on the special session of the Georgia General Assembly, which was called to address unresolved matters from the 2026 legislative session.

Suicide Prevention and Awareness Committee Report

Hon. Shondeana Morris, chair of the Suicide Prevention and Awareness Committee, began her report by reminding members of her presentation last year, which featured a video honoring and remembering the members of the Bar and Bench who have been lost to suicide over the years. She then shared the encouraging news that, during the 2025-2026 Bar year, not a single member of the State Bar was lost to suicide. She noted that this achievement reflects the continued importance of awareness, education, outreach, and support efforts aimed at promoting lawyer wellbeing and mental health within the profession.

Pro Bono Resource Center Report

Director Ashley Clark reported on the activities of the Pro Bono Resource Center, highlighting its efforts to help bridge the justice gap by recruiting and supporting attorneys in providing pro bono legal services to Georgians. She discussed the Center's focus on the three Rs: Research, Recruit, and Recognize, through maintaining statewide pro bono resources, engaging attorneys in volunteer service, and honoring those who contribute their time and expertise. She also highlighted resources available to volunteers, including the Paladin Pro Bono Opportunity Portal, emphasized the importance of Rule 6.1, which encourages attorneys to provide pro bono service, and recognized attorneys through the Pro Bono Honor Roll for their commitment to expanding access to justice. Director Clark concluded by honoring the legacy of Mike Monahan, whose dedication to pro bono service and expanding access to justice left a lasting impact on Georgia's legal community, noting that the Law School Excellence in Access to Justice Award has been renamed in his honor.

Committee Activity Report

The Board of Governors received a written report on the activities of the State Bar committees for the 2025-2026 Bar year.

State Bar of Georgia Audit Report

The Board of Governors received a copy of the State Bar of Georgia Audit Report for the year-end 2025 and related auditor's letter regarding governance.

Office of the General Counsel

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

Fee Arbitration Program

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

Law Practice Management Program

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

Sections' Annual Reports

The Board of Governors received written reports from the following sections: Alternative Dispute Resolution Section, Antitrust Law Section, Aviation Law Section, Bike Law Section, Cannabis & Hemp Law Section, Child Protection & Advocacy Section, Construction Law Section, Creditor's Rights Section, E-Discovery & the Use of Technology Law Section, Eminent Domain Section, Energy Law Section, Entertainment and Sports Law Section, Environmental Law Section, Family Law Section, Franchise and Distribution Law Section, Health Law Section, Nonprofit Law Section, Privacy & Technology Law Section, Real Property Law Section, School & College Law Section.

Institute of Continuing Legal Education

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

Unlicensed Practice of Law Program

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

State Bar of Georgia Satellite Office Reports

The Board of Governors received written reports from the Coastal Georgia Office in Savannah and the South Georgia Office in Tifton.

Communications Media Report

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

Old Business

There was no old business.

New Business

There was no new business.

Remarks/Q&A/Comments/Suggestions

There were none.

Adjournment

There being no further business, the meeting was adjourned at 11:40 a.m.

Norbert D. Hummel IV, Secretary

Approved:

William C. Gentry, President



MEMORANDUM

To: The Board of Governors of the State Bar of Georgia

From: Russell Willard, General Counsel
Bill NeSmith, Deputy General Counsel

Date: September 8, 2026

Re: Proposed Rules Changes

The Disciplinary Rules and Procedures Committee have proposed changes to four rules found within the Georgia Rules of Professional Conduct. Below is a short explanation of the proposed rule changes on the agenda for the Fall 2026 Meeting of the Board of Governors:

1. Rule 4-211. Formal Complaint; Service

This proposed amendment shifts the time within which formal complaints must be filed with the Supreme Court from 30 to 90 days. This reflects that, increasingly, the State Disciplinary Board is finding probable cause for a formal complaint to issue but such probable cause finding will reduce to private discipline if the respondent does certain acts within a specified period of time (normally 60 days from the date of the SDB vote), such as agreeing to be bound by fee arbitration, returning client files, withdrawing from a case, providing an accounting of funds held in trust, etc.

The reality is that this contingent discipline extends beyond the time within which the rules require that the formal complaint issues by the Court, and one of two things happen: 1) a formal complaint is filed pursuant to the rules in a case that may, and indeed is likely, to

result in the imposition of private discipline (which also requires a dismissal being filed with the Supreme Court after the imposition of private discipline which creates additional record work for Supreme Court staff); or 2) the SDB taking votes in each individual case to grant an extension of time to file the formal complaint while the post-vote procedures are carried forward to conclusion.

2. Rule 4-215. Powers and Duties of the State Disciplinary Review Board

Rule 4-216. Proceedings Before the State Disciplinary Review Board

These rule amendments recognize something that the Supreme Court has been doing by order for the last couple of years. On a petition for reinstatement from suspension, the Supreme Court has ordered the State Disciplinary Review Board to consider the petition for reinstatement and make a recommendation on whether the Supreme Court should grant the reinstatement. The amendments authorize the SDRB to review such petitions (within the black letter of the Georgia Rules of Professional Conduct) and specify procedures for the filing of the petition, filing of responsive pleadings, and assembling the record of the review for transmittal of the recommendation to the Supreme Court.

3. Rule 4-221. Hearing Procedures.

The proposed revisions to Rule 4-221 remove cross-references to the Uniform Superior Court Rules and instead provide a framework, wholly contained within the Georgia Rules of Professional Conduct, for when and how discovery materials are to be filed into the record in disciplinary proceedings. This continues removing cross-references in the Georgia Rules of Professional Conduct to procedures set out in either the Georgia Code or the Uniform Superior Court rules, due to the concern that our disciplinary procedures can then be modified, in cases of cross-references rather than spelled out procedures, by entities outside the Bar and affect the Bar's disciplinary processes.

Specifically, the amended rule would provide that depositions and other discovery material is not to be filed unless:

- 1) otherwise required by the Georgia Rules of Professional Conduct;
- 2) ordered by the Special Master, State Disciplinary Review Board, or the Supreme Court;
- 3) requested by any party;
- 4) relief is requested related to the discovery material; or
- 5) such material is to be used at a disciplinary hearing or is necessary to inform a pretrial or posttrial motion.

The rule further specifies which party is responsible for remaining the custodian of such materials until they are filed into the record.

1 Rule 4-211. Formal Complaint; Service

2 (a) Within ~~30~~ 90 days after a finding of Probable Cause, the Office of the General
3 Counsel shall file a formal complaint that specifies with reasonable particularity
4 the acts complained of and the grounds for disciplinary action. A copy of the formal
5 complaint shall be served upon the respondent after appointment of a Special
6 Master. In those cases where a Notice of Discipline has been filed and rejected, the
7 filing of the formal complaint shall be governed by the time period set forth in Rule
8 4-208.4. The formal complaint shall be served pursuant to Rule 4-203.1.

9 (b) Reserved.

10 (c) At all stages of the proceeding, both the respondent and the State Bar of Georgia
11 may be represented by counsel. Counsel representing the State Bar of Georgia shall
12 be authorized to prepare and sign notices, pleadings, motions, complaints, and
13 certificates for and in behalf of the State Bar of Georgia and the State Disciplinary
14 Board.

1 Rule 4-215. Powers and Duties of the State Disciplinary Review Board

2 In accordance with these Rules, the State Disciplinary Review Board

3 shall have the following powers and duties:

4 (a) to review reports of Special Masters, and to recommend to
5 the Supreme Court of Georgia the imposition of punishment and
6 discipline or dismissal of the complaint;

7 (b) to adopt forms for notices and any other written instruments
8 necessary or desirable under these Rules;

9 (c) to prescribe its own rules of conduct and procedure;

10 (d) to receive Notice of Reciprocal Discipline and to recommend
11 to the Supreme Court of Georgia the imposition of punishment
12 and discipline pursuant to Bar Rule 9.4 (b) (3); and

13 (e) to administer State Disciplinary Review Board reprimands.

14 (f) to review Petitions for Reinstatements, and to recommend to
15 the Supreme Court of Georgia whether the respondent should be
16 reinstated to the practice of law.

1 Rule 4-216. Proceedings Before the State Disciplinary Review Board

- 2 (a) Upon receipt of the record and exceptions to the report of the
3 Special Master pursuant to Rule 4-214, the State Disciplinary Review
4 Board shall consider the record, review findings of fact and conclusions
5 of law, and determine whether a recommendation of disciplinary action
6 will be made to the Supreme Court of Georgia and the nature of such
7 recommended discipline. The findings of fact made by a Special Master
8 may be reversed if the State Disciplinary Review Board finds them to be
9 clearly erroneous or manifestly in error. Conclusions of law and
10 determinations of appropriate sanctions shall be reviewed de novo.
- 11 (b) The respondent shall have the right to challenge the competency,
12 qualifications, or objectivity of any member of the State Disciplinary
13 Review Board considering the case under a procedure as provided for in
14 the Rules of the State Disciplinary Review Board.
- 15 (c) There shall be no de novo hearing before the State Disciplinary
16 Review Board.
- 17 (d) The State Disciplinary Review Board may consider exceptions to
18 the report of the Special Master and may in its discretion grant oral
19 argument if requested by any party within 15 days of transmission of

20 the record and exceptions to the State Disciplinary Review Board.
21 Exceptions and briefs shall be filed with the Clerk of the State
22 Disciplinary Boards, in accordance with Rule 4-214. The responding
23 party shall have 30 days after service of the exceptions within which to
24 respond.

25 (e) Within 90 days after receipt of the record including any exceptions
26 to the report of the Special Master and responses thereto the State
27 Disciplinary Review Board shall file its report with the Clerk of the
28 State Disciplinary Boards. The 90-day deadline may be extended by
29 agreement of the parties or with the consent of the Chair of the State
30 Disciplinary Review Board for good cause shown. A copy of the State
31 Disciplinary Review Board's report shall be served upon the respondent,
32 and the Clerk shall file the record in the case with the Supreme Court
33 of Georgia within 10 days after the report is filed. If no report is filed by
34 the State Disciplinary Review Board within 90 days of receipt by it of
35 the record and no extension is granted, the Clerk shall file the original
36 record in the case with the Clerk of the Supreme Court of Georgia, and
37 the case shall be considered by the Court on the record.

38 (f) Petitions for Reinstatement

39 A petition for reinstatement shall be filed with the Clerk of the State
40 Disciplinary Boards.

41 (1) The Office of the General Counsel shall have 20 days after
42 service of the petition to respond. If the Office of the General
43 Counsel files a response, the petitioner shall have 10 days after
44 service of any response to file a reply to the response. If the
45 Petitioner files a reply to the response, the Office of the General
46 Counsel shall have 10 days after service of the reply to file a sur-
47 reply. An extension of 5 days may be granted by the Chair of the
48 Disciplinary Review Board for good cause shown to the initial
49 deadline of any responsive pleading under this sub-paragraph, but
50 no additional extension may be granted for that particular
51 responsive pleading after an extension has been granted. After
52 service of the sur-reply or the conclusion of any period for a
53 responsive pleading without such a responsive pleading being
54 filed, the record shall be closed, and the Clerk of the State
55 Disciplinary Board shall deliver the record to the Review Board.
56 (2) Within 60 days after receipt of the record, the State
57 Disciplinary Review Board shall file its report with the Clerk of

58 the State Disciplinary Boards. The 60-day deadline may be
59 extended up to 15 days by the Chair of the State Disciplinary
60 Review Board. A copy of the State Disciplinary Review Board's
61 report shall be served upon the respondent, and the Clerk shall
62 file the record in the case with the Supreme Court of Georgia
63 within 10 days after the report is filed. If no report is filed by the
64 State Disciplinary Review Board, the Clerk shall file the original
65 record in the case with the Clerk of the Supreme Court of Georgia
66 within 90 days of receipt of the record by the State Disciplinary
67 Review Board, and the case shall be considered by the Court on
68 the record.

Rule 4-221. Hearing Procedures

(a) Oaths. Before entering upon his duties as herein provided, each member of the State Disciplinary Board, each member of the State Disciplinary Review Board, and each Special Master shall swear or affirm to the following oath by signing a copy and returning it to the Clerk of the Boards or to the Clerk of the Supreme Court of Georgia, as appropriate.

“I do solemnly swear or affirm that I will faithfully and impartially discharge and perform all of the duties incumbent upon me as a member of the State Disciplinary Board of the State Bar of Georgia/member of the State Disciplinary Review Board of the State Bar of Georgia/Special Master according to the best of my ability and understanding and agreeable to the laws and Constitution of this State and the Constitution of the United States.”

The Clerk of the Boards shall maintain the completed Oaths of Board members, and the Clerk of the Supreme Court of Georgia shall file the completed Oaths of Special Masters.

(b) Pleadings and Copies. Original pleadings shall be filed with the

20 Clerk of the Boards at the headquarters of the State Bar of Georgia,
21 and the parties shall serve copies upon the Special Master and the
22 opposing party pursuant to the Georgia Civil Practice Act.

23 Depositions and other original discovery shall be retained by counsel
24 and shall not be filed except as follows: ~~permitted under the Uniform-~~
25 ~~Superior Court Rules.~~

26 (1) Depositions and other discovery material shall not be required to
27 be so filed unless:

28 (i) Required by these Rules;

29 (ii) Ordered by the Special Master, Review Board, or the
30 Supreme Court;

31 (iii) Requested by any party to the action;

32 (iv) Relief relating to discovery material is sought and said
33 material has not previously been filed under some other provision
34 of these Rules, in which event copies of the material in dispute
35 shall be filed by the movant contemporaneously with the motion
36 for relief; or

37 (v) Such material is to be used at an evidentiary hearing or is
38 necessary to a pretrial or posttrial motion and said material has
39 not previously been filed.

(2) Until such time as discovery material is filed under sub-
paragraphs (i) through (v) of paragraph (b) (1) of this Rule, the
original of all depositions shall be retained by the party taking the
deposition and the original of all other discovery material shall be
retained by the party requesting such material, and the person thus
retaining the deposition or other discovery material shall be the
custodian thereof.

(c) Witnesses and Evidence; Contempt.

(1) The respondent and the State Bar of Georgia shall have
the right to require the issuance of subpoenas for the attendance
of witnesses to testify or to produce books and papers. The
Special Master shall have the power to compel the attendance of
witnesses and the production of books, papers, and documents
relevant to the matter under investigation, by subpoena, and as
further provided by law in civil cases under the laws of Georgia.

(2) The following shall subject a person to rule for contempt
of the Special Master or State Disciplinary Board:

- (i) disregard, in any manner whatsoever, of a subpoena
issued pursuant to Rules 4-203 (9), 4-210 (h) or 4-221 (c) (1);
- (ii) refusal to answer any pertinent or proper question of a

60 Special Master; or

61 (iii) willful or flagrant violation of a lawful directive of a

62 Special Master.

63 It shall be the duty of the Chair of the State Disciplinary Board or
64 Special Master to report the facts supporting contempt to the Chief
65 Judge of the Superior Court in and for the county in which the
66 investigation, trial or hearing is being held. The Superior Court shall
67 have jurisdiction of the matter and shall follow the procedures for
68 contempt as are applicable in the case of a witness subpoenaed to
69 appear and give evidence on the trial of a civil case before the Superior
70 Court under the laws in Georgia.

71 (3) Any Special Master shall have power to administer oaths
72 and affirmations and to issue any subpoena herein provided
73 for.

74 (4) Depositions may be taken by the respondent or the State
75 Bar of Georgia in the same manner and under the same
76 provisions as may be done in civil cases under the laws of
77 Georgia, and such depositions may be used upon the trial or an
78 investigation or hearing in the same manner as such depositions

79 may be used in civil cases under the laws of Georgia.
80 (5) All witnesses attending any hearing provided for under
81 these Rules shall be entitled to the same fees as now are allowed
82 by law to witnesses attending trials in civil cases in the Superior
83 Courts of this State under subpoena.

84 (d) Venue of Hearings.

85 (1) The hearings on all complaints and charges against a
86 resident respondent shall be held in the county of the
87 respondent's main office or the county of residence of the
88 respondent unless he otherwise agrees.

89 (2) Where the respondent is a nonresident of the State of
90 Georgia and the complaint arose in the State of Georgia, the
91 hearing shall be held in the county where the complaint arose.

92 (3) When the respondent is a nonresident of the State of
93 Georgia and the offense occurs outside the State, the hearing may
94 be held in the county of the State Bar of Georgia headquarters.



MEMORANDUM

To: Board of Governors
From: Bill NeSmith
Date: September 9, 2026
Re: Proposed section bylaw changes

Updated Bylaws:

Elder Law Section
Child Protection and Advocacy Section

Action Requested

Approve the amended bylaws of the Elder Law Section and the Child Protection and Advocacy Section. Each is a complete update that conforms to the Section Model Bylaws the Board of Governors previously approved.

Background

Section bylaws must comply with Bar rules, bylaws, and standing policies. The Board-approved model standardizes membership, officers, elections, meetings, fiscal year, amendments, and the rule that a section may not act contrary to Bar policy. Both sections have updated their prior bylaws to fully comply with the Model Bylaws. The Board must approve the amended bylaws before they take effect.

Elder Law Section

The proposed bylaws fully restate the section's governing document in accordance with the Model Bylaws. Officer structure and terms, elections and succession, meetings and notice, membership and dues, and the amendment process are standardized. The section's purpose, advancing Bar objectives in elder care and related practice, remains unchanged.

Child Protection and Advocacy Section

Child Protection likewise amended its bylaws to align with the Model Bylaws and the Bar fiscal year (July–June). The principal changes govern the timing and procedures for officer elections. Other revisions align meeting and time-bound requirements with the Bar calendar. Membership reviewed the drafts, submitted comments by the published deadline, and voted at a properly noticed meeting to send the amended bylaws to the Board. The section's purpose remains unchanged.

Recommendation

Approve the amended bylaws of both sections as submitted.

**ELDER LAW SECTION
STATE BAR OF GEORGIA**

BYLAWS

**ARTICLE I
Name and Purpose**

Section 1: The name of this Section shall be the ELDER LAW Section.

Section 2: The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to develop their knowledge and professional abilities in elder law and to render better services to their clients and to the public.

**ARTICLE II
Membership and Dues**

Section 1: Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues for the current year. Annual dues shall be determined by a majority vote of the members of the Section, subject to approval by the Board of Governors.

Section 2: Student Law Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except that of voting or holding office.

Section 3: The amount of annual dues for Section members and law student members may be changed by a majority vote of the members of the Section, subject to the approval of the Board of Governors of the State Bar of Georgia.

ARTICLE III **Officers**

Section 1: The Officers of the Section shall be a Chairperson, a Vice-Chairperson, and a Treasurer/Secretary (a combined position), as well as the immediate Past Chairperson, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section.

Section 2: All newly elected Officers shall hold office for a term of one year beginning at the commencement of the fiscal year of the State Bar of Georgia following the election at which they are elected and ending at the close of the same fiscal year of the State Bar of Georgia or until their successor has been elected. Upon the conclusion of the term, or during a vacancy of an unexpired term, if a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become Chairperson. Upon the conclusion of the term, or during a vacancy of an unexpired term, if a vacancy arises in the office of the Vice-Chairperson, the Treasurer/Secretary shall become Vice-Chairperson. The Treasurer/Secretary shall be elected annually by the members of the Section. If a vacancy arises in the office of the Treasurer/Secretary, the Section Executive Committee shall appoint a successor for the unexpired term.

Section 3: The Chairperson shall provide notice of the Section Executive Committee meetings and Section meetings. The Chairperson will preside over all meetings of the Section Executive Committee and of the Section, appoint appropriate committees to serve during his or her term as Chairperson, and plan and supervise the annual meeting of the Section. The Chairperson shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibility as may be prescribed by the Section or by the State Bar of Georgia.

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

Section 5: The Treasurer/Secretary shall keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chairperson. The Treasurer/Secretary shall provide an accounting to the Section at its annual meeting or upon the Chairperson's request. Additionally, the Treasurer/Secretary shall record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Treasurer/Secretary, and perform such other duties as may be prescribed by the Chairperson.

ARTICLE IV **Meetings of the Section**

Section 1: A Section shall meet a minimum of twice per Bar year. Other meetings of the Section may be held from time to time on the call of the Chairperson or Vice-Chairperson or any three members of the Section Executive Committee or any ten active members of the Section. An annual meeting of the Section shall be held each Bar year at a location of the Section's choosing.

Section 2: The Chairperson may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chairperson.

Section 3: At any meeting of the Section, ten or more members present and eligible to vote shall constitute a quorum. Presence at a meeting can be in-person or by any electronic means of communication other than text messaging or email as set forth in Art. IV, Section 7 of these Bylaws.

Section 4: Except for administrative decisions made by the Officers or Section Executive Committee, all actions of the Section shall be by a majority vote of the members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

Section 5: Parliamentary procedure at all meetings of the Section shall be governed by Robert's Rules of Order Newly Revised, and by these Bylaws.

Section 6: Notice of Section meetings shall be given at least ten days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be given by email or by mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

Section 7: If deemed prudent or necessary, the Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email. A Section may adopt internal rules allowing email voting on noncontroversial matters, provided the rule allows any member to request verbal debate or discussion, which would stop all email voting. The Office of the General Counsel must approve all internal rules.

ARTICLE V

Section Executive Committee

Section 1: The Section Executive Committee shall consist of the Officers of the Section and other members of the Section appointed by the Chairperson, whose term shall be co-existent with that of the Chairperson.

Section 2: Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this provision shall be reported to the members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

Section 3: All committees, except as otherwise provided herein, shall be appointed or removed by the Chairperson. Members of the Section Executive Committee, other than the Officers, and any other members of the Section may serve as Chairperson of appointed committees.

ARTICLE VI

Elections

Section 1: Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chairperson shall appoint three or more members of the Section to be a nominating committee which shall nominate a Treasurer/Secretary of the Section for the ensuing term of office. The nominating committee's report shall be made to the Treasurer/Secretary thereafter, who shall present the report to the Section at its next meeting, or by email or publication of a newsletter. Thereafter, and before the election of Officers, any member of the Section may nominate any other member of the Section for election to fill any of the vacant offices by transmitting said nomination to the Treasurer/Secretary. Nominations shall close ten days after the presentation of the nominating committee report.

Section 2: The Officers of the Section shall be elected by written or electronic ballot. Before each election, the Section shall provide voting instructions to all voting members. Ballots providing selections of the duly nominated candidates for each office shall be delivered in person at a regular or called meeting, by U.S. mail or by other Section-approved electronic voting methods. Voting shall take place no later than ten (10) days after the close of nominations. Each member of the Section wishing to participate in the election shall complete his or her ballot by casting a vote for at least one candidate for each vacant office. Ballots shall be cast in accordance with the voting instructions for each election. Votes cast contrary to the prescribed voting instructions shall not be counted. Within five (5) days of the due date for return of completed ballots, votes of Section members shall be tallied, and elected candidates shall be informed of their election. An election to any office requires a majority of the votes cast. If more than two candidates are nominated for any office and no candidate so nominated receives a majority of the votes cast upon the first ballot, then the two candidates receiving the largest number of votes cast upon such first ballot shall be voted upon again in a second ballot. The candidate receiving a majority of the votes cast upon such second ballot shall be declared to be elected to the particular office. A Special Meeting of the Section may be called by the Officers to otherwise modify the procedure governing any election.

ARTICLE VII

Finances

Section 1: Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by a member of the Section Executive Committee and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

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

Section 3: Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. To be reimbursed, the Section must submit a receipt for the expense incurred on behalf of the Section to the Sections Director. The Sections Director will report the expense to the Executive Committee, which will approve or deny the reimbursement.

Section 4: A financial report of the funds of the Section shall be reported by the Treasurer/Secretary at each meeting of the Section upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

ARTICLE VIII

Miscellaneous

Section 1: The Section shall conduct continuing education programs at least once each Bar year. Continuing education programs that are more than six credit hours shall be conducted through the Institute of Continuing Legal Education of the State Bar of Georgia in the area of law and field of practice of this Section. The Section may conduct any continuing legal education program that is less than six hours without the Institute of Continuing Legal Education of the State Bar of Georgia. The Commission must approve all continuing education programs on Continuing Lawyer

Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

Section 2: The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit proposed legislation to the Advisory Committee on Legislation for the Committee's consideration. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

Section 3: The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws, and standing policies of the State Bar of Georgia.

ARTICLE IX

Effective Date and Amendment

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

Section 2: No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed, and subscribed before the undersigned this _____ day of _____, 2026.

CHAIRPERSON

SECRETARY/TREASURER

CHILD PROTECTION AND ADVOCACY SECTION
STATE BAR OF GEORGIA

BYLAWS

ARTICLE I

Name and Purpose

Section 1: The name of the Section shall be the Child Protection and Advocacy Section.

Section 2: The purpose of this Section shall be to form an association of licensed lawyers in the State of Georgia who desire to develop their knowledge and professional abilities in practices related to child protection and advocacy, including but not limited to representation of children, parents, and agencies in juvenile court and related proceedings, and to render better services to their clients and to the public.

ARTICLE II

Membership and Dues

Section 1: Each member of this Section shall be a member in good standing of the State Bar of Georgia. Upon enrollment and payment of annual Section dues, any member of the State Bar shall be enrolled as a member of this Section. Thereafter, dues shall be paid in advance annually at the time of the payment of dues to the State Bar of Georgia. Section members who are enrolled and whose dues are paid shall constitute the membership of this Section. Any member whose annual dues are unpaid and past due shall cease to be a member and shall be dropped from the rolls of the Section, subject to reinstatement at any time upon the payment of dues for the current year. Annual dues shall be set by the Section leadership and approved by the Board of Governors.

Section 2: Law Student Members: Any student law member, pursuant to Rule 1-206.1, shall be eligible and may become a law student member of this Section upon application and payment of the required dues. Law student members shall be entitled to all of the privileges of this Section, except those of voting or holding office.

Section 3: The amount of annual dues for Section members and law student members may be changed in an amount determined by a majority vote of the members of the Section, subject to the approval of the Board of Governors of the State Bar of Georgia.

ARTICLE III

Officers

Section 1: The Officers of the Section shall be a Chairperson, a Vice-Chairperson, a Treasurer, and a Secretary, all of whom shall be members in good standing of the Section and who shall perform the usual duties of their respective offices and the duties hereafter specified. These officers shall be members of the Section Executive Committee and shall have general charge of the affairs of the Section.

Section 2: All newly elected Officers shall hold office for a term of one (1) year beginning at the commencement of the fiscal year of the State Bar of Georgia following the election at which they are elected and ending at the close of the same fiscal year of the State Bar of Georgia or until their successor has been elected. If a vacancy arises in the office of the Chairperson, the Vice-Chairperson shall become the Chairperson for the unexpired term. If a vacancy arises in the office of the Chairperson and there is also a vacancy in the office of the Vice-Chairperson, the President of the State Bar of Georgia shall appoint a successor Chairperson for the unexpired term. The Section Executive Committee may, by majority vote, fill any other vacancy in any other elected office for the balance of the unexpired term of such office.

Section 3: The Chairperson shall provide notice of the Section Executive Committee meetings and Section meetings. The Chairperson will preside over all meetings of the Section Executive Committee and of the Section, appoint appropriate committees to serve during his or her term as Chairperson, and plan and supervise the annual meeting of the Section. The Chairperson shall perform all executive and administrative duties necessary to the organization and functioning of the Section, including any responsibilities prescribed by the Section or the State Bar of Georgia.

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

Section 5: The Secretary shall record and keep minutes of all meetings of the Section, present minutes to the Section members for approval, maintain permanent records until such time that the permanent records are transferred to the elected or appointed successor of the Secretary, and perform such other duties as may be prescribed by the Chairperson.

Section 6: The Treasurer shall keep an accurate record of all dues collected and expenses of the Section, assist in the preparation of an annual budget for the Section, report upon the budget at meetings of the Section, and shall perform other duties as may be prescribed by the Chairperson. The Treasurer shall provide an accounting to the Section at its annual meeting or upon the Chairperson's request.

ARTICLE IV

Meetings of the Section

Section 1: A Section shall meet a minimum of twice per Bar year. Other meetings of the Section may be held from time to time on the call of the Chairperson, Vice-Chairperson, or any four (4) members of the Section Executive Committee, or any ten (10) active members of the Section. An annual meeting of the Section shall be held each Bar year at a location of the Section's choosing.

Section 2: The Chairperson may call a Special Meeting of the Section to be convened at such time and place and with such program and order of business as may be fixed by the Chairperson.

Section 3: At any meeting of the Section, ten (10) members present and eligible to vote shall constitute a quorum. Presence at a meeting can be in-person or by any electronic means of communication other than text messaging or email, as set forth in Art. IV, Section 7 of these Bylaws.

Section 4: Except for administrative decisions made by the Officers or the Section Executive Committee, all actions of the Section shall be by a majority vote of the members of the Section present and eligible to vote at any properly called meeting at which a quorum is present.

Section 5: Parliamentary procedure at all meetings of the Section shall be governed by Robert's Rules of Order, Newly Revised, and by these Bylaws.

Section 6: Notice of Section meetings shall be given at least ten (10) days prior to the time and place of the meeting of the Section. Notice of a Section meeting shall be provided by email or by mailing a notice to each member of the Section. Notice shall be sent to the member's email address or office address as the same appears in the membership rolls of the Section maintained by the State Bar of Georgia. Notice of this Section's meetings may be included in other written or printed materials as distributed by the State Bar by email, U.S. mail, or posted on the official website of the State Bar of Georgia.

Section 7: If deemed prudent or necessary, the Section may conduct any meeting by any electronic means that allows for discussion, debate, and voting other than by text messaging or email. A Section may adopt internal rules to allow for email voting on noncontroversial matters, provided that the rule allows for any member to request verbal debate or discussion, which would halt all email voting. The Office of the General Counsel must approve all internal rules and regulations.

ARTICLE V

Section Executive Committee

Section 1: The Section Executive Committee shall consist of the Officers of the Section and other members of the Section appointed by the Chair, whose term shall be co-existent with that of the Chair. The Section Executive Committee shall include the Immediate Past Chair and at least five other members of the Section. Efforts shall be made to include representatives from a diverse range of practice related to child protection and advocacy, as well as to include lawyers from across the State. Six members of the Executive Committee, either in person or via electronic means that allow for discussion, debate, and voting other than by text messaging or email, shall constitute a quorum. Motions may be passed by a majority of those present. The Section Executive Committee may vote on noncontroversial matters via email, provided that if any member requests verbal debate or discussion, all email voting shall halt.

Section 2: Except for actions requiring a vote from the entire membership of the Section, the Section Executive Committee shall have full authority to act for the Section in any way the Section itself would be authorized to act. Any such action taken by the Executive Committee under this

provision shall be reported to the members of the Section at its next meeting and by email or by the publication of a newsletter that is mailed or emailed to the members of the Section.

Section 3: All committees, except as otherwise provided herein, shall be appointed or removed by the Chairperson. Members of the Section Executive Committee, other than the Officers, and any other members of the Section may serve as Chairperson of appointed committees.

ARTICLE VI

Elections

Section 1: Annual elections for new officers shall occur between the mid-year meeting of the State Bar of Georgia and the annual meeting of the State Bar of Georgia. Prior to each election, the Chairperson shall appoint three (3) or more members of the Section to serve as a nominating committee, which shall nominate one or more members of the Section as qualified to hold each of the Section's offices for the ensuing term of office. The nominating committee's report shall be submitted to the Secretary thereafter, who shall present the report to the Section at its next meeting, or by email, or through publication in a newsletter. Thereafter, and before the election of Officers, any member of the Section may nominate any other member of the Section for election to fill any of the vacant offices by transmitting said nomination to the Secretary. Nominations shall close ten days after the presentation of the nominating committee report.

Section 2: The Officers of the Section shall be elected by written or electronic ballot. Before each election, the Section will provide voting instructions to all voting members. Ballots providing selections of the duly nominated candidates for each office shall be delivered in person at a regular or called meeting, by U.S. mail, or by other Section-approved electronic voting methods. Voting shall take place no later than ten days after the close of nominations. Each member of the Section wishing to participate in the election shall complete their ballot by casting a vote for at least one candidate for each vacant office. Ballots shall be cast in accordance with the voting instructions for each election. Votes cast contrary to the prescribed voting instructions shall not be counted. Within five (5) days of the due date for return of completed ballots, votes of Section members shall be tallied, and elected candidates shall be informed of their election. An election to any office requires a majority of the votes cast. If more than two (2) candidates are nominated for any office and no candidate so nominated receives a majority of the votes cast upon the first ballot, then the two (2) candidates receiving the largest number of votes cast upon such first ballot shall be voted upon again in a second ballot, and the candidate receiving a majority of the votes cast upon such second ballot shall be declared to be elected to the particular office. A Special Meeting of the Section may be called by the Officers to otherwise modify the procedure governing any election.

ARTICLE VII

Finances

Section 1: Funds of the Section shall be deposited in the treasury of the State Bar of Georgia. All expenses and accounts payable of the Section shall be approved by the Treasurer and paid by the Chief Financial Officer of the State Bar of Georgia. The Treasurer of the Section shall

communicate with the Sections Director to obtain financial information necessary to create financial reports to be delivered to the members of the Section.

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

Section 3: Officers and members of the Section shall not be compensated for services to the Section but may be reimbursed for reasonable expenditures incurred on behalf of the Section. Reimbursement of expenditures requires a receipt for the expense incurred on behalf of the Section and prior approval from the Section Executive Committee. The Treasurer will submit the reimbursement request and receipt to the Sections Director. The Sections Director will report the expense to the State Bar Executive Committee, which will approve or deny the reimbursement.

Section 4: A financial report of the funds of the Section shall be reported by the Treasurer at each meeting of the Section or upon request by any member of the Section. The Sections Director will assist the Treasurer in preparing a financial report for the Section. This Section shall have the same fiscal year as the State Bar of Georgia.

ARTICLE VIII

Miscellaneous

Section 1: The Section shall conduct continuing education programs at least once each Bar year in the area of law and field of practice of this Section. Continuing education programs that are six (6) hours or more in credit hours shall be conducted through the Institute of Continuing Legal Education of the State Bar of Georgia in the area of law and field of practice of this Section. The Section may conduct any continuing legal education program that is less than six hours without going through the Institute of Continuing Legal Education of the State Bar of Georgia. The Commission must approve all continuing education programs on Continuing Lawyer Competency. The Section may coordinate its continuing legal education efforts with the other sections of the State Bar of Georgia.

Section 2: The Section, subject to the rules, bylaws, and Standing Board Policies of the State Bar of Georgia, may study or review proposed legislation. The Section may submit proposed legislation to the Advisory Committee on Legislation for the Committee's consideration. The Section shall report or submit a report in writing of any legislative activities to the State Bar of Georgia at or prior to the Annual Meeting of the State Bar of Georgia. Written reports shall be submitted at least six (6) weeks in advance of the Annual Meeting for publication in the Annual Meeting Board Book.

Section 3: The Section will not engage in actions and activities or promote positions that are not germane to the scope and purpose of the State Bar of Georgia. A section shall not do any act or take any action contrary to the rules, bylaws, and standing policies of the State Bar of Georgia.

ARTICLE IX

Effective Date and Amendment

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

Section 2: These Bylaws may be amended by a majority vote of the members of the Section present at any properly called meeting at which a quorum is present, provided a majority of the Section Executive Committee has first approved the proposed amendment, subject to Section 3.

Section 3: No amendment to these Bylaws shall become effective until approved by the Board of Governors of the State Bar of Georgia.

Signed, sealed, and subscribed before the undersigned this the ____ day of _____, 20____.

CHAIRPERSON

SECTION SECRETARY



State Bar of Georgia

To: Bar Officers/Finance Committee

From: Ron Turner *RT*

Date: September 9, 2026

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

Attached please find the June 2026 financial statements. As June 30 is the year-end of the Bar, full departmental details are attached. The amounts provided in the attached financial statements are subject to change due to the receipt of any additional invoices, if significant in nature, related to June 30, 2026 and the audit by the Bar's outside accountants.

Line-item variance explanations follow. Department managers are expected to specify savings elsewhere in their budgets when exceeding a line item, unless there was a budgeting error. Line-item variances < **\$2,500** are not explained to conserve your time.

New and revised items are highlighted in bold.

Savings were realized to offset these overages. In many instances unbudgeted items were covered as part of the use of unallocated cash.

Executive Summary

In total, the Bar budgeted a loss of \$1,074,873 for the year ended June 30, 2026. This total budgeted loss for the Bar was calculated as a budgeted loss for Bar operations of \$1,047,848 and a budgeted loss for the Bar Center of \$27,025.

The Bar Center realized an actual loss of \$491,521 for the year instead of the budgeted loss of \$27,025. This difference of \$464,496 is comprised of the following components: (1) additional interest income and earnings due primarily to the write-up of the Bar's investments to fair market value. These income amounts totaled \$226,380 more than what was budgeted. The write-up or write-down of investments to fair market value is a standard adjustment. However, since we normally do not sell investments, we have a zero budget for both the realized and unrealized gains on investments (2) additional revenue due to contributions from CCLC of \$47,138 (3) additional rental revenue of \$93,607 and (4) additional parking revenue of \$154,367 and (5) a reduction of \$160,168 in operating costs associated with the building. These savings were offset by (6) additional audio/video, furniture and equipment costs of \$138,320 and (7) additional building rehab costs of \$985,999. These seven amounts net to an additional expense of \$442,659.

Bar operations realized a gain of \$583,722 instead of the budgeted loss of \$1,047,848. This difference of \$1,631,570 is comprised of the following components: (1) additional interest income and earnings due primarily to the write-up of the Bar's investments to fair market value. Like Bar Center operations, these income amounts totaled \$510,394 more than what was budgeted. (2) ICLE earned \$302,158 more in net program revenue than what was originally budgeted (3) savings in salaries and related personnel costs of \$743,790, (4) savings in officer and non-officer Executive Committee member expenses of \$42,737, (5) savings in attorney and staff travel of \$74,628 (6) savings associated with the Bar Journal of and other printing costs of \$32,943 (7) savings in supplies of \$26,067. The savings were offset by the following components: (8) additional credit card discounts and fees of \$30,982 (9) an overage in meeting costs (Board of Governors and Members meetings, Supreme Court and Court of Appeals meeting costs and Executive Committee meetings costs) of \$41,950 (10) an overage in YLD net committees expense of \$29,874 (11) additional costs for the State Disciplinary Board Panels of \$46,308 (12) additional contract labor and contract programming costs of \$42,231. These twelve items total a difference of \$1,541,372.

Administration

Credit card discounts and fees are over budget primarily due to the increased use of credit cards for payments. This increased use was the result of more Bar members paying their dues by credit card in the current period than what was originally anticipated.

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.

Contract programming costs are in excess of the budget due to costs associated with the membership department. The vendor made certain programming changes which required the Bar to make changes to the programming logic that is used.

Office of General Counsel

Luncheons are in excess of the budget primarily due to additional lunch meetings to discuss operations of the department along with monthly continuing education meetings.

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.

Communications

Taxes and benefits are in excess of budget to the type of coverage for one employee in the department. Individual coverage was budgeted for while the actual expense was for family coverage.

Young Lawyers Division

Committees expense for the Young Lawyers Division was over budget primarily **due to the following:** (1) expenses incurred by the Sports Law Committee. However, these increased expenses were substantially offset by income generated by the same committee and (2) **hotel and food costs are higher than what was originally anticipated/budgeted along with additional expenses incurred beyond the scope of what was originally anticipated.**

Savannah

Rent and utilities are greater than the budget due to higher than anticipated real estate taxes and operating costs. The Bar is required to pay their share of real estate taxes and operating costs monthly as part of the rent and then if additional amounts are due, those payments are also required.

High School Mock Trial

Taxes and benefits are in excess of budget due to the accrual of vacation pay for the current year. The amount accrued was greater than the amount accrued in prior years.

Costs for the district and regional mock trial competitions 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.

Credit card discounts and fees are over budget primarily due to the increased use of credit cards for payments. This increased use was the result of more Bar members paying by credit card for their continuing education classes in the current period than what was originally anticipated.

Costs for bond premium amortization are in excess of the budget due to more bonds bought at a premium than what was anticipated.

BOG and Member Meetings

Costs associated with the BOG and Member Meetings are in excess of the budget primarily due to the following reasons: (1) hotel and food costs are higher than what was originally anticipated/budgeted (2) annual meeting production cost was higher than anticipated and (3) there was a change in the scope of services requested.

Supreme Court Meetings and Court of Appeals Meetings

Supreme Court meetings are in excess of the budget due to hotel and food costs being higher than originally anticipated/budgeted.

Fastcase

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

Sections

Salaries are greater than budget due to the payment of compensation to two hourly employees who worked more than the budgeted 37.5 hours per week but less than or equal to 40 hours per week.

Overtime is more than the budget due to additional time incurred at the Mid-Year Meeting, Spring Meeting, **and Annual Meeting** and various other section events. These amounts were not originally budgeted.

Conference Center

Salaries are greater than budget due to the payment of compensation to two hourly employees who worked more than the budgeted 37.5 hours per week but less than or equal to 40 hours per week.

Taxes and benefits are in excess of budget to the type of coverage for one employee in the department. Individual coverage was budgeted for while the actual expense was for employee and spouse.

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 **\$986,000** 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 **\$388,800** for pre-cooling and heating coils associated with the building (5) approximately **\$33,100** associated with other building costs (6) approximately \$22,600 associated with architect costs for potential bathroom upgrades (7) approximately \$200,000 for a generator replacement (8) approximately \$22,600 in leasing commission costs associated with **two** new tenants to the building and **(9) approximately \$12,700 in costs associated with schematic plans and mood board for the rental space.**

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 costs for HVAC are greater than the budget primarily due to replacement of the air handler and condensate receiver tank. Both repairs totaled approximately \$26,000.

Repairs and maintenance for plumbing is over budget due to the failure of domestic water backflow testing which required a rebuild.

Repairs and maintenance for elevators is greater than the budget by approximately \$11,100 due to an emergency elevator drive replacement which cost approximately \$14,060.

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.

Electric is over the budget due to higher than anticipated electric bills for July and August 2025 to cool the building.

Security Contract is over budget primarily due to an under budget in this account.

Parking

Salaries for parking are over budget primarily due to an increase in the number of events that were staffed. With more events staffed, additional salaries were also required.

Payroll taxes, workers' compensation and medical insurance/benefits were all in excess of the budgeted amounts because of the overage in salaries. These expenses are all calculated as a percentage of the budgeted salaries amount.

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.

Incentive management fees were more than the budget due to the increased revenue also received. The incentive management fee is based upon the total amount of revenue received.

Shared Office Overhead

Shared office allocations exceed actual shared office expense by approximately **\$166,500**. This is a positive variance.

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 June 30, 2026

	Year Ending 06/30/2025	Year To Date June 30, 2026	% of Budget	Year Ending 06/30/2026
	Actual	Actual		Annual Budget
Membership Numbers				
Active Members	42,777	43,469	99.47 %	43,700
Inactive Members	7,827	7,688	99.33 %	7,740
Provisional Members	21	31	62.00 %	50
Associates/Affiliates	20	20	153.85 %	13
Foreign Legal Consultants	12	12	133.33 %	9
Students	491	505	121.69 %	415
Emeritus	5,095	5,509	109.63 %	5,025
Total Membership Numbers	56,243	57,234	100.50 %	56,952
Revenue				
Dues Active	11,283,972	11,688,435	99.06 %	11,799,000
Dues Inactive	1,061,172	1,056,478	101.11 %	1,044,900
Dues Provisional	9,900	20,337	301.29 %	6,750
Dues Associates	850	1,700	188.89 %	900
Dues Foreign Legal Consultant	2,508	3,240	133.33 %	2,430
Dues Late Fees	244,825	252,475	97.11 %	260,000
Dues NSF Check Fee	140	180	128.57 %	140
Dues Prior Years	11,847	9,369	124.92 %	7,500
Total License and Dues	12,615,214	13,032,214	99.32 %	13,121,620
Program Registration Income	4,742,679	5,102,158	106.29 %	4,800,000
Section Expense Reimbursement	320,694	335,385	100.00 %	335,385
CSF Expense Reimbursement	73,000	190,000	100.00 %	190,000
Advertising and Sales	53,362	55,731	203.85 %	27,340
Membership Income	215,977	256,897	146.50 %	175,350
Credit Card Processing Fees	131,682	148,123	128.80 %	115,000
Interest Income	704,444	840,394	254.66 %	330,000
Miscellaneous Revenues	34,896	37,898	172.26 %	22,000
Total Bar Revenue	18,891,948	19,998,800	104.61 %	19,116,695
Total Bar Expenses	18,710,206	19,415,078	96.28 %	20,164,543
SBG Net Gain (Loss)	\$ 181,742	\$ 583,722	(55.71) %	\$ (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 June 30, 2026

	Year Ending 06/30/2025	Year To Date June 30, 2026	% of Budget	Year Ending 06/30/2026
	Actual	Actual		Annual Budget
Total Bar Center Operations Revenue	3,409,662	3,429,359	118.05 %	2,904,940
Total Bar Center Operations Expenses	3,984,407	3,920,880	133.73 %	2,931,965
Total Bar Center Operations Net Gain (Loss)	\$ (574,745) \$	(491,521)	1,818.76 % \$	(27,025)
Combined Revenue	22,301,610	23,428,158	106.39 %	22,021,635
Combined Expenses	22,694,613	23,335,957	101.04 %	23,096,508
Total Combined Net Income (Loss)	\$ (393,003) \$	92,201	(8.58) % \$	(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 June 30, 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	78,330	0.00 %	99,229	0.00 %	0	(99,229)	146,317
CCLC Contributions to Bar Center	937,139	67.42 %	1,437,138	103.39 %	1,390,000	(47,138)	1,358,389
Interest and Dividend Income	74,631	54.08 %	265,151	192.14 %	138,000	(127,151)	183,425
Bar Center Income and Cash Receipts	\$ 1,090,100	71.34 %	\$ 1,801,518	117.90 %	\$ 1,528,000	\$ (273,518)	\$ 1,688,131
Bar Center Expenses and Cash Disbursements							
Bond Premium Amortization	3,008	25.06 %	9,985	83.21 %	12,000	2,015	11,053
Investment Service Fees	9,679	40.33 %	32,229	134.29 %	24,000	(8,229)	27,376
Conference Center Renovations	9,306	97.96 %	9,306	97.96 %	9,500	194	0
Audio Video, Furniture and Equipment	0	0.00 %	172,320	506.83 %	34,000	(138,320)	64,498
Building Rehabilitation	259,734	0.00 %	985,999	0.00 %	0	(985,999)	1,275,625
Tenant Improvements	0	0.00 %	11,813	0.00 %	0	(11,813)	0
President's Boardroom	0	0.00 %	0	0.00 %	0	0	1,109
Bar Center Expenses and Cash Disbursements	281,727	354.37 %	1,221,652	1,536.67 %	79,500	(1,142,152)	1,379,661
Bar Center Combined Net Cash Flow	\$ 808,373	55.81 %	\$ 579,866	40.03 %	\$ 1,448,500	\$ 868,634	\$ 308,470
Conference Center Income and Expenses							
Room Rentals and Various Charges	0	0.00 %	16,427	121.68 %	13,500	(2,927)	16,415
Conference Center Operating Expenses	44,933	9.12 %	502,513	101.99 %	492,708	(9,805)	469,343
Conference Center Combined Net Cash Flow	\$ (44,933)	9.38 %	\$ (486,085)	101.44 %	\$ (479,208)	\$ 6,877	\$ (452,929)
Rental Income and Expenses							
Rental Income	83,265	11.07 %	845,607	112.45 %	752,000	(93,607)	983,600
Building Operating Expenses	211,134	10.61 %	1,829,162	91.95 %	1,989,330	160,168	1,792,395
Rental Combined Net Cash Flow	\$ (127,869)	10.33 %	\$ (983,555)	79.49 %	\$ (1,237,330)	\$ (253,775)	\$ (808,795)
Parking Income and Expenses							
Parking Income	76,122	12.45 %	765,807	125.25 %	611,440	(154,367)	721,517
Parking Deck Operating Expenses	37,176	10.04 %	367,553	99.22 %	370,427	2,874	343,008
Parking Combined Net Cash Flow	\$ 38,947	16.16 %	\$ 398,254	165.24 %	\$ 241,013	\$ (157,241)	\$ 378,509
Total Bar Center Operations Net Gain (Loss)	\$ 674,517	(2,495.90) %	\$ (491,521)	1,818.76 %	\$ (27,025)	\$ 464,496	\$ (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 June 30, 2026

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Revenues				
Dues - Active	\$ 11,688,435	\$ 11,799,000	99.06 %	\$ 11,283,972
Dues - Inactive	1,056,478	1,044,900	101.11 %	1,061,172
Dues - Provisional	20,337	6,750	301.29 %	9,900
Dues - Misc. Types	4,940	3,330	148.35 %	3,358
Dues - Late Fees	262,024	267,640	97.90 %	256,812
Total Dues & Licenses	13,032,214	13,121,620	99.32 %	12,615,214
Program Registration Income	5,102,158	4,800,000	106.29 %	4,742,679
Section Expense Reimbursement	335,385	335,385	100.00 %	320,694
CSF Expense Reimbursement	190,000	190,000	100.00 %	73,000
Advertising and Sales	55,731	27,340	203.85 %	53,362
Membership Income	99,272	84,150	117.97 %	94,477
Pro Hac Vice	612,425	480,000	127.59 %	535,200
Pro Hac Vice Contra	(454,800)	(388,800)	116.98 %	(413,700)
Credit Card Processing Fees	148,123	115,000	128.80 %	131,682
Interest Income	840,394	330,000	254.66 %	704,444
Miscellaneous Revenues	37,898	22,000	172.26 %	34,896
Total Revenues	19,998,800	19,116,695	104.61 %	18,891,948
Expenses				
Administration	2,946,743	2,988,568	98.60 %	2,846,592
General Counsel	5,471,016	5,633,355	97.12 %	5,133,157
Communications	918,994	958,061	95.92 %	1,061,121
Lawyer's Assistance Program	154,999	155,000	100.00 %	154,674
Fee Arbitration	573,344	626,996	91.44 %	571,668
Law Practice Management	462,025	573,367	80.58 %	458,571
Sections	337,031	335,385	100.49 %	323,193
Savannah Office	319,981	325,224	98.39 %	310,494
Tifton Office	182,316	203,515	89.58 %	209,899
Young Lawyers	488,583	470,224	103.90 %	435,031
Unauthorized Practice of Law	752,515	862,268	87.27 %	904,586
Law Related Education	450,063	464,994	96.79 %	438,473
High School Mock Trial	190,737	185,155	103.01 %	187,023
ICLE	4,508,988	4,530,379	99.53 %	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 June 30, 2026

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Pro Bono	212,216	212,216	100.00 %	212,216
Fastcase	486,539	480,000	101.36 %	462,428
Officers' Expenses	67,029	99,470	67.39 %	73,857
Resource Center Contribution	55,166	55,166	100.00 %	55,166
Total Other Expenses	1,003,339	1,005,200	99.81 %	1,104,541
Unallocated Services	(166,546)	0	0.00 %	(168,187)
Total Expenses	19,415,078	20,164,543	96.28 %	18,710,206
Net Income	\$ 583,722	\$ (1,047,848)	(55.71) %	\$ 181,742

Note: For Total Other Expenses, the details can be found on the next page.
Created on 08/30/2026
State Bar of Georgia

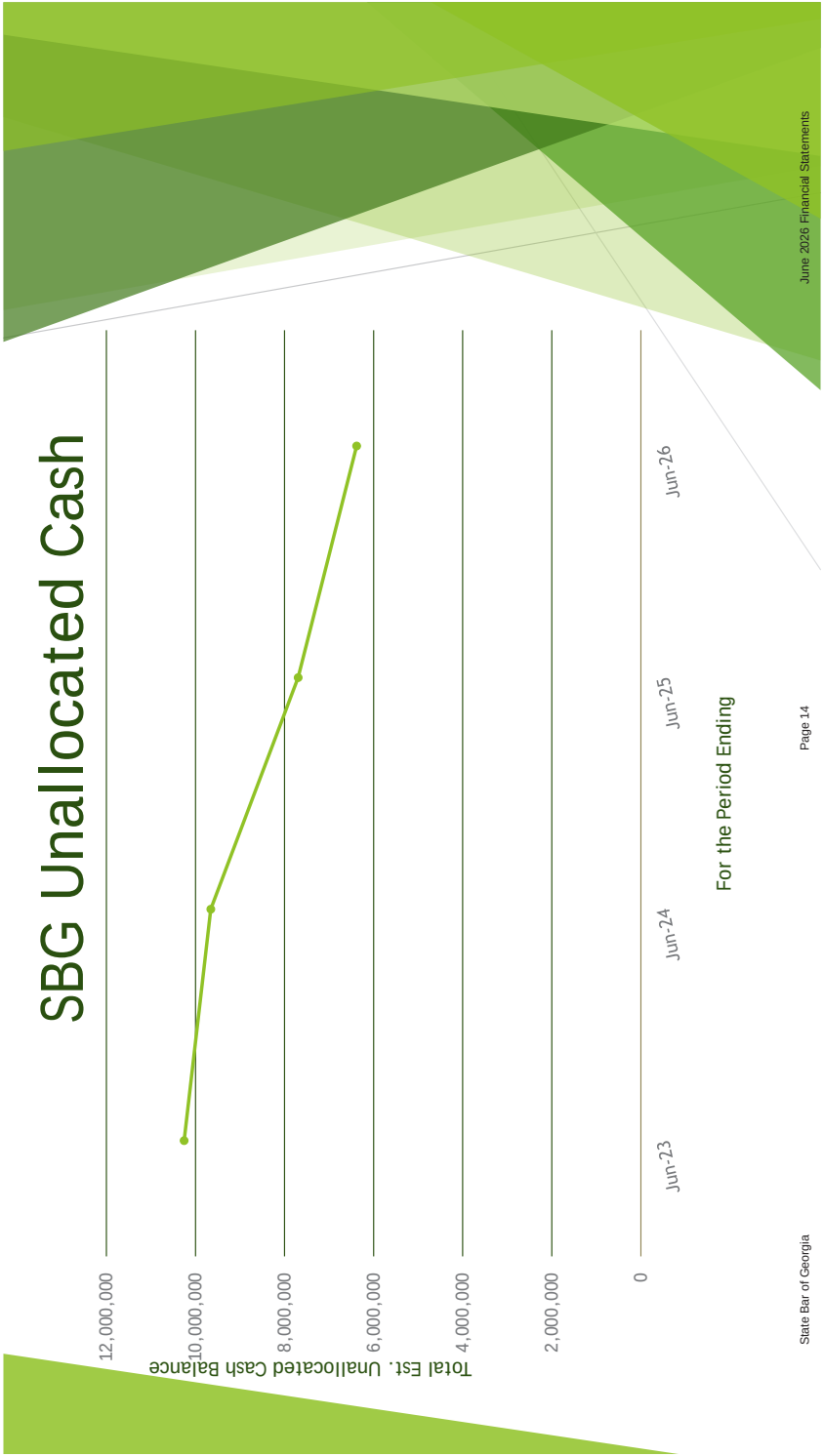
State Bar of Georgia
Supporting Schedule of Other Expenses - YTD
For the Year To Date Period Ending June 30, 2026

	YTD Actual	Annual Budget	YTD % of Budget	Prior Year
Other Expenses	\$	\$		
BOG and Member Meetings	654,523	597,500	109.54 %	651,918
Supreme Court Meetings	91,832	79,000	116.24 %	81,230
Executive Committee Meetings	29,431	62,000	47.47 %	56,444
Court of Appeals Meetings	24,664	20,000	123.32 %	24,814
State Disciplinary Board Lawyers	34,000	34,000	100.00 %	31,500
Electronic Ballots	17,044	18,000	94.69 %	16,646
Dues Notice	33,476	38,000	88.10 %	32,984
Letters of Good Standing	1,602	2,400	66.76 %	2,033
Bar Membership Cards	13,120	12,500	104.96 %	12,442
50 Year Certificates	4,170	6,300	66.18 %	4,823
Membership Database Project	0	0	0.00 %	110,713
State Bar Committees	15,581	20,000	77.90 %	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	7,959	23,000	34.60 %	11,688
Investment Service Fees	26,183	36,000	72.73 %	28,407
Access to Justice/Pro Bono	30,000	30,000	100.00 %	7,500
Total Other Expenses	\$ 1,003,339	\$ 1,005,200	99.81 %	\$ 1,104,541

State Bar of Georgia
Status and Use of Cash and Investments
For the Current Period Ending June 30, 2026

	Current Month (June 2026)	Ending of Prior Fiscal Year (June 2025)	Dollar Change	% Increase/ Decrease
Cash and Investments - Bar	\$ 46,749,486			
Less:				
CCLC Cash and Investments Included in Above Amount	(7,681,315)			
Unrealized (Gain)/Loss in Investments	<u>(1,133,381)</u>			
Net Cash Available for State Bar	<u>37,934,790</u>			
Use of Cash:				
Less:				
Board Designated - See Separate Schedule Attached	(8,463,385)			
Donor Temporarily Restricted - See Separate Schedule Attached	<u>(3,232,403)</u>			
Total Board Designated and Temporarily Restricted	<u>(11,695,788)</u>			
Other - Cash Allocated:				
Collection of Outstanding Accounts Receivable	223,946			
Payment of Accounts Payable	(1,563,077)			
Payment of Accrued Vacation	(580,128)			
Deferred Income	(12,485,215)			
Payment of Credit Card Bill	(470,322)			
Payment of Accrued Salary	(448,105)			
Payment of Accrued Taxes	(34,280)			
Payment of Other Accrued Expenses (primarily pension)	(732,963)			
Payment to Client Security Fund	(3,026,819)			
Net Amount to be Received from Related Entities	469,083			
Total Other - Cash Allocated	<u>(18,647,880)</u>			
Anticipated Use of Unallocated Cash - Bar Operations (For Ongoing Projects in Progress).	<u>-</u>			
Estimated Cash and Investments - June 30, 2026 - Bar	<u>7,591,122</u>	8,379,251	(788,129)	-9%
Cash and Investments - Bar Center	299,918			
Other Cash Allocated - Bar Center:				
Collection of Outstanding Accounts Receivable	55,645			
Payment of Accounts Payable	(120,636)			
Deferred Income	(27,867)			
Payment of Other Accrued Expenses	(60,894)			
Security Deposit	(8,874)			
Total Other - Cash Allocated - Bar Center	<u>(162,626)</u>			
Anticipated Use of Unallocated Cash - Bar Center Operations (For Ongoing Projects in Progress).	<u>(1,346,388)</u>			
Estimated Cash and Investments June 30, 2026 - Bar Center	<u>(1,209,096)</u>	(683,890)	(525,206)	-77%
Total Estimated Cash Balance at June 30, 2026	\$ 6,382,026	\$ 7,695,361	(1,313,335)	-17%

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.



State Bar of Georgia
Board-Designated and Donor Temporarily Restricted Net Assets
For the Year To Date Period Ending June 30, 2026

	June 30, 2023	June 30, 2024	June 30, 2025	June 30, 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	300,000
Board Designated - Sections	3,664,312	3,745,183	3,608,573	3,413,385
YLD Meetings	77,999	49,795	5,091	0
Total Board-Designated excludes ICLE	\$ 8,792,311	\$ 8,844,978	\$ 8,663,664	\$ 8,463,385
Donor Temporarily Restricted				
Legislative	\$ 1,806,483	\$ 2,423,119	\$ 2,825,925	\$ 2,709,793
Law Related Education/Marshall fund	207,599	192,396	162,382	122,314
High School Mock Trial	15,299	17,481	27,719	25,115
Basics Program	116,951	121,963	125,851	129,806
Younger Lawyers	87,199	126,603	135,410	108,802
Lawyers Assistance	31,863	33,229	34,352	33,909
Georgia Diversity Program	13,555	6,374	165	45
Bar Media Conference	3,115	1,523	943	643
Law Day	6,212	6,317	5,610	4,887
Access to Justice	3,175	19,993	22,150	19,878
Promote Inclusion	8,701	5,924	12,649	20,338
Military Vet Pro Bono	14,481	15,101	15,582	16,079
Justice Portraits	1,022	1,066	1,100	1,135
Center for Lawyer Well-Being	0	0	1,195	38,803
Senior Lawyers Division	0	0	0	856
Total Donor Temporarily Restricted	\$ 2,315,655	\$ 2,971,089	\$ 3,371,033	\$ 3,232,403
Net Board Designated and Donor Temporarily Restricted	\$ 11,107,967	\$ 11,816,068	\$ 12,034,697	\$ 11,695,787

State Bar of Georgia

Sections End of Period Balances

For the Year To Date Period Ending June 30, 2026

	2023 June 30	2024 June 30	2025 June 30	2026 June 30
Administrative Law	5,415	3,650	1,033	0
Agricultural Law	15,245	15,081	16,199	17,633
Animal Law	6,859	7,960	8,417	9,121
Anti-Trust Law	13,595	13,768	12,615	12,786
Appellate Practice Law	28,338	31,423	18,675	21,892
Aviation Law	11,198	8,446	5,856	0
Bankruptcy Law	83,998	84,451	38,833	54,780
Bike Law	3,854	4,797	5,439	6,300
Business Law	241,256	266,886	293,867	312,427
Cannabis and Hemp Law	15,274	20,322	25,922	28,296
Child Protection and Advocacy Law	6,976	8,745	10,845	9,375
Class Action Law	4,734	4,058	4,992	7,577
Constitutional Law	27,877	29,732	35,359	41,430
Construction Law	26,054	29,142	33,089	36,303
Consumer Law	51,659	53,548	57,389	61,399
Corporate Counsel Law	127,444	94,180	102,052	104,731
Creditor's Rights Law	46,899	49,363	35,810	41,681
Criminal Law	174,486	188,475	180,029	181,926
Dispute Law	49,926	62,924	73,039	83,445
E-Discovery and Use of Technology Law	34,558	55,788	47,202	49,089
Elder Law	146,843	159,997	155,265	149,573
Eminent Domain Law	65,781	57,060	53,055	50,272
Employee Benefits Law	36,540	38,182	41,262	44,808
Energy Law	0	198	1,721	3,983
Entertainment and Sports Law	72,629	77,275	75,947	55,418
Environmental Law	96,921	101,910	104,838	103,793
Equine Law	6,868	7,141	7,394	8,330
Family Law	365,473	350,651	220,110	76,716
Fiduciary Law	224,980	248,744	244,240	281,502
Franchise and Distribution Law	8,242	9,729	9,446	9,750
General Practice and Trial Law	65,181	70,571	102,820	113,326
Government Attorney Law	32,990	35,038	36,138	38,425
Health Law	37,353	42,765	27,631	23,005
Immigration Law	41,920	46,813	51,056	55,044
Intellectual Property Law	206,892	227,554	209,102	182,584
International Law	86,953	85,732	91,214	84,645
Judicial Law	18,222	18,212	18,149	15,008
Labor Law	102,539	104,105	93,255	86,446

State Bar of Georgia
Sections End of Period Balances
For the Year To Date Period Ending June 30, 2026

	2023 June 30	2024 June 30	2025 June 30	2026 June 30
Legal Economics Law	6,671	7,023	7,248	7,479
Local Government Law	56,744	59,979	58,702	61,624
Military and Veterans Law	18,403	20,281	21,440	12,956
Nonprofit Law	21,472	26,782	28,142	23,128
Privacy and Technology Law	36,345	(6,082)	48,183	59,006
Product Liability Law	117,187	128,385	137,714	147,215
Professional Liability Law	17,313	20,063	19,469	17,418
Real Property Law	403,493	414,763	348,879	244,115
Religious Liberty Law	1,325	2,933	4,219	5,443
School and College Law	40,768	42,856	41,733	44,501
Senior Lawyers Law	12,024	12,702	8,635	1,177
Taxation Law	36,464	35,026	37,828	41,553
Tort and Insurance Law	104,254	77,521	131,488	136,997
White Collar Law	0	295	2,198	0
Worker's Compensation Law	199,877	188,240	163,390	147,954
Total	\$ 3,664,312	\$ 3,745,183	\$ 3,608,573	\$ 3,413,385

State Bar of Georgia
Summary of Members and Voluntary Legislative Contributions
With Contributions Paid Through June 30, 2026

Dues Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	2026-27 Dues Season	2025-26 Dues Season	2024-25 Dues Season
	<u>51,081</u>	<u>50,592</u>	<u>50,114</u>
Active - Number Paid	34,134	44,769	43,317
Inactive - Number Paid	<u>5,368</u>	<u>7,919</u>	<u>8,074</u>
Total Number of Members With Dues Paid	<u>39,502</u>	<u>52,688</u>	<u>51,391</u>
Percent of Total Members With Dues Paid	<u>77.3%</u>	<u>104.1%</u>	<u>102.5%</u>
Number of Members Who Made A Contribution	<u>3,109</u>	<u>4,493</u>	<u>8,649</u>
Percent of Members Who Made A Contribution	<u>7.9%</u>	<u>8.5%</u>	<u>16.8%</u>
Total Contribution Amount	\$ <u>280,796</u>	\$ <u>386,115</u>	\$ <u>820,248</u>
Average Amount Paid	\$ <u>90</u>	\$ <u>86</u>	\$ <u>95</u>

Legislative Contribution Amounts by Dues Year

2026 - 2027	<u>\$ 280,796</u>
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>

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 June 30, 2026

Dues	2026-27 Dues Season	2025-26 Dues Season	2024-25 Dues Season
Total Number of Members at Apr 30 of Previous Bar year (active and inactive)	51,081	50,592	50,114
Active - Number Paid	34,134	44,769	43,317
Inactive - Number Paid	5,368	7,919	8,074
Total Number of Members With Dues Paid	39,502	52,688	51,391
Percent of Total Members With Dues Paid	77.3%	104.1%	102.5%
Number of Members Who Made A Contribution	1,421	2,062	3,460
Percent of Members Who Made A Contribution	3.6%	3.9%	6.7%
Total Contribution Amount	\$ 166,082	\$ 231,377	\$ 485,947
Average Contribution Amount	\$ 117	\$ 112	\$ 140

GLSP Contribution Amounts by Dues Year

2026 - 2027	<u>\$ 166,082</u>
2025 - 2026	<u>\$ 231,377</u>
2024 - 2025	<u>\$ 485,947</u>
2023 - 2024	<u>\$ 490,605</u>
2022 - 2023	<u>\$ 483,850</u>
2021 - 2022	<u>\$ 478,287</u>
2020 - 2021	<u>\$ 436,815</u>
2019 - 2020	<u>\$ 366,674</u>
2018 - 2019	<u>\$ 295,454</u>
2017 - 2018	<u>\$ 312,251</u>

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 June 30, 2026

Beginning Balance	\$ 2,825,925
Income:	
Interest and Dividend Income	76,032
Gain/Loss Investment Interest Allocation	27,219
Miscellaneous Income	386,775
Total Income	490,026
Expenditures:	
Staff and Contract Lobbyists	507,070
Grassroots Efforts	9,872
Travel	11,071
Legislative Guests/Meetings	10,414
Shared Office Allocation	21,659
Computer Software	174
Miscellaneous	45,898
Total Expenditures	606,158
Net Donor Temporarily Restricted Balance	\$ 2,709,793

State Bar of Georgia
Summary of Client Security Fund Activity
For the Year To Date Period Ending June 30, 2026

	2023	2024	2025	
	June 30	June 30	June 30	June 30, 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	83,055
Gain/Loss Investment Interest Allocation	19,577	92,242	47,344	28,846
Client Security Fund Assessments	751,680	760,050	767,625	773,648
Restitution Income	18,445	821	13,207	58,477
Total Income	\$ 822,819	\$ 897,477	\$ 888,400	\$ 944,026
Expenses:				
Restricted Expenses	73,000	73,000	73,000	190,000
Client Security Fund Claims Payments	159,879	239,968	870,020	429,526
Bond Premium Amortization	4,288	5,737	3,704	3,125
Investment Service Fees	7,710	8,066	9,064	10,076
Total Expenses	\$ 244,877	\$ 326,771	\$ 955,788	\$ 632,727
Net Income	\$ 577,942	\$ 570,706	\$ (67,388)	\$ 311,299
Fund Balance, End of Period	\$ 2,212,202	\$ 2,782,908	\$ 2,715,520	\$ 3,026,819

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 88,055	6.43 %	\$ 1,352,627	98.72 %	\$ 1,370,129	\$ 17,502	\$ 1,271,379
Overtime	1,476	30.00 %	5,573	113.29 %	4,919	(654)	5,991
Taxes and Benefits	30,014	6.97 %	396,845	92.12 %	430,807	33,962	379,708
Pension	2,977	3.06 %	92,051	94.73 %	97,171	5,120	90,168
Total Personnel Services	122,522	6.44 %	1,847,096	97.06 %	1,903,026	55,930	1,747,246
Operating Expenses							
Shared Office Allocation	43,318	8.33 %	519,812	100.00 %	519,812	0	541,791
Postage and Freight	123	2.15 %	742	12.91 %	5,750	5,008	3,475
Printing	0	0.00 %	113	4.34 %	2,600	2,487	927
Supplies	115	4.42 %	2,915	112.13 %	2,600	(315)	2,761
Telephone	375	8.33 %	4,500	100.00 %	4,500	0	4,500
Subscriptions and Books	0	0.00 %	3,391	103.67 %	3,270	(121)	4,392
Dues and Memberships	435	14.45 %	1,610	53.49 %	3,010	1,400	1,961
Seminars and Training	277	4.69 %	3,274	55.50 %	5,900	2,626	3,244
Miscellaneous	1,325	12.92 %	6,718	65.54 %	10,250	3,532	42,995
Attorney and Staff Travel	5,435	9.74 %	31,218	55.95 %	55,800	24,582	38,672
Executive Director Travel	2,086	7.96 %	22,755	86.85 %	26,200	3,445	28,788
Luncheons	171	6.46 %	2,540	95.85 %	2,650	110	1,531
Bank Fees	308	8.79 %	636	18.18 %	3,500	2,864	171
Credit Card Discount and Fees	96,118	31.31 %	333,123	108.51 %	307,000	(26,123)	303,875
Computer Hardware	0	0.00 %	0	0.00 %	800	800	4,064
Computer Software	0	0.00 %	2,172	90.52 %	2,400	228	1,588
Membership Software License	0	0.00 %	144,430	116.95 %	123,500	(20,930)	114,710
Contract Programming	5,925	107.73 %	19,697	358.14 %	5,500	(14,197)	0
Total Operating Expenses	156,011	14.38 %	1,099,646	101.35 %	1,085,042	(14,604)	1,099,345
Furniture/Equipment	0	0.00 %	0	0.00 %	500	500	0
Total Expenses	\$ 278,533	9.32 %	\$ 2,946,742	98.60 %	\$ 2,988,568	\$ 41,826	\$ 2,846,591

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	275,610	8.51 %	3,212,610	99.15 %	\$ 3,240,066	\$ 27,456	\$ 3,009,566
Salaries-Hourly PT	1,957	4.61 %	27,156	64.04 %	42,399	15,245	26,764
Overtime	108	3.86 %	1,076	38.26 %	2,812	1,736	1,024
Taxes and Benefits	108,333	10.62 %	962,695	94.37 %	1,020,146	57,451	816,417
Pension	7,271	3.39 %	204,133	95.05 %	214,759	10,626	183,526
Total Personnel Services	393,279	8.70 %	4,407,668	97.51 %	4,520,182	112,514	4,037,297
Operating Expenses							
Shared Office Allocation	57,757	8.33 %	693,083	100.00 %	693,083	0	639,310
Postage and Freight	1,995	11.33 %	17,156	97.48 %	17,600	444	16,140
Printing	2,204	20.99 %	2,416	23.00 %	10,500	8,084	945
Supplies	1,303	4.83 %	15,134	56.05 %	27,000	11,866	14,697
Telephone	225	4.69 %	2,700	56.25 %	4,800	2,100	2,952
Subscriptions and Books	2,373	9.81 %	7,431	30.70 %	24,200	16,769	20,661
Dues and Memberships	4,640	26.51 %	16,328	93.30 %	17,500	1,172	18,014
Seminars and Training	795	4.08 %	13,610	69.80 %	19,500	5,890	14,928
Miscellaneous	97	3.90 %	1,015	40.58 %	2,500	1,485	1,512
Recruitment Costs	0	0.00 %	565	18.85 %	3,000	2,435	147
Attorney and Staff Travel	21,680	19.73 %	88,870	80.89 %	109,865	20,995	83,262
Investigator Travel	185	2.57 %	4,262	59.20 %	7,200	2,938	4,423
Luncheons	136	2.05 %	9,441	143.05 %	6,600	(2,841)	4,052
Computer Hardware	597	7.45 %	5,627	70.12 %	8,025	2,398	7,028
Computer Software	0	0.00 %	8,328	71.80 %	11,600	3,272	9,056
Contract Labor	0	0.00 %	0	0.00 %	0	0	61,415
Contract Programming	3,600	13.85 %	17,850	68.65 %	26,000	8,150	69,600
Receiverships	2,706	36.07 %	7,319	97.59 %	7,500	181	6,738
State Disciplinary Board Panel	28,724	35.03 %	128,308	156.47 %	82,000	(46,308)	96,156
Lexis Online	5,553	18.70 %	23,905	80.49 %	29,700	5,795	21,167
Total Operating Expenses	134,570	12.14 %	1,063,348	95.96 %	1,108,173	44,825	1,092,203
Furniture/Equipment	0	0.00 %	0	0.00 %	5,000	5,000	3,657
Total Expenses	\$ 527,849	9.37 %	\$ 5,471,017	97.12 %	\$ 5,633,355	\$ 162,338	\$ 5,133,157

Communications

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	26,539	8.47 %	313,342	100.00 %	313,343	1	303,254
Overtime	0	0.00 %	0	0.00 %	1,040	1,040	1,089
Taxes and Benefits	9,084	8.20 %	117,642	106.25 %	110,722	(6,920)	114,894
Pension	1,125	5.62 %	19,482	97.28 %	20,026	544	19,110
Total Personnel Services	36,748	8.26 %	450,466	101.20 %	445,131	(5,335)	438,347
Expenses							
Shared Office Allocation	7,220	8.33 %	86,635	100.00 %	86,635	0	86,687
Postage and Freight	189	9.48 %	1,262	63.08 %	2,000	738	980
Supplies	133	13.31 %	1,080	108.03 %	1,000	(80)	681
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	132	1.67 %	5,690	72.11 %	7,890	2,200	5,189
Dues and Memberships	0	0.00 %	660	162.96 %	405	(255)	405
Seminars and Training	0	0.00 %	2,029	39.02 %	5,200	3,171	1,230
Miscellaneous	17	1.62 %	93	9.32 %	1,000	907	593
Attorney and Staff Travel	7,254	32.03 %	17,757	78.40 %	22,650	4,894	17,622
Luncheons	0	0.00 %	30	30.07 %	100	69	50
Credit Card Discount and Fees	162	53.86 %	654	218.05 %	300	(354)	884
Computer Hardware	0	0.00 %	2,485	99.41 %	2,500	15	0
Computer Software	72	4.48 %	1,529	95.58 %	1,600	71	1,458
Media Consultants	12,112	36.71 %	28,201	85.46 %	33,000	4,799	30,365
Website Maintenance	8,539	9.77 %	78,788	90.15 %	87,400	8,612	67,242
Website Redesign	0	0.00 %	0	0.00 %	0	0	168,909
Membership Certificates	488	24.41 %	2,824	141.23 %	2,000	(824)	2,185
Subtotal	36,393	14.30 %	230,617	90.59 %	254,580	23,963	385,330
Furniture/Equipment	0	0.00 %	0	0.00 %	0	0	0
Subtotal	73,141	10.45 %	681,084	97.34 %	699,711	18,627	823,726
Publications							
Bar Journal	41,440	16.84 %	227,371	92.39 %	246,100	18,729	227,778
Supplemental Directory	281	2.49 %	10,539	93.68 %	11,250	711	9,347
Special Publications and Printing	0	0.00 %	0	0.00 %	1,000	1,000	270
Total Publications	41,721	16.15 %	237,910	92.09 %	258,350	20,440	237,395
Total Communications	114,862	11.99 %	918,993	95.92 %	958,061	39,068	1,061,121

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 28,149	10.27 %	\$ 255,181	93.06 %	\$ 274,206	\$ 19,025	\$ 252,470
Overtime	0	0.00 %	0	0.00 %	1,040	1,040	12
Taxes and Benefits	15,689	11.01 %	131,065	91.95 %	142,541	11,476	130,525
Pension	(3,148)	(18.38) %	12,549	73.29 %	17,124	4,575	15,508
Total Personnel Services	40,690	9.36 %	398,795	91.70 %	434,911	36,116	398,515
Operating Expenses							
Shared Office Allocation	7,220	8.33 %	86,635	100.00 %	86,635	0	86,687
Postage and Freight	489	6.99 %	4,905	70.07 %	7,000	2,095	3,304
Printing	0	0.00 %	1,940	46.19 %	4,200	2,260	0
Supplies	472	14.52 %	1,698	52.26 %	3,250	1,552	835
Subscriptions and Books	0	0.00 %	468	58.48 %	800	332	1,240
Dues and Memberships	0	0.00 %	365	73.00 %	500	135	300
Seminars and Training	0	0.00 %	35	1.46 %	2,400	2,365	380
Miscellaneous	79	7.97 %	880	87.97 %	1,000	120	1,245
Attorney and Staff Travel	2,728	68.19 %	2,728	68.19 %	4,000	1,272	2,331
Luncheons	49	1.39 %	1,512	43.21 %	3,500	1,988	669
Computer Software	0	0.00 %	1,157	144.62 %	800	(357)	0
Contract Labor	6,000	8.00 %	72,000	96.00 %	75,000	3,000	72,000
Contract Programming	225	7.50 %	225	7.50 %	3,000	2,775	4,163
Total Operating Expenses	17,262	8.99 %	174,548	90.87 %	192,085	17,537	173,154
Total Expenses	\$ 57,952	9.24 %	\$ 573,344	91.44 %	\$ 626,996	\$ 53,652	\$ 571,669

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Consultation	94	3.12 %	2,970	99.00 %	3,000	30	5,400
Publications	0	0.00 %	161	214.88 %	75	(86)	65
Vendor Directory	0	0.00 %	11,125	111.25 %	10,000	(1,125)	7,261
Miscellaneous Income	80	6.67 %	1,165	97.08 %	1,200	35	1,583
Total Revenues	174	1.22 %	15,421	108.03 %	14,275	(1,146)	14,309
Personnel Services							
Salaries	25,546	8.58 %	263,479	88.47 %	297,802	34,323	240,648
Overtime	703	27.05 %	2,635	101.36 %	2,600	(35)	2,627
Taxes and Benefits	11,955	8.15 %	103,604	70.60 %	146,754	43,150	95,732
Pension	982	6.05 %	15,864	97.71 %	16,235	371	15,469
Total Personnel Services	39,186	8.46 %	385,582	83.21 %	463,391	77,809	354,476
Operating Expenses							
Shared Office Allocation	7,220	8.33 %	86,635	100.00 %	86,635	0	86,687
Postage and Freight	49	3.26 %	797	53.11 %	1,500	703	1,039
Printing	422	52.78 %	422	52.78 %	800	378	77
Supplies	0	0.00 %	864	107.98 %	800	(64)	480
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	123	2.74 %	2,545	56.56 %	4,500	1,955	4,343
Dues and Memberships	690	38.33 %	1,217	67.64 %	1,800	583	943
Seminars and Training	1,140	76.00 %	1,940	129.33 %	1,500	(440)	2,269
Miscellaneous	41	11.57 %	841	240.14 %	350	(491)	750
Attorney and Staff Travel	2,757	15.32 %	9,118	50.66 %	18,000	8,882	11,144
Lunches	0	0.00 %	80	26.67 %	300	220	100
Credit Card Discount and Fees	9	2.21 %	335	83.67 %	400	65	153
Computer Hardware	0	0.00 %	684	0.00 %	0	(684)	0
Computer Software	376	4.29 %	6,726	76.73 %	8,766	2,040	5,496
Total Operating Expenses	12,902	10.22 %	113,104	89.59 %	126,251	13,147	114,381
Total Expenses	52,088	8.83 %	498,686	84.57 %	589,642	90,956	468,857
Solo and Small Firm	(2,084)	(104.22) %	21,240	1,061.98 %	2,000	(19,240)	(4,022)
Net Income	\$ (53,999)	9.42 %	\$ (462,025)	80.58 %	\$ (573,367)	\$ (111,342)	\$ (458,570)

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 11,962	8.52 %	\$ 141,386	100.70 %	\$ 140,400	\$ (986)	\$ 136,474
Overtime	51	9.81 %	510	98.08 %	520	10	922
Taxes and Benefits	7,844	11.72 %	64,942	97.05 %	66,917	1,975	60,790
Pension	489	5.77 %	8,252	97.44 %	8,469	217	8,127
Total Personnel Services	20,346	9.41 %	215,090	99.44 %	216,306	1,216	206,313
Operating Expenses							
Shared Office Allocation	3,610	8.33 %	43,318	100.00 %	43,318	0	43,343
Postage and Freight	0	0.00 %	37	0.00 %	0	(37)	29
Printing	0	0.00 %	0	0.00 %	0	0	257
Supplies	0	0.00 %	701	175.43 %	400	(301)	209
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	82	3.73 %	1,163	52.84 %	2,200	1,037	3,950
Dues and Memberships	0	0.00 %	220	146.67 %	150	(70)	135
Seminars and Training	0	0.00 %	410	41.00 %	1,000	590	613
Miscellaneous	0	0.00 %	0	0.00 %	0	0	472
Attorney and Staff Travel	6,433	35.06 %	19,994	108.96 %	18,350	(1,644)	19,065
Credit Card Discount and Fees	50	0.00 %	50	0.00 %	0	(50)	35
Computer Software	0	0.00 %	729	91.10 %	800	71	729
Committee Brochures	362	30.16 %	362	30.16 %	1,200	838	202
Internet Services	0	0.00 %	430	0.00 %	0	(430)	0
President	2,929	16.28 %	12,602	70.01 %	18,000	5,398	15,133
President Elect	2,379	19.58 %	6,833	56.24 %	12,150	5,317	8,031
Immediate Past President	4,224	42.24 %	9,751	97.50 %	10,000	249	8,047
Treasurer	(113)	(4.53) %	2,613	104.53 %	2,500	(113)	2,500
Secretary	(556)	(22.21) %	3,055	122.21 %	2,500	(555)	2,500
Meetings	0	0.00 %	47,500	100.00 %	47,500	0	47,500
Total Operating Expenses	19,475	12.10 %	150,668	93.60 %	160,968	10,300	153,650
Committees Activities							
Committees Income	(2,750)	275.00 %	(22,935)	2,293.47 %	(1,000)	21,935	(8,450)
Committees Expense	36,063	38.39 %	145,759	155.14 %	93,950	(51,809)	83,519
Total Committees Activities	33,313	35.84 %	122,824	132.14 %	92,950	(29,874)	75,069
Total Expenses	\$ 73,134	15.55 %	\$ 488,582	103.90 %	\$ 470,224	\$ (18,358)	\$ 435,031

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 31,657	6.09 %	\$ 468,449	90.10 %	\$ 519,941	\$ 51,492	\$ 544,646
Overtime	0	0.00 %	0	0.00 %	260	260	0
Taxes and Benefits	19,554	10.06 %	148,681	76.49 %	194,377	45,696	175,413
Pension	(4,772)	(19.05) %	18,196	72.62 %	25,056	6,860	36,560
Total Personnel Services	46,439	6.28 %	635,326	85.90 %	739,634	104,308	756,619
Operating Expenses							
Shared Office Allocation	9,025	8.33 %	108,294	100.00 %	108,294	0	130,030
Postage and Freight	81	9.02 %	790	87.75 %	900	110	768
Printing	0	0.00 %	308	307.94 %	100	(208)	0
Supplies	7	0.77 %	870	87.05 %	1,000	130	1,493
Subscriptions and Books	0	0.00 %	0	0.00 %	725	725	832
Dues and Memberships	710	84.52 %	820	97.62 %	840	20	1,202
Seminars and Training	399	79.80 %	399	79.80 %	500	101	0
Miscellaneous	50	4.99 %	236	23.56 %	1,000	764	423
Attorney and Staff Travel	0	0.00 %	0	0.00 %	800	800	119
Investigator Travel	42	1.38 %	844	28.15 %	3,000	2,156	1,114
Lunches	0	0.00 %	137	13.70 %	1,000	863	58
Contract Programming	0	0.00 %	0	0.00 %	0	0	7,650
Lexis Online	757	16.93 %	4,492	100.37 %	4,475	(17)	4,278
Total Operating Expenses	11,071	9.03 %	117,190	95.56 %	122,634	5,444	147,967
Total Expenses	\$ 57,510	6.67 %	\$ 752,516	87.27 %	\$ 862,268	\$ 109,752	\$ 904,586

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 10,432	8.46 %	\$ 123,968	100.55 %	\$ 123,287	\$ (681)	\$ 119,120
Overtime	0	0.00 %	0	0.00 %	260	260	173
Taxes and Benefits	5,935	9.08 %	64,286	98.31 %	65,392	1,106	58,162
Pension	403	5.41 %	7,209	97.08 %	7,426	217	7,061
Total Personnel Services	16,770	8.54 %	195,463	99.54 %	196,365	902	184,516
Operating Expenses							
Shared Office Allocation	1,805	8.33 %	21,659	100.00 %	21,659	0	21,672
Postage and Freight	0	0.00 %	91	60.57 %	150	59	41
Printing	0	0.00 %	0	0.00 %	100	100	0
Supplies	582	7.76 %	266	22.19 %	1,200	934	560
Telephone	0	0.00 %	7,021	93.60 %	7,500	479	6,794
Subscriptions and Books	0	0.00 %	156	77.97 %	200	44	181
Miscellaneous	0	0.00 %	31	1.55 %	2,000	1,969	0
Attorney and Staff Travel	0	0.00 %	1,018	101.84 %	1,000	(18)	1,151
Lunches	0	0.00 %	0	0.00 %	100	100	38
Computer Software	0	0.00 %	175	174.80 %	100	(75)	0
Equipment Maintenance and Rental	3	0.16 %	978	54.33 %	1,800	822	984
Rent and Utilities	7,560	8.44 %	92,411	103.20 %	89,550	(2,861)	93,848
Facilities Maintenance	0	0.00 %	712	20.34 %	3,500	2,788	709
Total Operating Expenses	9,950	7.72 %	124,518	96.63 %	128,859	4,341	125,978
Total Expenses	\$ 26,720	8.22 %	\$ 319,981	98.39 %	\$ 325,224	\$ 5,243	\$ 310,494

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 5,858	8.46 %	\$ 69,894	100.96 %	\$ 69,227	\$ (667)	\$ 66,942
Salaries-Hourly PT	1,986	6.36 %	18,189	58.24 %	31,231	13,042	21,370
Taxes and Benefits	2,792	12.05 %	22,334	96.37 %	23,175	841	19,755
Pension	(1,487)	(24.63) %	4,048	67.04 %	6,038	1,990	3,962
Total Personnel Services	9,149	7.06 %	114,465	88.27 %	129,671	15,206	112,029
Operating Expenses							
Shared Office Allocation	1,354	8.33 %	16,244	100.00 %	16,244	0	16,254
Postage and Freight	0	0.00 %	584	83.43 %	700	116	596
Printing	0	0.00 %	0	0.00 %	100	100	17
Supplies	102	4.08 %	2,421	96.84 %	2,500	79	2,607
Telephone	524	7.49 %	6,328	90.39 %	7,000	672	6,363
Subscriptions and Books	0	0.00 %	334	83.54 %	400	66	345
Seminars and Training	0	0.00 %	149	14.90 %	1,000	851	0
Miscellaneous	0	0.00 %	0	0.00 %	200	200	17
Attorney and Staff Travel	0	0.00 %	390	26.00 %	1,500	1,110	1,249
Luncheons	18	18.36 %	79	78.96 %	100	21	71
Computer Software	0	0.00 %	1,606	84.52 %	1,900	294	0
Equipment Maintenance and Rental	2	0.07 %	971	48.54 %	2,000	1,029	992
Rent and Utilities	2,279	9.70 %	23,054	98.10 %	23,500	446	21,602
Facilities Maintenance	1,407	24.69 %	5,540	97.19 %	5,700	160	5,730
Total Operating Expenses	5,686	9.05 %	57,700	91.81 %	62,844	5,144	55,843
Furniture/Equipment	0	0.00 %	10,152	92.29 %	11,000	848	42,027
Total Expenses	\$ 14,835	7.29 %	\$ 182,317	89.58 %	\$ 203,515	\$ 21,198	\$ 209,899

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Miscellaneous Income	21	0.00 %	137	0.00 %	\$ 0	\$ (137)	\$ 264
Total Revenues	21	0.00 %	137	0.00 %	0	(137)	264
Personnel Services							
Salaries	6,592	2.67 %	235,055	95.28 %	246,700	11,645	239,048
Overtime	0	0.00 %	0	0.00 %	364	364	0
Taxes and Benefits	18,667	14.45 %	130,743	101.23 %	129,154	(1,589)	115,730
Pension	1,308	7.79 %	16,688	99.46 %	16,779	91	15,999
Total Personnel Services	26,567	6.76 %	382,486	97.33 %	392,997	10,511	370,777
Operating Expenses							
Shared Office Allocation	5,415	8.33 %	64,977	100.00 %	64,977	0	65,015
Postage and Freight	0	0.00 %	41	69.15 %	60	19	17
Printing	0	0.00 %	0	0.00 %	500	500	0
Supplies	0	0.00 %	431	28.67 %	1,500	1,069	768
Subscriptions and Books	0	0.00 %	156	51.99 %	300	144	180
Dues and Memberships	0	0.00 %	0	0.00 %	0	0	153
Seminars and Training	0	0.00 %	0	0.00 %	200	200	0
Miscellaneous	136	27.28 %	158	31.70 %	500	342	310
Attorney and Staff Travel	0	0.00 %	1,950	50.51 %	3,860	1,910	1,517
Luncheons	0	0.00 %	0	0.00 %	100	100	0
Total Operating Expenses	5,551	7.71 %	67,713	94.05 %	71,997	4,284	67,960
Total Expenses	32,118	6.91 %	450,199	96.82 %	464,994	14,795	438,737
Net Income	\$ (32,097)	6.90 %	\$ (450,062)	96.79 %	\$ (464,994)	\$ (14,932)	\$ (438,473)

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Miscellaneous Income	\$ 0	0.00 %	\$ 1,055	527.50 %	\$ 200	\$ (855)	\$ 36
Total Revenues	0	0.00 %	1,055	527.50 %	200	(855)	36
Personnel Services							
Salaries	6,597	8.46 %	78,396	100.55 %	77,969	(427)	75,396
Taxes and Benefits	6,202	19.12 %	34,987	107.85 %	32,441	(2,546)	30,740
Pension	263	5.62 %	4,559	97.29 %	4,686	127	4,463
Total Personnel Services	13,062	11.35 %	117,942	102.47 %	115,096	(2,846)	110,599
Operating Expenses							
Shared Office Allocation	1,805	8.33 %	21,659	100.00 %	21,659	0	21,672
Postage and Freight	0	0.00 %	94	31.45 %	300	206	31
Supplies	0	0.00 %	141	20.15 %	700	559	93
Subscriptions and Books	39	3.00 %	585	45.00 %	1,300	715	635
Dues and Memberships	360	180.00 %	360	180.00 %	200	(160)	296
Seminars and Training	0	0.00 %	13	0.00 %	0	(13)	0
Miscellaneous	0	0.00 %	0	0.00 %	300	300	0
Attorney and Staff Travel	53	1.77 %	934	31.11 %	3,000	2,066	3,631
Lunches	0	0.00 %	334	55.71 %	600	266	333
Credit Card Discount and Fees	0	0.03 %	36	35.73 %	100	64	2
Computer Hardware	0	0.00 %	0	0.00 %	0	0	3,235
Computer Software	0	0.00 %	364	60.73 %	600	236	364
Total Operating Expenses	2,257	7.85 %	24,520	85.26 %	28,759	4,239	30,292
HSMT Events							
Sponsorships	0	0.00 %	(3,500)	70.00 %	(5,000)	(1,500)	0
Law Academy	0	0.00 %	3,505	63.72 %	5,500	1,995	4,740
Regional Competition	0	0.00 %	4,651	(116.29) %	4,000	(8,651)	(4,069)
State Competition	0	0.00 %	17,585	97.69 %	18,000	415	15,457
National Competition	(6,751)	(37.51) %	15,000	83.34 %	18,000	3,000	18,296
District Competition	0	0.00 %	12,089	134.32 %	9,000	(3,089)	11,745
Total HSMT Events	(6,751)	(16.27) %	49,330	118.87 %	41,500	(7,830)	46,169
Total Expenses	8,568	4.62 %	191,792	103.47 %	185,355	(6,437)	187,059

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Net Income	(8,568)	4.63 %	(190,737)	103.01 %	(185,155)	5,582	(187,023)

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Program Revenue							
Registration Revenue	192,830	3.98 %	5,226,489	107.76 %	4,850,000	(376,489)	4,744,145
Program Discounts	3,691	(7.38) %	(171,190)	342.38 %	(50,000)	121,190	(21,544)
Other	0	0.00 %	1,400	0.00 %	0	(1,400)	20,078
Sponsorship	1,230	0.00 %	45,459	0.00 %	0	(45,459)	0
Total Program Revenue	197,751	4.12 %	5,102,158	106.29 %	4,800,000	(302,158)	4,742,679
Program Expenditures	80,598	4.52 %	1,972,976	110.59 %	1,784,000	(188,976)	1,700,923
Net Margin on Programs	117,153	3.88 %	3,129,182	103.75 %	3,016,000	(113,182)	3,041,755
Personnel Services							
Salaries Full Time	81,102	6.07 %	1,234,833	92.48 %	1,335,312	100,479	1,122,077
Salaries Part Time	2,769	8.45 %	28,050	85.62 %	32,760	4,710	23,694
Overtime Pay	2,218	8.53 %	25,706	98.87 %	26,000	294	14,563
Taxes and Benefits	57,421	11.72 %	393,860	80.39 %	489,964	96,104	307,427
Pension	(1,756)	(2.19) %	71,592	89.47 %	80,016	8,424	49,322
Total Personnel Services	141,754	7.22 %	1,754,041	89.31 %	1,964,052	210,011	1,517,083
Operating Expenses							
Shared Office Allocation	36,098	8.33 %	433,177	100.00 %	433,177	0	433,433
Board and Committee Meetings	2,273	113.65 %	3,964	198.22 %	2,000	(1,964)	1,888
Dues and Memberships	1,470	24.50 %	6,509	108.48 %	6,000	(509)	6,641
Licenses and Certification	0	0.00 %	713	47.50 %	1,500	787	610
Seminars and Training	0	0.00 %	14,812	123.43 %	12,000	(2,812)	4,997
Attorney and Staff Travel	6,244	23.13 %	26,689	98.85 %	27,000	311	14,123
Supplies	1,870	9.35 %	18,057	90.28 %	20,000	1,943	10,040
Printing	0	0.00 %	0	0.00 %	1,500	1,500	0
Subscriptions and Books	7,366	7.92 %	92,840	99.83 %	93,000	160	79,711
Postage and Freight	0	0.00 %	63	25.04 %	250	187	64
Telephone	525	6.48 %	6,300	77.78 %	8,100	1,800	5,400
Internet Services	334	4.64 %	3,660	50.83 %	7,200	3,540	2,329
Computer Software	0	0.00 %	0	0.00 %	1,000	1,000	1
Contract Programming	0	0.00 %	3,003	100.10 %	3,000	(3)	0
Computer Hardware	1,085	21.69 %	4,421	88.43 %	5,000	579	14,848
Miscellaneous	161	4.02 %	1,635	40.86 %	4,000	2,365	3,903

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Professional Fees	0	0.00 %	17,874	223.43 %	8,000	(9,874)	0
Equipment Maintenance and Rental	0	0.00 %	0	0.00 %	1,000	1,000	0
Credit Card Discount and Fees	4,578	4.16 %	114,586	104.17 %	110,000	(4,586)	102,002
Banking Fees	0	0.00 %	2	1.75 %	100	98	1
Luncheons	380	7.62 %	4,403	88.07 %	5,000	597	4,112
Contract Labor	0	0.00 %	0	0.00 %	1,000	1,000	1,020
Volunteer Recognition	1,596	19.94 %	5,582	69.77 %	8,000	2,418	6,841
Marketing Materials	0	0.00 %	3,145	39.32 %	8,000	4,855	14,736
Total Operating Expenses	63,980	8.35 %	761,435	99.43 %	765,827	4,392	706,700
Furniture and Equipment							
Furniture and Equipment	0	0.00 %	0	0.00 %	2,500	2,500	0
Total Expenses	205,734	7.53 %	2,515,476	92.06 %	2,732,379	216,903	2,223,783
Net Income Before Other Inc and Exp	(88,581)	(31.23) %	613,706	216.38 %	283,621	(330,085)	817,972
Other Income and Expenses							
Interest Income	29,008	22.31 %	221,466	170.36 %	130,000	(91,466)	159,653
Bond Premium Amortization	(1,979)	49.48 %	(10,045)	251.14 %	(4,000)	6,045	(763)
Investment Service Fees	(873)	8.73 %	(10,491)	104.91 %	(10,000)	491	(10,234)
Total Other Income and Expenses	26,156	22.55 %	200,930	173.22 %	116,000	(84,930)	148,656
Net Income	\$ (62,425)	(15.62) %	\$ 814,636	203.85 %	\$ 399,621	\$ (415,015)	\$ 966,629

State Bar of Georgia Expenditure Statement - Operations For the Current Period Ending June 30, 2026

Other Activities and Miscellaneous

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Other Activities							
SBG President	4,075	11.32 %	11,825	32.85 %	36,000	24,175	31,625
SBG President Elect	977	4.88 %	16,100	80.50 %	20,000	3,900	10,875
SBG President Elect Elect	0	0.00 %	990	73.32 %	1,350	360	0
SBG Treasurer	1,369	30.42 %	5,100	113.33 %	4,500	(600)	4,500
SBG Secretary	1,364	30.31 %	4,084	90.75 %	4,500	416	4,500
SBG Immediate Past President	1,364	10.10 %	8,063	59.73 %	13,500	5,437	6,179
SBG Past Past President	0	0.00 %	0	0.00 %	1,620	1,620	0
Exec. Comm. - Bert Hummel	2,925	97.48 %	4,484	149.47 %	3,000	(1,484)	3,000
Exec. Comm. - R. Gary Spencer	1,804	60.13 %	3,307	110.22 %	3,000	(307)	3,000
Exec. Comm. - Thua G. Barlay	1,611	53.72 %	2,969	98.96 %	3,000	31	3,000
Exec. Comm. - David S. Lipscomb	1,667	55.56 %	3,477	115.91 %	3,000	(477)	1,568
Exec. Comm. - Martin E. Valbuena	780	26.00 %	2,882	96.08 %	3,000	118	3,000
Exec. Comm. - Joyce Gist Lewis	1,295	43.16 %	3,748	124.93 %	3,000	(748)	2,610
Total Officer's Expenses	19,231	19.33 %	67,029	67.39 %	99,470	32,441	73,857

Miscellaneous

BOG and Member Meetings	449,883	75.29 %	654,523	109.54 %	597,500	(57,023)	651,918
Supreme Court Meetings	19,415	24.58 %	91,832	116.24 %	79,000	(12,832)	81,230
Executive Committee Meetings	0	0.00 %	29,431	47.47 %	62,000	32,569	56,444
Court of Appeals Meetings	15,047	75.23 %	24,664	123.32 %	20,000	(4,664)	24,814
Lawyer's Assistance Program	0	0.00 %	155,000	100.00 %	155,000	0	154,674
Sections	28,353	8.45 %	337,030	100.49 %	335,385	(1,645)	323,193
State Disciplinary Board Lawyers	2,833	8.33 %	34,000	100.00 %	34,000	0	31,500
Elections	0	0.00 %	17,045	94.69 %	18,000	955	16,646
Dues Notice	0	0.00 %	33,476	88.10 %	38,000	4,524	32,984
Letters of Good Standing	74	3.07 %	1,602	66.76 %	2,400	798	2,033
Bar Membership Cards	961	7.69 %	13,120	104.96 %	12,500	(620)	12,442
50 Year Certificates	0	0.00 %	4,170	66.18 %	6,300	2,130	4,823
Fastcase	0	0.00 %	486,539	101.36 %	480,000	(6,539)	462,428
Membership Database Project	0	0.00 %	0	0.00 %	0	0	110,713
State Bar Committees	4,319	21.59 %	15,580	77.90 %	20,000	4,420	16,486
Georgia Diversity Program	0	0.00 %	10,000	100.00 %	10,000	0	10,000
ABA Delegate Breakfast	0	0.00 %	2,255	75.14 %	3,000	745	2,413
1st Floor Painting	0	0.00 %	0	0.00 %	6,000	6,000	0
Commitment to Equality Awards	0	0.00 %	7,500	100.00 %	7,500	0	2,500
Resource Center Contribution	0	0.00 %	55,166	100.00 %	55,166	0	55,166
Bond Premium Amortization	(3,615)	(15.72) %	7,959	34.60 %	23,000	15,041	11,688

**State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026**

Other Activities and Miscellaneous	
Investment Service Fees	
Access to Justice/Pro Bono	
Total Miscellaneous	
Pro Bono	
Total Other Activities	
Unallocated Services	
Grand Total	

Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
(18,035) 0	(50.10) % 0.00 %	26,182 30,000	72.73 % 100.00 %	36,000 30,000	9,818 0	28,407 7,500
499,235	24.58 %	2,037,074	100.31 %	2,030,751	(6,323)	2,100,002
17,685	8.33 %	212,216	100.00 %	212,216	0	212,216
536,150	22.89 %	2,316,320	98.89 %	2,342,437	26,117	2,386,075
(56,989)	0.00 %	(166,546)	0.00 %	0	166,546	(168,187)
2,014,403	9.99 %	19,415,078	96.28 %	20,164,543	749,465	18,710,206

State Bar of Georgia
Expenditure Statement - Operations
For the Year To Date Period Ending June 30, 2026

	Current Month	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Shared Office Overhead							
Rubbish Removal	230	7.67 %	2,742	91.40 %	3,000	258	2,724
Telephone	4,296	7.93 %	51,784	95.54 %	54,200	2,416	49,263
Subscriptions and Books	0	0.00 %	0	0.00 %	0	0	0
Computer Software	157	2.30 %	6,529	96.01 %	6,800	271	6,369
Internet Services	2,618	10.03 %	27,304	104.62 %	26,100	(1,204)	22,708
Equipment Rental	838	1.47 %	54,206	95.10 %	57,000	2,794	55,396
Kitchen	1,716	6.73 %	26,152	102.56 %	25,500	(652)	24,026
Facilities Maintenance	0	0.00 %	10,437	52.06 %	20,050	9,613	14,652
Payroll Service	2,598	14.43 %	17,689	98.27 %	18,000	311	16,974
Audit	0	0.00 %	36,549	105.94 %	34,500	(2,049)	31,252
Building and Other Insurance (Not Group)	16,818	7.35 %	204,400	89.34 %	228,800	24,400	220,548
Furniture/Equipment	0	0.00 %	0	0.00 %	0	0	5,615
Supplies and Printing	1,342	3.05 %	31,565	71.74 %	44,000	12,435	24,343
Subtotal	30,613	5.91 %	469,357	90.62 %	517,950	48,593	473,870
Other Services							
Accounting	36,963	6.44 %	541,266	94.33 %	573,797	32,531	577,542
Human Resources	23,220	7.48 %	304,805	98.23 %	310,298	5,493	291,976
Mailroom	7,089	9.43 %	74,531	99.12 %	75,190	659	63,444
Receptionist	536	0.65 %	75,321	90.84 %	82,914	7,593	61,206
Information Technology	53,452	5.65 %	874,518	92.42 %	946,195	71,677	859,682
Subtotal Other Services	121,260	6.10 %	1,870,441	94.07 %	1,988,394	117,953	1,853,850
Total Shared Office Overhead	151,873	6.06 %	2,339,798	93.36 %	2,506,344	166,546	2,327,720
Total Allocated Services	(208,862)	8.33 %	(2,506,344)	100.00 %	(2,506,344)	0	(2,495,906)
Unallocated Services	(56,989)	0.00 %	(166,546)	0.00 %	0	166,546	(168,187)

State Bar of Georgia
Expenditure Statement - Operations
For the Year To Date Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Prior Year
Related Organizations Shared Office Allocations						
Georgia Bar Foundation	\$ 367	8.33 %	\$ 4,400	100.00 %	\$ 4,400	\$ 4,240
Continuing Legal Education	7,219	8.33 %	86,635	100.00 %	86,635	86,687
Pro Bono	4,626	8.33 %	55,510	100.00 %	55,510	54,784
Professionalism	367	8.33 %	4,400	100.00 %	4,400	4,240
Sections	5,415	8.33 %	64,977	100.00 %	64,977	65,015
Subtotal	17,994	8.33 %	215,922	100.00 %	215,922	214,966
State Bar Departments - Shared Office Allocations						
Membership Meetings	9,025	8.33 %	108,294	100.00 %	108,294	108,358
Executives	3,609	8.33 %	43,318	100.00 %	43,318	43,343
General Counsel	30,684	8.33 %	368,200	100.00 %	368,200	390,090
Communications	57,757	8.33 %	693,083	100.00 %	693,083	639,310
Fee Arbitration	7,219	8.33 %	86,635	100.00 %	86,635	86,687
Law Practice Management	7,220	8.33 %	86,635	100.00 %	86,635	86,687
Savannah Office	1,805	8.33 %	86,635	100.00 %	86,635	86,687
Tifton Office	1,354	8.33 %	21,659	100.00 %	21,659	21,672
Younger Lawyers	3,610	8.33 %	16,244	100.00 %	16,244	16,254
Unauthorized Practice of Law	9,024	8.33 %	43,318	100.00 %	43,318	43,343
Law Related Education	5,415	8.33 %	108,294	100.00 %	108,294	130,030
High School Mock Trial	1,805	8.33 %	64,977	100.00 %	64,977	65,015
ICLE	36,098	8.33 %	21,659	100.00 %	21,659	21,672
Conference Center	7,220	8.33 %	433,177	100.00 %	433,177	433,433
Legislative Program	1,805	8.33 %	86,635	100.00 %	86,635	86,687
Subtotal	190,869	8.33 %	2,290,422	100.00 %	2,290,422	2,280,940
Total Allocated Services	\$ 208,862	8.33 %	\$ 2,506,344	100.00 %	\$ 2,506,344	\$ 2,495,906

Sections

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 16,619	8.72 %	\$ 195,612	102.65 %	\$ 190,554	\$ (5,058)	\$ 187,422
Overtime	1,799	59.97 %	7,843	261.41 %	3,000	(4,843)	5,146
Taxes and Benefits	4,298	9.35 %	45,637	99.29 %	45,963	326	43,442
Pension	(262)	(1.99) %	11,834	89.68 %	13,196	1,362	11,457
Total Personnel Services	22,454	8.89 %	260,926	103.25 %	252,713	(8,213)	247,467
Operating Expenses							
Shared Office Allocation	5,415	8.33 %	64,977	100.00 %	64,977	0	65,015
Postage and Freight	0	0.00 %	569	71.17 %	800	231	336
Printing	0	0.00 %	142	0.00 %	0	(142)	212
Supplies	314	15.71 %	3,286	164.25 %	2,000	(1,286)	4,905
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	3,643	168.70 %	2,160	(1,483)	727
Dues and Memberships	0	0.00 %	0	0.00 %	135	135	0
Seminars and Training	0	0.00 %	0	0.00 %	1,000	1,000	0
Miscellaneous	0	0.00 %	289	28.85 %	1,000	711	1,191
Attorney and Staff Travel	95	1.38 %	504	7.31 %	6,900	6,396	1,711
Luncheons	0	0.00 %	0	0.00 %	500	500	0
Computer Hardware	0	0.00 %	261	0.00 %	0	(261)	0
Computer Software	0	0.00 %	729	91.10 %	800	71	729
Special Meetings	0	0.00 %	0	0.00 %	1,500	1,500	0
Total Operating Expenses	5,899	7.14 %	75,300	91.08 %	82,672	7,372	75,726
Furniture/Equipment	0	0.00 %	805	0.00 %	0	(805)	0
Total Expenses	\$ 28,353	8.45 %	\$ 337,031	100.49 %	\$ 335,385	\$ (1,646)	\$ 323,193

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
After Hours Fees	0	0.00 %	12,350	130.00 %	\$ 9,500	\$ (2,850)	\$ 14,563
Beverage Service	0	0.00 %	1,617	161.73 %	1,000	(617)	1,272
Cleaning Fees	0	0.00 %	1,260	126.00 %	1,000	(260)	280
Audio Video Support	0	0.00 %	1,200	60.00 %	2,000	800	300
Total Revenues	0	0.00 %	16,427	121.68 %	13,500	(2,927)	16,415
Personnel Services							
Salaries	20,877	8.65 %	247,220	102.39 %	241,449	(5,771)	236,407
Overtime	772	17.16 %	4,634	102.98 %	4,500	(134)	3,177
Taxes and Benefits	11,080	10.79 %	115,133	112.17 %	102,643	(12,490)	95,640
Pension	1,100	7.44 %	14,649	99.11 %	14,781	132	10,496
Total Personnel Services	33,829	9.31 %	381,636	105.03 %	363,373	(18,263)	345,720
Operating Expenses							
Shared Office Allocation	7,220	8.33 %	86,635	100.00 %	86,635	0	86,687
Supplies	867	27.12 %	1,969	61.52 %	3,200	1,231	2,054
Subscriptions and Books	0	0.00 %	5,290	85.32 %	6,200	910	5,837
Miscellaneous	0	0.00 %	0	0.00 %	500	500	51
Attorney and Staff Travel	0	0.00 %	0	0.00 %	500	500	206
Credit Card Discount and Fees	0	0.00 %	174	87.15 %	200	26	131
Computer Hardware	0	0.00 %	945	0.00 %	0	(945)	0
After Hours Security	0	0.00 %	0	0.00 %	500	501	0
Contract Programming	0	0.00 %	0	0.00 %	1,500	1,500	0
Equipment Maintenance and Rental	6	0.12 %	4,092	81.85 %	5,000	907	4,468
Furniture Repairs and Maintenance	2,500	17.86 %	13,506	96.47 %	14,000	494	9,028
Kitchen	0	0.00 %	7,755	77.55 %	10,000	2,245	7,643
Total Operating Expenses	10,593	8.26 %	120,366	93.86 %	128,235	7,869	116,105
Total Expenses	44,422	9.04 %	502,002	102.11 %	491,608	(10,394)	461,825
Furniture/Equipment	511	46.43 %	511	46.43 %	1,100	589	7,518
Net Income	\$ (44,933)	9.38 %	\$ (486,085)	101.44 %	\$ (479,208)	\$ 6,877	\$ (452,929)

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Interest and Dividend Income	\$ 74,631	54.08 %	\$ 265,151	192.14 %	\$ 138,000	\$ (127,151)	\$ 183,424
Gain/Loss Investment Interest Allocation	78,330	0.00 %	99,229	0.00 %	0	(99,229)	146,317
CCLC Contributions to Bar Center	937,139	67.42 %	1,437,138	103.39 %	1,390,000	(47,138)	1,358,390
Total Revenues	1,090,100	71.34 %	1,801,518	117.90 %	1,528,000	(273,518)	1,688,131
Operating Expenses							
Bond Premium Amortization	3,008	25.06 %	9,985	83.21 %	12,000	2,015	11,053
Investment Service Fees	9,679	40.33 %	32,229	134.29 %	24,000	(8,229)	27,376
Conference Center Renovations	9,306	97.96 %	9,306	97.96 %	9,500	194	0
Audio Video, Furniture and Equipment	0	0.00 %	172,320	506.83 %	34,000	(138,320)	64,498
Building Rehabilitation	259,734	0.00 %	985,999	0.00 %	0	(985,999)	1,275,625
Tenant Improvements	0	0.00 %	11,813	0.00 %	0	(11,813)	0
President's Boardroom	0	0.00 %	0	0.00 %	0	0	1,109
Total Operating Expenses	281,727	354.37 %	1,221,652	1,536.67 %	79,500	(1,142,152)	1,379,661
Total Expenses	281,727	354.37 %	1,221,652	1,536.67 %	79,500	(1,142,152)	1,379,661
Net Income	\$ 808,373	55.81 %	\$ 579,866	40.03 %	\$ 1,448,500	\$ 868,634	\$ 308,470



Rental

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Income Rental Operations	\$ 83,265	11.07 %	\$ 845,607	112.45 %	\$ 752,000	\$ (93,607)	\$ 983,600
Total Revenues	83,265	11.07 %	845,607	112.45 %	752,000	(93,607)	983,600
Operating Expenses							
Luncheons	0	0.00 %	476	0.00 %	0	(476)	0
Computer Hardware	0	0.00 %	10,061	0.00 %	0	(10,061)	0
Personnel Management Salary	5,699	8.77 %	46,068	70.87 %	65,000	18,932	41,605
Administrative Taxes and Benefits	577	2.29 %	12,118	48.09 %	25,200	13,082	17,335
Travel	0	0.00 %	0	0.00 %	100	100	672
Postage	120	0.00 %	1,055	0.00 %	0	(1,055)	0
Luncheons	0	0.00 %	147	0.00 %	0	(147)	0
Supplies	0	0.00 %	0	0.00 %	100	100	121
Telephone Expense	189	9.95 %	1,849	97.32 %	1,900	51	1,648
Management Fees	5,874	8.39 %	69,463	99.23 %	70,000	537	67,440
Bank Fees	110	6.11 %	1,327	73.71 %	1,800	473	1,261
Seminars and Training	0	0.00 %	170	0.00 %	0	(170)	0
R&M Salaries	20,117	8.94 %	217,616	96.68 %	225,100	7,484	203,870
R&M Taxes and Benefits	2,747	2.84 %	44,643	46.12 %	96,800	52,157	67,871
R&M HVAC	3,218	4.69 %	85,393	124.41 %	68,640	(16,753)	107,427
R&M Plumbing	13,703	152.26 %	24,307	270.03 %	9,000	(15,307)	14,246
R&M Fire/Life Prevention	735	4.77 %	9,373	60.77 %	15,425	6,052	11,495
R&M Electrical/Lamps	1,498	8.81 %	13,024	76.61 %	17,000	3,976	12,548
R&M Water Treatment	1,072	8.71 %	11,860	96.42 %	12,300	440	11,768
R&M Life Safety Contract	20,538	31.74 %	20,538	31.74 %	64,715	44,177	14,925
R&M Tools/Radios	0	0.00 %	0	0.00 %	3,000	3,000	2,116
R&M Elevators	16,441	50.59 %	43,584	134.11 %	32,500	(11,084)	26,351
R&M Pest Control	338	8.45 %	4,056	101.40 %	4,000	(56)	3,948
R&M Rubbish Removal	2,800	21.54 %	24,452	188.09 %	13,000	(11,452)	18,926
R&M Other: Locks and Keys	0	0.00 %	0	0.00 %	300	300	230
R&M Painting	0	0.00 %	1,870	20.78 %	9,000	7,130	0
R&M Other: General Building	293	0.71 %	1,835	4.43 %	41,400	39,565	7,828
R&M Lobby	0	0.00 %	0	0.00 %	3,000	3,000	0
Uniforms	0	0.00 %	412	27.43 %	1,500	1,088	2,228
Electric	52,159	12.48 %	433,130	103.62 %	418,000	(15,130)	439,199
Water	5,849	9.00 %	37,755	58.08 %	65,000	27,245	30,722
Gas	0	0.00 %	31,667	98.96 %	32,000	333	24,044
Security Contract	36,598	9.15 %	428,656	107.16 %	400,000	(28,656)	408,092
Cleaning	13,706	7.26 %	171,221	90.74 %	188,700	17,479	179,429

Rental

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Grounds Supplies and Maintenance Insurance	465 6,288	1.94 % 7.78 %	5,578 75,458	23.24 % 93.33 %	24,000 80,850	18,422 5,392	6,954 68,096
Total Operating Expenses	211,134	10.61 %	1,829,162	91.95 %	1,989,330	160,168	1,792,395
Total Expenses	211,134	10.61 %	1,829,162	91.95 %	1,989,330	160,168	1,792,395
Net Income	\$ (127,869)	10.33 %	\$ (983,555)	79.49 %	\$ (1,237,330)	\$ (253,775)	\$ (808,795)

Parking

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Monthly Parking Operations	\$ 16,376	13.93 %	\$ 187,617	159.62 %	\$ 117,540	\$ (70,077)	\$ 125,262
Daily Parking Operations	4,262	7.91 %	53,991	100.17 %	53,900	(91)	75,696
Special Events Parking Operations	55,110	12.52 %	518,941	117.94 %	440,000	(78,941)	516,673
EV Charging Stations	374	0.00 %	5,258	0.00 %	0	(5,258)	3,886
Total Revenues	76,122	12.45 %	765,807	125.25 %	611,440	(154,367)	721,517
Operating Expenses							
Credit Card Fee - EV Charging Stations	22	0.00 %	315	0.00 %	0	(315)	277
Salaries	13,078	9.32 %	138,746	105.22 %	131,867	(6,879)	119,424
Payroll Taxes	2,410	12.96 %	21,492	115.55 %	18,600	(2,892)	16,771
Workers' Compensation	2,237	12.93 %	19,950	115.31 %	17,300	(2,650)	15,563
Medical Ins/Benefits	3,069	12.95 %	27,373	115.50 %	23,700	(3,673)	21,374
Signs	1,208	0.00 %	5,459	0.00 %	0	(5,459)	0
Uniforms	0	0.00 %	1,260	314.98 %	400	(860)	372
Repairs and Maintenance	877	2.51 %	29,250	83.57 %	35,000	5,750	35,321
Tickets	0	0.00 %	0	0.00 %	600	600	0
Cell Phone/Beeper	80	9.52 %	1,534	182.60 %	840	(694)	384
Office Expenses	180	1.71 %	7,072	67.42 %	10,490	3,418	10,742
Invoicing Expenses	445	7.95 %	5,344	95.43 %	5,600	256	5,811
Bank Charges	574	11.25 %	6,386	125.22 %	5,100	(1,286)	6,099
Credit Card Fees	578	5.78 %	11,131	111.31 %	10,000	(1,131)	8,412
Garage Insurance	1,205	8.32 %	14,009	96.62 %	14,500	491	13,780
Business License	0	0.00 %	1,228	122.78 %	1,000	(228)	833
Management Fee	500	11.90 %	4,800	114.29 %	4,200	(600)	4,200
Security	4,050	5.47 %	46,476	62.81 %	74,000	27,524	66,237
Payroll Processing	329	8.65 %	4,150	109.19 %	3,800	(350)	3,646
Equipment and Supplies	534	82.28 %	2,213	340.50 %	650	(1,563)	3,966
Miscellaneous	0	0.00 %	260	52.02 %	500	240	496
Cleaning	0	0.00 %	1,800	47.62 %	3,780	1,980	3,300
Fire Safety	0	0.00 %	0	0.00 %	2,500	2,500	0
Handheld Rental	0	0.00 %	5,901	0.00 %	0	(5,901)	0
Incentive Management Fees	5,800	96.65 %	11,404	190.07 %	6,000	(5,404)	6,000
Total Operating Expenses	37,176	10.04 %	367,553	99.22 %	370,427	2,874	343,008
Total Expenses	37,176	10.04 %	367,553	99.22 %	370,427	2,874	343,008
Net Income	\$ 38,947	16.16 %	\$ 398,254	165.24 %	\$ 241,013	\$ (157,241)	\$ 378,509

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Revenues							
Interest and Dividend Income	\$ 25,099	20.08 %	\$ 210,225	168.18 %	\$ 125,000	\$ (85,225)	\$ 152,966
Gain/Loss on Investments	1,004	0.00 %	13,916	0.00 %	0	(13,916)	35,541
Sponsor Fees	107,440	7.62 %	1,555,090	110.29 %	1,410,000	(145,090)	1,414,573
Late Penalties	115,762	16.78 %	845,743	122.57 %	690,000	(155,743)	641,703
Attorneys Fees	21,944	5.93 %	319,187	86.27 %	370,000	50,813	302,206
Total Revenues	271,249	10.45 %	2,944,161	113.46 %	2,595,000	(349,161)	2,546,989
Personnel Services							
Salaries	28,295	8.54 %	336,343	101.46 %	331,517	(4,826)	320,312
Overtime	0	0.00 %	0	0.00 %	520	520	34
Taxes and Benefits	10,174	9.06 %	121,454	108.17 %	112,280	(9,174)	102,536
Pension	1,418	6.50 %	21,426	98.17 %	21,825	399	20,758
Total Personnel Services	39,887	8.56 %	479,223	102.81 %	466,142	(13,081)	443,640
Operating Expenses							
Shared Office Allocation	7,220	8.33 %	86,635	100.00 %	86,635	0	86,687
Postage and Freight	16,287	904.84 %	16,300	905.54 %	1,800	(14,500)	121
Printing	0	0.00 %	7,404	7,403.82 %	100	(7,304)	512
Supplies	25	2.55 %	42	4.29 %	1,000	958	494
Telephone	75	7.50 %	900	90.00 %	1,000	100	900
Subscriptions and Books	0	0.00 %	156	38.99 %	400	244	180
Dues and Memberships	0	0.00 %	945	94.50 %	1,000	55	900
Seminars and Training	0	0.00 %	795	79.50 %	1,000	205	695
Miscellaneous	0	0.00 %	483	80.39 %	600	117	2,030
Attorney and Staff Travel	2,471	61.78 %	4,854	121.36 %	4,000	(854)	3,835
Board Meetings	7,219	0.00 %	9,480	0.00 %	0	(9,480)	0
Lunches	230	6.59 %	13,376	382.18 %	3,500	(9,876)	2,507
Credit Card Discount and Fees	4,111	10.28 %	44,137	110.34 %	40,000	(4,137)	36,214
Computer Hardware	0	0.00 %	2,834	0.00 %	0	(2,834)	567
Computer Software	0	0.00 %	350	43.70 %	800	450	350
Contract Programming	82,350	274.50 %	182,287	607.62 %	30,000	(152,287)	375
CLE Contribution to the Bar Center	937,138	67.42 %	1,437,139	103.39 %	1,390,000	(47,139)	1,358,389
Grants	0	0.00 %	32,636	65.27 %	50,000	17,364	83,316
Scholarships	0	0.00 %	5,625	56.25 %	10,000	4,375	4,440
Pro Bono Vouchers	0	0.00 %	0	0.00 %	0	0	30,000

Note: CLE Contribution to the Bar Center is comprised of the following two items; (1) \$500,000 and (2) \$2 of every \$4 per credit hour paid by attorneys and/or sponsors.

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Bond Premium Amortization	744	4.96 %	10,226	68.17 %	15,000	4,774	8,171
Investment Service Fees	0	0.00 %	21,260	92.43 %	23,000	1,740	20,781
Audit	0	0.00 %	0	0.00 %	5,000	5,000	5,000
Total Operating Expenses	1,057,870	63.54 %	1,877,864	112.80 %	1,664,835	(213,029)	1,646,464
Total Expenses	1,097,757	51.51 %	2,357,086	110.61 %	2,130,977	(226,109)	2,090,104
Net Income	\$ (826,508)	(178.12) %	\$ 587,075	126.52 %	\$ 464,023	\$ (123,052)	\$ 456,885

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	41,483	26.59 %	185,137	118.68 %	\$ 156,000	\$ (29,137)	\$ 133,979
Taxes and Benefits	9,295	33.55 %	34,431	124.28 %	27,704	(6,727)	25,509
Pension	3,229	26.26 %	14,502	117.93 %	12,297	(2,205)	2,447
Total Personnel Services	54,007	27.55 %	234,070	119.42 %	196,001	(38,069)	161,935
Operating Expenses							
Shared Office Allocation	1,805	8.33 %	21,659	100.00 %	21,659	0	21,672
Postage and Freight	0	0.00 %	0	0.00 %	100	100	0
Supplies	0	0.00 %	654	261.56 %	250	(404)	1,680
Telephone	75	8.33 %	900	100.00 %	900	0	525
Subscriptions and Books	0	0.00 %	156	22.28 %	700	544	355
Dues and Memberships	375	53.57 %	1,370	195.66 %	700	(670)	391
Seminars and Training	0	0.00 %	0	0.00 %	1,500	1,500	365
Miscellaneous	0	0.00 %	124	82.65 %	150	26	788
Attorney and Staff Travel	3,313	19.32 %	11,071	64.55 %	17,150	6,079	6,961
Luncheons	10,338	60.81 %	30,619	180.12 %	17,000	(13,619)	17,773
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,267
Computer Software	0	0.00 %	175	58.27 %	300	125	0
Contract Programming	18,750	6.87 %	273,000	100.00 %	273,000	0	273,000
Groups/Meetings	10,414	189.34 %	10,414	189.34 %	5,500	(4,914)	4,631
Grassroots	809	8.09 %	9,871	98.72 %	10,000	129	11,494
Bond Premium Amortization	798	19.96 %	2,856	71.38 %	4,000	1,144	3,578
Investment Service Fees	2,569	36.19 %	9,219	129.85 %	7,100	(2,119)	8,820
Total Operating Expenses	49,246	13.68 %	372,088	103.36 %	360,009	(12,079)	353,300
Furniture/Equipment	0	0.00 %	0	0.00 %	500	500	0
Total Expenses	\$ 103,253	18.55 %	\$ 606,158	108.92 %	\$ 556,510	\$ (49,648)	\$ 515,234

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	22,939	6.34 %	344,266	95.16 %	\$ 361,786	\$ 17,520	\$ 376,959
Overtime	0	0.00 %	26	4.77 %	550	524	0
Taxes and Benefits	11,618	7.74 %	131,918	87.83 %	150,204	18,286	139,114
Pension	1,099	5.63 %	18,980	97.30 %	19,507	527	22,811
Total Personnel Services	35,656	6.70 %	495,190	93.07 %	532,047	36,857	538,884
Operating Expenses							
Postage and Freight	198	12.39 %	1,452	90.76 %	1,600	148	1,398
Supplies	0	0.00 %	1,101	68.82 %	1,600	499	945
Subscriptions and Books	0	0.00 %	0	0.00 %	500	500	0
Seminars and Training	0	0.00 %	0	0.00 %	1,400	1,400	249
Miscellaneous	0	0.00 %	329	65.74 %	500	171	344
Attorney and Staff Travel	0	0.00 %	0	0.00 %	100	100	0
Lunches	47	3.89 %	674	56.13 %	1,200	526	716
Computer Software	0	0.00 %	41,360	119.54 %	34,600	(6,760)	35,006
Contract Programming	0	0.00 %	98	39.00 %	250	152	0
Total Operating Expenses	245	0.59 %	45,014	107.82 %	41,750	(3,264)	38,658
Furniture/Equipment	1,062	0.00 %	1,062	0.00 %	0	(1,062)	0
Total Expenses	\$ 36,963	6.44 %	\$ 541,266	94.33 %	\$ 573,797	\$ 32,531	\$ 577,542

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 21,161	5.59 %	\$ 325,254	85.98 %	\$ 378,277	\$ 53,023	\$ 397,608
Overtime	0	0.00 %	112	21.63 %	520	408	0
Taxes and Benefits	12,271	8.00 %	127,620	83.21 %	153,378	25,758	145,829
Pension	(9,076)	(35.32) %	14,483	56.35 %	25,702	11,219	12,334
Total Personnel Services	24,356	4.37 %	467,469	83.79 %	557,877	90,408	555,771
Operating Expenses							
Postage and Freight	0	0.00 %	200	114.11 %	175	(25)	143
Supplies	0	0.00 %	4,678	103.96 %	4,500	(178)	4,879
Telephone	75	4.17 %	1,425	79.17 %	1,800	375	1,800
Subscriptions and Books	0	0.00 %	528	105.57 %	500	(28)	360
Dues and Memberships	0	0.00 %	0	0.00 %	500	500	0
Seminars and Training	0	0.00 %	4,990	45.45 %	10,980	5,990	0
Miscellaneous	0	0.00 %	30	1.52 %	2,000	1,970	406
Attorney and Staff Travel	0	0.00 %	0	0.00 %	3,000	3,000	0
Luncheons	0	0.00 %	56	22.50 %	250	194	239
Computer Hardware	10,516	9.17 %	114,420	99.73 %	114,725	305	75,311
Computer Software	17,167	8.62 %	189,267	95.03 %	199,162	9,896	166,285
Contract Labor	627	2.10 %	23,060	77.32 %	29,824	6,763	23,872
Contract Programming	0	0.00 %	66,871	393.36 %	17,000	(49,871)	28,208
Internet Services	46	1.64 %	860	30.58 %	2,810	1,950	1,431
Total Operating Expenses	28,431	7.34 %	406,385	104.95 %	387,226	(19,159)	302,934
Furniture/Equipment	664	60.83 %	664	60.83 %	1,092	428	976
Total Expenses	\$ 53,451	5.65 %	\$ 874,518	92.42 %	\$ 946,195	\$ 71,677	\$ 859,682

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	16,355	8.46 %	194,349	100.55 %	\$ 193,291	\$ (1,058)	\$ 186,912
Taxes and Benefits	5,653	7.98 %	68,983	97.36 %	70,851	1,868	64,768
Pension	735	5.63 %	12,703	97.29 %	13,056	353	12,449
Total Personnel Services	22,743	8.20 %	276,035	99.58 %	277,198	1,163	264,129
Operating Expenses							
Postage and Freight	105	70.25 %	386	257.27 %	150	(236)	51
Printing	0	0.00 %	0	0.00 %	50	50	0
Supplies	17	3.30 %	623	124.71 %	500	(123)	637
Telephone	75	8.33 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	156	31.19 %	500	344	529
Dues and Memberships	0	0.00 %	299	29.90 %	1,000	701	1,113
Licenses and Certifications	0	0.00 %	0	0.00 %	300	300	0
Seminars and Training	0	0.00 %	9,807	98.07 %	10,000	193	13,167
Miscellaneous	47	3.96 %	867	72.22 %	1,200	333	889
Flexible Spending	(2,359)	0.00 %	(2,237)	0.00 %	0	2,237	(512)
Recruitment Costs	1,027	20.53 %	8,951	179.03 %	5,000	(3,951)	4,993
Background Checks	160	13.33 %	1,137	94.71 %	1,200	63	1,340
Engagement Committee	1,406	11.72 %	7,503	62.53 %	12,000	4,497	4,686
Attorney and Staff Travel	0	0.00 %	28	0.00 %	0	(28)	0
Lunchrooms	0	0.00 %	0	0.00 %	300	300	53
Computer Software	0	0.00 %	350	0.00 %	0	(350)	0
Total Operating Expenses	478	1.44 %	28,770	86.92 %	33,100	4,330	27,846
Total Expenses	\$ 23,220	7.48 %	\$ 304,805	98.23 %	\$ 310,298	\$ 5,493	\$ 291,976

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ (1,880)	(3.85) %	\$ 43,075	88.12 %	\$ 48,880	\$ 5,805	\$ 42,058
Overtime	0	0.00 %	0	0.00 %	364	364	0
Taxes and Benefits	2,249	7.52 %	28,855	96.47 %	29,910	1,055	18,496
Pension	167	5.66 %	2,881	97.32 %	2,960	79	0
Total Personnel Services	536	0.65 %	74,811	91.11 %	82,114	7,303	60,554
Operating Expenses							
Supplies	0	0.00 %	361	120.39 %	300	(61)	0
Seminars and Training	0	0.00 %	149	29.80 %	500	351	0
Miscellaneous	0	0.00 %	0	0.00 %	0	0	52
Total Operating Expenses	0	0.00 %	510	63.77 %	800	290	52
Furniture/Equipment	0	0.00 %	0	0.00 %	0	0	600
Total Expenses	\$ 536	0.65 %	\$ 75,321	90.84 %	\$ 82,914	\$ 7,593	\$ 61,206

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 4,353	8.37 %	\$ 52,091	100.18 %	\$ 52,000	\$ (91)	\$ 45,098
Overtime	0	0.00 %	0	0.00 %	364	364	0
Taxes and Benefits	2,591	13.72 %	19,340	102.44 %	18,879	(461)	15,264
Pension	145	4.59 %	3,029	96.26 %	3,147	118	2,914
Total Personnel Services	7,089	9.53 %	74,460	100.09 %	74,390	(70)	63,276
Operating Expenses							
Supplies	0	0.00 %	71	23.74 %	300	229	74
Seminars and Training	0	0.00 %	0	0.00 %	500	500	0
Miscellaneous	0	0.00 %	0	0.00 %	0	0	95
Total Operating Expenses	0	0.00 %	71	8.90 %	800	729	169
Total Expenses	\$ 7,089	9.43 %	\$ 74,531	99.12 %	\$ 75,190	\$ 659	\$ 63,444

Membership

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 27,793	8.45 %	\$ 330,207	100.43 %	\$ 328,796	\$ (1,411)	\$ 310,653
Overtime	0	0.00 %	0	0.00 %	520	520	93
Taxes and Benefits	11,489	8.35 %	139,272	101.20 %	137,624	(1,648)	139,733
Pension	939	5.31 %	17,131	96.98 %	17,664	533	16,815
Total Personnel Services	40,221	8.30 %	486,610	100.41 %	484,604	(2,006)	467,294
Operating Expenses							
Shared Office Allocation	9,025	8.33 %	108,294	100.00 %	108,294	0	108,358
Postage and Freight	11	0.23 %	327	6.41 %	5,100	4,773	3,044
Printing	0	0.00 %	113	0.00 %	0	(113)	0
Supplies	0	0.00 %	533	53.36 %	1,000	467	479
Subscriptions and Books	0	0.00 %	600	59.97 %	1,000	400	1,150
Seminars and Training	0	0.00 %	0	0.00 %	500	500	0
Miscellaneous	0	0.00 %	0	0.00 %	250	250	36
Luncheons	0	0.00 %	199	79.64 %	250	51	122
Credit Card Discount and Fees	96,119	31.31 %	333,123	108.51 %	307,000	(26,123)	303,875
Computer Hardware	0	0.00 %	0	0.00 %	800	800	1,583
Computer Software	0	0.00 %	874	87.40 %	1,000	126	874
Membership Software License	0	0.00 %	144,429	116.95 %	123,500	(20,929)	114,711
Contract Programming	1,431	71.56 %	14,327	716.31 %	2,000	(12,327)	0
Total Operating Expenses	106,586	19.35 %	602,819	109.47 %	550,694	(52,125)	534,232
Furniture/Equipment	0	0.00 %	0	0.00 %	500	500	0
Total Expenses	\$ 146,807	14.17 %	\$ 1,089,428	105.18 %	\$ 1,035,798	\$ (53,630)	\$ 1,001,525

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 15,068	8.68 %	\$ 177,208	102.05 %	\$ 173,654	\$ (3,554)	\$ 148,575
Overtime	59	2.07 %	3,896	137.22 %	2,839	(1,057)	4,312
Taxes and Benefits	4,222	4.40 %	66,922	69.72 %	95,992	29,070	63,970
Pension	450	5.62 %	7,789	97.29 %	8,006	217	7,640
Total Personnel Services	19,799	7.06 %	255,815	91.20 %	280,491	24,676	224,497
Operating Expenses							
Shared Office Allocation	3,610	8.33 %	43,318	100.00 %	43,318	0	43,343
Postage and Freight	0	0.00 %	41	0.00 %	0	(41)	241
Supplies	75	8.33 %	741	247.04 %	300	(441)	1,104
Telephone	0	0.00 %	900	100.00 %	900	0	900
Subscriptions and Books	0	0.00 %	360	90.00 %	400	40	900
Dues and Memberships	0	0.00 %	0	0.00 %	500	500	0
Seminars and Training	0	0.00 %	0	0.00 %	500	500	0
Miscellaneous	0	0.00 %	55	0.00 %	0	(55)	45
Attorney and Staff Travel	2,480	8.78 %	19,983	70.74 %	28,250	8,267	22,112
Lunches	140	23.40 %	392	65.19 %	600	208	428
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,173
Computer Software	0	0.00 %	584	97.42 %	600	16	0
Contract Programming	4,494	149.79 %	5,371	179.04 %	3,000	(2,371)	0
Total Operating Expenses	10,799	13.78 %	71,745	91.55 %	78,368	6,623	70,246
Total Expenses	\$ 30,598	8.53 %	\$ 327,560	91.28 %	\$ 358,859	\$ 31,299	\$ 294,743

Executives

State Bar of Georgia
Expenditure Statement - Operations
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year to Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Personnel Services							
Salaries	\$ 45,194	5.21 %	\$ 845,212	97.41 %	\$ 867,679	\$ 22,467	\$ 812,150
Overtime	1,417	90.83 %	1,677	107.50 %	1,560	(117)	1,588
Taxes and Benefits	14,303	7.25 %	190,652	96.68 %	197,191	6,539	176,003
Pension	1,588	2.22 %	67,130	93.89 %	71,501	4,371	65,714
Total Personnel Services	62,502	5.49 %	1,104,671	97.08 %	1,137,931	33,260	1,055,455
Operating Expenses							
Shared Office Allocation	30,683	8.33 %	368,200	100.00 %	368,200	0	390,090
Postage and Freight	112	17.22 %	374	57.59 %	650	276	190
Printing	0	0.00 %	0	0.00 %	2,600	2,600	827
Supplies	115	8.85 %	1,641	126.21 %	1,300	(341)	1,178
Telephone	300	8.33 %	3,600	100.00 %	3,600	0	3,600
Subscriptions and Books	0	0.00 %	2,430	129.97 %	1,870	(560)	2,342
Dues and Memberships	435	17.33 %	1,610	64.14 %	2,510	900	1,961
Seminars and Training	277	5.65 %	3,275	66.83 %	4,900	1,625	3,244
Miscellaneous	1,325	13.25 %	6,663	66.63 %	10,000	3,337	42,914
Attorney and Staff Travel	2,955	10.73 %	11,235	40.78 %	27,550	16,315	16,560
Executive Director Travel	2,086	7.96 %	22,754	86.85 %	26,200	3,446	28,788
Luncheons	31	1.71 %	1,950	108.32 %	1,800	(150)	981
Bank Fees	307	8.79 %	636	18.18 %	3,500	2,864	171
Computer Hardware	0	0.00 %	0	0.00 %	0	0	1,308
Computer Software	0	0.00 %	714	89.25 %	800	86	714
Contract Programming	0	0.00 %	0	0.00 %	500	500	0
Total Operating Expenses	38,626	8.47 %	425,082	93.22 %	455,980	30,898	494,868
Total Expenses	\$ 101,128	6.34 %	\$ 1,529,754	95.97 %	\$ 1,593,911	\$ 64,157	\$ 1,550,323

State Bar of Georgia
Statement of Account
For the Current Period Ending June 30, 2026

	Current Month Actual	Year To Date Actual	Budget	Remaining Balance of Budget	Prior Year
Beginning Fund Balance	39,007	1,194	0	(1,194)	0
Income					
Interest and Dividend Income	280	960	0	(960)	23
Gain/Loss Investment Interest Allocation	293	268	0	(268)	10
Miscellaneous Income	(40)	49,064	0	(49,064)	170
Program Contributions	0	500	0	(500)	1,750
Total Income	533	50,792	0	(50,792)	1,953
Personnel Services					
Salaries	250	2,875	0	(2,875)	0
Overtime	0	0	0	0	0
Taxes and Benefits	19	220	0	(220)	0
Pension	0	0	0	0	0
Total Personnel Services	269	3,095	0	(3,095)	0
Operating Expenses					
Postage and Freight	0	1,911	0	(1,911)	0
Supplies	420	5,876	0	(5,876)	0
Miscellaneous	800	800	0	(800)	0
Lunches	0	355	0	(355)	0
Credit Card Discount and Fees	0	1	0	(1)	0
Internet Services	0	992	0	(992)	0
Rent and Utilities	(800)	0	0	0	0
Restricted Expenses	0	0	0	0	0
Bond Premium Amortization	11	37	0	(37)	754
Investment Service Fees	37	117	0	(117)	1
Total Operating Expenses	468	10,089	0	(10,089)	758
Ending Fund Balance	38,803	38,803	0	(38,803)	1,194

State Bar of Georgia
Income Statement
For the Current Period Ending June 30, 2026

	Current Month Actual	Month % of Budget	Year To Date Actual	YTD % of Budget	Budget	Remaining Balance of Budget	Prior Year
Beginning Fund Balance	700	0.00 %	0	0.00 %	0	0	0
Income							
Interest and Dividend Income	3	0.00 %	3	0.00 %	0	(3)	0
Gain/Loss Investment Interest Allocation	3	0.00 %	3	0.00 %	0	(3)	0
Miscellaneous Income	150	0.00 %	850	0.00 %	0	(850)	0
Total Income	156	0.00 %	856	0.00 %	0	(856)	0
Personnel Services							
Salaries	0	0.00 %	0	0.00 %	0	0	0
Overtime	0	0.00 %	0	0.00 %	0	0	0
Taxes and Benefits	0	0.00 %	0	0.00 %	0	0	0
Pension	0	0.00 %	0	0.00 %	0	0	0
Personnel Services	0	0.00 %	0	0.00 %	0	0	0
Operating Expenses							
Restricted Expenses	0	0.00 %	0	0.00 %	0	0	0
Bond Premium Amortization	0	0.00 %	0	0.00 %	0	0	0
Investment Service Fees	1	0.00 %	1	0.00 %	0	(1)	0
Total Operating Expenses	1	0.00 %	1	0.00 %	0	(1)	0
Ending Fund Balance	856	0.00 %	856	0.00 %	0	(856)	0

State Bar of Georgia
Statement of Account
For the Current Period Ending June 30, 2026

	Current Month Actual	Year To Date Actual	Budget	Remaining Balance of Budget	Prior Year
Beginning Fund Balance	399	164	164	0	6,374
Income					
Interest and Dividend Income	2	7	100	93	40
Gain/Loss Investment Interest Allocation	1	2	0	(2)	71
Miscellaneous Income	0	10,000	10,000	0	10,000
Dues	1,750	17,250	18,000	750	14,250
CLE Conference	0	200	5,000	4,800	0
Total Income	1,753	27,459	33,100	5,641	24,361
Expenses					
CLE Conference	0	6	500	494	0
Miscellaneous	0	4,888	700	(4,188)	0
Credit Card Discount and Fees	7	83	100	17	62
Contract Labor	2,100	22,600	38,000	15,400	30,500
Bond Premium Amortization	0	0	100	100	3
Investment Service Fees	0	1	100	99	6
Total Expenses	2,107	27,578	39,500	11,922	30,571
Ending Fund Balance	45	45	(6,236)	(6,281)	164



October 17, 2026

A warm welcome to our YLD members and guests!

It is such an honor and privilege to report to this esteemed body as the 80th president of the Young Lawyers Division of the State Bar of Georgia. The YLD has been a huge part of my life and legal career, and I am incredibly excited to have the opportunity to lead this organization during such a special year.

Over the years, I have had the opportunity to serve the YLD in many different roles, including as a Leadership Academy graduate, Middle Georgia representative, committee chair, director, Signature Fundraiser co-chair, Review editor and officer. Along the way, I have gained incredible mentors, lifelong friends and opportunities that have helped shape me as both a lawyer and a leader. The YLD is truly near and dear to my heart, and I could not be more excited to spend this year celebrating everything that makes this organization so special.

This year, we are celebrating the YLD's 80th anniversary! For eight decades, the YLD has brought young lawyers together to serve their communities, grow as professionals, develop as leaders and build lasting friendships. That is something worth celebrating.

Since its establishment in 1947, the purpose of the Younger Lawyers Section, now Division, has been to further the goals of the State Bar, increase the interest and participation of young lawyers and foster the principles of duty and service to the public. Eighty years later, those same values continue to guide us. This year, we will build on YLD success by continuing to serve as the service arm of the State Bar while creating meaningful opportunities for young lawyers throughout Georgia to learn, lead, serve and connect.

I am especially excited about what we have planned for this historic year. We will celebrate the YLD's incredible legacy while also looking toward the future and continuing to invest in the next generation of Georgia lawyers. From CLEs and leadership development to service projects, networking events and opportunities to connect young lawyers across the state, there is a lot to look forward to.

We have already welcomed an incredible group of officers, directors, district representatives and committee chairs who are bringing fresh ideas, enthusiasm and plenty of energy to the YLD. I am so excited to work alongside this group throughout the year. I encourage each of you to get to know and support these young leaders because they truly represent the future of our profession. Our committees are already hard at work planning events and programming across Georgia. Whether it is through CLE programming, community service, pro bono initiatives, leadership opportunities or networking events, the YLD is committed to providing meaningful ways for young lawyers to get involved.

One of my biggest goals this year is to continue connecting young lawyers throughout Georgia. The

YLD is at its best when young lawyers from every corner of our state feel like they have a place in our organization. We will continue working with local and affinity bar associations and other Bar affiliates to bring young lawyers together, strengthen relationships and create new opportunities for collaboration.

Of course, I am especially excited about our Signature Fundraiser on January 30, 2027. We will gather at the historic Georgia Theatre in Athens to benefit Stepping Stone Child Advocacy and Sexual Assault Center while celebrating the YLD's 80th birthday. Break out your favorite 1980s attire and join us for what is sure to be an unforgettable evening as we celebrate this incredible milestone and support such an important community resource.

Throughout the year, the YLD will continue to provide opportunities for young lawyers to learn, serve and connect. At our meetings and events, members can expect great CLE programming, opportunities to give back to their communities and plenty of chances to build relationships with lawyers from across the state.

As we celebrate 80 years of the Young Lawyers Division, I am incredibly grateful for the leaders and members who built the organization we know and love today. I am also excited about the future and the next generation of leaders who will continue that legacy.

Some specific YLD events to look forward to include:

- Dec. 4, 2026 — Leadership Academy Holiday Luncheon (Atlanta, Ga.)
- Dec. 4, 2026 — YLD Leadership Holiday Party (Atlanta, Ga.)
- January 30, 2027 — Signature Fundraiser benefiting Stepping Stone Child Advocacy and Sexual Assault Center (Athens, Ga.)

Our future meetings are as follows:

- Jan. 15-18, 2027 — Midyear Meeting (Atlanta, Ga.)
- Mar. 4-7, 2027 — Spring Meeting (Carolina, Pr.)
- Jun. 10-13, 2027 — Annual Meeting (Kissimmee, Fl.)

At each of our quarterly meetings, you can expect either a CLE, one networking event and one service opportunity. Details will be provided in advance.

At the Fall Meeting in Hilton Head, we hope you will join the YLD Book Club for a Fireside Chat with author Brinson Raley, who writes under the pen name Thomas Lee and serves as chair of the YLD Criminal Law Committee, for a conversation about how storytelling has helped sharpen skills as a young attorney.

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 Law Subcommittee

Nathan Miles and Xander Melnick, Co-Chairs

The YLD Business Litigation Subcommittee will kick off the legal food frenzy with a YLD-led volunteer

food packaging day. The ACFB allows up to 60 volunteers so we hope to reach that number by partnering with the Community Service Committee and any other committees that would like to join. We also plan to coordinate a CLE panel with the Litigation Committee that will cover a topic interesting to both plaintiff's attorneys and commercial litigators that are defense focused.

YLD Community Service Projects Committee

Lyddy O'Brien and Nick Smith, Co-Chairs

The YLD Community Service Projects Committee has several service projects being planned in collaboration with other committees. The Wellness Committee is working with us to plan an outdoor day of service planting trees with Trees Atlanta in either October or early November. We are working with the Corporate Counsel Committee to plan a volunteer event with Empty Stocking Fund in November or December. We are also talking with the Child Protection & Advocacy committee about an event to assemble care packages for survivors of domestic violence, to be distributed through Circle of Hope in early January or February of 2027.

YLD Corporate Counsel Committee

Dymond Anthony, Sarah Richardson Trahan, and Forrest Lind, Co-Chairs

The YLD Corporate Counsel Committee will be participating with the Empty Stocking Fund in November to help provide holiday gifts to children in need. We are also planning a CLE in November on AI in the workplace.

YLD Ethics and Professionalism Committee

Lauren Atkinson and Shannan Young, Co-Chairs

The YLD Ethics and Professionalism Committee sent an introductory email to committee members and began identifying key Georgia Rules of Professional Conduct to highlight through social media hypotheticals. We started planning a joint professionalism event with Gate City YLD, potentially featuring a four-to-five-course etiquette dinner. No tentative date has been identified at this time.

YLD Estate and Elder Law Committee

Benjamin Walker, Myles Braxton, and Sydney Painter, Co-Chairs

The YLD Estate and Elder Law Committee is excited to announce that we are partnering with Atlanta Legal Aid to host a Wills Clinic for approximately 20 clients on December 5, 2026, in Clayton County, Georgia. We are thrilled about the opportunity to once again work alongside Atlanta Legal Aid and provide meaningful legal assistance to individuals and families who may otherwise have limited access to these important estate-planning services. More information and additional details regarding the Wills Clinic will be available over the coming weeks. We look forward to sharing more updates soon!

YLD Federal Law Subcommittee

Olivia Landrum and Doug Comin, Co-Chairs

The YLD Federal Law Subcommittee is planning a networking happy hour for the Corporate Counsel, Labor and Employment Law, and Federal Law Committees. We plan to serve heavy hors d'oeuvres (provided by whichever restaurant/bar we host at) and have sponsors donate funds for drink tickets. This event would mostly be for networking but also a good chance for each committee to talk about their plans for the bar year, including any upcoming events.

YLD High School Mock Trial
Amber Porter, Chair

The YLD High School Mock Trial Committee is off to a great start of the year. First, members filled out a survey to outline their interests in volunteering with HSMT throughout the year. On September 1, the Committee held its first committee meeting of the year and discussed the Macon Law Academy, as well as planned for the Atlanta Law Academy. The Committee also strategized when and where potential needs of the HSMT Committee might arise prior to the competitions in the Spring to ensure volunteers are used in the best way. We're looking forward to a great year working alongside the HSMT Committee at-large.

YLD Judicial Law Clerk Committee
Ginny Calhoun, Tyler Kelly, Elizabeth Nelms, and Grace Young, Co-Chairs

The YLD Judicial Law Clerk Committee has the goal to provide a networking opportunity and wellness hike at the Ocmulgee Mounds National Historical Park, in Macon, GA and have lunch in downtown Macon after the hike. We are also planning an informational Zoom panel for law students on November 13, 2026. The goal of the meeting is to introduce the roles of law clerks and staff attorneys to law students, give them an opportunity to inquire about a career, and explain how to apply for these roles. The panel will consist of current and former judicial clerks and staff attorneys. We are still planning a tips and tricks and bar v. bench CLE for practitioners in February and a professionalism CLE at the Bar Center with a panel of judges from various classes of court for April.

YLD Labor and Employment Committee
Drew Williamson, Iriel Jones, and Amber Stapleton, Co-Chairs

The YLD Labor & Employment Committee is focused on building a strong foundation for the 2026-27 bar year through planning, member engagement, and event development.

The co-chairs held an initial planning meeting on July 27 to establish committee goals, discuss programming opportunities, review budget considerations, and identify potential networking, CLE, collaboration, and service initiatives. The Committee's first meeting was held virtually on August 26, with 10 attendees. Members discussed the Committee's vision, future meeting schedules, newsletter opportunities, upcoming YLD events, and plans to enhance communication and engagement through GroupMe.

The committee is currently planning several fall initiatives, including:

- A joint networking happy hour with the Federal Law Subcommittee on October 1 at Colony Square, with Kilpatrick Townsend confirmed as a sponsor.
- A joint virtual CLE with the Corporate Counsel Committee focused on Artificial Intelligence in the Workplace, covering topics such as AI in hiring, workplace surveillance, generative AI policies, and labor law considerations.
- Additional committee meetings scheduled for October 28 and December 9.

Looking ahead, the Committee's priorities include finalizing the fall CLE, increasing member participation, expanding cross-committee collaborations, establishing regular meeting preferences, and identifying a service project for the fall or winter season.

YLD Law School Outreach Committee
Brandon Sartin, Chair

The YLD Law School Outreach Committee met to plan its events for the 2026–2027 Bar year. The Committee plans to host lunch-and-learn programs at each Georgia law school, with panels of attorneys from both the private and public sectors discussing how their involvement in the Young Lawyers Division of the State Bar has helped with their careers and professional development. The Committee expects to host the John Marshall lunch and learn in the fall, with the remaining events taking place in the spring.

YLD Leadership Academy
James Banter, Matt Caudell, Meghan Golden, and Taylor Wilson, Co-Chairs

The YLD Leadership Academy ("LA") Co-Chairs have met regularly and successfully designed all six sessions for the 2027 Leadership Academy. Applications for the program are now open, and the Co-Chairs are preparing for the next phase of the selection process. We will meet with YLD President, Virginia Josey, in Macon to review applications and select the members of the 2027 Leadership Academy class in September. The Co-Chairs are excited about the strong foundation that has been established for the upcoming program and look forward to welcoming the next class of participants.

YLD Leadership Academy Alumni Subcommittee
Addison Gantt and Seth Golden, Co-Chairs

The YLD Leadership Academy Alumni Subcommittee annual alumni luncheon is already booked for the Piedmont Driving Club. We have discussed an event in Macon to correspond with the Leadership Academy kickball tournament (and possibly sponsor a food truck event that could complement the tournament). The event may include a social event in downtown Macon where alumni can receive a small token recognizing their time in the Leadership Academy, like a lapel pin or something similar.

YLD Legal Food Frenzy Committee
Jack Wareham and Jessica Luegering, Co-Chairs

The Legal Food Frenzy Committee has scheduled introductory calls with committee members to discuss our mission and brainstorm fall and spring events that will increase awareness, engagement, and YLD participation in the Legal Food Frenzy. Potential events include volunteering at the Atlanta Community Food Bank and partnering with the Community Service Projects committee for a day of service event or food drive.

YLD Litigation Committee
Cole Harper and Holly Stephens, Co-Chairs

The YLD Litigation Committee will have a panel of entrepreneurs who have started their own firms share their experiences with those interested in branching out. We hope to have 4-5 panelists, and coordinate with a firm to sponsor a location and happy hour. We are also planning a coordinated event with the Federal Litigation Committee to have a joint event where federal practitioners can share experiences and stories from federal courts.

YLD Solo Practice and Small Firm Committee

Angelik Holloway, Dalton Trammell, and Morgan Boulineau, Co-Chairs

The Solo Practice and Small Firm Committee intends to do another Solo or Small Firm workshop this fall, hopefully in November this year, with the goal of hosting a CLE for 15-20 solo or small firm committee members. We plan to get speakers on solo and small firm finances, including financial advisors and accountants, to discuss taxes and retirement for solo and small firms, insurance brokers to discuss options for health insurance planning, and much more. We also plan to host a coffee hour or happy hour during the State Bar Midyear Meeting in January in Atlanta, bringing together solo and small firm committee members to network, exchange ideas, and discuss the unique aspects of solo and small firm practice.

YLD Wellness Committee

Harshila Leva and Liza McDaniel, Co-Chairs

The YLD Wellness Committee is partnering with YLD Community Service Projects Committee and Trees Atlanta to help plant trees in Atlanta.

YLD Women in the Profession Committee

Olivia Mercer and Cayton Chrisman, Co-Chairs

The YLD Women in the Profession Committee is currently planning three initiatives:

- **Networking Event:** The annual *Networking on the Pitch* event is tentatively scheduled for November 1 in Atlanta. Open to WIP and all YLD members, the event will focus on networking and may include a CLE or educational program prior to the match. Speaker options are currently being explored.
- **Service Project:** The committee is planning a Ronald McDonald House service event, where volunteers will assist with meal preparation for families. While dates are still being finalized, the goal is to expand this traditionally Atlanta-based event statewide, with service opportunities in Atlanta, Augusta, Savannah, and Columbus.
- **Wellness Event:** A spring wellness program is being considered, with options including instructor-led outdoor yoga or a group 5K participation event. Dates and locations are to be determined.

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 Bar Association 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

Fall Meeting | Oct. 10-12

The Westin Hilton Head Island Resort and Spa
Hilton Head, SC

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

Midyear Meeting | Jan. 15-16

Omni Hotel at the Battery Atlanta
Atlanta, GA

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

Spring Meeting | Mar. 4-7

Fairmont El San Juan Hotel
Carolina, Puerto Rico

Annual Meeting | Jun. 10-13

Gaylord Palms Resort & Convention Center
Kissimmee, FL

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

This is going to be a fun and memorable year for the YLD, and I cannot wait to celebrate it with all of you. I am always eager to connect with members of the Board of Governors and learn how the YLD can continue to support the State Bar and its members. Please do not hesitate to reach out to me at any time. I would be thrilled to meet with you, hear your ideas and discuss ways we can work together throughout this historic year.

Thank you for your continued support of the Young Lawyers Division. I look forward to seeing you throughout this special 80th year as we celebrate the YLD, build on its success and continue creating opportunities for young lawyers across Georgia.

Sincerely,

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

Virginia C. Josey
YLD President



October 17, 2026

Dear Members of the Board of Governors:

As the inaugural President of the State Bar of Georgia's Senior Lawyers Division ("SLD"), I am honored to provide you with this report on the Division's formation, leadership, and programming as we complete our first months of operation. I extend my sincere gratitude to the Supreme Court and the Board of Governors for their vision in establishing the SLD and for their continued support of our mission to serve Georgia's senior lawyers and, through them, the broader legal community.

The SLD represents a vital constituency within our Bar—lawyers who have devoted decades to the practice of law and who possess invaluable experience, institutional knowledge, and a demonstrated commitment to the profession. Our Division is dedicated to harnessing these strengths through service, engagement, and wellness initiatives that benefit both our members and the legal community at large.

Division Launch and Membership

I am pleased to report that the SLD has launched with considerable momentum. We have over 1,270 dues paying members, reflecting strong interest in and enthusiasm for the Division's work. During our inaugural Executive Committee Meeting and Strategic Planning Session on August 14, 2026, at State Bar Headquarters, we established our theme for this Bar year: Seasoned Wisdom. Fresh Engagement. This theme captures our commitment to leveraging the deep experience of our members while fostering new opportunities for professional growth, connection, and contribution.

Leadership and Committee Structure

In consultation with President-Elect Howard Delashmit, I have appointed inaugural committee chairs to serve two-year terms, providing them adequate time to develop and implement meaningful programming. We have organized the Division around three standing committees, each reflecting a core pillar of the SLD's mission:

- Service Committee — Chair: Catherine J. "Cathy" Waddell, Marietta
- Engagement Committee — Chair: Thomas A. "Tom" Schroeder, Acworth
- Wellness Committee — Chair: Tammy Stanley, Rex

The Service Committee will focus on pro bono service and mentoring, enabling our members to give back to the profession and the community. The Engagement Committee will develop professional and social programming to foster connection among senior lawyers throughout Georgia. The Wellness Committee will address financial planning and health wellness, recognizing the unique

needs of lawyers at this stage of their careers. A Committee Chair Orientation Session was held in September 2026 to ensure alignment of our strategic objectives.

Fall 2026 Programming

The SLD has planned a robust schedule of events for fall 2026, designed to build community and provide value to our members:

- September 12, 2026 – SLD Night at Truist Park (Braves v. Reds), providing an informal networking opportunity for our members.
- October 17, 2026 – SLD Bus Tour to Savannah to engage with Coastal Georgia SLD members and strengthen our statewide presence.
- October 29, 2026 – SLD Fall Seminar at the Bar Center, focusing on succession planning and financial well-being for senior lawyers.

Looking Ahead

The Engagement Committee is developing programming to coincide with the Board of Governors meetings at the State Bar's Mid-Year Meeting in Atlanta, the Spring Meeting at Lake Oconee, and the Annual Meeting at Gaylord Palms Resort & Convention Center. We hope these events will provide opportunities for SLD members from around the state to interact with each other, the YLD and the Board and for the Board to observe the Division's work firsthand.

I respectfully invite members of the Board of Governors to attend any of our events and to share any guidance or priorities you believe the SLD should consider as we continue to build the Division. We are committed to ensuring that the SLD serves not only its members but also the broader goals of the State Bar of Georgia.

Thank you again for your support of the Senior Lawyers Division. I look forward to reporting on our continued progress and to working with the Board to advance the interests of Georgia's legal profession.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Betsy", with a stylized flourish at the end.

Elizabeth B. Hodges
President, Senior Lawyers Division
State Bar of Georgia



STATE BAR OF GEORGIA

Access to Justice Project:

Unlocking Georgia's Pro Bono Potential

A Strategic Framework for Data-Driven Engagement

April 22, 2026

Executive Summary: The Strategic Pivot

Analysis of the Access to Justice Project reveals a legal community with a high-latent capacity for service: 54% of Georgia attorneys currently provide pro bono work voluntarily. However, structural friction points—specifically time-unpredictability and expertise gaps—prevent more consistent participation. The Bar's path forward is not through regulation, but through "Productization"—redesigning pro bono opportunities into time-limited modules and institutionalizing professional incentives to align with the realities of modern legal practice.

1. Stakeholder Landscape: Demographics & Geography

Effective resource deployment requires a granular understanding of the Bar's membership base. The survey captured perspectives from over 1,100 professionals, representing a seasoned and stable workforce.

PROFESSIONAL DEMOGRAPHICS

- **Gender Identity:** The respondent pool is nearly balanced, with 50.60% identifying as Female and 46.60% identifying as Male.
- **Racial/Ethnic Composition:** The majority of respondents are White (74.9%), followed by Black or African American (15.3%), and Asian (1.6%). Other groups, including Mixed Race and Middle Eastern, represent roughly 8.2% combined.
- **Experience & Seniority:** The workforce is high-seniority, with 55.6% having over 20 years of experience and over 30% aged 60 or older.
- **Work Environment:** 37.3% operate in small private practices (under 10 staff), which often face the highest administrative hurdles to volunteering.

GEOGRAPHIC REACH

The survey successfully reached 85 distinct Georgia counties, covering approximately 53% of the state's 159 counties. Engagement concentration follows major metropolitan hubs.

Rank	County	Responses	% of Sample
1	Fulton	340	32.1%
2	DeKalb	98	9.3%
3	Cobb	82	7.8%
4	Gwinnett	53	5.0%
5	Chatham	34	3.2%
6	Bibb	29	2.7%
7	Richmond	20	1.9%
8	Fayette	17	1.6%
9	Cherokee	17	1.6%
10	Muscogee	16	1.5%

While urban engagement is robust, identifying rural "service deserts" remains a priority for ensuring statewide legal access.

2. Strategic Levers: The Three Pillars of Engagement

To broaden participation without mandates—which are widely viewed as an infringement on professional autonomy—the Bar should deploy three mutually exclusive strategic levers:

Pillar I: Productization (Time-Limited Tasks)

The "Fear of Open-Ended Litigation" is the primary deterrent for volunteers. Attorneys seek "bite-sized" tasks they can fit into busy schedules.

Action: Transition referrals to limited-scope projects (e.g., 1-day clinics, document review). This was the top recommendation with 620 selections.

Pillar II: Professional Incentivization (CLE Exchange)

Licensure compliance is a major professional pain point. Aligning service with these requirements provides a tangible professional "return" on time.

Action: Implement a standard 1:5 ratio (1 hour CLE credit per 5 hours of service). This is the leading motivator for 56% of respondents.

Pillar III: Capability Building (Mentorship Safety Net)

Many attorneys are hesitant to volunteer in high-need areas like housing or family law due to a perceived lack of specialized competence.

Action: Provide Legal Aid Co-Counsel to act as a "safety net," ensuring high-quality client representation while building volunteer confidence. 308 respondents cited this as a key factor.

3. Comparative Benchmarking: Innovation in Access

Georgia can solve its unique geographic and procedural hurdles by adapting models successfully deployed in other jurisdictions:

THE COLORADO MODEL: REGULATORY & GEOGRAPHIC REFORM

- **Licensed Legal Paraprofessionals (LLP):** Colorado allows trained non-lawyers to be licensed to handle specific family law matters (divorce, custody) without direct attorney supervision. This creates a more affordable tier of help for the "missing middle."
- **Justice Hubs:** Utilization of rural libraries as technology hubs to provide high-speed internet and private rooms for virtual pro bono consultations.
- **Remote Proceedings:** A uniform policy for remote court participation ensures rural litigants do not face hours of travel for short hearings.

THE VIRGINIA MODEL: PROCESS SIMPLIFICATION

- **Plain Language Initiative:** Rewriting court forms to a 5th-grade reading level, replacing archaic terms like "interrogatories" with accessible language like "Discovery Questions."
- **A2J Author & Guided Interviews:** Interactive software that automatically generates complex legal documents based on simple user answers, reducing the technical barrier to filing.
- **Visual Case Maps:** Flowcharts that allow litigants to see exactly where they are in the "Filing to Final Order" process, reducing anxiety and procedural errors.

4. Conclusion: A Vision for Sustainable Service

The findings of the Access to Justice Project confirm that the State Bar of Georgia does not face a lack of professional will; rather, it faces a lack of accessible infrastructure. The high rate of voluntary engagement (54%) proves that the legal community possesses a deep-seated desire to serve.

However, this desire is often stifled by practical concerns: the unpredictability of litigation timelines, the lack of specialized expertise in high-need areas, and the administrative burden of finding appropriate cases.

To foster a more sustainable pro bono ecosystem, the Bar must move beyond the debate over mandates and focus on institutionalizing **Value-Exchange and Support Systems**.

By productizing pro bono work into time-limited modules, the Bar can attract veteran attorneys who possess high expertise but limited time. Simultaneously, by offering CLE credits and structured mentorship, the Bar can mobilize younger attorneys who are eager to serve but require a professional "safety net."

Ultimately, the goal is to transform pro bono from a series of "random acts of kindness" into a predictable, supported, and rewarded component of every Georgia lawyer's career.

By lowering the entry hurdles, the Bar will naturally expand its reach into the state's geographic service deserts, ensuring that justice is accessible to all Georgians, regardless of income or location. Investment in these structural levers will not only solve the justice gap but also strengthen the internal culture of the Bar, fostering a lifelong commitment to service that begins in law school and persists through retirement. By aligning professional incentives with the public interest, Georgia can lead the nation in creating a modern, efficient, and equitable legal system.

Contact:

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Dr. Omar Nagi, Survey Methodologist, omar.nagi@umsv.edu

Report Prepared by: The Access to Justice Project Research Team



STATE BAR OF
GEORGIA

STATE BAR OF GEORGIA

2025-26

ANNUAL REPORT

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President's Report



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**CHRISTOPHER P.
TWYMAN**

2025-26 President
State Bar of Georgia

It is with pride and pleasure that I report on the progress and accomplishments of this historic Bar year. A year ago, we outlined an agenda to improve our committee system, to continue the Bar's integration into and observation of artificial intelligence, to focus on our asset at 104 Marietta Street and seek leasing opportunities and maximize income potential, and to vigorously promote the rule of law.

We have answered that call. And we, together, have done more. We have taken action to place the Bar on a more solid governing and financial footing going forward.

Additionally, please know that this Bar year has been about more than those platform items and those action items that we debated and, at times, approved during our meetings. This year has also been about making the Bar more visible to our members. So, we made a point to move beyond the walls of our Bar building and outside of our Board meeting spaces to go where our members are. I was honored to visit local bar meetings and gatherings in Atlanta, Augusta, Columbus, Macon, to share with attorneys throughout this state about the work of the Bar and the resources available to Georgia attorneys that are often unknown or overlooked. Although generations of State Bar presidents have traveled the state to meet with

members, this year reinforced for me that the true value of those visits lies not in what we say, but in what we learn. The lesson I will carry forward is that meaningful leadership requires us to remain curious, accessible and willing to listen.

Likewise, I had the pleasure of attending a 7th Judicial District Judge's Meeting to discuss our work and initiatives supported by the Bar and promoted through our Bench and Bar Committee. Beyond just passing rules and promoting agenda items, this year has been about educating members on what we do as a Bar, and seeking more involvement and participation from our members.

Our message to members during these many visits was a consistent one: first, be informed about our focus areas of artificial intelligence, the Bar Center, Bar committee performance and the rule of law. Then, incorporate these resources into your local practices for the greater improvement of our collective law practice.

Artificial Intelligence

With that background, allow me to highlight our progress through the year beginning with our Artificial Intelligence and Emerging Technologies Committee.

This Bar year, we remained present with the advancement of artificial intelligence. In November 2025, we launched

our AI Toolkit to provide guidance for the use of AI in the practice of law and to promote the responsible use of the technology. The Toolkit's goal is simple: to support lawyers in using AI tools in ways that are ethical, appropriate and fully compliant with the Georgia Rules of Professional Conduct. It offers recommendations, best practices, and resources to help lawyers make informed decisions about when and how to use generative AI. Through the continued great work of our Artificial Intelligence and Emerging Technologies Committee, we are fulfilling the Bar's mission to advance the science of law.

The Bar Center

Emerging technologies and AI will lend its hand to our work and focus on our Bar Center at 104 Marietta Street. In January, we signed with a new parking partner, Universal Parking, to bring an updated parking experience to Bar parking and better technology to improve revenue collection. Until now, visitor parking fees have been static and, at times, below market. As part of this new partnership, we will move to a dynamic pricing model in July to maximize revenue opportunities by charging our visitors true market prices. Our members, of course, will continue to enjoy priority and free parking.

Our new parking model is just one example of our efforts to strengthen the economic engine that is the Bar Center. We also turned our attention to occupancy, working closely with our broker to attract prospective tenants and maximize the value of our space.

Importantly, we have remained focused on more than simply filling square footage. Our goal has been to identify tenants who align with the mission of the Bar and the public we serve, while also moving closer to market-driven lease rates and strengthening the long-term financial position of the organization.

I am pleased to report activity in three categories: those opportunities that crossed the finish line, those still advancing through negotiations and those that ultimately chose a different path.

Among our successes, the Latino Community Fund has committed to nearly 2,000 square feet on the sixth floor, and the Georgia Innocence Project will occupy nearly 3,000 square feet on the fourth floor. Both organizations advance work that closely aligns with our broader commitment to access to justice and service to the public.

We also remain in active discussions with a nonprofit organization focused on workforce development and youth opportunity. Should that transaction come to fruition, it would result in occupancy

of approximately 15,000 square feet on our second floor.

Not every opportunity reaches the finish line. During the year, we saw prospective arrangements involving an immigration-focused nonprofit, the U.S. Postal Service retail space and most recently a significant proposal involving nearly 30,000 square feet in the basement and sub-basement areas. While those opportunities did not materialize, they provided valuable insight into the market and reaffirmed the attractiveness of spaces that many would have previously considered difficult to lease.

Taken together, these efforts demonstrate meaningful progress toward a tenant mix that better reflects our mission, serves the public and supports the long-term financial health of the Bar Center.

As you know, we have continued to invest in the Bar Center through targeted upgrades and maintenance projects. Importantly, those investments were made without increasing member license fees directly, expanding our operating budget or relying on resources needed for day-to-day operations. Looking ahead, increased occupancy and leasing activity should help offset a portion of the costs associated with the facility and further strengthen the building's long-term financial position.

Please understand that these new lease relationships will not result in an imme-

diate windfall to the Bar Center coffers, but this leasing activity will generate additional revenue on the Bar Center side to help offset expenses related to the maintenance of the Bar Center.

Bar Committee Performance

This Bar year, we also brought more accountability to our committees and, as a result, realized more productivity from the committees. From the outset, we pressed committees to push comprehensive projects and work, not merely panels and presentations. We tightened minutes and other record-keeping rules to promote continuity from meeting-to-meeting, year-to year and to keep our committees on task. Additionally, and for the first time, we called on our committees to provide end-of-the-year activity reports for publication in the Board Book. These reports highlight the hard work of our committees this past Bar year, provide a summary to our greater membership of the committee work and hold our committees accountable to their respective missions.

Of course, while a year may seem like a long time, we all know that meaningful committee work cannot always be packaged into just 12 months. Committee work will continue, and some of those projects initiated during my Bar presidency will yield fruit in the coming months and years. This year, the Access to Justice Committee conducted a State of Pro Bono survey with plans to create a strategic plan for the next five years. As that committee completes its review of the survey results, I anticipate that in the coming months the Access to Justice

Committee will present its findings to the Executive Committee and this body. Just one example of our committees doing the work of the Bar.

We also welcomed a new division into the Bar fold. The Senior Lawyers Division (SLD) was established in February, culminating the hard work and vision of President-Elect Bill Gentry and a supporting cast who all worked tirelessly toward the division's creation. The Senior Lawyers Division's mission is, in part, to foster discussion about issues germane to older lawyers; create an interchange of ideas with other groups, including the Young Lawyers Division; provide mentoring opportunities to younger lawyers; and foster camaraderie among the older members of the State Bar. Our Bar will be well served by this new division.

The Rule of Law

And speaking of doing the necessary work of the Bar, there is one committee of which we are all members. We are all members of this learned profession. And part of our collective committee work—our professional work—is to promote the rule of law.

Promoting and defending the rule of law was a constant theme of this year. And it should be a focus and theme *every* year. Because understanding and defending the rule of law falls squarely in line with this Bar's stated mission—improving the administration of justice.

For years, the State Bar of Georgia has promoted the rule of law through law-related education. From the Journey Through Justice Program, which hosted

83 tours at the Bar and 14 on the road this Bar year, to our High School Mock Trial Program, we are bringing constitutional literacy to our youth, our future generation. To compliment these great programs, I, along with Chief Justice Peterson and YLD President Veronica Cox, filmed a series of educational videos for elementary students, middle schoolers and high school students to emphasize the importance of and to promote the rule of law.

On May 1, I had to opportunity to address a group gathered at the Supreme Court of Georgia for Law Day. At that event, I was able to remind other lawyers gathered there that throughout our history, our nation has faced moments that tested its commitment to the rule of law. But the legal system's ability to self-correct is not only a testament to the work of lawyers and judges working in defense of the rule of law, but validation that our system of government—that *we*—are a nation of laws, *not* of men.

This year, I was proud to stand and promote and defend the rule of law at every opportunity. Because without the rule of law, we, as lawyers, cannot fulfill our purpose.

CLE Compliance Period

One more note about the year. After years of work by dedicated volunteers, staff and our partners on the Court, the new CLE compliance period became a reality this year. I am proud that we were able to modernize the system in a way that provides greater flexibility and relief for Georgia lawyers while continuing to emphasize the importance of lifelong learning.

Continuing legal education matters because competence matters. It matters to our clients, to our courts and to the public we serve. These changes acknowledge the realities of modern practice while reaffirming our commitment to maintaining a profession that is knowledgeable, ethical and prepared for the challenges ahead. I believe this will prove to be one of those quiet but transformative improvements whose full value will be appreciated for years to come.

Thank You

To the Chief Justice and the Court: thank you being a partner in the work of the Bar. Your leadership and partnership are meaningful—not only to me, but in the success of our Board and the Bar. A special thanks to our liaisons, Justice Bethel, Presiding Justice Warren and Justice McMillian, for your collaboration during this Bar year.

To the Executive Committee: thank you for your support and for standing behind my initiatives. More importantly, thank you for your engagement, your deliberation and your vision. You showed up to every meeting dedicated and ready to work. And that made my service easier and enjoyable.

To the Board of Governors: thank you for how you represent your constituents and your dedication to showing up and making sure that we, as Bar leaders get it right. You were not here to provide a rubber stamp. You used your voice and offered sound debate. You keep us strong as a Bar.

And to the 56,000 lawyers in this state: thank you for putting your trust in me to lead as your 63rd president. It has truly been an honor and a privilege. ●

About the Bar

The State Bar of Georgia exists to foster among the members of the Bar of this state the principles of duty and service to the public; to improve the administration of justice; and to advance the science of law. All persons authorized to practice law in this state are required to be members.

The Bar has strict codes of ethics and discipline that are enforced by the Supreme Court of Georgia through the State Bar's Office of the General Counsel. Membership license fees and other contributions help the Bar provide programs that are mutually beneficial to its members and the general public. ●

TOTAL # OF STAFF

108 FULL TIME EMPLOYEES **8** PART TIME EMPLOYEES

TOTAL # OF BAR MEMBERS

55,699

**LICENSE
FEE** FOR ACTIVE MEMBERS

\$270

Georgia's license and other mandatory fees rank **7th** lowest among 33 mandatory bar associations.



Executive Director's Message



PHOTO BY RONNIE J. HEATH PHOTOGRAPHY

DAMON E. ELMORE

Executive Director
State Bar of Georgia
damone@gabar.org

We are thrilled to present the fifth annual comprehensive report on the operations of the State Bar of Georgia. It is with great pride that we offer this broad snapshot of our work and accomplishments, showcasing the value we provide to our members and the public we serve. Our goal remains to provide meaningful insight into the benefits, services and opportunities available through the Bar while addressing many of the questions we frequently hear from lawyers across the state.

Five years ago, we committed to building on this report annually, and we remain dedicated to ensuring it is transparent, relevant, easy to navigate, and rich with meaningful data and statistics. We are grateful to our managers and to our Communications Department for their diligence in gathering, analyzing and presenting the information contained in these pages.

Your feedback continues to be invaluable. If there is something significant we have overlooked or an area where we can improve, we welcome your input. We are committed to continuous improvement, and your insights help us better serve our members and fulfill our mission.

We are grateful for the leadership, vision and support of our 2025-26 president, Christopher P. Twyman, the Board of Governors and our volunteer leaders in advancing the work of the State Bar during this Bar year. The results reflected in

the pages that follow, and the momentum we carry forward, are a testament to the dedication, professionalism, and unwavering commitment of our staff and volunteers. Together, we remain laser-focused on protecting the public, advancing the science of the law, and improving the administration of justice and the quality of legal services throughout Georgia.

We now look ahead to the new Bar year and the leadership of President William P. "Bill" Gentry. We are excited to support his vision and priorities while continuing our work to responsibly steward Bar resources, strengthen the contributions of our committees and volunteer leaders, navigate the opportunities and challenges presented by emerging technologies, and uphold our enduring commitment to the rule of law.

We are equally grateful to all of our volunteer leaders, as well as our liaisons with the Supreme Court of Georgia, Justice Charlie Bethel and Justice Carla Wong McMillian, for their guidance, partnership and support. Their engagement continues to strengthen the relationship between the Court and the organized Bar.

As we reflect on another successful year and look to the future, we embrace the opportunities and challenges ahead with optimism and purpose. We remain committed to becoming better with each passing day and to serving Georgia's lawyers and citizens with excellence. DEE ●

Member Benefits



STATE BAR PARKING DECK

Free Parking is available to all Bar members and is open Monday–Friday from 7 a.m. to 5 p.m. Free parking is also available on nights and weekends with a Bar card and picture ID. In 2024, the State Bar added six Level 2 EV charging stations on the fourth level. ●



VENDOR DIRECTORY

gabar.org/vendor-directory

The online Vendor Directory provides a listing of practice-related products and services; many offer discounts to Bar members. ●

MB | MemberBenefits

MEMBER BENEFITS, INC.

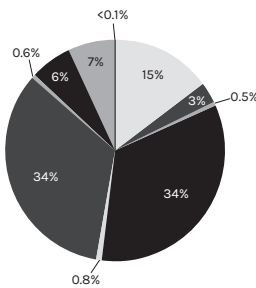
gabar.memberbenefits.com

Member Benefits, Inc., is the recommended broker of the State Bar of Georgia, Health, Dental & Vision Plans, plus Long-Term Disability and Long-Term Care. From July 1, 2025, through June 30, 2026, there were 855 total enrollments in various individual insurance products and 782 enrollments in employer-insurance products in the past year. ●

MEMBER BENEFITS, INC., TOTAL PRODUCT ENROLLMENTS

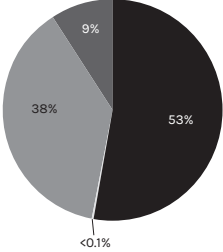
TOTAL # OF INDIVIDUAL
PRODUCT ENROLLMENTS
9,256 ⬆5% since 2023-24

- Critical Illness (<0.1%)
- Dental (15%)
- Disability (3%)
- ID Theft Protection (0.5%)
- Life/AD&D (34%)
- Long-Term Care (0.8%)
- Medical (34%)
- Medicare (0.6%)
- Telehealth (6%)
- Vision (7%)



TOTAL # OF EMPLOYER
PRODUCT ENROLLMENTS
4,895 ⬆19% since 2023-24

- Ancillary (53%)
- Cybersecurity (<0.1%)
- Medical (38%)
- Professional Liability (9%)



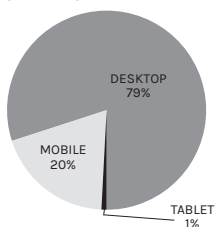


VLEX FASTCASE LEGAL RESEARCH

vLex Fastcase is provided free to all members and includes a comprehensive, national law library on your computer/tablet/smartphone, with online access to cases, statutes, regulations, court rules and bar publications. ●



SEARCH DEVICE TYPE BREAKDOWN



RELIAGUIDE

gabar.reliaguide.com/home

ReliaGuide, with its Find a Lawyer directory, serves as the Bar's enhanced member directory that offers members the ability to create a profile with a photo, up to three practice areas, education, contact and license information at no cost. An expanded profile (Profile Plus) is available for only \$15 a month. From July 1, 2025, through June 30, 2026, interactions with member profiles totaled 580,028, including 86,676 profile views, 8,214 completed contact forms and 29,789 clicks on lawyer phone numbers and email addresses. ●

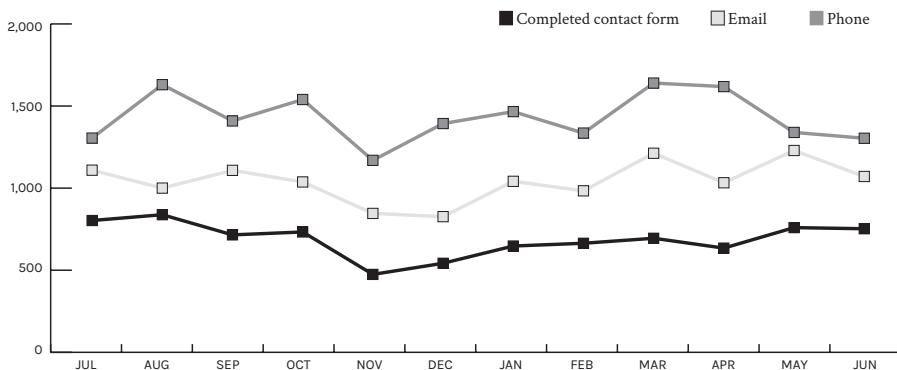
OF MEMBER PROFILE INTERACTIONS

580,028

↑7% since 2024-25

The majority of searches occurred on Tuesdays between 10 a.m. and 5 p.m.

OF RELIAGUIDE CONTACT ACTIONS JULY 1, 2025-JUNE 30, 2026



The State Bar of Georgia offers a wide range of services and programs that benefit Bar members. Members are encouraged to familiarize themselves with these services and programs, and are welcome to contact the staff members listed for further information. For more information on these programs and services, please visit www.gabar.org.

Bar Conference Center: Atlanta

404-419-0155 | conferencecenter@gabar.org

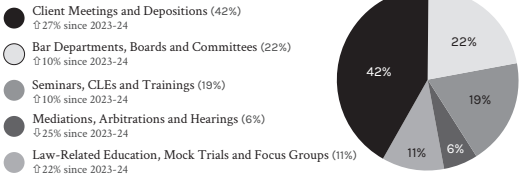
KYLE GAUSE, DIRECTOR

The State Bar of Georgia Conference Center is available for use by Bar members and legal organizations. With the increase in the request for hybrid and virtual offerings, the Conference Center is well-equipped to handle set-up for a number of virtual platforms (webinars, Zoom meetings, etc.), in addition to more traditional meeting formats.

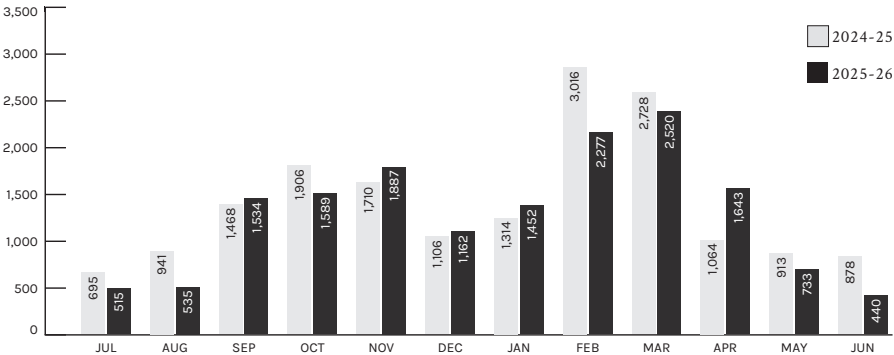
The Conference Center features 13 unique meeting rooms that can host two to 200 attendees.

MONTHLY AVERAGE
OF ATTENDEES
1,357

AVERAGE MONTHLY USAGE BY EVENT TYPE



OF CONFERENCE CENTER VISITORS JULY 1, 2025 -JUNE 30, 2026



Center for Lawyer Wellbeing

www.gabar.org/wellbeing

R. JAVOYNE HICKS, CHAIR

The State Bar of Georgia's Center for Lawyer Wellbeing was created in 2024 to promote holistic wellness for legal professionals. Membership in the Center offers invaluable resources, networking opportunities and exclusive benefits designed to support lawyers' personal and professional growth.

We encourage all to join to help build a comprehensive and robust destination for lawyers that places wellness, wellbeing and resilience as a critical part of law practice and an essential element of lawyer competency. The voluntary annual membership fee is \$40.

Goals of the Center for Lawyer Wellbeing

- Collaborating with Bar sections, committees and other entities to provide high-quality, up-to-date programming that will educate lawyers, judges, law students and other stakeholders on the significance of wellbeing issues and provide them with the tools they need to make a positive impact.
- Serving as a clearinghouse and repository of information on the work of

the State Bar of Georgia, its sections, committees, divisions and programs in the area of wellbeing.

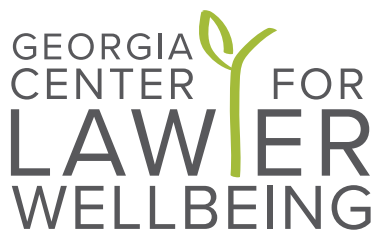
- Encouraging continued study of the connection between wellbeing, professionalism and discipline.
- Developing and sharing policies and best practices that move the profession toward healthier behaviors.
- Eliminating the stigma associated with help-seeking behaviors.

Benefits of Membership in the Center for Lawyer Wellbeing

The benefits listed are a representative example of the current, planned and potential offerings to members. Benefits are subject to change.

- Discounts on continuing education and professional development.
- Discounts on wellness products and services.
- Priority access to wellness events and programs.
- Exclusive access to premium wellness resources.
- Networking with wellness experts and peers.
- Exclusive member-only events and perks.
- Recognition and rewards.

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. ●



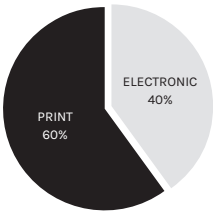
Communications

404-527-8761 | communications@gabar.org
JENNIFER MASON, DIRECTOR

The Bar's publications and media relations are coordinated by this department and various committees. This department is also responsible for maintaining the State Bar of Georgia website. The *Georgia Bar Journal*, published quarterly, is

the flagship publication of the State Bar of Georgia. The department also handles a majority of the social media content for the Bar, coordinates the annual awards program and provides staff support for the Center for Lawyer Wellbeing Board. ●

GEORGIA BAR
JOURNAL
DISTRIBUTION TYPE



OF SOCIAL MEDIA FOLLOWERS

FACEBOOK	INSTAGRAM	LINKEDIN
8,105	2,793	10,044
↑ 2.9% since 2024-25	↑ 9.6% since 2024-25	↑ 12% since 2024-25
The State Bar's Facebook audience is split 65.8% women and 34.2% men.	12% of the State Bar's Instagram interactions are by non-followers.	62% of the State Bar's LinkedIn audience is from the greater Atlanta area.

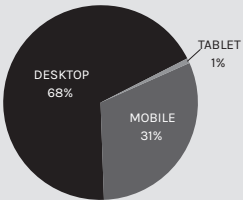
CONNECT WITH THE BAR

- www.gabar.org
- [@statebarofgeorgia](#)
- [@statebarofga](#)
- [/state-bar-of-georgia](#)
- [@StateBarOfGeorgia](#)

www.gabar.org
JULY 1, 2025-JUNE 30,2026

- TOP FIVE PAGES VISITED
1. Member Directory
 2. Home
 3. Handbook
 4. Public/Find a Lawyer
 5. Search

DEVICE TYPE BREAKDOWN



TOTAL # OF USERS	2,880,257
TOTAL # OF VIEWS	6,996,186
TOTAL # OF SESSIONS	3,947,316

Continuing Legal Education Regulation

404-527-8710 | cle@gabar.org
DEE DEE WORLEY, DIRECTOR

This program operates under the Commission on Continuing Lawyer Competency and assists lawyers with keeping track of their CLE hours through an online CLE transcript that can be viewed by the lawyer any time by logging in to their member portal on the Bar's website, www.gabar.org.

The CLE requirement is designed to help lawyers maintain their professional competence throughout their active practice of law. In 2025 active lawyers were required to keep current on the law by attending a minimum of 12 hours of legal education including 2 ethics hours, 1 professionalism hour and 3 trial hours. Lawyers can complete these 12 hours by an approved CLE program attended either in person or through a distance-learning format. In addition to CLE programs, lawyers can receive CLE hours each year for coaching a high school mock trial team; judging a high school, college or law school mock trial competition; authoring a published legal article or observing a trial.

Starting in 2026, the Supreme Court of Georgia approved a rules change that moved the CLE requirement from an annual requirement to a biennial requirement. The first CLE deadline with the biennial CLE requirement is Dec. 31, 2027. The biennial CLE requirement is 18 CLE hours including 3 ethics hours and 2 professionalism hours. ●

OF ACTIVE BAR MEMBERS IN 2025-26
42,887

OF CLE PROVIDERS THAT SUBMITTED COURSES
810
↓ 7% since 2024-25

OF BAR MEMBERS WITH A CLE REQUIREMENT
31,654

OF CLE COURSES APPROVED FOR CREDIT
19,088
↓ 0.6% since 2024-25

OF BAR MEMBERS SUSPENDED FOR CLE NONCOMPLIANCE
55

OF CLE HOURS ATTENDED BY BAR MEMBERS
460,220
↑ 2% since 2024-25

In the 2025-26 Bar year, **11,233** active lawyers received a CLE exemption (judge, out of state, age 70, Bar examiner, military, TILPP).



Fee Arbitration

404-527-8750 | feearbitration@gabar.org

DONNA DAVIS, DIRECTOR

The State Bar of Georgia's Fee Arbitration Program is a service provided to the public and the attorneys of Georgia. This Program provides a convenient mechanism for the resolution of fee disputes between attorneys and clients, and between attorneys in connection with the dissolution of a practice or the withdrawal of an attorney from a partnership or practice, or between attorneys concerning the allocation of fees earned from joint services.

Overview of Petition Process

There are four essential phases of the petition process:

1 Petition

Petitions can be initiated by either the attorney or the client. In client-initiated petitions, co-petitioners are the people who were financially responsible for the client's legal fees.

2 Answer

Answers are submitted by the respondent. As of Jan. 28, 2022, respondents must agree to be bound in order for the Fee Arbitration Program to continue through the remaining processes.

3 Committee

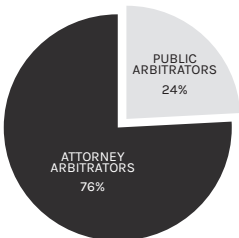
The committee and committee staff read the petition, answer, rebuttals and any additional information submitted to determine jurisdiction.

4 Hearing

If jurisdiction is accepted, arbitrators are selected and a hearing is scheduled. Parties are able to attend in person or participate by Zoom. Arbitrators must attend in person. •

TOTAL # OF VOLUNTEER
ARBITRATORS IN 2025-26

223



TOTAL # OF PETITIONS
RECEIVED IN 2025-26

780



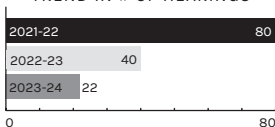
of cases resolved via settlement, declined jurisdiction, arbitration award, etc.

TOTAL # OF HEARINGS
HELD IN 2025-26*

10

** In comparison, in calendar year 2020, during the COVID-19 pandemic, the Fee Arbitration Program held 31 hearings; the program held 81 hearings in calendar year 2021, prior to the January 2022 Rule change requiring attorneys to be bound by the result of the arbitration.*

TREND IN # OF HEARINGS



Finance

404-527-8748 | ront@gabar.org
RON TURNER, CHIEF FINANCIAL OFFICER

The Finance Department is responsible for safeguarding the financial integrity and sustainability of the State Bar of Georgia. The department manages all

financial operations in compliance with accounting standards, statutory requirements, and the State Bar’s internal regulations. It maintains public trust by ensur-

TOTAL AMOUNT RAISED FOR
GLSP CAMPAIGN
\$231,522

ing fiscal responsibility, transparency, and efficient management of resources to support the Bar’s mission and services to its members.



FY2026 Financial Summary
The State Bar operated at a planned financial deficit for the Bar year ending June 30, 2026. The State Bar’s net assets are estimated to be in the range of \$35 million to \$37 million. The Bar year’s end is June 30, and as such, this amount is estimated. The State Bar operates without any debt.

Approved FY26 Budget
The State Bar Board of Governors approved a budget with a deficit for the year ended June 30, 2026, of \$1,074,873.

Management’s Responsibility
The State Bar of Georgia’s management is responsible for the information provided in the Financial Report. The basic financial statements and related notes are audited by an independent accounting firm in accordance with auditing standards generally accepted in the United States of America. ●

Georgia Diversity Program

404-219-8174 | gadiversityprogram@gmail.com

HALIMA HORTON WHITE, DIRECTOR



The Georgia Diversity Program (GDP) remains committed to advancing diversity, equity, inclusion, and belonging within Georgia's legal profession. Through educational programming, professional development, leadership initiatives and pipeline programs, GDP continues to create meaningful opportunities for students, attorneys, judges, corporate counsel, government lawyers and legal organizations across the state.

GDP is comprised of law firms, corporate legal departments, government agencies and legal organizations that support the program through annual membership and active participation. Throughout 2026, the Steering Committee met regularly to develop programming, strengthen partnerships, and address issues impacting diversity and inclusion within the legal profession.

Continuing Legal Education and Professional Development

In late March 2026, GDP presented its Spring CLE, which included topics such as U.S. Supreme Court and Supreme Court of Georgia updates, ethical guidelines for communicating with opposing counsel and immigration updates. The program was well attended and received positive comments from attendees. It was a dynamic presentation. For example, the Supreme Court update included audio from various U.S. Supreme Court oral arguments.

High School Pipeline Program

The High School Pipeline is one of GDP's signature initiatives. Bradley hosted 15 students during the two-week summer program that exposed high school students to lawyers and law students. Scholars met daily with their instructors—a high school guidance counselor and a lawyer. They worked with their scholars on writing (such as thank you emails and personal statements to get into college). They also worked on Lincoln-Douglas debates, including researching and analyzing topics approved for high school students, such as whether police should be required to wear body cameras at all times.

The highlight of the program is the lunches the scholars attend at different law firms, corporate legal departments and other organizations. This year, for example, the scholars learned about credit at Equifax, learned about how legal departments further corporate functions at Newell Brands, and learned about how professionalism and etiquette further relationships at Fisher Phillips. There is significant engagement in the program among the Atlanta legal community.

Business Development Initiative

In 2026, GDP launched planning efforts for its inaugural Business Development Symposium. This year, we will invite small businesses (rather than in-house counsel) to attend and to actually interview lawyers they'd like to hire in practice areas, such as

immigration, corporate advice, trademarks and copyrights, estate planning and more.

Community Engagement and Partnerships

GDP continued to strengthen relationships with Georgia law schools, bar associations, corporate legal departments, law firms, government agencies and members of the judiciary. For example, we recently co-sponsored a Summer Associates Happy Hour with the Georgia Asian Pacific American Bar Association, the Georgia Association of Black Women Attorneys and others.

Looking Ahead

As GDP moves into 2027, we are determined to obtain significant engagement in programs that tangibly benefit lawyers, such as a Business Development Symposium where small businesses without in-house counsel will interview lawyers to hire. We will offer CLEs that tangibly arm lawyers with the knowledge they need to be effective in their craft. And we will expand our reach throughout Georgia.

Programming is supported by Georgia Diversity Program member firms. We are grateful to these firms, a list of which can be found at www.gabar.org/diversity, for their continued support and acknowledge that without their dedication, the work of the program would not be possible. ●

Georgia High School Mock Trial

404-527-8779 | mocktrial@gabar.org

RICH HARRIS, DIRECTOR

The Georgia High School Mock Trial (HSMT), recognized as one of the strongest in the nation as exemplified by three top 10 finishes in the last three National Championships, oversees an annual statewide competition of more than 130 schools (2,300+ students). Participating teams come from every region of Georgia, Valdosta to Dalton and Savannah to Columbus. Mock trial develops and enhances vital life skills such as public speaking, critical thinking and teamwork, while providing participants with practical knowledge of our legal system. The competition relies on thousands of volunteer hours by members of the State Bar and especially the Young Lawyers Division. Volunteer lawyers coach teams, coordinate and run the competition, write the case and staff the panels that judge rounds.

Law Academy

The program also conducts Law Academy, a three-day program each summer, designed to empower the top mock trial students with trial practice and leadership skills they can take back to their teammates. The faculty of Law Academy consists of highly experienced judges and trial lawyers. In 2026, due to student demand, the program will host two separate weekends, in Atlanta and Macon •

Georgia HSMT by the Numbers

2026 SEASON

- 2,370 students (+337 since 2025)
- 135 schools registered (+8 since 2025)
- 371 coaches: judges, attorneys and teachers (+48 since 2025)

DISTRICTS

- 54 teams (+2 since 2025)
- 9 locations across the state
- 200+ volunteers on judging panels

REGIONS

- 146 competing teams
- 17 locations across the state
- 700+ volunteers on judging panels (+70 since 2025)

STATE FINALS

- 18 teams
- 89 volunteers on judging panels
- 5 rounds over 3 days to crown State Champion

State Champion Northview High School competed at the National High School Mock Trial Championship in Des Moines, finishing **2nd** (National Runner-Up) of 44 teams.

CONNECT WITH HSMT

-  www.georgiamocktrial.org
-  [@GeorgiaMockTrial](https://www.facebook.com/GeorgiaMockTrial)
-  [@georgia_hs_mock_trial](https://www.instagram.com/georgia_hs_mock_trial)



Governmental Affairs // Legislative Program

404-526-8608 | jennm@gabar.org

JENN MCNEELY, DIRECTOR



The 2025–26 Bar year marked another year of significant growth and engagement for the State Bar of Georgia's Governmental Affairs Department. Through legislative advocacy, member engagement, strategic communications and collaboration with Bar leadership, sections, committees and policymakers, the department continued to advance the Bar's mission of promoting the administration of justice and supporting the legal profession.

Legislative Advocacy

During the 2026 legislative session, the Governmental Affairs team monitored hundreds of bills and resolutions affecting the legal profession, the judiciary and the administration of justice. Working closely with the Advisory Committee on Legislation, the Executive Committee, Bar sections and committees, and legislative leadership, the department evaluated proposed legislation and advanced the Bar's legislative priorities throughout the session.

The Bar's most notable legislative accomplishment was the successful passage of legislation expanding the qualifications for quiet title special masters. The legislation increases the pool of qualified attorneys eligible to serve in these proceed-

ings, particularly benefiting rural judicial circuits while preserving the integrity and expertise required for these appointments.

The team also continued its advocacy in support of adequate funding for indigent defense. We monitored numerous proposals involving unlicensed practice of law, remote online notarization, judicial administration, civil procedure, probate practice, election law and other matters affecting Georgia lawyers and courts.

In addition to the regular legislative session, the department monitored and reported on the governor's 2026 special session.

Legislative Communications

Keeping members informed remained a central focus throughout the year. We published regular legislative updates during the general session, providing concise, nonpartisan summaries of significant legislative activity. Following both the regular and special legislative sessions, members received comprehensive recaps outlining enacted legislation and key developments affecting the practice of law. We also contributed legislative articles to the *Georgia Bar Journal*, including the annual Legislative Review and a Legislative Session Preview.

Member Engagement and Public Policy

The Governmental Affairs Department continued to strengthen relationships between the legal profession and state

polymakers through numerous engagement opportunities. During the Bar's Annual Meeting, the department hosted the Legislative Appreciation Dinner, bringing together members of the judiciary, legislative leaders, constitutional officers and Bar leadership to strengthen relationships and foster collaboration between Georgia's legal and governmental communities.

Throughout the year, the department also coordinated meetings of the Advisory Committee on Legislation, providing members with opportunities to review legislative proposals, receive policy briefings and recommend positions on issues affecting the profession.

Gold Dome Track: Answering the Call

One of the department's signature accomplishments this year was the launch of Gold Dome Track: Answering the Call, a first-of-its-kind initiative designed to encourage attorneys to consider public service through elected office. Developed in response to the continued decline in the number of lawyers serving in the Georgia General Assembly, the program consisted of a two-part educational series. The first session featured a panel of current and former lawyer-legislators who shared candid perspectives on campaigning, serving in office and balancing legislative responsibilities with the practice of law. The second session provided participants with practical campaign training led by campaign finance attorneys, political consultants and election professionals covering the mechanics of running for office.

Looking Ahead

Building on the momentum of the past year, the Governmental Affairs Department will continue expanding member engagement opportunities, strengthening legislative relationships and advancing initiatives that support the legal profession and improve Georgia's justice system.

Future priorities include expanding the Gold Dome Track program through regional programming, increasing opportunities for member participation in the legislative process, strengthening communications with Bar sections and committees, developing a legislative externship program for law students and continuing to advocate for policies that enhance the administration of justice throughout Georgia.

Our team remains committed to serving as a trusted resource for Bar members, legislative leaders and the judiciary while ensuring that the voice of Georgia's legal profession is informed, engaged and effectively represented.

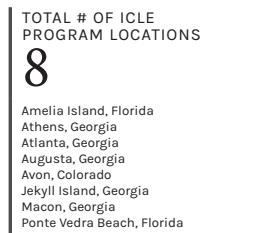
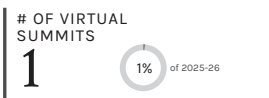
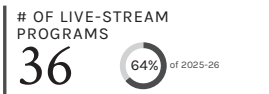
The State Bar of Georgia's Legislative Program is exclusively funded by voluntary contributions from our members. Any official position by the State Bar of Georgia, including its sections and committees, must follow the process outlined in Standing Board Policy 100, www.gabar.org/SBP100, and meet the standards set out by the U.S. Supreme Court in Keller v. State Bar of California. The State Bar and affiliated entities cannot take an official position on legislation without following these policies and standards. ●

Institute of Continuing Legal Education

678-529-6688 | icle@gabar.org

JULIA NEIGHBORS, DIRECTOR

The Institute of Continuing Legal Education of the State Bar of Georgia (ICLE) was established to promote 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. For more information about upcoming CLE programs, please visit icle.gabar.org.



CONNECT WITH ICLE

-  icle.gabar.org
-  [@statebargaicle](https://www.instagram.com/statebargaicle)
-  [@iclega](https://www.facebook.com/iclega)
-  [/iclega](https://www.linkedin.com/company/iclega)



Law Practice Management

404-527-8770 | lpm@gabar.org
NKOYO EFFIONG, DIRECTOR

The Law Practice Management Program helps Georgia lawyers start, scale or shutdown their practices with less stress. Through our resource library, vendor directory, toolkits, webinars, consultations and the Take Charge! Conference, we equip lawyers and legal professionals to build future-ready law firms that are agile, strategic and prepared to navigate change in an increasingly fast-moving technology landscape. Our goal is not simply to help lawyers adopt new tools, but to help them use technology, sound practice management principles and human judgment in ways that strengthen sustainable practices while preserving the independence, ethics, advocacy and professional identity that make lawyers and the practice of law distinct. ●

OF STARTUP KITS
DISTRIBUTED
140

OF LPM INSIDER
SUBSCRIBERS
626

OF BOOKS IN THE
RESOURCE LIBRARY
1,445

OF ATTENDEES AT THE 2025
TAKE CHARGE! CONFERENCE
95

OF LIBRARY
PATRONS
2,248

OF ATTENDEES AT THE 2026
TAKE CHARGE! 1-DAY SUMMIT
36

Generative AI Toolkit

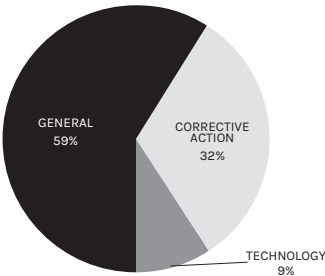


The Generative AI Toolkit is live on the website along with additional resources and guidance on how to ethically incorporate generative AI and emerging tech into your workflow. Get the information you need at www.gabar.org/ai.

CONNECT WITH LPM

-  bit.ly/lpmnewsletter
-  [@gabarlpm](https://www.instagram.com/gabarlpm)
-  [/law-practice-management](https://www.linkedin.com/company/law-practice-management)

CONSULTATION TYPE BREAKDOWN



Law-Related Education

404-527-8785 | lre@gabar.org
DEBORAH CRAYTOR, DIRECTOR



The Law-Related Education (LRE) Program offers K-12 teachers a wide variety of strategies for including LRE in their social studies, law, business and public safety curricula, as well as suggestions for relating LRE to language arts, science and math curricula. The program also offers the free interactive field trip known as Journey Through Justice (JTJ) for students in grades 4-12;

maintains the Virtual Museum of Law at www.thelawmuseum.org; provides lesson plans, classroom resources and links to current events on more than 60 legal topics via online LiveBinders at www.livebinders.com/s/175847; conducts teacher workshops; presents at teacher and parent conferences; and sponsors the ABA Civics and Law Honor Roll for Georgia high school students. ●

OF JTJ FIELD TRIP GROUPS IN 2025-26

94

OF STUDENT PARTICIPANTS IN JTJ IN 2025-26

4,267



TOP 5 VIRTUAL MUSEUM OF LAW VIDEOS BASED ON # OF VIEWS



VIDEO	# OF VIEWS	
"Brown v. Board of Education"	512,306	⬆ 4% since 2024-25
"Marbury v. Madison"	349,169	⬆ 6% since 2024-25
The Lizzie Borden Case	142,263	⬆ 2% since 2024-25
The Scopes "Monkey" Trial	117,245	⬆ 7% since 2024-25
The Amistad Case	116,145	⬆ 6% since 2024-25

TOTAL # OF VIEWS OF ALL MUSEUM OF LAW VIDEOS TO DATE

2,255,474

⬆ 7% since 2024-25

TOP 5 LIVEBINDERS BASED ON # OF VIEWS

VIDEO	# OF VIEWS	
First Amendment: Freedom of Speech, Press and Assembly	14,795	⬆ 32% since 2024-25
"Hands Up, Don't Shoot" Free Press or Fair Trial	12,345	⬆ 7% since 2024-25
General Cruel and Unusual Punishment Resources	12,027	⬆ 62% since 2024-25
University of California v. Bakke	11,515	⬆ 30% since 2024-25
Lizzie Borden	9,141	new to the list this year

TOTAL # OF VIEWS OF ALL LIVEBINDERS TO DATE

373,190

⬆ 745% since 2024-25

Lawyer Assistance Program

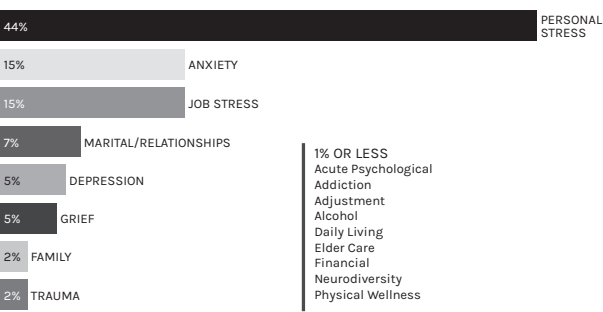
800-327-9631 | gabar@curalinc.com
CURALINC HEALTHCARE, SERVICE PROVIDER

The Lawyer Assistance Program (LAP) is a confidential service provided through SupportLinc, a program administered by CuraLinc Healthcare, to help State Bar members with life's difficulties. Members are entitled to six prepaid clinical sessions per calendar year.

LAP provides a broad range of helping services to members seeking assistance with stress, anxiety, depression, substance abuse, family problems, workplace conflicts, psychological and other issues.

Members may contact LAP for confidential assistance 24 hours a day, seven days a week, by calling 800-327-9631. Visit www.gabar.org/lap for more information about LAP. ●

PRIMARY PRESENTING CONCERNS



UTILIZATION STATISTICS JULY 1, 2025-JUNE 30, 2026

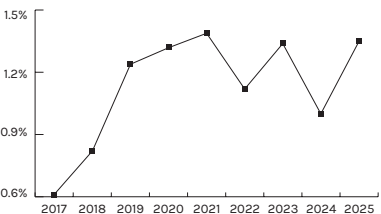
OF EAP CASES
413

Includes the total number of files, organizational services, information calls, etc., that have an open/service date that falls between, and includes, the reporting period date range.

OF ACTIVITIES
1,063

The total of services utilized includes the number of cases, technology participants and training participants that have an open/service date that falls between, and includes, the reporting period date range.

HISTORIC UTILIZATION



Meetings

404-527-8713 | meetings@gabar.org

GAKII KASSAMBA, DIRECTOR

The Meetings Department successfully planned and executed the State Bar of Georgia's four signature Board of Governors meetings during the 2025-26 Bar year, serving a combined 1,880 attendees across the Fall, Midyear, Spring and Annual meetings. In addition to these major meetings, the department coordinated the annual joint meeting with the Supreme Court of Georgia and several Executive Committee meetings, including a Court of Appeals dinner.

2026 Annual Meeting

The 2026 Annual Meeting reflected strong member participation and a continued commitment to delivering meaningful programming, thoughtful hospitality and a seamless attendee experience. With 920 attendees, the Annual Meeting represented the highest attendance among the year's major meetings and served as a cornerstone event for the Bar year.

Opening Night Festival

Family-friendly entertainment, games, and live music created a welcoming atmosphere for attendees and guests. The festival served as a signature attendee experience, combining family-friendly entertainment, games, and live music in an engaging setting. Survey responses highlighted the event's popularity and underscored its role in strengthening member connections and creating a welcoming atmosphere for members and their families.

Presidential Inaugural Gala

The Presidential Inaugural Gala marked the inauguration of William C. "Bill"

Gentry as the 64th president of the State Bar of Georgia and included recognition of Kathy Jackson as the State Bar's Employee of the Year. A highlight of the evening was the inspiring address by Distinguished Service Award recipient Brenda Joy "BJ" Bernstein, whose remarks left a lasting impression on attendees and contributed to a memorable conclusion to the Annual Meeting.

Legal Exposition

Law-related vendors and professional service providers connected with attendees and supported the meeting experience. This year featured a diverse group of law-related vendors and professional service providers, who participated in the Legal Exposition creating meaningful opportunities for engagement between attendees and industry partners. Survey responses noted the value of exploring new products and services, learning about emerging legal technologies and connecting with exhibitors whose solutions enhance law practice management, client service and professional development.

Event Technology

The CrowdComms platform enhanced registration, communication, attendee engagement, meeting navigation and operational efficiency. Its success demonstrated the value of innovative event technology and strategic sponsorships in elevating the member experience while helping offset rising meeting-related costs.

Member Engagement

Governance sessions, CLE programming, networking events, wellness activities, and

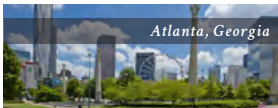
FALL 2025 | OCT. 10-12



204 ATTENDEES

178 in 2024 | ⬆14%

MIDYEAR 2026 | JAN. 15-17



535 ATTENDEES

241 in 2025 | ⬆122%

SPRING 2026 | MARCH 27-29



221 ATTENDEES

192 in 2025 | ⬆15%

ANNUAL 2026 | JUNE 11-14



920 ATTENDEES

644 in 2025 | ⬆43%

family-focused programming contributed to a well-rounded meeting experience. Survey feedback highlighted attendees' appreciation for the balance of educational content, meaningful networking opportunities and inclusive social programming. Many respondents identified the Annual Meeting as a valuable opportunity to reconnect with colleagues, engage with Bar leadership and participate in experiences that strengthened their connection to the State Bar community. ●

Membership

404-527-8777 | membership@gabar.org
AMANDA DRAPER, DIRECTOR

The mission of the Membership Department is to deliver high-quality service to State Bar members through responsive and effective communication—whether by phone, email or in-person interaction. On average, the department responds to approximately 75 phone inquiries and 60 emails daily, ensuring consistent support across all channels.

Staffed by a dedicated team of five professionals, the department serves a core membership of approximately 56,500 attorneys. This number increases annually by an estimated 1,000 new members. In addition to the core membership, the department also provides support to 7,200 individuals in other membership categories, including student, affiliate, provisional, resigned, retired, disabled, suspended, disbarred and terminated members.

A cornerstone of the department's service is the timely and accurate maintenance of the membership database, which houses critical attorney information. Members can update their information online or request changes through the department. Each year, more than 18,000 updates are processed. This data is essential in addressing inquiries from both the public and the membership base.

OF ACTIVE MEMBERS
43,338
↑1.3% since 2024-25

OF INACTIVE MEMBERS
7,668
↓2% since 2024-25

Beyond database management, the department handles a variety of essential member services. These include invoicing and processing annual membership license fees, issuing Letters of Good Standing (approximately 3,500 annually), and assisting members with login access to the State Bar website. The team also processes approximately 1,100 new attorney enrollment packages annually, along with 200 photo IDs and 1,200 membership cards.

OF EMERITUS MEMBERS
5,570
↑9% since 2024-25

OF NEW MEMBERS
1,650
↑17% since 2024-25

The Membership Department also manages the annual Board of Governors election. This includes oversight of the election process for all 153 board seats, verification of candidate petitions, ballot creation and ensuring voting compliance with established deadlines. The assistant director serves as the staff liaison to the State Bar of Georgia Elections Committee, coordinating meetings and assisting in the periodic review and revision of election procedures and policies. ●

SATELLITE OFFICE

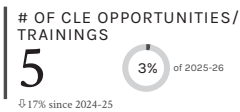
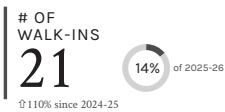
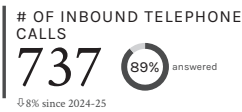
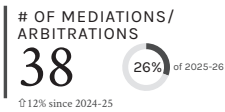
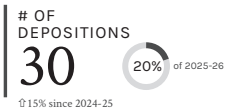
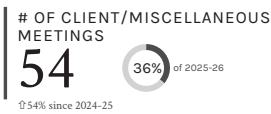
Coastal Georgia Office: Savannah

912-239-9910 // 877-239-9910 | kindallh@gabar.org

KINDALL HARVILLE, OFFICE MANAGER

The Coastal Georgia Office of the State Bar of Georgia provides metro-Savannah attorneys more direct access to the Bar. Our facility is often used to provide space for CLE opportunities, depositions, mediations and client meetings. Our facility is a popular “halfway” meeting point for attorneys from Southeast Georgia, South Carolina or Florida to meet with those from Atlanta and other areas. Mediators like using this office because of its neutrality—mediations of varied sizes are frequently scheduled here.

Many solo practitioners enjoy having an impressive space to use when meeting with their clients. Our members also benefit from the ability to use videoconferencing and other available technologies as a means to conduct business with distant offices. These technologies allow more access to various meetings without additional travel and/or overhead costs. Some of the local bar associations, the Savannah Bar and the Port City Bar specifically, have occasionally used our facility for their monthly meetings or other events, such as meet and greets or awards ceremonies. One of our main activities is assisting public consumers by phone. Whether it is directing them to the Bar’s website for attorney referrals, or transferring them to the appropriate department in the Atlanta office that can best assist them with their requests. We are very often the first interaction a member of the public has with the State Bar of Georgia. ●



- ATTORNEY LOCATIONS**
- | | |
|--------------------|-------------------|
| Alpharetta | Macon |
| Atlanta | Marietta |
| Augusta | Milledgeville |
| Browns Summit (NC) | New Orleans (LA) |
| Brunswick | Peachtree Corners |
| Columbus | Richmond (VA) |
| Dallas (TX) | Rincon |
| Duluth | Savannah |
| Dunwoody | Statesboro |
| Gainesville | Tucker |
| Hinesville | Valdosta |
| Lancaster (SC) | Vidalia |

SATELLITE OFFICE

South Georgia Office: Tifton

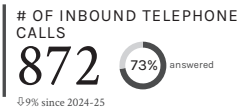
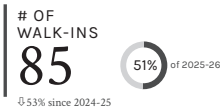
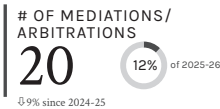
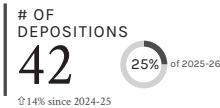
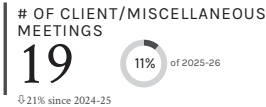
229-387-0446 // 800-330-0446 | lacarar@gabar.org

LACARA REDDICK, OFFICE MANAGER

The South Georgia Office located in Tifton serves more than 500 guests annually. Attorneys from across the state utilize the office for depositions, mediations, hearings, client meetings and continuing legal education programs. The space is also used for small receptions, socials, business meetings and other law-related training. Our office is a well-liked meeting space due because of its strategic location in Tifton, a key hub for several major transportation routes including I-75 and multiple U.S. highways.

The Tifton office features two conference rooms equipped with modern videoconferencing systems and other advanced technology, which enable seamless collaboration between in-person and remote participants and are compatible with a wide range of virtual meeting platforms. The conference rooms offer flexible, interchangeable configurations to accommodate various meeting, training and collaboration needs. There is also a guest office that provides attorneys with a professional workspace and a private setting for client meetings.

Our staff coordinates space requests and works diligently to respond to inquiries and correspondence from attorneys and consumers by phone, mail, email and in person. We also work closely with the Tifton Judicial Circuit Bar Association to organize meetings, support events and foster meaningful engagement throughout the community. The South Georgia



ATTORNEY LOCATIONS		
Adel	Cordale	Marietta
Albany	Decatur	Moultrie
Alpharetta	Douglas	Ocilla
Americus	Dunwoody	Pembroke
Ashburn	Glen Allen (VA)	Savannah
Atlanta	Homerville	Thomasville
Brunswick	Jonesboro	Tifton
Cartersville	Leesburg	Valdosta
Cedartown	Lenox	Vienna
Columbus	Macon	

Office is committed to providing excellent customer service and helping mem-

bers strengthen their connection to the State Bar of Georgia. ●

Sections

404-527-8782 | sections@gabar.org
MARY JO SULLIVAN, DIRECTOR

Sections are voluntary, non-appointed groups within the State Bar of Georgia that offer specialized resources and services tailored to specific areas of the law. Each section is led by member-elected leaders who develop and coordinate educational programs, community service initiatives and networking opportunities. Section leadership is also responsible for sharing relevant information about these events with their members, with support available from the State Bar's Sections team.

The level of activity within a section is largely driven by the engagement of its members. All Bar members in good standing are eligible to join a section by paying the annual dues set by each individual section; however, only active members of the State Bar may nominate candidates for section office or serve in a leadership role. Sections also organize Continuing Legal Education (CLE) programs—both accredited and non-accredited—at discounted rates for their members. •

During the 2025-26 Bar year, the State Bar's sections collectively offered **189.5 hours** of CLE-accredited programming. In addition to general credit hours, several programs included specialty credits. Approximately **4,965** members fulfilled their continuing legal education requirements through these offerings.

OF STATE BAR
SECTIONS
52



While most of the 52 sections remain active throughout the Bar year, the largest sections continue to demonstrate consistent engagement.

- **Real Property Law**
3,147 members (+3 since 2025)
- **Insurance Law**
2,526 members (+33 since 2025)
- **Corporate Counsel Law**
1,907 members (+116 since 2025)
- **Family Law**
1,844 members (+3 since 2025)
- **General Practice & Trial Law**
1,844 members (-6 since 2025)
- **Business Law**
1,802 members (+72 since 2025)
- **Criminal Law**
1,421 members (+33 since 2025)
- **Labor & Employment Law**
1,344 members (+3 since 2025)
- **Fiduciary Law**
1,258 members (+14 since 2025)
- **Intellectual Property Law**
1,213 members (+36 since 2025)

Senior Lawyers Division

404-527-8778 | sld@gabar.org

JESSICA OGLESBY, DIRECTOR



ELIZABETH B.
“BETSY” HODGES

2025-26 SLD President
State Bar of Georgia

The State Bar of Georgia’s Senior Lawyers Division (SLD) was formally on established Feb. 5, 2026, creating a new professional home for attorneys age 55 and older to strengthen connections among senior lawyers while supporting mentorship, retirement and succession planning, cognitive health awareness and increased pro bono engagement.

Membership is automatic and free for eligible State Bar members in good standing, representing more than 25,000 Georgia attorneys. SLD members who wish to become voting members of the division may do so by paying voluntary dues of \$25 each Bar year.

In its first few months, the division used its momentum and seized opportunities to host events for networking including receptions at Kilpatrick Townsend and the State Bar’s Annual Meeting. Additionally, the SLD started what will likely be one of many collaborative service events with the Young Lawyers Division to build member engagement—hosting a donation drive at the Annual Meeting to support ReThreaded, an organization that supports survivors of human trafficking. Community service partnerships were on display to help foster collaboration with younger lawyers within the legal profession.

The SLD is committed to creating meaningful opportunities for senior lawyers to connect, serve and lead. ●

INAUGURAL SLD OFFICERS

President
Elizabeth B. “Betsy” Hodges

President-Elect
Howard Delashmit

Treasurer
James Hyder

Secretary
Kendall Butterworth

TOTAL # OF
VOTING MEMBERS
1,390

CONNECT WITH THE SLD

-  www.gabar.org/sld
-  [@GeorgiaSLD](https://www.facebook.com/GeorgiaSLD)
-  [/senior-lawyers-division-state-bar-of-georgia](https://www.linkedin.com/company/senior-lawyers-division-state-bar-of-georgia)



Transition Into Law Practice Program

404-527-8704 | tilpp@gabar.org
DEE DEE WORLEY, DIRECTOR

The Transition Into Law Practice Program (TILPP) is the mentoring and continuing legal education program for lawyers newly admitted to the State Bar of Georgia, unless exempted. The goal of TILPP is to afford beginning lawyers with meaningful access to experienced lawyers equipped to teach the practical skills, seasoned judgment, and sensitivity to ethical and professionalism values necessary to practice law in a highly competent manner.

Lawyers enrolled in TILPP satisfy the mentoring component by enrolling in one of three types:

1 Inside Mentoring

For an attorney who works in a law firm or organization and has a mentor within that firm or organization.

2 Outside Mentoring

For an attorney who is a sole practitioner with a mentor from another firm or organization.

3 Group Mentoring

For an attorney who is employed in a non-legal setting, unemployed or who otherwise does not have an individual mentor.

New lawyers must also complete 12 hours of CLE. Most will attend the Beginning Lawyers Program to fulfill 6 of those hours and their choice for the additional 6 hours. Lawyers who are prosecutors or public defenders must attend their applicable training, which will satisfy their CLE requirement for the year. ●

Did You Know?

The State Bar of Georgia was the first in the country to have a mandatory mentoring program for lawyers.

TOTAL # OF LAWYERS ENROLLED IN TILPP

862

↑ 2% since 2024-25

OF PROSECUTORS

25

↑ 19% since 2024-25

3% of 2025-26

OF PUBLIC DEFENDERS

31

↑ 3% since 2024-25

3.5% of 2025-26

OF GROUP MENTORING

120

↑ 10% since 2024-25

14% of 2025-26

OF INSIDE MENTORING

612

↑ 1.6% since 2024-25

71% of 2025-26

OF OUTSIDE MENTORING

19

↓ 20% since 2024-25

2% of 2025-26

OF DEFERRED

55

↓ 7% since 2024-25

6.5% of 2025-26

Young Lawyers Division

404-527-8778 | yld@gabar.org

JESSICA OGLESBY, DIRECTOR



VERONICA R. COX

2025-26 YLD President
State Bar of Georgia

The Young Lawyers Division is responsible for aiding and promoting the advancement of the younger members of the State Bar by providing a program of activities and projects which serve the profession and the public. All members who have not yet reached their 36th birthday or who have been admitted to their first Bar less than five years are automatically a member.

The Young Lawyers Division (YLD) provides service, networking and leadership opportunities through 30 committees and 10 affiliate organizations from around the state. With almost 10,000 active young lawyers, committees and affiliates offer local opportunities for young lawyers to be involved in their communities.

This year, the YLD hosted 60 networking, service and social events, offered programming totaling 22 CLE hours and connected with more than 2,000 attendees at events throughout the year.

The YLD Review

The YLD Review seeks to provide a forum for the discussion of subjects pertaining to the regulation of the legal profession and improving the quality of legal services, as well as other matters of general interest to Georgia lawyers. This year, *The YLD Review*

published its first dual-language edition in English and Spanish. To read issues of *The YLD Review*, visit www.gabar.org/theylreview.

YLD Signature Fundraiser

The 19th Annual Signature Fundraiser, was held on Feb. 28, 2026, at The Overlook on First in Macon, Georgia. Rebecca Grist, chief assistant solicitor-general for Bibb County, received the YLD Lifetime Achievement Award, and James Banter, partner at James Bates Brannan Groover LLP, received the YLD Signature Service Award. The Signature Fundraiser raised \$23,000 for Middle Georgia Justice.

YLD Leadership Academy

The YLD Leadership Academy is a six-month cohort that begins in January each year and ends with a graduation ceremony at the State Bar of Georgia Annual Meeting. The program began in 2006 with 32 academy participants. The selected participants go through a competitive application process.

Applicants must be YLD members who have a history of involvement and leadership in their communities, offices and/or profession; who want to become more involved in the YLD and State Bar;

and who want to network with state and national leaders and hear their perspectives on effective lawyering and leadership. Young lawyers selected for the Lead-

ership Academy attend monthly sessions around the state, which include CLE programming, a community service project and networking. To date, the program

boasts more than 600 Leadership Academy alumni members, many who went on to leadership positions within the State Bar of Georgia. ●

2025-26 YLD Meetings

FALL 2025 | OCT. 10-12



In conjunction with the Board of Governors.

SPRING 2026 | APRIL 24-26



CONNECT WITH THE YLD

-  www.georgiayld.org
-  @GeorgiaYLD
-  @georgiayld
-  /georgiayld

MIDYEAR 2026 | JAN. 9-11



In conjunction with the Board of Governors.

ANNUAL 2026 | JUNE 11-14



In conjunction with the Board of Governors.



Board Action Items

SARAH I. COOLE, CHIEF OPERATING OFFICER

The following action items were taken by the Board of Governors of the State Bar of Georgia during the 2025-26 Bar year. ●

2025 Annual Meeting | June 7

The Board approved the establishment of the Senior Lawyers Division; appointments to the State Disciplinary Boards, Formal Advisory Opinion Board, Georgia Legal Services Program and Chief Justice's Commission on Professionalism; the 2025-26 Committees; the Executive Director election; the 2025-26 Election Schedule; and the Executive Committee election.

Proposed Rules and Bylaws Changes

- Article IX. Section 2. Senior Lawyers Division | YES, majority.
- Senior Lawyers Division Bylaws | YES, majority.
- Rule 1-707. Senior Lawyers Division | YES, majority.
- Bar Rule 1-202. Membership Status | YES, majority.
- Rule 1.15(II). Safekeeping Property-Trust Account and IOTLA | YES, majority.
- Rule 4-203.1. Uniform Service Rule | Did not pass.
- Rule 4-220. Notice of Punishment or Acquittal; Administration of Reprimands | YES, majority.

2025 Fall Meeting | Oct. 11

The Board approved appointments to the State Disciplinary Boards, the ICLE Board and the Commission on Continuing Lawyer Competency.

Proposed Rules and Bylaws Changes

- Rule 4-203.1(a) (Uniform Service Rule) | YES, majority.
- Eminent Domain Section Bylaws | YES, majority.
- Real Property Law Section Bylaws | YES, unanimous.

Legislative Proposal

- Professionalism Committee - Support for a Resolution of the General Assembly Recognizing April 2026 as Legal Professionalism Month | YES, majority.

2026 Midyear Meeting | Jan. 17

The Board approved nominations to the Georgia ABA delegate posts and nominations of the State Bar officers for the 2026-27 Bar year.

Proposed Rules and Bylaws Changes

- Article IV. Section 3. Misconduct and Removal | YES, majority.
- Rule 10-103. Funding | YES, majority.

New Legislative Proposals

- Indigent Defense Committee - Support for the Judicial Council's Budget Request for FY 2027 - Continued Funding for the Georgia Resource Center | YES, majority.
- Real Property Law Section - Expanding Legal Access to Qualified Special Masters - Amendments to O.C.G.A. § 23-3-63 | YES, majority.

2025 Spring Meeting | March 28

The Board approved the 2026-27 License Fees, State Bar Budget and Financial Resolutions.

2026-27 License Fees | YES, majority. Recommendations of the Executive Committee.

- Active Fees \$294. (\$24 increase from 2025-26.)
- Inactive Fees \$147. (\$12 increase from 2025-26.)

Approval of Other Bar License Fee Statement Items.

- Center, Division and Sections Dues (\$10 to \$50 opt-in).
- Clients' Security Fund (\$15/year per member per Bar Rule 1-506).
- Professionalism Fee (\$11/year).

Other Contributions.

- Legislative and Public Education Fund Contribution (\$100 optional contribution).
- Georgia Legal Services Program Donation (\$400 suggested individual contribution/\$100 suggested contribution for YLD).

Proposed Rules Changes

- Rule 4-221. Hearing Procedures | YES, majority.
- Rule 4-227. Petitions for Voluntary Discipline | YES, majority.

2026 Annual Meeting | June 5

The Board approved appointments to the State Disciplinary Board, Formal Advisory Opinion Board, Georgia Legal Services Program and Chief Justice's Commission on Professionalism; the 2026-27 Committees; the Executive Director election; the 2026-27 Election Schedule; and the Executive Committee election.

Other Action Items

- The sunseting of the Attorney Wellness Committee | YES, majority.
- The sunseting of the Communications Committee | YES, majority.



2025-26 REPORT OF THE

**OFFICE
OF THE
GENERAL
COUNSEL**



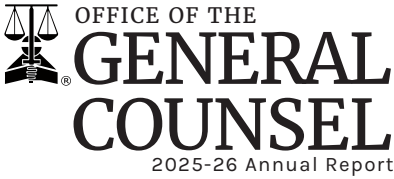


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Report of the General Counsel

RUSSELL WILLARD, GENERAL COUNSEL

I am pleased to update you on the activity of the Office of the General Counsel, including a complete report for the just-concluded Bar year as well as the activity within the Office of the General Counsel since the close of the last Bar year. This annual report shows in detail the work that the State Bar's attorneys and support staff are doing to further the mission, outreach and oversight that you have entrusted to us. It is an honor each and every day to work alongside those whose reports fill this annual report, and I commend each and every one of them to you for the work reflected in these pages.

The Office of the General Counsel received 3,727 disciplinary grievances during the 2025-26 Bar year. This reflects an increase of 21% from the 2024-25 Bar year, after an increase of more than 30% from the 2023-24 Bar year to the 2024-25 Bar year. Through the work of the Disciplinary Division of the Office of the General Counsel, overseen by Deputy General Counsel for the Disciplinary Division Andreea Morrison, 254 disciplinary grievances were determined, after screening, to merit further consideration and were forwarded to the State Disciplinary Board for additional investigation. An additional 27 grievances were administratively mooted after an order of disbarment was entered by the Supreme Court of Georgia. The Court entered public orders in 57 cases

during the 2025-26 Bar year, and the State Disciplinary Board imposed confidential discipline in an additional 38 cases.

Staff for the Office of the General Counsel served as both counsel to and administratively supported the work of the Clients' Security Fund Trustees. Fifty-five claims were investigated and processed by the Clients' Security Fund, and 31 claims were paid out reflecting a total disbursement of \$423,026 to claimants.

During the 2025-26 Bar year, the Office of the General Counsel staff served as receiver or worked closely with attorneys who agreed to volunteer their time to serve as receivers for deceased or disbarred lawyers. One of the vaults left to the State Bar by the Federal Reserve upon their departure for their new Midtown property is regularly overflowing with old and abandoned files, and I encourage each and every one of you to have engaged conversations with your actual designated attorney or someone who could fill that role for you should you need it so as not to saddle your family with the herculean task of client file triage and return upon your passing.

Both the Board of Governors and the Formal Advisory Opinion Board have been diligently at work during the just-concluded Bar year, and the Office of the General Counsel has worked closely with both groups to ensure that filings are timely made with the Supreme Court to

ensure that both proposed rule amendments and advisory opinions can be acted upon promptly by the Court. The specifics are laid out in detail in the reports provided by Deputy General Counsel for the Bar Counsel Division Bill NeSmith and Senior Assistant General Counsel John Shiptenko, and I encourage you to review how many rules have moved forward thanks to their support.

I want to thank the volunteers who the Office of the General Counsel works with daily. Many of these volunteers work within the legal profession but often our lay volunteers are just remotely connected to the legal profession, if at all. Both sets of volunteers routinely sacrifice personal and professional time to do the vital work of the State Bar, whether engaging as a member of one of our disciplinary boards, serving as a trustee of our Clients' Security Fund, digging into the meat of a proposed formal advisory opinion or one of the countless other ways that volunteers move the vital work of the State Bar forward. The work reflected in these pages could simply not be accomplished without their time, effort and commitment to public service.

Thank you for the trust that you have placed in me and the staff within the Office of the General Counsel. It is a true pleasure and privilege to serve as your general counsel. ●

Client Assistance Program of the Office of the General Counsel

JAKARAH EVERETT, ASSISTANT GENERAL COUNSEL/CAP DIRECTOR

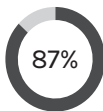
The Client Assistance Program (CAP) of the Office of the General Counsel is often the first point of contact that a dissatisfied client or former client has with the State Bar about an attorney. Most often, CAP intervenes to facilitate communication between attorneys and their clients, but it also supports former clients in retrieving their files from former attorneys and assists individuals with locating potential resources when the State Bar does not have the authority to help them. CAP's efforts quickly resolve issues for the public and save the State Bar the expenses associated with the formal grievance process where it is unnecessary.

CAP attempts to resolve issues at an initial, informal stage where early intervention may provide a resolution before a Rule of Professional Conduct may be violated or actual harm occurs to the public. Through active intervention at this phase, CAP was able to resolve 87% of the issues reported to it during the 2025-26 Bar year outside of the formal grievance process. ●

TOTAL # OF LETTERS/EMAILS
2,776

TOTAL # OF CALLS
8,582

TOTAL # OF NEW COMPLAINTS
6,948 ↑ 2% since 2024-25



of issues resolved outside the formal grievance process

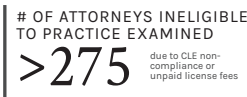
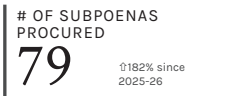
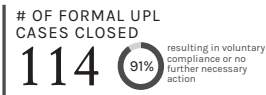


Unlicensed Practice of Law Department of the Office of the General Counsel

404-527-8769 | upl@gabar.org
JOHN MARTY, DIRECTOR

The Unlicensed Practice of Law (UPL) Department of the Office of the General Counsel acts at the direction of a statewide Standing Committee and 10 District Committees representing each of the judicial districts in Georgia. All UPL committees are directly appointed by the Supreme Court of Georgia and are comprised of both lawyer and nonlawyer members, the latter of which must make up a majority of each committee. UPL committees are charged with the consideration of complaints received, processed and thoroughly investigated by the UPL Department. The Standing Committee additionally considers requests for advisory opinions. Most UPL investigations result in subjects either agreeing to comply or without the need for further action. Cases not resolved at the District Committee level are often referred for criminal prosecution, while others have resulted in the filing of injunctive relief actions when approved by the Standing Committee.

A registry of subjects who have either been permanently enjoined from engaging in the practice of law by court order or have voluntarily executed a cease-and-desist affidavit within the last two years may be found on the Bar's website. ●



State Disciplinary Board

JEFFREY WILLIAM DELOACH, CHAIR

The State Disciplinary Board is charged with investigating grievances for potential violations of the Georgia Rules of Professional Conduct, issuing confidential discipline and determining whether there is probable cause to bring formal charges against an attorney. The work of the Board is an essential part of

the State Bar of Georgia's regulatory function. As the chair of the State Disciplinary Board, I would like to thank each Board member for their service.

The 2025-26 State Disciplinary Board consisted of two ex-officio members—the president-elect of the State Bar of Georgia and the president-elect of the Young

Lawyers Division; 12 investigating members—four lawyers from each of the three federal judicial districts of Georgia; two at-large members, and four non-lawyer, public members. During the 2025-26 Bar year, the Board held 10 meetings and managed eight in-person gatherings (Atlanta (3), Lake Oconee, Macon, Marietta, Rising Fawn, and Amelia Island (FL)). The remaining meetings were virtual.

The Bar received 3,727 grievance forms this year. After review and screening by the Office of General Counsel, 3,020 grievances were closed or dismissed for their failure to state facts sufficient to invoke the jurisdiction of the State Bar (the number includes some grievances that were pending when the fiscal year began). A total of 254 grievances contained allegations which, if true, would amount to violations of one or more of the Georgia Rules of Professional Conduct (39 more than last year). Each of those grievances was referred to one of the district Board members for further investigation.

Investigating members of the Board handled an average of 18 cases during the Bar year. Members worked diligently and efficiently to report each case within 180 days. Each case required investigation and time away from the Board member's law practice, without compensation other than reimbursement of travel expenses. At the conclusion of each investigation, the Board member made a report and recommendation to the full Board. The Board dismissed 19 grievances, five of



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TOTAL # OF GRIEVANCE
FORMS RECEIVED

3,727 +647 since
2024-25

TOTAL # OF GRIEVANCE
FORMS DISMISSED

3,020 *some pending
at the beginning
of the Bar year

TOTAL # OF GRIEVANCE FORMS
REFERRED FOR INVESTIGATION

254 +39 since
2024-25

those with a letter of instruction to educate and inform the lawyer about the Rules of Professional Conduct. One hundred and sixty-five cases met the “probable cause” standard and were returned to the Office of the General Counsel for prosecution. In matters that met the standard for probable cause, 26 respondents received confidential discipline in the form of Formal Letters of Admonition or State Disciplinary Board Reprimands. In more serious cases, the Board issued a Notice of Discipline for some level of public discipline or made a referral to the Supreme Court of Georgia for a hearing before a special master.

The State Disciplinary Board took the following action during the 2025-26 Bar year:

ACTION TAKEN	# OF CASES
Confidential Reprimands	22
Formal Letters of Admonition	16
Cases Dismissed with Letters of Instruction	5

Public discipline imposed by the Supreme Court of Georgia is further described in the Annual Report of the State Disciplinary Review Board of the State Bar of Georgia.

It has been a privilege to work with such an outstanding group of volunteers to accomplish this important work on behalf of the State Bar of Georgia. I would like to recognize those members of the State Disciplinary Board as listed below who have unselfishly devoted so much of their personal and professional time to this necessary task. ●

2025-26 State Disciplinary Board

Lawyer Members

Neal Callahan, *Columbus*
Kassi Nicole Conley, *Atlanta*
Jeffrey William DeLoach, *Watkinsville*
Marcella Coladangelo Ducca, *Atlanta*
Jennifer Elizabeth Dunlap, *Columbus*
Pamela Felecia Everett, *Pooler*
Taylor H. Haley, *Saint Simons Island*
Christine Koehler, *Lawrenceville*
William H. Noland, *Macon*

Robert Smalley III, *Dalton*
Christian J. Steinmetz III, *Savannah*
Carl Robert Varnedoe, *Savannah*
Simon H. Bloom, *Atlanta*
Terri N. Gordon, *Decatur*

Non-Lawyer Members

Noemi de Miguel Mota, *Lilburn*
C. Anthony Smith, *Alpharetta*

Jennifer D. Ward, *Savannah*
Elisabeth Peyton Williams, *Atlanta*

Ex-Officio Members

Virginia C. Josey, *Macon*
YLD President-Elect
William C. Gentry, *Marietta*
President-Elect

State Disciplinary Review Board

NORBERT DANIEL HUMMEL IV, CHAIR

The State Disciplinary Review Board plays an important role in our disciplinary system and serves several functions. Under the Bar Rules, the Review Board offers an additional level of appellate review after a disciplinary case has been heard by a special master. The parties may elect to file exceptions and request review by the

Review Board before the case is filed with the Supreme Court. In these cases, the Review Board considers the complete record, reviews the findings of fact and conclusions of law, and determines whether a recommendation of disciplinary action will be made to the Supreme Court of Georgia. The Board has the discretion to

grant oral argument if requested by either party. The Supreme Court may follow the Review Board's recommendation but may also render an opinion that modifies the recommendation in some way.

In addition, the Review Board reviews all cases involving reciprocal discipline. If a Georgia lawyer has been disciplined in another jurisdiction resulting in a suspension or disbarment, the lawyer is subject to reciprocal discipline in Georgia. The Review Board is charged with reviewing the record from the foreign jurisdiction and recommending the appropriate reciprocal disciplinary result in Georgia. These cases present many interesting issues for the Board and can be challenging when the lawyer objects to reciprocal discipline. In all cases, the Board must consider whether the case is in the correct procedural posture to be reviewed, whether the lawyer was afforded due process in the underlying disciplinary proceeding, whether the misconduct would result in similar discipline under our rules and recommend discipline which would be substantially similar to the discipline imposed in the foreign jurisdiction. The Review Board also issues Review Board Reprimands when directed by the Supreme Court and makes recommendations in reinstatement cases which involve suspensions with conditions for reinstatement as directed by the Supreme



Court. The Board also provides input on amendments to the Bar Rules involving the disciplinary process.

The Supreme Court approved amendments to the disciplinary rules which became effective July 1, 2018. Under these rules, the former Review Panel was renamed the State Disciplinary Review Board, and the size of the Board was reduced from 15 to 11 members. In particular, the number of lawyer members who serve on the Board from around the state was reduced from nine to seven. The Review Board is currently composed of two lawyers from each of the three federal judicial districts in Georgia, one at-large lawyer member and two non-lawyer members. These members are appointed in alternate years by the Supreme Court of Georgia and the president of the State Bar. Two ex-officio members also serve on the Board in their capacity as officers of the State Bar.

The following is a brief summary of public disciplinary action taken by the Supreme Court of Georgia during the period from July 1, 2025, to June 30, 2026:

FORM OF DISCIPLINE	# OF CASES	# OF LAWYERS
Disbarment/Voluntary Surrender	235	26
Suspensions	21	21
Public Reprimand	0	0
Review Board Reprimand	1	1

The foregoing summary does not begin to reflect the important issues that were carefully considered by the Review Board over the past year. In addition to attending regular meetings, each Board member must review material for each case prior to the meeting in order to make a fair and well-reasoned decision. This represents a major commitment of time and energy

on the part of each Board member, all of whom acted with the highest degree of professionalism and competency during their terms. I would like to recognize the members of the Board as listed below who have unselfishly devoted so much of their time to the implementation of the disciplinary system of the State Bar of Georgia. ●

2025–26 State Disciplinary Review Board

Members

Northern District
Norbert Daniel Hummel IV, *Kennesaw*
William Hickerson Thomas Jr., *Atlanta*
Middle District
Veronica McClendon, *Macon*
Alex Musole Shalishali, *Columbus*
Southern District
Pamela Sue James, *Augusta*
John Ryd Bush Long, *Augusta*

Lay Members

LaShekia Hughes, *Macon*
Susan Leger-Boike, *Cordele*

At-Large

Brandon Alexander Bullard, *Atlanta*

Ex-Officio

Ivy N. Cadle, *Macon*
Kenneth Mitchell Jr., *Decatur*



Clients' Security Fund

WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

The legal profession is one of few professions in which members create and maintain a means for clients to recover losses in rare instances of trust monies being misappropriated. Every U.S. state, including Georgia and Canadian provinces, has a fund for client protection. The State Bar of Georgia Clients' Security Fund is a public service of the legal pro-

fession in Georgia. Its purpose is to repay clients who have lost money because of a lawyer's dishonest conduct. Every lawyer admitted to practice in Georgia, including those admitted as a foreign law consultant or those who join the State Bar of Georgia without taking the Georgia Bar examination, contributes to this Fund. The Trustees are proud of the ef-

forts made to maintain the integrity of the legal profession.

Creation of the Fund

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

Administration of the Fund

The Clients' Security Fund Board of Trustees performs all acts necessary and proper to fulfill the purposes of and effectively administer the Fund. The rules,



issued by order of the Supreme Court of Georgia, establish a Board of Trustees consisting of six lawyer members and one non-lawyer member appointed to staggered terms by the president of the State Bar of Georgia. Trustees of the Fund receive no compensation or reimbursement for their service. The trustees select the chair and vice chair to serve as officers for the Fund. Pursuant to Bar Rule 10-104, the trustees serve a term of three years.

2025-26 Board of Trustees

Members

Karl David Cooke Jr., *Macon*
Michael G. Geoffroy, *Covington*
Shondeana Crews Morris, *Decatur*
Robert J. Kauffman, *Douglasville*
Tyronia Monique Smith, *Atlanta*
LaToya Simone Williams, *Warner Robins*
Non-Lawyer Member
Sammy Strode, *Savannah*
Executive Committee Liaison
R. Javoyne Hicks, *Atlanta*

These trustees have served tirelessly, and their dedication to this program is greatly appreciated.

Funding

Members of the State Bar of Georgia provide the primary funding for the Clients' Security Fund. All license-fee-paying members of the State Bar of Georgia are assessed \$15 annually. On March 26, 2026, the Supreme Court of Georgia issued an order amending Bar Rule 10-103 (Funding) to make clear that the trustees of the Clients' Security Fund can spend up to the annually assessed amount and any surplus fund received from assessments in prior Bar years. The amendment became effective April 30, 2026.

The trustees of the Clients' Security Fund maintain all monies held in the

name of the Fund and exclusively control the disbursement of the funds.

Loss Prevention Efforts

A crucial role of the trustees of the Fund is to promote and endorse rules and educational programs designed to prevent losses. Two significant programs exist to avoid lawyer theft of clients' funds.

Overdraft Notification

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

Payee Notification

During the 1993 legislative session, with the urging of the Board of Trustees, the Board of Governors endorsed legislation specifically designed to prevent lawyer theft of personal injury settlement funds. As a result of these efforts, the "payee notification rule" was approved as an amendment to the Insurance Code. This statute requires insurers to notify the payee of an insurance settlement when the check is mailed to the payee's attorney. This places the client on notice that the attorney has received settlement funds.

Adopting this procedure has substantially reduced claims involving the theft of insurance funds.

Claims Process

Before the Clients' Security Fund pays a claim, the trustees must determine that the loss arose out of the client-lawyer or fiduciary relationship and was caused by the lawyer's dishonest conduct. The rules define "dishonest conduct" as acts "committed by a lawyer like theft or embezzlement of money, or the wrongful taking or conversion of money, property, or other things of value." The lawyer's "dishonest" conduct must result in their disbarment, indefinite suspension or voluntary surrender of their license. The final disposition does not need to result from a grievance but can be attained when credible information is presented from any source without a memorandum of grievance being filed. Claimants are responsible for providing sufficient documentation to support their claims.

Trustees of the Clients' Security Fund may also make awards on claims involving deceased, disabled or otherwise unavailable lawyers who could not be disciplined for their dishonest acts. At their discretion, trustees can evaluate the merits of a claim based on available evidence of dishonesty and improper conduct regardless of the lawyer's disciplinary status.

Claims filed by corporations or partnerships, government entities and certain members of the attorney's family are typically denied. The Fund also does not reimburse losses covered by insurance or resulting from malpractice or financial investments.

A statement of Fund balance, income and expenses for the period ending June 30, 2026, is on the next page. ●

Annual Financial Statistics

	2024-25	2025-26
Balance ending June 30, 2026	\$2,782,908	\$2,715,520
Income to Fund		
Assessments	\$ 767,625	\$ 773,648
Restitution	\$ 13,207	\$ 58,477
Interest and Dividend Income	\$ 60,224	\$ 61,060
Gain/Loss Investment Assessment	\$ 47,344	\$ 5,762
Distributions from Fund		
Claims Paid	\$ 870,020	\$ 423,026
Restricted Expenses	\$ 73,000	\$ 190,000
Bond Premium Amortization	\$ 3,704	\$ 2,238
Investment Service Fee	\$ 9,064	\$ 7,224

Summary of Claims Activity

Following is a summary of claims activity from July 1, 2025–June 30, 2026.

ACTIVITY	2024-25	2025-26
Recorded Application Requests	48	71
Claims Filed	48	75
Claims Considered	59	60
Claims Approved	43	31
Claims Denied	4	24
Claims Tabled	7	15
Claims Reconsidered	9	4
Claims Administratively Closed	3	5
Claims Withdrawn	1	0
Claims Pending	38	60
Inactive Claims	5	18
# of Lawyers Involved in Paid Claims	18	22



Formal Advisory Opinion Board

JOHN J. SHIPTENKO, SENIOR ASSISTANT GENERAL COUNSEL

Formal Advisory Opinions

FAO Request Process

Requests for formal advisory opinions (FAOs) are submitted to Bar Counsel, who assesses the requests to determine the best way to handle the requestor's ethical issue. If the request is submitted to the

Board, the Office of the General Counsel prepares the request for the Board's consideration and then researches the ethical issue to determine how the Georgia Rules of Professional Conduct (GRPC) apply to the issue, whether a current FAO addresses the issue, and whether other jurisdictions have addressed the issue.

Board Meetings

The Board works throughout the year, considering and researching the ethical issues presented in FAO requests and drafting proposed opinions. During the 2025-26 Bar year, the Board conducted two meetings.

If the Board accepts a request for the drafting of an FAO, the Board assigns one or more Board members to draft a proposed opinion. Bar Counsel supports the Board throughout the drafting process. If a request is rejected, the Board specifies the reason for rejecting the request, and Bar Counsel informs the requestor in writing of the Board's decision.

During the 2025-26 Bar year, the Board considered the following requests for a formal advisory opinion:

Formal Advisory Opinion Request No. 25-R2

FAO Request No. 25-R2 was received in the 2024-25 Bar year on or about June 25, 2025. The request was considered by the Board during the 2025-26 Bar year at its Sept. 9, 2025, meeting. The requestor presented the following questions:

1. *Are all lawyers who participate in conveyancing, or the closing of real estate transactions, governed by the Formal Advisory Opinions of the State Bar of Georgia, issued by the Supreme Court of Georgia, and by the UPL Advisory Opinions issued by the State Bar of Georgia Standing Committee on*



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the Unlicensed Practice of Law, or only those lawyers who are participating in the closing of residential real property?

2. *May a lawyer participate in a closing transaction where he/she does not participate in the preparation and execution of the settlement/closing statement?*
3. *May a lawyer participate in a closing transaction where the closing funds are held and disbursed by someone other than a lawyer?*

The Board determined that the GRPC and existing opinions adequately address the issues raised in the request. Accordingly, the Board declined the request for the drafting of an FAO.

Formal Advisory Opinion

Request No. 26-R1

FAO Request No. 26-R1 was received on or about Feb. 3, 2026. The requestor inquired about the following:

1. *Does the engagement letter consent provision described above constitute valid "informed consent" under Rule 1.6 (a) sufficient to authorize a lawyer to post a review of a former client on tiipstr?*
2. *Does a tiipstr review limited to characterizations of the client's conduct as a client—without disclosing the nature of the representation, privileged communications, or case-specific facts—constitute "information gained in the professional relationship" within the meaning of Rule 1.6 (a)?*
3. *If informed consent is obtained, may a lawyer ethically post: (a) a numerical rating; (b) written commentary that the client "failed to pay," "did not follow*

advice" or "was difficult to work with"; and/or (c) a "do not represent" designation?

4. *Does the analysis differ for positive reviews—for example, stating that a client was "cooperative," "paid promptly" and "followed advice"—where the disclosure benefits the client?*
5. *May tiipstr permissibly provide guidance to lawyer-users that reviews complying with these parameters are ethically permitted in Georgia?*

At its April 14, 2026, meeting, the Board determined that the request was not of general interest to the members of the State Bar of Georgia and the GRPC adequately address the issues raised in the request. Accordingly, the Board declined the request for the drafting of an FAO.

Consideration of Proposed Opinions

Once a proposed opinion is drafted, the Board considers the draft to determine whether to approve the proposed opinion as drafted for first publication or modify it. Bar Counsel assists the Board as needed.

Approval of Proposed Opinion

Once the Board approves a proposed opinion for first publication, it determines whether to post the publication on the State Bar website or in the *Georgia Bar Journal* in accordance with Bar Rule 4-403.

First Publication of the Proposed Opinion

The first publication process offers State Bar members an opportunity to review the proposed opinion and submit comments to the Board through the Office

of the General Counsel. The comments, any research materials and feedback from the Office of the General Counsel are provided to the Board. The Board reviews the proposed opinion in light of the comments and other information received and decides whether to modify the proposed opinion. If the proposed opinion is modified, and the Board determines the modifications are substantive, the first publication process is repeated.

Final Approval and Second Publication of the Proposed Opinion; Filing of Proposed Opinion with the Supreme Court of Georgia

Once the Board makes a final determination to approve and issue the opinion, it is published for a second publication and filed with the Supreme Court of Georgia. The Board decides whether to post the publication on the State Bar website or in the *Georgia Bar Journal* in accordance with Bar Rule 4-403. When the second publication of an opinion occurs, Bar counsel facilitates the publication with the State Bar's Communications Department and president, and files the opinion with the Supreme Court of Georgia.

Discretionary Review

Following the filing of the opinion, the Board decides whether to recommend that the Office of the General Counsel seek discretionary review of the opinion on behalf of the State Bar with the Supreme Court of Georgia. If the Board opts for discretionary review, Bar Counsel assists in this process by drafting the petition and filing it with the Supreme Court of Georgia. In accordance with Rule 4-403, the State Bar or the person who requested the opinion may file a petition for discretionary review, or the Supreme Court of Georgia may decide to review

the opinion on its own motion. If the Supreme Court of Georgia grants the petition for discretionary review or decides to review the opinion on its own motion, the State Bar and the person requesting the opinion shall follow the briefing schedule set forth in Supreme Court of Georgia Rule 10. Bar Counsel and the Board are available to assist the General Counsel in drafting the State Bar's brief in support of the opinion.

During the 2025-26 Bar year, the following opinion, drafted by the Board during the 2024-25 Bar year, continued through the discretionary review process.

Proposed Formal Advisory Opinion No. 24-1

May a lawyer use a third-party vendor to request the production of documents from a non-party pursuant to O.C.G.A. § 9-11-34(c) and to follow up on and effectuate such a request to a non-party, and if so, what degree of autonomy may the lawyer allow the third-party vendor?

On Sept. 18, 2024, the Board approved the proposed opinion for first publication. The proposed opinion was published on the State Bar website on Oct. 23, 2024, pursuant to Bar Rule 4-403 (c). State Bar members were invited to submit comments regarding the proposed opinion. On Jan. 23, 2025, based on the comments received, the Board approved an amended version of the proposed opinion for second publication and filing with the Supreme Court of Georgia. The Board also voted in favor of requesting that the Office of the General Counsel file a petition for discretionary review.

On Sept. 11, 2025, the Office of the General Counsel filed a petition for discretionary review with the Supreme Court of Georgia. The Supreme Court of Georgia

issued an order granting discretionary review on Nov. 4, 2025, and directed the State Bar and other interested parties to address the question of whether FAO No. 24-1 should be approved. The State Bar filed its brief in support on Nov. 10, 2025, answering the Court's question in the affirmative. This opinion remains pending with the Supreme Court of Georgia.

Issuance of a Formal Advisory Opinion

FAOs are either issued by the Board (if no petition for discretionary review is sought or the Supreme Court of Georgia declines to review the opinion on its own motion) or the Supreme Court of Georgia (if the Court grants discretionary review or reviews the opinion on its own motion and approves the opinion). When an FAO is issued, Bar counsel drafts a notice of the issuance of an FAO, which is published on the State Bar website along with the opinion. Bar counsel also facilitates the placement of the opinion in the Handbook on the State Bar website and updates the FAO indexes.

Other Matters the Board Addressed During the 2025-26 Bar Year

Maxwell v. State, 367 Ga. App. 302 (2023)
In the 2023-24 Bar year, the Board received a copy of the concurring opinion issued by Presiding Judge Christopher J. McFadden in the above-referenced case, which questioned whether, considering Rule 4.2 and Comment [2] of the rule, "the district attorney or assistant district attorney may have violated it when they directed their investigator to question Maxwell outside the presence of his attorney and without notice to his attor-

ney..." At the oral argument of the *Maxwell* case, counsel for the state pointed out that there are no relevant cases construing Rule 4.2 as it relates to the underlying ethical issue. The majority ruled that the Court need not construe Rule 4.2 to decide the case and that it is up to the State Bar to address the matter in the first instance.

This issue was also presented to the State Bar's Disciplinary Rules and Procedures Committee (DRPC) to consider whether Rule 4.2 should be amended in light of the concurring opinion. The Board decided to table its consideration of this matter pending the DRPC's decision regarding Rule 4.2. At its Jan. 16, 2026, meeting, the DRPC concluded its review and consideration of *Maxwell v. State* and decided that it would not recommend or propose any changes to Rule 4.2 or the Comments to Rule 4.2.

The Board was informed of the DRPC's decision, and at their April 14, 2026, meeting and decided to table this matter until the next FAOB meeting, allowing Board members more time to consider the issue presented.

Amendments to Rules 7.1 Through 7.5 and Their Impact on FAO Nos. 94-1, 97-3, 98-4, 00-2, 01-1, 05-6 and 16-3

At their April 14, 2026 meeting, the Board was informed that, in light of the Supreme Court of Georgia's Nov. 18, 2025, order approving amendments to the advertising rules (Rules 7.1 through 7.5) effective as of March 1, 2026, eight opinions, issued either by the Supreme Court or the Formal Advisory Opinion Board, contain references to those rules.

The Board was advised of the process approved by the Supreme Court of Georgia and used by the Board in prior years following amendments to the GRPC, under

which the Board reviewed existing formal advisory opinions to consider the impact the amended rules have on the opinions.

The Board decided that it would like to follow the previously approved process used in prior years to evaluate the eight identified opinions. A motion passed to recommend that the general counsel, in consulting with the Supreme Court regarding the process for assessing the effect of the amended rules on opinions, request the Court's approval for the Board to proceed under the previously approved process. The Supreme Court of Georgia's decision regarding the Board's process is pending.

Formal Advisory Opinion Board
The Board, listed below, consists of active members of the State Bar who are

appointed by the president of the State Bar with the approval of the Board of Governors.

Bar Rules

The Formal Advisory Opinion Board is governed by Bar Rules 4-223, 4-401, 4-402, 4-403 and 4-404, and its own internal rules. The Office of the General Counsel periodically reviews these rules, advises the Board regarding whether it should consider amending the rules and suggests proposed amendments.

Formal advisory opinions, opinion indexes and the rules governing the Board are located on the State Bar's website at www.gabar.org/advisory-opinions. •



2025–26 Formal Advisory Opinion Board		
At-Large Edward B. Krugman, <i>Atlanta</i> Martin A. Levinson, <i>Atlanta</i> Letitia A. McDonald, <i>Atlanta</i> Mary A. Prebula, chair, <i>Atlanta</i> Jeffrey Hobart Schneider, <i>Atlanta</i>	chair, <i>Atlanta</i>	Tia L. Gibbs, <i>Atlanta</i>
Georgia Trial Lawyers Association Christy Crowe Childers, <i>Macon</i>	Georgia District Attorneys' Association Sherry Boston, <i>Decatur</i>	Atlanta's John Marshall Law School Professor Jeffrey Alan Van Detta, <i>Atlanta</i>
Georgia Defense Lawyers Association Jacob Edward Daly, <i>Atlanta</i>	Young Lawyers Division Emily Christine Long, <i>Lawrenceville</i>	State Disciplinary Board Marcella Coladangelo Ducca, <i>Atlanta</i>
Georgia Association of Criminal Defense Lawyers Amanda Rourk Clark Palmer, vice	Emory University Professor Jennifer Murphy Romig, <i>Atlanta</i>	State Disciplinary Review Board John Ryd Bush Long, <i>Augusta</i>
	University of Georgia Professor David N. Lefkowitz, <i>Athens</i>	Executive Committee R. Gary Spencer, <i>Atlanta</i>
	Mercer University Professor Patrick E. Longan, <i>Macon</i>	
	Georgia State University	

Pro Hac Vice Program

NARIAH DANCY, PRO HAC VICE ADMINISTRATOR

Attorneys seeking to appear *pro hac vice* in State and Superior Courts and before the State Board of Workers' Compensation and the Georgia State-wide Business Court must comply with Uniform Superior Court Rule 4.4. Attorneys seeking to appear *pro hac vice* in Magistrate Court must comply with Uniform Magistrate Court Rule 7.5. Pursuant to both rules, attorneys applying for *pro hac vice* admission in Georgia must serve a copy of their application for admission on the State Bar of Georgia's Office of the General Counsel.

Applicants can submit their application and fee (check, money order or credit card) via mail or the online portal on the State Bar's website. The *pro hac vice* administrator creates a paper and electronic file for all applications received by mail and creates an electronic file for all applications received via the online portal. The paper files are purged annually. The *pro hac vice* administrator reviews the applications to determine whether the application contains the required information pursuant to the rule and its appendix and whether the attorney submitted the annual and application fees. The *pro hac vice* administrator also verifies the attorney's status with their home jurisdiction(s), determines if the attorney has any disciplinary history (and gets a copy if possible), and obtains the judge's name and address for the case.

If an attorney fails to provide the required fee(s) or provides an incorrect fee amount, the *pro hac vice* administrator will request the required fee(s) or correct fee amount via email or mail. If the attorney fails to provide information required by the applicable rule's appendix, the *pro hac*

vice administrator requests that the attorney file an amended application with the Court and send a copy of the same to the Office of the General Counsel.

After the contents of the application are entered into the *pro hac vice* database, the information is verified and the fees are received, the *pro hac vice* administrator drafts a letter to the Court, reviewed by counsel within the Office of the General Counsel, explaining whether the application complies with the rule and its appendix. Occasionally, counsel may conclude that the attorney appears ineligible for *pro hac vice* admission under the rule and will file a Response with the Court to that effect.

Below is a chart reflecting the average monthly *pro hac vice* caseload.

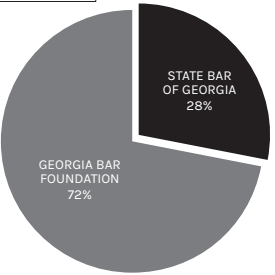
AVERAGE MONTHLY CASELOAD	# OF CASES
Incoming calls	80
Incoming emails	120
Voicemails	40
Outgoing calls	50
Outgoing emails/letters	275

The rules state that any domestic or foreign lawyer granted admission *pro hac vice* must pay an annual fee of \$200 on or before Jan. 15 for each subsequent calendar year of admission. If the annual fee is not received by Jan. 15, Georgia Rule of Professional Conduct 5.5(l) requires applicants to submit a late fee of \$100, along with the annual fee, by March 1. In December 2025, the *pro hac vice* administrator sent 2,169 annual fee notice emails and 355 annual fee notice letters to appli-

cants (and a copy to their sponsor), which includes a payment link and information on how to notify the Office of the General Counsel if the applicant is no longer admitted *pro hac vice*. If an applicant fails to submit the required annual and late fees, counsel provides the applicable court with a letter stating that the applicant is not in compliance with the rule.

During the period of July 1, 2025, through June 30, 2026, the Office of the General Counsel reviewed 2,108 *pro hac vice* applications. The Office of the General Counsel filed 15 formal responses with Georgia courts regarding the apparent non-eligibility of the applicant. The Office of the General Counsel collected a total of \$628,425 from *pro hac vice* applicants. The fees are divided between the

State Bar of Georgia and the Georgia Bar Foundation. The State Bar of Georgia received \$175,825 from the total collected. The Georgia Bar Foundation received \$452,600 from the total collected. ●



Overdraft Notification Program

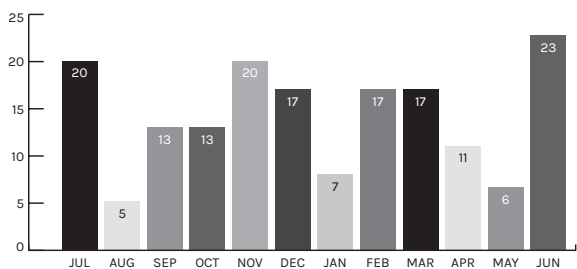
REGINA PUTMAN, TRUST ACCOUNT OVERDRAFT NOTIFICATION COORDINATOR

The Overdraft Notification Program received 169 overdraft notices from financial institutions approved as depositories for Georgia attorney trust accounts. Of the total number of notices received, three overdraft reports were received on the trust accounts of disbarred lawyers and one overdraft report was received on the trust account of a lawyer ineligible to practice because of unpaid Bar license fees. A total of 106 files were dismissed based on the receipt of satisfactory responses following the initial State Bar inquiry, three files were referred to the Law Practice Management Program, 15 files were forwarded to the State Disciplinary Board for possible disciplinary action and one file was closed because the State Bar received overdraft notification regarding the trust account of a disbarred member. (Several attorney overdraft files contained more than one overdraft notice regarding the same IOLTA account number. Some overdraft files opened during the latter part of FY 2025-26 remain open, pending final review and disposition.)

Financial Institutions Approved as Depositories for Attorney Trust Accounts

The number of financial institutions approved as depositories for attorney trust accounts is affected by bank failures, bank mergers, the physical presence of a financial institution branch office location

OF OVERDRAFT NOTICES RECEIVED IN 2025-26



within the state of Georgia and a bank's willingness to execute the Office of the General Counsel's overdraft reporting agreement and the Georgia Bar Foundation's interest rate comparability agreement. Currently, 164 banks and credit unions are reflected on the State Bar of Georgia's List of Financial Institutions Approved as Depositories for Attorney Trust Accounts. Of those approved banks, 10 financial institutions have obtained limited approval under Rule 1.15 (III) (c) (1) (i) (A) of the Georgia Rules of Professional Conduct to maintain and service qualifying Georgia IOLTA accounts for State Bar members whose clients request and agree that their funds be held at an institution that is neither in the state of Georgia nor in the state where the lawyer's office is located. An updated

list of approved banks can be found at www.gabar.org/banks.

State Bar of Georgia Trust Account Overdraft Notification (TAON) Program—Office of the General Counsel

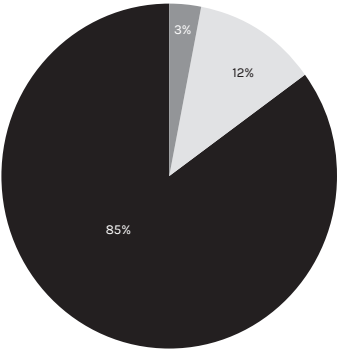
Rule 1.15 of the Georgia Rules of Professional Conduct mandates the lawyer disciplinary system enforces the standard of safekeeping of client property as a fundamental fiduciary obligation of lawyers. The dishonor of drafts for insufficient funds drawn from client trust accounts is an early warning that a lawyer is engaging in conduct likely to injure clients. The TAON Program acts to significantly reduce the level of lawyer misappropriations. Financial institutions that maintain

lawyer trust accounts are required to notify the State Bar of Georgia's Office of the General Counsel of overdrafts, which enables the State Bar of Georgia to intervene before major losses occur and a significant

number of clients and third parties are harmed. Participation by financial institutions is a prerequisite to their continued eligibility to hold lawyer trust accounts. The Bar rule also enables the Office of

the General Counsel to counsel errant lawyers to take corrective action before the lawyer's misconduct becomes so egregious as to mandate serious sanction, including disbarment. ●

MONTH 2025-26	ACTUAL # NOTICES RECEIVED	FILES CLOSED/ ADEQUATE RESPONSE	FILES CLOSED/ LPMP	GRIEVANCES INITIATED	TOTAL CLOSED
July	20	11	0	0	11
August	5	10	0	1	11
September	13	10	0	1	11
October	13	4	1	1	6
November	20	6	2	1	9
December	17	12	0	2	14
January	7	2	0	0	2
February	17	10	0	3	13
March	17	23	0	1	24
April	11	4	0	3	7
May	6	1	0	1	2
June	23	13	0	1	14
TOTAL	169	106	3	15	124
PERCENTAGE		85%	3%	12%	



OVERDRAFT FILE DISPOSITION

- Adequate Response (85%)
- Board Initiated Grievances (12%)
- Law Practice Management Referral (3%)



Amendments to Bar Rules

WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

Requests for amendments to the Rules and Regulations for the Organization of the State Bar of Georgia may come from State Bar Officers, Committees, Sections or any State Bar member. If a member of the State Bar requests an amendment,

the request is typically submitted to the Office of the General Counsel, the executive director, a State Bar officer or the governing committee associated with the particular rule(s). The Office of the General Counsel then will prepare a draft of

the proposed rule amendment; however, Bar members may also provide their draft of a proposed opinion.

The Office of the General Counsel typically circulates the draft of a proposed rule amendment amongst interested parties until it meets with general approval; it is then forwarded to the Executive Committee for their review. Pursuant to Article IV, Section 2 of the State Bar of Georgia Bylaws, the Executive Committee has the power to exercise all the powers of the Board of Governors between meetings of the Board and shall report to each meeting of the Board. Accordingly, the Executive Committee reviews the proposed amendment before it is presented to the Board of Governors. If approved, the proposed amendment is submitted to the Board of Governors for review and approval. If the Executive Committee does not approve a proposed amendment, it is typically not submitted to the Board of Governors. However, no specific rule states that a proposed amendment needs to be presented to or approved by the Executive Committee. Proposed amendments can be submitted directly to the Board of Governors by a member of the Board of Governors as a new agenda item.

After the Board of Governors approves the proposed amendment, the Office of the General Counsel prepares a Notice of Motion to Amend the Rules of the State Bar of Georgia. This Notice



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is published in the *Georgia Bar Journal* or on the State Bar of Georgia website pursuant to Bar Rule 5-101. At the same time the Notice of Motion to Amend is published, a copy of the notice is filed with the Supreme Court of Georgia. At least 30 days after the publication date of the Notice, a Motion to Amend the Rules of the State Bar of Georgia and a Brief in Support of the Motion to Amend the Rules of the State Bar of Georgia may be filed with the Supreme Court of Georgia and published in accordance with Rule 5-101.

Pursuant to Bar Rule 5-102, Bar members are allowed to file comments or written objections to any motion to amend the Rules of the State Bar of Georgia. All objections shall be filed with the clerk of the Supreme Court of Georgia by a designated date, with a copy served upon the General Counsel of the State Bar of Georgia. Each objection shall contain the grounds on which the objection is based. If desired, a request for oral argument on the proposed amendment may be requested. According to Bar Rule 1-503, the Supreme Court of Georgia, at its sole discretion, may grant or deny a request for oral argument. The clerk of the Supreme Court of Georgia shall notify the General Counsel of the State Bar of Georgia and the person seeking oral argument of the date of any oral argument granted under the provisions of Rule 23 (b) of the Rules of the Supreme Court of Georgia.

If the Supreme Court approves or modifies and approves the amendment to the rules, the Office of the General Counsel notifies the entity requesting the amendment of the Supreme Court's decision and publishes a notice of the amended rule on the State Bar's website. The State Bar's Handbook is also updated accordingly. The State Bar Handbook is only available in electronic form and is found on the State Bar of Georgia website at www.gabar.org/handbook.

Following is a summary of actions taken during the 2025-26 Bar year regarding proposed amendments to the Rules and Regulations for the Governance of the State Bar of Georgia:

Motion 2023-1

Approved by order of the Supreme Court of Georgia on Nov. 18, 2025, effective March 1, 2026.

Part IV Georgia Rules of Professional Conduct, Chapter 1, Rule 4-102. Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct 7.1 Through 7.5
The amendments to these rules are a massive rewrite of the advertising rules.

Motion 2023-2

Approved by order of the Supreme Court of Georgia on March 26, 2026, effective April 30, 2026.

Part I Creation and Organization, Chapter 2, Membership, Rule 1-207. Official Address and Change of Address
The amendments to this rule require members to provide the Bar with an email address as part of their official address.

Motion 2024-2

Approved by order of the Supreme Court of Georgia on Nov. 10, 2025, effective Dec. 4, 2025.

Part VII Continuing Legal Education
The amendments to these rules are a massive rewrite of the Commission on Continuing Lawyer Competency and Continuing Legal Education rules based on the Lawyer Competency Task Force recommendations.

Motion 2025-9

Approved by order of the Supreme Court of Georgia on Dec. 19, 2025, effective Feb. 5, 2026.

Part 1 Creation and Organization, Chapter 7, Rule 1-107. Senior Lawyers Division
This rule was established to create the Senior Lawyers Division.

Motion 2025-10

Approved by order of the Supreme Court of Georgia on Dec. 19, 2025, effective Feb. 5, 2026.

Part IV Georgia Rules of Professional Conduct, Chapter 1, Rule 4-102. Disciplinary Action; Levels of Discipline; Georgia Rules of Professional Conduct 1.15 (II). Safekeeping Property – Trust Account and IOLTA

The amendment to this rule stipulates that a lawyer holding or managing funds in a fiduciary capacity without representing any party must notify all parties in writing that neither the funds nor the lawyer is subject to the Georgia Rules of Professional Conduct. Additionally, lawyers may not use their law firm trust or IOLTA accounts to hold fiduciary funds unless they represent a client in a specific matter.

Part IV Georgia Rules of Professional Conduct, Chapter 2, Rule 4-220 (Notice of Punishment or Acquittal; Administration of Reprimands)

The amendment to this rule replaces the term "issued" with "read in the presence of the respondent" and requires the reprimand to be administered during the portion of the Review Board meeting open to the public. Additional changes clarify notice requirements for both the public and the respondent.

Motion 2025-11

Approved by order of the Supreme Court of Georgia on March 26, 2026, effective April 30, 2026.

Part IV Georgia Rules of Professional Conduct, Chapter 2, Disciplinary Proceedings, Rule 4-203.1. Uniform Service Rule

The amendment to this rule defines a lawyer's "official address" for serving documents; and authorizes State Bar Investigators or individuals approved by the State Disciplinary Board to serve Petitions for the Appointment of a Special Master

and Formal Complaints. The changes also specify acceptable methods of service and introduce the use of an affidavit to document unsuccessful service attempts.

Motion 2026-1

Approved by order of the Supreme Court of Georgia on March 26, 2026, effective April 30, 2026.

Part X Clients' Security Fund, Rule 10-103. Funding

The amendment to this rule changes the current wording of the rule to make clear that the trustees of the Client Security Fund can spend up to the annual assessment plus any surplus funds from prior Bar year.

Motion 2026-2

Approved by order of the Supreme Court of Georgia on June 25, 2026, effective July 23, 2026.

Part IV Georgia Rules of Professional Conduct, Chapter 2, Rule 4-221.

Hearing Procedures

The amendments to this rule refine hearing procedures by improving the management of disciplinary proceedings while preserving due process. A key addition expressly recognizes the special master's authority to address disruptive conduct by providing practical tools to maintain order and continue proceedings without resorting to contempt immediately. The amendments also update venue provisions to ensure that hearings can proceed even when traditional venue rules are impracticable. The amendments also expressly permit hearings before the special master that are not final evidentiary hearings to be held by video or telephone conference, reflecting modern practice and promoting efficiency while preserving existing venue requirements for final hearings.

Motion 2026-3

Approved by order of the Supreme Court of Georgia on June 25, 2026, effective July 23, 2026.

Part IV Georgia Rules of Professional Conduct, Chapter 2, Rules 4-227. Petitions for Voluntary Discipline

The amendments to this rule clarify and streamline the procedures for Petitions for Voluntary Discipline by requiring that petitions for voluntary surrender of a Bar license be filed directly with the Supreme Court of Georgia, rather than with a special master, after a formal complaint has been filed. The Office of the General Counsel has 30 days to respond, and proceedings before the special master are expressly stayed and tolled while the petition is pending. ●

Judicial Procedures & Administration/ Uniform Rules Committee

WILLIAM D. NESMITH III, DEPUTY GENERAL COUNSEL

The **Judicial Procedures & Administration/Uniform Rules Committee** is a standing committee charged with monitoring the practical operation of Georgia's judicial system across all courts and recommending improvements to applicable laws and uniform court rules based on its observations and experience. The Committee reviews and evaluates all proposed legislation affecting the courts of this state and provides its findings and recommendations to the Executive Committee. The Committee also examines all proposed uniform and other court rules and makes recommendations regarding their adop-

tion, modification or implementation to promote the fair and efficient administration of justice throughout Georgia's court system.

The Committee is comprised of 16 active members of the State Bar of Georgia, including the Executive Committee liaison, who are appointed by the president of the State Bar of Georgia.

During the 2025-26 Bar year, the Committee received and reviewed proposed amendments to the following Uniform Superior Court Rule that were approved by the Council of Superior Court Judges of Georgia:

- Rule 4.3. Withdrawal
- Rule 10.2. Opening Statement in Criminal Matters
- Rule 21. Limitation of Access to Court Files
- Rule 21.1. Motions and Orders
- Rule 21.3. Ex Parte Orders
- Rule 21.5. Amendments

After careful review and consideration, the Committee provided its comments, after review by the Executive Committee of the State Bar, to the Council of Superior Court judges reflecting concerns and comments on behalf of the State Bar. ●

Disciplinary Orders of the Supreme Court of Georgia

KATHYA S. JACKSON, CHAIR, STATE DISCIPLINARY BOARDS

REINSTATEMENTS GRANTED

Feb. 5, 2026 Muhammad Abdul-Warit Abdur-Rahim
March 12, 2026 Candace Lanette Sneed

REVIEW BOARD REPRIMANDS

Jan. 16, 2026 Muhammad Abdul-Warit Abdur-Rahim

SUSPENSIONS

Indefinite Suspensions

July 22, 2025 Charles M. Dalziel Jr.
Sept. 29, 2025 Joseph Pryor Durham Jr.
May 5, 2026 Francis X. Moore
May 19, 2026 Charles M. Dalziel Jr.

Definite Suspensions

Jan. 5, 2026 Stephanie Dianne Woodard
May 19, 2026 Hillman James Toombs

Interim Suspensions

Aug. 27, 2025 Matthew Jason Anderson
Aug. 27, 2025 Sean Patrick Collins
Aug. 27, 2025 Patrick Fitzgerald McKee
Sept. 10, 2025 Destin Michelle Gillum
Sept. 10, 2025 Mylee McKinney
Oct. 14, 2025 Nicole Jones
March 2, 2026 Michael P. Carestia
March 3, 2026 Kenneth DeWayne Teal
March 11, 2026 Angela Mary Kinley (*two cases*)
May 6, 2026 Nicole Krashun Carson
May 6, 2026 Jimmy Thomas Howell Jr.
May 7, 2026 Stephen Anthony Burroughs
May 7, 2026 Kerry Eston Hand
June 18, 2026 Mary Jane Palumbo Melton
June 18, 2026 Edward J. Tarver Jr.

INTERIM SUSPENSIONS LIFTED

Sept. 18, 2025 Mylee McKinney
Oct. 16, 2025 Nicole Jones
Oct. 24, 2025 Sean Patrick Collins
March 9, 2026 Michael P. Carestia
March 11, 2026 Angela Mary Kinley (*two cases*)
June 25, 2026 Mary Jane Palumbo Melton
June 25, 2026 Edward J. Tarver, Jr.

DISBARMENTS/VOLUNTARY SURRENDERS

July 22, 2025 Justin Allen Chin
Aug. 12, 2025 Dominique Marc Henri Lemoine (*two cases*)
Aug. 12, 2025 William Keith McGowan
Aug. 12, 2025 Kathleen Strang
Aug. 26, 2025 Vi Bui
Aug. 26, 2025 Allen Charles Jones
Sept. 16, 2025 Melvin Raines II
Sept. 16, 2025 Paul Gerard Wersant
Nov. 4, 2025 Brian Joel Aplin (*two cases*)
Nov. 4, 2025 Destin Michelle Gillum
Dec. 9, 2025 Je'Nita Lane
Dec. 23, 2025 Christopher Casey Taylor (*six cases*)
Jan. 21, 2026 Nubiyn Matamalaki Mosi Mzekewe
Feb. 3, 2026 Paul Jason York
Feb. 17, 2026 Bryan Matthew Pritchett
March 3, 2026 Joseph William Cloud
March 17, 2026 Charles Bruce Singleton Jr.
April 21, 2026 Leonard Richard Medley III
May 5, 2026 Shaquandra A. Woods
May 19, 2026 Matthew Jason Anderson
May 19, 2026 Brandon Andrew Cline
May 19, 2026 Clifford E. Hardwick, IV
June 16, 2026 Lisa Paige Lenn
June 16, 2026 Mylee McKinney
June 16, 2026 Andrew Thurston Murphy
June 16, 2026 Samuel David Ozburn

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**State Bar
of Georgia**



MEMORANDUM

To: ICLE Advisory Board Members

From: Julia Neighbors, ICLE Director

Date: September 8, 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.

Annual Data (July 1, 2025 – June 30, 2026)

- 8 - Locales ICLE Hosted Programs
- 57 - CLE Programs
- 909 - Speakers
- 5,808 - Attendees
- 13,980 – On-demand programs sold
- 75,142 - hours of viewed on-demand programs

ICLE Programs (May 1, 2026 – August 31, 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
 - o 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
 - o War Stories and Georgia Evidence Update – June 11, 2026
 - o 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

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- On Demand Programs
 - o 677 on demand products purchased by 476 customers (July 1, 2025 – August 31, 2026)
 - o 13,979 on demand products purchased by 9,131 customers (September 1, 2025 – August 31, 2026)

Spring 2026 Member Benefit CLE

- 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
- The program was rebroadcast on the following dates:
 - o Wednesday, July 29, 2026
 - o Wednesday, August 19, 2026
- Upcoming rebroadcast dates:
 - o Wednesday, September 23, 2026
 - o Wednesday, October 28, 2026

Upcoming Off-Site Programs and Institutes

- 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
- Appellate Practice Workshop – September 30 – October 1, 2026 - Atlanta, GA
- 2026 Advanced Health Law – October 7, 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
- 2026 Corporate Counsel Institute – Dec. 10-11, 2026 – Atlanta, GA

Program Chair Support and Training

ICLE hosted a virtual Program Chair Orientation on August 20, 2027, 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 were discussed (9 hours v. 12 hours for institutes) as well as the timing of programs (scheduling programs during a two-year compliance period). A video recording of the orientation is available.

Law Practice Management Program

(Abbreviated report for the 2026-2027 Bar Year)

Total Number of Members Served – 76

July 1, 2026 – September 8, 2026

The program has successfully engaged a total of 76 members and their staff from July 1, 2026, to September 8, 2026. During this period, we made contact with 31 existing members, 43 new members, and 2 law firm staff.

Resource Requests

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

- **Starting a Law Practice** – 39 copies of the [Starting a Georgia Law Practice Guide](#) were distributed to our members by request, including 13 via email, 25 through web store orders, and 1 during office visit to the Bar Center. Additionally, we received 2 inquiries by phone regarding resources for opening a law practice.
- **Software Recommendation/Technology Advice** – We received 2 inquiries from members seeking law office software recommendations via email and/or phone.
- **LPM Resources Assistance** – The program has responded to 104 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, 8 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 7 [virtual consultations](#) were completed during this period. Our program has completed 7 general 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, 13 members registered for library access. The library also recorded 2 in-office visits from 2 members, with 21 members checking out a total of 82 materials. In addition, the Resource Library handled 19 email inquiries and 1 phone call 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 262 Instagram followers, 139 LinkedIn followers, and 641 [LPM Insider](#) subscribers, totaling 1,042 followers—and growing.

Speaking Engagements and LPM Seminars

A total of 5 programs were scheduled during this period. See list of events below:

Date	Event Name	Presentation(s)
September 15, 2026	Georgia General Assembly CLE, Georgia State Capitol, Atlanta, GA	<i>Practical Uses of AI</i> , Panelists: Nkoyo-Ene Effiong Lewis, Natalie Glaser and Alex Khoury
September 17, 2026	Take Charge! Conference—The Intelligent Firm: From Overwhelmed to Optimized , State Bar of Georgia Conference Center, Atlanta, GA	<i>Future of Law—Ethics</i> , Moderator: Nkoyo-Ene Effiong Lewis; Panelists: Kimberly Y. Bennett, James S. Lewis, Robert S. Sexley and Professor Jennifer Romig

September 17-18, 2026	Take Charge! Conference—The Intelligent Firm: From Overwhelmed to Optimized , State Bar of Georgia Conference Center, Atlanta, GA	Program Chair: Nkoyo-Ene Effiong Lewis, Sponsored by the State Bar's Law Practice Management Program
September 18, 2026	Take Charge! Conference—The Intelligent Firm: From Overwhelmed to Optimized , State Bar of Georgia Conference Center, Atlanta, GA	<i>The Human Advantage: Professionalism, Judgment, and the Future of Law Practice</i> , Moderator: Karlise Y. Grier Panelists: Holly L. Geerdes, Nkoyo-Ene Effiong Lewis and William C. "Bill" Gentry
September 18, 2026	Take Charge! Conference—The Intelligent Firm: From Overwhelmed to Optimized , State Bar of Georgia Conference Center, Atlanta, GA	<i>60 Tips, Gadgets, Sites in 60 Minutes</i> , Moderator: Sheila Baldwin; Panelists: Brett Burney, Sonia Lakhany, Cynthia Thomas and Jason Wiggam
September 30, 2026	Transition Into Law Practice Program (TILPP) Group Mentoring CLE , State Bar of Georgia Conference Center, Atlanta, GA	<i>Law Practice Management Program & vLex Fastcase Demo</i> , Sheila Baldwin and

Clio vLex Fastcase Platform Report

vLex Fastcase: New Platform and Documents

[vLex Fastcase](#) continues to be one of the Bar's most valuable member benefits, providing free legal research to all members. Over 50% of our 55,000+ members log into their Fastcase account annually.

News: Clio's acquisition of vLex Fastcase, announced last November and signals a major shift toward integrated, AI-driven legal research platforms. The rebranding will soon take place to reflect this change with vLex Fastcase replace with Clio Library.

Current Status: Our members have access to vLex Fastcase with a global legal knowledge base with over 1 billion documents and Docket Alarm, with over 650M+ dockets and legal documents with a continuous addition of materials from the court system. Members will continue to log into their bar account and select the vLex Fastcase link until the rebranding takes place, which will then show a link to Clio Library.

Future Changes and Enhancements for Bar Association Members: Soon, vLex Fastcase will be rebranded as Clio Library. Within the broader Clio ecosystem, legal research will take place in [Clio Work](#), which includes [Clio Library](#), [Clio Docket](#), and [Vincen](#)t.

vLex Fastcase Reported Issues and Usage Report Partner Usage Report for State Bar of Georgia June 30, 2026—August 31, 2026

Category	Year	Jun	Jul	Aug	Total
First Time Logins	2026	34	29	26	89
Total Logins	2026	6,132	6,047	6,446	18,625
Unique Users Who Logged In	2026	1,827	1,707	1,756	5,290
New Premium Subscriptions	2026	0	0	0	0
Unique Users Redirected from vLex	2026	166	140	135	441
Total Redirections from vLex	2026	432	492	516	1,440
Total Transactions	2026	13,012	16,936	18,152	48,100

vLex Fastcase Reported Issues/Problems (July 2026-September 2026)

vLex Fastcase Reported Issues / Problems	
Issue Reported to Member Benefits Coordinator (MBC)	Response
Several Members requested Assistance to navigate vLex Fastcase. (04/01/26 - 09/01/26) Several members each month request personal assistance in navigating their search experience.	vLex Fastcase (Bar Staff) Responses (04/01/26 - 09/01/26) Bar staff gives directions personally by walking them through several options and follows up with the excellent resources provided by Clio.
MBC General Assistance Request for assistance from members who were getting a 404-error message. (09/04/26) Several Members were unable to access their account.	vLex Fastcase (Bar Staff) Responses (09/04/26) Bar staff resolved the issue and determined that it was on the bar side after an update to our site. Communications discovered a temporary fix until the underlying issue was addressed.

CloudLawyer/ReliaGuide Report

The [Find a Lawyer](#) directory continues to experience steady, consistent growth across key performance metrics, reflecting continued engagement from both members and the public. This sustained growth demonstrates the directory's increasing value as a resource for members and a tool for connecting prospective clients with attorneys.

As part of ongoing enhancements, additional email options have been added to member profiles, giving members greater flexibility in choosing which email addresses are displayed publicly and where client inquiries are directed. This added flexibility helps streamline the client intake process and improve how members manage incoming opportunities.

Statistic Updates Through January 1st – September 8th

- 397,370 interactions with member profiles (views, clicks, and contact requests)
- 56,935 profile views
- 5,687 completed contact form requests
- 8,574 clicks on lawyer's email
- 11,632 clicks on lawyer's phone number
- 4,432 total sign ins
- 456 Profile Plus subscriptions
- 22 analytics products purchased
- 15 website products purchased
- 24 Lawyer Referral Network subscriptions



State Bar of Georgia Private Health Insurance Exchange September 8, 2026

INDIVIDUAL ENROLLMENTS	
Total Enrollments	9,256
• Medical	3,115
• Medicare	57
• Dental	1,343

• Vision	608
• Telehealth	573
• ID Theft Protection	50
• Life / AD&D	3,123
• Disability	305
• Critical Illness	12
• Long-Term Care Enrollments	70
EMPLOYER ENROLLMENTS	
Total Enrollments	4,895
• Medical	1,881
• Ancillary	2,596
• Professional Liability	416
• Cyber Security	2

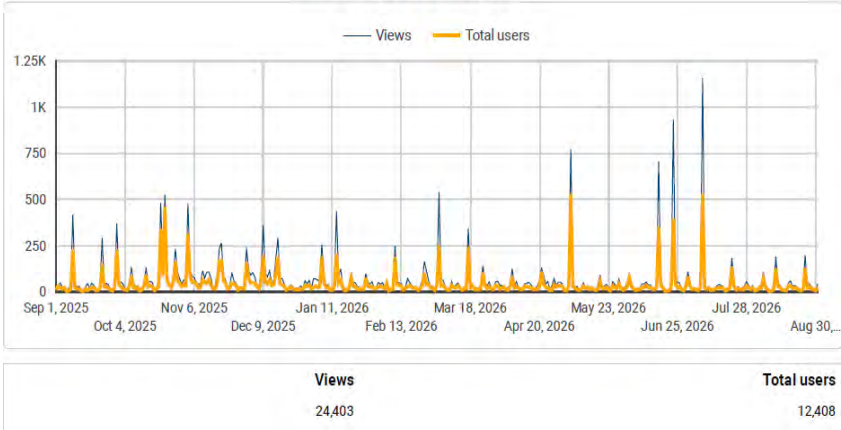


Member Benefits

Website Analytics Report: State Bar of Georgia

Aug 23, 2026 - Aug 29, 2026

PREVIOUS 12 MONTHS





CHIEF JUSTICE'S COMMISSION ON PROFESSIONALISM

Members for 2025-2026

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

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

Mrs. Veronica Rogusky Cox
Atlanta, Georgia

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

Mr. Jeffrey William DeLoach
Epps Holloway DeLoach & Hoipkernier LLC
Watkinsville, Georgia

Ms. Anissa D. Floyd
Summit 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, Georgia

Professor Tonja Jacobi
Emory University School of Law
Atlanta, Georgia

Mr. Francys Johnson
Davis Bozeman Johnson Law
Statesboro, Georgia

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 Shubow
Atlanta Circuit Public Defender's Office
Atlanta, Georgia

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

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: October 17, 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 judges and lawyers. 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. A brief update of some of the Commission's activities as of September 8, 2026, is as follows.

NOMINATIONS FOR THE 27TH ANNUAL JUSTICE ROBERT BENHAM AWARDS FOR COMMUNITY SERVICE

The Commission will accept nominations for the 27th Annual Justice Robert Benham Awards for Community Service (CSA27) from approximately September 14, 2026, through 11:59 p.m. on November 11, 2026. Judges and lawyers meet the criteria for these prestigious state-wide awards if they have combined a professional career with outstanding service and dedication to their communities through voluntary participation in community organizations, government-sponsored activities, or humanitarian work outside of their professional practice or judicial duties.

For more information on the nomination eligibility criteria or to nominate a deserving lawyer or judge, visit <https://cjcpga.org/nominationsbenhamcsa/>.



COMMISSION 2026 CONVOCAION ON PROFESSIONALISM AND THE RULE OF LAW

The Commission will hold a CLE Convocation on *Professionalism and The Rule of Law* on **October 30, 2026**, at the State Bar of Georgia, Atlanta Headquarters. **Ms. Lauren Shubow**, Shubow Law, is the Program Chair. See <https://cjcpga.org/professionalism-and-rule-of-law-convocation-10-30-26/>

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Report On PROFESSIONALISM IS CONTAGIOUS: AN INTERVIEW WITH DEAN A. JAMES ELLIOTT, “JIM ELLIOTT” (1941-2024) FILMED JULY 21, 2023

On July 23, 2026, from **12:15 p.m. – 1:30 p.m.**, the Commission held a CLE entitled *Professionalism Is Contagious: An Interview with Dean A. James Elliott, Filmed July 21, 2023*. The CLE was held in partnership with the Georgia Legal History Foundation (“GLHF”) and with the assistance of GLHF Trustee, John C. Sammon. **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 451 “Unique Viewers.” The Commission reported CLE attendance for 438 Georgia attorneys. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-0jfUku5ZZ9UOe3v1DDaoMQ_3D_3D/.

STATE BAR OF GEORGIA COMMITTEE ON PROFESSIONALISM PROJECTS

The Commission staffs the State Bar of Georgia Committee on Professionalism (“Committee”), currently chaired by **Mr. Carlos R. Vilela**. **Ms. J. Maria Waters** serves as the Committee’s Vice-Chair. Some of the Committee’s projects during 2025-2026 and 2026-2027 Bar years are summarized below.

SPEAKERS AND WRITERS BUREAU

The Speakers and Writers Bureau sub-committee of the State Bar of Georgia’s Committee on Professionalism was co-chaired by **Mr. Kevin Patrick** and **Mr. Michael Perez** during the 2025-2026 Bar year. A recent sub-committee activity was as follows.

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

The Commission and the State Bar of Georgia Committee on Professionalism and the Young Lawyers Division of the State Bar of Georgia held 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. **Judge Mike Jacobs, Ms. Cathy Cox, Mr. Christopher S. Cohilas, Mr. Byung J. “BJay” Pak, and Ms. Andreea Morrison** were the panelists. **Mr. Edward Lindsey** served as moderator. The Program Chairs were **Mr. Kevin Patrick, Ms. Meghan Golden, and Ms. Meagan Hurley**. Former Commission member and YLD Immediate-Past President, **Ms. Victoria Cox**, also assisted with the program. Written materials for the program are available here: <https://cjcpga.org/mastering-professionalism-ethics-and-public-office-cle-presentation-on-06-30-26/>. **The CLE was approved for 2 hours of CLE credit, including 1 hour of professionalism CLE credit and 1 hour of ethics CLE credit.** According to the Zoom report generated for the CLE, the CLE was attended by 946 “Unique Viewers.” The Commission reported CLE attendance for 882 Georgia attorneys. To view the evaluations from the CLE, please visit https://www.surveymonkey.com/results/SM-vl2gqnid0RPIq6l8RyXrOg_3D_3D/.

2026 LAW SCHOOL ORIENTATIONS ON PROFESSIONALISM

The Commission funds in part and provides staff support for the Committee’s work on the Law School Orientations on Professionalism. The orientations are designed to provide incoming first-year law students with their first introduction to professionalism. Georgia judges and lawyers are invited to serve as “Group Leaders” during the orientations to help students learn the meaning of professionalism and why it is important for them as law students. **Ms. Samantha Beskin-Schemer** served as Chair of the Law School Orientations on Professionalism sub-committee during the 2025-2026 Bar year. She will continue to serve as Chair for the 2026-2027 Bar year, with **Judge Margaret Riley Schweitzer** serving as the Vice Chair of the sub-committee.

2026 Law Schools Orientations on Professionalism Summary Chart				
Name of School	Date	# of Stu- dents	# Group Leaders	Professionalism Speaker
Atlanta's John Marshall Law School	August 8, 2026	145	18	Judge Eric Richardson State Court of Fulton County
Emory University Law School	August 13, 2026	269	44	Justice Leah Ward Sears (Retired) Supreme Court of Georgia
Georgia State University Law School	August 11, 2026	295	22	Justice Harold D. Melton (Retired) Supreme Court of Georgia
Mercer University Law School	August 7, 2026	157	24	Judge Sharell Lewis State Court of Bibb County
University of Georgia School of Law	August 19, 2026	≤171	28	None
Totals		1,037	136	

Neither the Committee, the law schools, nor the Commission could offer this wonderful program without our hundreds (literally) of attorneys and judges who volunteer to serve as group leaders and professionalism plenary speakers. In addition, the support of our law school partners is invaluable to the Committee and the Commission. To each and every one of our Group Leaders, professionalism plenary speakers, and law school partners, both the Committee and the Commission say thank you!

For additional information regarding the Law School Orientations on Professionalism, please visit <http://cjcpga.org/law-school-orientations-on-professionalism-2026/>.



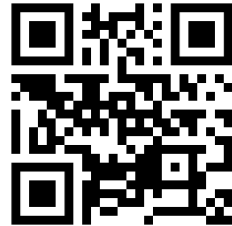
CONNECT WITH A COLLEAGUE CONTEST

The Committee’s 2025-2026 Connect With A Colleague sub-Committee was 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 6, 2026, through April 30, 2026, to encourage attorneys to make new connections with their colleagues to advance professionalism in our legal community. On May 20, 2026, the Committee held a random drawing to select the contest winners from among all the entries in the contest. The contest winners were as follows: **Kimberly Puckett Mullins**, First Place Contest Winner; **Kelsie J. Mattox**, Second Place Contest Winner; and **Andrea L. Alabi**, Third Place Contest Winner. The Committee was also grateful to the sponsors of the 2026 Connect With A Colleague Contest who were as follows: **Jeffrey M. Smith**, Principal Shareholder, Greenberg Traurig, LLP (Atlanta Hawks ticket donor); **Kevin Patrick**, Founder, Kevin Patrick Law (Atlanta United Ticket donor); and **Past Presidents of the State Bar of Georgia and the Young Lawyers Division** (Chateau Elan Golf & Spa Resort & Winery \$875 Gift Certificate).



For more information about the Connect With A Colleague contest, visit: <https://cjcpga.org/cwac/>.



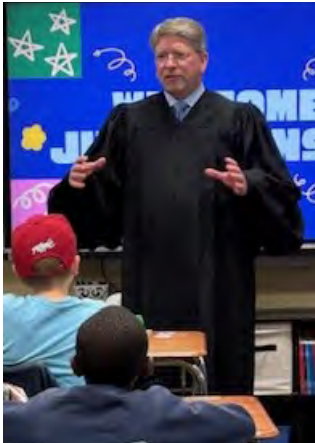
LAW DAY 2026

Each year, the State Bar, along with many other bar associations and legal organizations, partners 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 were **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**, former Staff Attorney to the late Judge Howard C. Kaufold, Jr., Oconee Judicial Circuit.

In the Third Judicial District, **Chief Judge Jeff Hanson** of the State Court of Bibb County and a member of the Chief Justice's Commission on Professionalism, spoke with 3rd Graders at the Academy for Classical Education in Macon. He discussed how the Rule of Law guarantees that everyone has a chance to succeed. Chief Judge Hanson also talked to the students about what it means to apply the law evenly to everyone.

In the Eighth Judicial District, Oconee Circuit **Juvenile Court Judge Stephanie Burton** and **Circuit Public Defender Ashley McLaughlin** spoke to 5th graders at Dodge County Elementary School in conjunction with career day. Judge

Burton and Mr. McLaughlin spoke about what it means to be lawyer and what it takes to work in the legal profession.



Judge Hanson spoke to Third Graders at the Academy for Classical Education, which is a public charter school in Macon. He spoke on the Law Day Theme: *The Rule of Law and the American Dream*. The students had lots of questions for Judge Hanson, and he reports that he had a great time with them.



Juvenile Court Judge Stephanie Burton and Circuit Public Defender Ashley McLaughlin spoke to each 5th Grade class at Dodge County Elementary School on May 7, 2026. Judge Burton and Mr. McLaughlin spoke about this year's Law Day theme in connection with the school's Career Day.

Additionally, in 2025, the Law Day sub-committee implemented a pilot project for Georgia high school students in connection with Law Day. With the assistance of **Judge Cheveda McCamy**, the Law Day sub-committee began in 2025 with one school, Newton High School, to test proof of concept, and it was a great success! In 2026, the Law Day sub-committee expanded the pilot project to include two high schools – Dodge County High School in Eastman, Georgia, and Newton High School in Covington, Georgia. In partnership with educators from both schools, student groups were encouraged to submit short video presentations in connection with this year's Law Day theme, *The Rule of Law and the American Dream*.

First, Second, and Third place winners received cash prizes and certificates of excellence for their hard work and participation. The First, Second, and Third place winners of the contest were as follows:

- 1) Newton High School - Parker Group # 18 (Christopher Ford-Wilson, Bailey Stover, Alivia Jones, Asia Lanham)
- 2) Dodge County High School - Spivey Group (C. R., U. N., S. S., P. M., N. D.)
- 3) Newton High School - Parker Group # 13 (Kaylee Huynh)

Winning submissions from this year's contest will be published for a short time on various social media outlets for the Chief Justice's Commission on Professionalism. To see the winning videos, for which the Commission has student

releases on file, visit <https://www.youtube.com/playlist?list=PLQV837Gd6caw>.



Mr. Marlan Eller (far left), Ms. Denise Warner (second from right), and Ms. Karlise Y. Grier (far right) pose with the First Place Law Day Social Media Contest Winners from Newton High School (student releases are on file).

COMMISSION MEMBER APPOINTMENTS FROM THE STATE BAR OF GEORGIA

At the Annual Meeting on June 13, 2026, the State Bar of Georgia Board of Governors appointed **Judge Charity Bridgewater**, Magistrate Court of Clayton County, and **Mr. Jeffrey M. Smith**, Shareholder, Greenberg Traurig, LLP, to the Chief Justice's Commission on Professionalism to begin serving initial three-year terms on July 1, 2026. **Mr. William C. "Bill" Gentry** and **Ms. Virginia Candace Josey** will serve on the Commission for a one-year term ex officio as President of the State Bar of Georgia and President of the Young Lawyers Division of the State Bar of Georgia, respectively.

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 Spring 2026 Georgia Bar Journal Professionalism Page entitled *Thank You to My Colleagues for Your Concern for My Welfare* 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

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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.



Karlise Y. Grier, leads Group Leader trainings for the Law School Orientations on Professionalism at AJMLS on August 8, 2026; at Emory Law on August 13, 2026; and at UGA on August 19, 2026.

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>



Thank You to My Colleagues for Your Concern for My Welfare

One tenet of A Lawyer's Creed and the Aspirational Statement on Professionalism reads: "To my colleagues in the practice of law, I

BY KARLISE Y. GRIER

In July 2025, a doctor told me she suspected I had uterine cancer. In September 2025, after having abdominal surgery and spending two nights in the hospital, I was diagnosed with Stage III uterine cancer. It sounded scary and it felt scary—especially then. As I understood my diagnosis in laymen's terms, I had an aggressive form of

cancer that was treatable since it had not metastasized. The doctors don't like to use the word "cure," but the hope is that they can treat this first appearance of cancer so it does not reoccur.

Initially, I tried to keep my illness to a close few because I did not want pitying looks or people thinking I was headed to

an early grave. Since I have no hair now, after usually having quite a bit of hair, secrecy is really impossible. As a result, I thought I would use this opportunity to discuss an aspect of A Lawyer's Creed and the Aspirational Statement on Professionalism from a personal viewpoint and to remind lawyers about the State Bar of Georgia's SOLACE Committee, of which I am a founding member.

One tenet of A Lawyer's Creed and the Aspirational Statement on Professionalism reads: "To my colleagues in the practice of law, I offer concern for your welfare. I will strive to make our association a professional friendship."¹ I've watched this tenet come to life for me in many different ways since I learned of my illness, but I want to highlight three in particular.² First, I was diagnosed after I had previously committed to moderating a professionalism CLE panel for the Solo and Small Firm Institute on Sept. 19, 2025, eight days after my surgery. I obviously could not fulfill the commitment. So, one of the first people I contacted about my illness was one of my former opposing counsels, Karen Brown Williams. I first got to know and admire Karen from watching her present at the Family Law Institute. Eventually, we had family law cases where we were counsel for opposing parties, and thereafter, we developed a "professional friendship." Earlier in the summer of 2025, we'd actually gotten together for a catch-up lunch before I



knew I'd need her help. The professionalism we both demonstrated when working through our clients' cases for them was the foundation of that professional friendship.³ We did not always agree about case resolution, and we were both, I believe, appropriately diligent, prepared and "zealous" (although I personally detest that word) on behalf of our clients. Our professionalism was the reason I could call on a former opposing counsel and get the help I needed when I needed it. Karen said yes without hesitation, and ensured the Sept. 19, 2025, professionalism panel ran smoothly without me.

After learning of my illness, I also made another call to a close personal friend, Cathy Scarver. I first met Cathy when I was a solo family law practitioner and she was a law student. One of her family members needed representation, and one of her law professors referred her

to me. I represented Cathy's family member, and along the way, Cathy graduated from law school and became a bankruptcy trustee and we moved from professional acquaintances to professional friendship to just good friends. I like to think the professionalism I displayed throughout my representation of her family member played a role in the development of that friendship. More importantly, since I sometimes see my former client about once a year when Cathy and her family come to the State Bar's Annual Meeting, I'm grateful and humbled to have a former client who values my work as their family law attorney highly enough that they welcome me when I hang out with their family.⁴ Can an attorney ask for anything better? Nor can a person ask for a better friend than someone who volunteers to pick you up from your home somewhere around 4:45 a.m. to get you to the hospital

by 5:30 a.m. Cathy also spent the day at the hospital with me while I was in surgery and was one of the first folks I saw in my hospital room after surgery. And this kindness grew out of my representation of a family law client whom I believe I represented with professionalism. Cathy's actions are another example of the aspect of professionalism of showing concern for the welfare of our colleagues.

A third call I made was to friend, former mentee and now also mentor, and former State Bar President Dawn Jones. Although Dawn has far surpassed me in her Bar work, she really was a former mentee. I initially met Dawn through my work with the Georgia Association of Black Women Attorneys (GABWA). I was one of several people to encourage Dawn to get involved with the State Bar of Georgia and to help introduce her to the "Annual Meeting." As president of GABWA in 2001, one of



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**When life
doesn't
make sense.**

The SOLACE program is designed to assist any member of the legal community (lawyers, judges, law office and court staff, law students and their families) in Georgia who suffer serious loss due to a sudden catastrophic event, injury or illness. Visit www.gabar.org/solace for more information, or email solace@gabar.org.

SOLACE
Support of Lawyers, All Concern Encouraged

my first assignments for Dawn, however, was to ask her to represent GABWA at a meeting that was being convened by then-Atlanta Bar Association president, Seth Kirschenbaum. Seth organized a meeting of a group of lawyers who later formed the Atlanta Bar's Multi-Bar Leadership Council. Dawn went to this initial meeting on behalf of GABWA, and her Bar career is now, of course, part of Georgia legal history. As an aside, please note that Dawn's service really highlights the tenet of A Lawyer's Creed, which says, "As a professional, I should ... [a]ssist in organized bar activities."³ Dawn has taken that professionalism tenet to a unique level all her own that even I have not been able to emulate. She, nevertheless, made time when I needed her—my former critical care nurse with her Masters in Nursing friend—to also come spend the day with me at the hospital on Sept. 11 while I was in surgery and to stay with me until I returned to my hospital room and met with my doctor after surgery. She also took me to my appointment two weeks later when I met with my doctor to review my pathology report and get my formal diagnosis. From mentee, to colleagues in Bar work, to mentor. It's another remarkable demonstration of what it means to show concern for a colleague in the practice of law and to live out a tenet of professionalism.

Thus far, I have been fortunate that I have received all that I have needed from my personal village. But, if I had needed to reach beyond my personal village, I am comforted to know that I could have done so with the help of the State Bar of Georgia's SOLACE Committee. So, I also want to take a moment to share about this Bar program. SOLACE stands for Support of Lawyers/Legal Personnel, All Concerned Encouraged. There may come a time when I may have a need that someone in my village cannot meet, and if and when that happens, I will call on SOLACE. Founded in Georgia under the leadership of former State Bar President Ken Shigley, SOLACE is designed

to assist those in the legal community who have experienced some significant, potentially life-changing event in their lives. The sole purpose of the program is to allow the legal community to reach out in meaningful and compassionate non-monetary ways to judges, lawyers, court personnel, paralegals, legal secretaries and their families who experience deaths or other catastrophic illnesses, sickness or injury. SOLACE is voluntary, simple and straightforward. SOLACE does not solicit monetary contributions but assistance or donations in kind. SOLACE has helped many Georgia lawyers, and is ready and willing to also help you should you need it. To learn more about SOLACE, visit the State Bar of Georgia's website.⁴ We are here for you!

I am not a Pollyanna, and admittedly not every lawyer who has been made aware of my circumstances has been kind, supportive or helpful. But 99.9999% of the Georgia lawyers who have learned of my illness have been *wonderful* and have embodied for me the meaning of professional friendship. I am so grateful to each and every one of them. Georgia lawyers have made this healing journey possible, and I appreciate you. In part, because of my Georgia lawyer professional friends, I am claiming for myself a "cure"—a full recovery. I, therefore, look forward to continuing to serve Georgia lawyers for many years to come.



Karlise Y. Grier
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Chief Justice's Commission
on Professionalism
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Endnotes

1. Chief Justice's Commission on Professionalism, *Lawyer's Creed, A Lawyer's Creed and the Aspirational Statement on Professionalism*, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> at lines 13-15 (last visited March 9, 2026).
2. Thank you to Karen Brown Williams, Cathy Scarver and Dawn Jones for proofreading this article and for giving me their permission to share these experiences with the members of the State Bar of Georgia.
3. As a result of emulating the professionalism ideal that follows, Karen and I developed a professional friendship. "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." Chief Justice's Commission on Professionalism, *Lawyer's Creed, A Lawyer's Creed and the Aspirational Statement on Professionalism*, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> at lines 6-9 (last visited March 9, 2026).
4. Perhaps, having a former client welcome you at their family gatherings is what is meant by: "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." Chief Justice's Commission on Professionalism, *Lawyer's Creed, A Lawyer's Creed and the Aspirational Statement on Professionalism*, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> at lines 145, 147 (last visited March 9, 2026).
5. Chief Justice's Commission on Professionalism, *Lawyer's Creed, A Lawyer's Creed and the Aspirational Statement on Professionalism*, <http://cjcpga.org/wp-content/uploads/2019/07/2-Lawyers-CreedAspStatement-v-2013-Line-Number-with-new-logo-and-seal-v07-25-19.pdf> at lines 145, 147 (last visited March 9, 2026).
6. State Bar of Georgia, Center for Lawyer Wellbeing, SOLACE, <https://www.gabar.org/programs/lawyer-wellbeing/mental-wellbeing/solace>.

Media Report

PUBLISHED ARTICLES 2026-2027

Publication	Letter Date	Letter Title	Circulation
Valdosta Daily Times	2026-07-30	Congratulations to Judge Burnham on Superior Court appointment	17,170
Moultrie Observer	2026-07-30	Congratulations to Judge Burnham on Superior Court appointment	6,199

