

Virginia State Bar 87th Annual Report

Annual Report
for the period
July 1, 2024 – June 30, 2025



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ADMINISTRATIVE / GOVERNING REPORTS

Report of the Executive Director/Chief Operating Officer Cameron M. Rountree

Membership

As of late-August 2025, the Virginia State Bar's (VSB's) active membership stood at 32,152 (-132, from early-August 2024). Associate membership included 13,480 (-141) additional lawyers, and there were 989 judges (+3).

Officers for 2024-2025

President: Michael M. York
President-elect: K. Brett Marston
Immediate Past President: Chidi I. James
Executive Director/COO: Cameron M. Rountree

Officers for 2025-2026

K. Brett Marston of the law firm Gentry Locke Attorneys, in Roanoke, was sworn in as the 87th president of the Virginia State Bar on Friday, June 13, 2025, to assume office on July 1, 2025. Brett is a current member of the Virginia State Bar Council and the Executive Committee. He has chaired the Legal Ethics Committee and the Construction Law Section and has served on the Professionalism Committee and the VSB Young Lawyers Conference Board of Governors.

He is his firm's managing partner and has extensive experience in construction contract negotiations and preparation, payment disputes, mechanic's liens, bond claims, construction defects, delay claims, insurance matters, and OSHA compliance. He handles significant construction matters in federal and state courts as well as arbitration and mediation for general contractors, subcontractors, owners, design professionals, and suppliers.

Brett was inducted as a Virginia Law Foundation Fellow in 2019. He has been a member of the Roanoke Bar Association since 1994 and has served in many roles, including as its president in 2006. He has received the Roanoke Bar Association President's Volunteer Service Award, Silver Level, for community service. Additionally, he received the Virginia State Bar R. Edwin Burnette Jr. Young Lawyer of the Year Award in 2004.

Brett is originally from Appomattox. He is a graduate of the University of Virginia and the George Mason University School of Law. He is married to Colleen Myers Marston and has two sons, Luke and William.

Susan B. Tarley of the law firm Tarley Robinson in Williamsburg was unopposed in filing a nominating petition with the VSB executive director on or before March 15, 2025. Therefore, in accordance with the Bylaws of the VSB, Part I, Article III, Sec. 3, she was elected at the June 2025 Annual Meeting as the next president-elect of the VSB for fiscal year (FY) 2026.

Sue has practiced law for 36 years, with a focus on common interest communities and commercial and residential real estate. She also served as a substitute judge for the Ninth Judicial Circuit for 18 years and as an adjunct professor at William and Mary Law School.

Throughout her career, Sue has held leadership positions in the community, the legal profession, and her practice area, serving on the boards of non-profit entities including the Avalon Center, the Williamsburg Bar Association, the Greater Peninsula Women’s Bar Association, and the Central Virginia Chapter of the Community Association Institute. At the VSB, Sue currently serves on the VSB Council representing the 9th Judicial Circuit and on the Executive Committee. Previously, she was chair of the Clients’ Protection Fund Board and co-chair of the Common Interest Community subcommittee of the Real Property Section.

In 2012, Sue was admitted to the College of Community Association Lawyers as an attorney who had distinguished herself through contributions to the practice of community association law. She was a member of the inaugural class of Virginia Leaders in the Law in 2006 and was inducted into the Virginia Lawyers Hall of Fame in 2023. Tarley was named a 2025 Virginia Law Foundation Fellow.

Michael M. York became the immediate past president of the VSB on July 1, 2025. Before becoming a lawyer, Mike was a Pulitzer Prize-winning journalist and investigative reporter who covered federal courts for The Washington Post. In 1994, he established his own law office, specializing in litigation for corporate plaintiffs and defendants, as well as individuals in high-profile cases. His litigation practice has included class action lawsuits, multi-billion-dollar verdicts, whistle-blower disclosures, and criminal investigations. Additionally, Mike maintains an active civil and white-collar criminal practice in both state and federal courts. His clients have included whistleblowers, media groups, journalists, and national organizations.

Executive Committee members FY 2025:

At-large members:

- Carole H. Capsalis
- Derek A. Davis
- G. L. “Rex” Flynn Jr.
- Daniel P. Frankl
- Ann Marie Park
- Susan B. Tarley

Ex officio members:

- Christine H. Mougín-Boal—Conference of Local & Specialty Bar Associations Chair
- Zaida C. Thompson—Diversity Conference Chair
- Thomas G. Bell Jr.—Senior Lawyers Conference Chair
- Benjamin A. Shute—Young Lawyers Conference President

Council updates for FY 2026

The following changes in the membership composition of Council occurred at the end of FY 2025:

New & re-elected members (for terms from July 1, 2025, to June 30, 2028)		Resigned or term-limited members	
2 nd	Steven G. Owen	2 nd	Naveed Kalantar
3 rd	Matthew R. Foster (2nd term)		
4 th	Charlene A. Moring (2nd term)		
4 th	Kristan B. Burch	4 th	Corrynn J. Peters
5 th	Sean P. Dolan (2nd term)		
6 th	Derek A. Davis (2nd term)		
9 th	Andrew J. Dean	9 th	Susan B. Tarley
12 th	Anne L. Roddy (new seat created)		
13 th	Carson A. Cox	13 th	Cullen D. Seltzer
13 th	Karissa T. Kaseorg	13 th	Gordon F. Willis, Jr.
15 th	Mackenzie K. Babichenko (new seat created)		
16 th	Ann Marie Park (2nd term)		
17 th	G. L. “Rex” Flynn Jr. (2nd term)		
17 th	David E. Sher (2nd term)		
17 th	Carole H. Capsalis (filled unexpired vacancy)	17 th	Adam F. Krischer
19 th	Robert B. Walker (2nd term)		
19 th	John E. Foster	19 th	Gary V. Davis
19 th	Brianna B. Weiner	19 th	Tamika D. Jones
19 th	Vacant	19 th	Susan M. Butler
20 th	Leslie Y. Barnes	20 th	R. Penn Bain
22 nd	Michael A. Nicholas	22 nd	W. Hunter Byrnes
23 rd	Kevin E. Holt (2nd term)		
24 th	Hope R. Townes (2nd term)		
26 th	Peter K. McDermott II (2nd term)		
27 th	W. Grant Back (2nd term)		
29 th	Bradley D. Fleming (2nd term)		
31 st	Seema D. Ruchandani	31 st	Anna B. Bristle
AL	D. Bradley Marshall	AL	David P. Weber
AL	Jacob R. Lambert	AL	Patricia E. Smith

Council Re-allocation—In accordance with Part 6, Sec. IV, Para. 5 of the Rules of Court, “Any circuit having as of the 1st day of February in any year more than 500 active members in good standing who are domiciled or principally practice their profession in such circuit shall be entitled to one additional member of the Council for each additional 500 members or major fraction thereof.” Pursuant to this Rule’s formula, at the start of FY 2026, the 12th and 15th Circuits were entitled to one additional Council member each. Conversely, there is an arcane procedure for reducing a circuit’s Council allocation from the baseline formula cited in the Rule above. However, such circuit seats will not be reduced unless they have exceeded the original allocation from the Rule’s inception in 2008 and subsequently fallen below the population necessary to sustain that allocation. For example, Circuits 2, 4, 13, 17, and 23 would all be reduced by one Council seat if the Rule were adhered to

strictly without the reduction caveat. Circuit 19 would be reduced by three seats. As none of these circuits have exceeded their baseline allocation from 2008 and subsequently fallen below the number of lawyers necessary to sustain that baseline allocation, there have been no changes.

VSB Strategic Plan Operationalization

The VSB Strategic Plan

Actions at the 2024 strategic planning retreat drove most of the substance during the fiscal year (FY) 2025 Council agenda. This important and fruitful event took place on April 25th and 26th in Winchester. There were 25 participants, including 12 hand-selected volunteers and 13 senior staff members. Chris Newbold, executive vice president of ALPS Corporation, facilitated the discussion. The agenda covered the following items:

- The State of the VSB
- Pre-retreat survey results
- Recalling our north star: The VSB mission
- Creating the roadmap – envisioning what success looks like in the next three years and identifying high level strategic goals
- With strategic goals identified, what will we do, and how will we measure success?
- Assessing the budgetary ramifications of strategic goals

The four-pronged plan that resulted from those discussions was for the VSB to:

1. Operate from a position of financial health;
2. Strengthen cohesion among members and advance pathways for service in the VSB;
3. Best serve members and advance solutions designed to navigate a changing legal landscape; and
4. Advance access to legal services for all Virginians.

Taking each in turn:

Financial health— Last year, in FY 2024, I utilized the Executive Director’s Column in Virginia Lawyer magazine to raise concerns about the profession that had implications for the VSB. The most prominent pertained to increased VSB operating costs and declining revenue due to an unchanged dues rate for the previous 24 years. I noted that VSB costs had risen considerably in the preceding five years, primarily due to four “STIR” factors: S-alaries, T-echhnology, I-nflation, and R-ent.

As a service-providing agency, staff salaries and benefits represent 72% of VSB expenditures. Although these expenses have increased appreciably, the last revenue change occurred in 2000, when dues reached their statutory maximum. Before that, in 1995, the General Assembly enacted Va. Code § 54.1-3912 that limited VSB member dues to \$250 per year. Since 2000, this has meant that the VSB has absorbed a cumulative 56.5% increase in staff salaries and benefits without a corresponding increase in the dues rate. As a non-general fund agency, legislatively enacted raises for Commonwealth employees (which are critical to retaining talent) have depleted the stagnant value of dues dollars. Unlike most of the judiciary and the entirety of the legislative and executive branches, these raises are not met with concomitant legislative appropriations. For example, recently enacted raises totaling 20% from 2021 to 2024 have equated to more than \$1.7M of additional labor expenses that were required to be funded with existing VSB revenue.

Dues revenue has not just remained stagnant; its present-day value has declined due to an 82% increase in inflation since July 2000. Even disregarding the impact of salary and benefit increases, the VSB’s purchasing power is greatly reduced compared to 2000. This is material regarding the VSB’s

expenditures on travel reimbursements, vendor services, lodging costs, venue fees, food, paper, postage, supplies, and other related expenses. In real terms, this means the VSB is operating with slightly more than half the dues dollars (\$0.55) it generated in 2000. As a useful benchmark, if VSB dues from 2000 kept pace with inflation alone, they would have been approximately \$454 as of 2024.

The VSB implemented cost-saving measures to reduce expenditures. However, inflexible expenses, such as salaries and benefits, information technology costs, rent, and credit card processing fees, account for approximately 83% of VSB expenditures; thus, other reductions, while helpful, are less significant. The net result is that the VSB has drawn down its reserve fund over the last three years and is expected to continue doing so for the foreseeable future.

This became an important subject during the strategic planning retreat, and the Council and staff acted.

In FY 2025, the first action to address these concerns came when Council voted in support of an amendment to Part 6, Sec. IV, Paragraph 19 of the Rules of Court to restore delinquent fees (the penalty imposed on lawyers who fail to timely complete the five annual regulatory requirements—dues payment, professional liability insurance certification, attorney wellness fund payment, the clients’ protection fund payment, and IOLTA certification) to their pre-pandemic levels. As background, in 2020, the VSB, *sua sponte*, sought to alleviate the financial burden on lawyers who made delinquent payments during a period of unusual turmoil in law-related business operations caused by the COVID-19 pandemic. The request was to halve the penalty, and the Supreme Court ultimately approved it on April 28, 2021. At its October 2024 meeting, Council approved a proposal to increase the penalty from \$25 per delinquent certification/payment to \$50 per delinquent certification/payment, as it was in 2020 and before. The effort sought to increase revenue and reduce the level of VSB reserve funds utilized to meet increased operational expenses exacerbated by the S-T-I-R factors. The proposal to revert the penalty to \$50 per violation was approved by the Supreme Court in January 2025, with an effective date of March 17, 2025.

To further address the long-term financial realities, in FY 2025, VSB staff developed a multi-step approach to rectify the ongoing deficits through increasing dues revenue. This plan included:

- The VSB is soliciting public comments regarding its engagement in legislative activity to amend Va. Code § 54.1-3912 (March 2025).
- Council recommending that the Supreme Court approve VSB legislative activity concerning the statutory cap (June 2025).
- Supreme Court approving legislative activity (estimated August 2025).
- VSB petitioning the General Assembly to amend the Code of Virginia (estimated 2026 session).
- General Assembly amending Va. Code § 54.1-3912 and Governor signing bill (estimated late April 2026).
- VSB is soliciting public comments on amending the provision in Part 6, Sec. IV, Para. 11 regarding the prohibition on raising dues unless the reserve fund balance is less than 15% of the previous year’s operating expenditures (estimated June 2026).
- VSB is soliciting public comment about amending the provision in Part 6, Sec. IV, Para. 11

setting VSB dues at \$250 (estimated June 2026).

- Council recommending that the Court amend both provisions of Part 6, Sec. IV, Para. 11 (estimated October 2026).
- Court approving amendments to Part 6, Sec. IV, Para. 11 (estimated December 2026).
- Dues increase, effective for FY28 (for dues paid from June to July 2027).

As of the date of this report, the VSB has executed the first two steps of the plan and is cautiously optimistic that the remainder is on track to address the first prong of the strategic plan.

Cohesion among members— On this front, in the summer of 2024, the VSB hired a new Deputy Director of Bar Programs and Engagement (renamed from the Bar Services Department), Megan Connor, who has focused on increasing member engagement. Additionally, the Bar Programs and Engagement Department undertook a reorganization of Committees, Sections, and Conferences to increase cross-collaboration among interrelated volunteer entities and assign staff liaisons accordingly.

Serving members in the legal landscape—With respect to this prong of the strategic plan, it is well understood that the future of the practice is changing. From where lawyers practice to how they practice, the profession is undergoing a sea change that rivals (and may eclipse) the use of computerized legal research over a generation ago. Generative Artificial Intelligence (AI) has driven much of this transition. In addition to efforts by the Virginia Bar Association, the VSB took steps consistent with this aspect of the strategic plan.

For example, the Technology and Future Practice of Law (TFPL) Committee undertook an initiative to conduct more frequent engagement opportunities, including training, throughout the year. The TFPL Committee also assumed responsibility for the annual VSB Tech Show to maximize efficiency and ensure the longitudinal priorities of the TFPL Committee are incorporated into this valuable learning opportunity. Relatedly, at the end of the FY, the Legal Ethics Committee proposed Legal Ethics Opinion (LEO) 1901, providing advice to practitioners about the ethical billing practices associated with the use of AI. This LEO was pending with the Supreme Court as of the publishing of this report.

Moreover, even while facing financial headwinds, the VSB has expanded relevant regulatory tools to help Virginia practitioners. Thanks to Council’s adoption of a resolution in support of providing free trust accounting software to all members, effective October 22, 2024, this service became available. The software, called “Smokeball Bill,” is a tool to assist especially solo and small firms in complying with the Rules of Professional Conduct on billing and trust accounting obligations. As of the publishing of this report, hundreds of lawyers/firms had enrolled.

Advancing access—In March 2024, then-VSB President Chidi James appointed a Study Committee, called EGAD-VA (Entry Growth and Distribution of Virginia Attorneys), to engage stakeholders in considering the long-term strategic concerns about the number of lawyers being admitted to the profession in Virginia and where they are deciding to practice. This dual interest, admissions and distribution, was an intense focus of EGAD-VA in FY 2025.

EGAD-VA engaged members of the practice throughout the Commonwealth to identify the source of the declining number of lawyers practicing in Virginia overall and, most acutely, in “legal deserts.” EGAD-VA held several meetings of the Study Committee itself, as well as with members and the public, in eight field hearings to engage lawyers, academics, local government officials, and legal consumers. Additionally, VSB President Mike York and EGAD-VA Chair David Neumeyer held

discussions with all eight deans of Virginia’s law schools. Furthermore, President Mike York, President-elect Brett Marston, and I met with Virginia Board of Bar Examiners (VBBE) President Brian K. Jackson and Secretary and Treasurer Catherine Crooks Hill to learn more about the bar exam and common misconceptions. Finally, EGAD-VA conducted four surveys of all attorneys, attorneys in legal deserts, law students, and chief judges of General District and Circuit courts to learn about topics ranging from local attorney volumes and related impacts on the courts and the public to perceptions about the Virginia bar exam. EGAD-VA anticipates publishing its comprehensive report, including findings and recommendations, in mid-FY 2026.

VSB OFFICE, STAFFING AND ORGANIZATIONAL CHART

VSB Hearing Room

Thanks to the tremendous work of the VSB Facilities and IT staff, as well as the Clerk’s Office, the VSB Hearing Room became operational in FY 2025. On October 30, 2024, the VSB held a ribbon-cutting ceremony for the new space and, in a surprise announcement, named it in honor of VSB past president and executive director, Karen A. Gould. Attended by many past presidents, the ceremony was a surprise to Karen and an appropriate recognition of her decades of service to the VSB and her efforts in conceiving the transformation of the previously underutilized storage space. Not only was the first disciplinary hearing held in the new Karen A. Gould Hearing Room on January 24, 2025, but the Court of Appeals of Virginia also heard oral arguments in it on August 12, 2025 —a true testament to the work that brought the vision to fruition. Besides specific furniture and fixtures unique to the VSB’s needs, this renovation was funded with tenant improvement allowances provided by the landlord in the 1111 East Main Street office after the VSB renewed the lease in the fall of 2023.

Staffing

Although it abated considerably in FY 2025, the VSB continued to experience some staff turnover.

The following lists changes in salaried employment for FY 2025. Notably, full-time employees (FTEs) were below the budgeted number, representing a near all-time low in the ratio of staff to active and associate membership. At the end of FY 2025, there was one VSB staff member for every 518 dues-paying members (45,632 active and associate members/88). By comparison, this ratio was 1:405 in July 2000.

- Sara Madren (legal assistant) hired 07/10/2024
- Patricia Jackson (paralegal) hired 07/17/2024
- Thomas Callahan (legal assistant) separated 07/08/2024
 - Claire Lesman hired to replace Thomas 07/30/2024
- Jessica Beatty (assistant bar counsel) hired 10/01/2024
- Maureen Stengel (director of Bar Services/ later changed to Bar Programs & Engagement) retired 09/30/2024
 - Mallory Ralston (meetings coordinator) promoted to replace Maureen 09/10/2024
 - Megan Connor hired as deputy director of Bar Programs & Engagement to replace Mallory, 11/10/2024
- Paulette Davidson (meetings coordinator) retired 10/31/2024
 - Pamela Flynn hired to replace Paulette 10/25/2024
- Joshua Wysor (investigator-SWVA) separated 09/09/2024
 - Alfredo Ferrer hired to replace Joshua 11/10/2024
- Barbara Saunders (assistant ethics counsel) retired 12/31/2024
 - Diane Ferguson hired to replace Barbara 11/10/2024
- Courtney Noctor (information and records manager) separated 01/31/2025

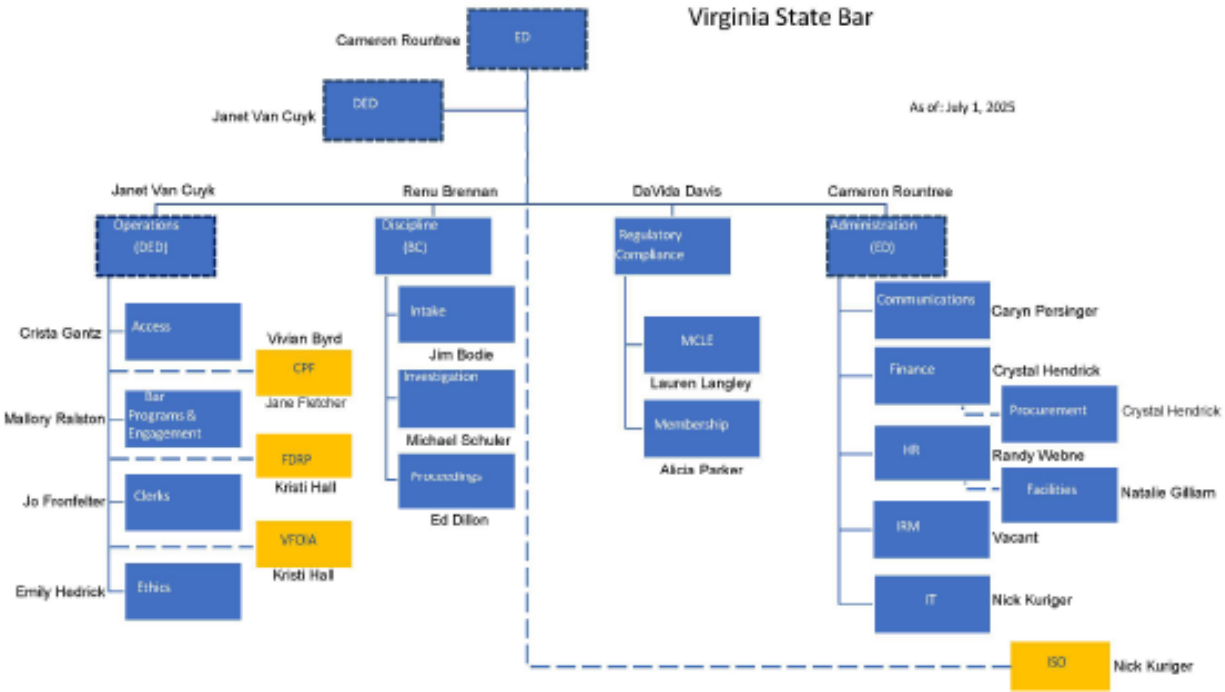
- Dee Norman (deputy director of communications) separated 03/28/2025
 - Cort Olson hired as legal editor to replace Dee 04/21/2025
- Dolly Shaffner (meetings coordinator) retired 03/31/2025
 - Jordan Harris hired to replace Dolly 04/01/2025
- Dorian Dalton (assistant ethics counsel) separated 04/09/2025
- Jennifer Ramos (assistant clerk) hired 04/25/2025
- Malik Glaspie (regulatory compliance analyst) separated 05/30/2025
- Kimberly Karnes (meetings assistant) separated 06/09/2025

Positions filled as of June 30, 2025: **88** (-0 compared to end of FY 2024)

FTE budgeted for FY25: **92**

FTE budgeted for FY26: **91**

Virginia State Bar Organizational Chart



Rule Changes and LEOs

The following were notable Rule changes and Court Orders entered this year:

- In January 2025, and effective March 17, 2025, the Supreme Court approved a petition submitted by Council after its October 2024 meeting to amend Part 6, Sec. IV, Paragraph 19 of the Rules of Court to restore delinquent fees to their pre-pandemic levels.
- In April 2025, and effective July 1, 2025, mindful of the financial strains on the VSB and the use of VSB dues to support them, the Court ordered the VSB to convert the four Conferences (the Conference of Local and Specialty Bar Associations, the Diversity Conference, the Senior Lawyers Conference, and the Young Lawyers Conference) into Sections. As such, they will no longer be eligible to receive VSB operating funds except for Council/Court-approved functions.
- In May 2025, and effective July 15, 2025, the Supreme Court approved amending RPC 1.5(g), making clear that non-refundable advanced fees are prohibited. The Legal Ethics Committee proposed the addition of paragraph (g) to Rule 1.5, which directly addresses the issue of non-refundable advanced legal fees. This addition codifies the prohibition of nonrefundable advanced fees, reiterating the conclusions in Legal Ethics Opinion (LEO) 1606 (1994; approved by the Court on November 2, 2016).
- In May 2025, and effective July 15, 2025, the Supreme Court approved amending RPC 6.5, clarifying that a program to provide court-appointed counsel at first appearance and/or same-day bail hearings in criminal cases is within the scope of the rule and that a lawyer is not required to conduct a conflict check before providing the short-term limited legal services.

- In May 2025, and effective July 15, 2025, the Supreme Court approved amending Part 6, Sec. IV, Paragraph 3(f) concerning the Emeritus class of membership. The Access to Legal Services Committee proposed amendments to Rule 3(f) Emeritus Class of Membership. This rule expanded the eligibility criteria for emeritus membership in the Virginia State Bar (VSB) to increase the number of experienced attorneys providing pro bono legal services to underserved communities. It eliminates the requirement for recent active practice and reduces the duration of required active practice from 20 years to 10 years. Additionally, it broadens the definition of "Qualified Legal Services Provider" to align with Rule 6.1 of the Virginia Rules of Professional Conduct, enabling emeritus attorneys to assist a wider range of pro bono clients beyond those strictly defined as "poor or working poor."

Report of the President

Michael M. York

Serving as the 86th President of the Virginia State Bar was easily the most rewarding experience of my professional life. I was sworn in by Chief Justice S. Bernard Goodwyn — a full month before my term officially started — during our 2024 Annual Meeting that coincided with a rocking, extreme sports festival at Virginia Beach. Our top-floor hotel room was a perfect place to watch JACKALOPE base jumpers launching off and aiming for a bull’s-eye on the beach below.

Like those JACKALOPE jumpers, I aimed to hit the mark in my year as VSB president as I traveled across the Commonwealth and beyond, representing our 55,000 members, celebrating our profession’s achievements, and confronting some of the difficult challenges we face together. It was an honor of a lifetime and a privilege to have had the opportunity to meet and befriend so many in our judicial system, whom I would have probably never known otherwise.

The year was busy – very busy. Our executive director, Cameron Rountree, wrote in his *Virginia Lawyer* column that I attended “a staggering 102 engagements.” That number sounded way too high, but then I discovered he may have missed a few.

My goals for the year: to shine a light on professionalism and civility in the practice of law, to strengthen the Bar’s financial and organizational footing, and to support creative, bold approaches to expanding access to justice in every corner of Virginia.

While the real thanks for our progress goes to the work of our dedicated staff, the commitment of our Executive Committee and Bar Council, and the leadership of lawyers and judges across Virginia, I did my best to put a personal face on our profession. These efforts included:

- Supporting the **Entry, Growth, and Distribution of Virginia Attorneys (EGAD VA) Study Committee**, created by my predecessor, Chidi James, to address the shortage of lawyers in underserved communities, a problem commonly known as “legal deserts.”
 - EGAD Committee Chair David Neumeyer and I talked with deans at Virginia’s eight law schools. The panel held eight joint hearings across the Commonwealth with the Supreme Court’s Access to Justice Commission. Special thanks to VSB staffer Crista Gantz for her work on this effort. That work is ongoing, and I am confident the recommendations will be bold and far-reaching.
 - As part of our EGAD outreach, I spoke at the 2024 Virginia Alliance of Paralegal Associations (VAPA) Biennial Education Conference in Charlottesville, and with David Neumeyer, conducted a CLE program for the Paralegal Association of Northern Virginia.
 - Took part in a free CLE at the 2025 Annual Meeting on EGAD VA efforts to date. The committee will soon deliver its recommendations to the Council. Already, we have seen important steps forward, such as the Virginia Board of Bar Examiners’ decision to adopt the NextGen Bar Exam beginning in 2028, which should encourage more law graduates to sit for the Virginia exam and practice here.
- Focusing on the Bar’s **need to restore financial stability** and operate from a position of financial health. Throughout my presidential year, I talked with many groups about the Bar’s finances, noting there has not been a Bar dues increase in more than 25 years. The Supreme Court of Virginia (SCV) has green-lighted the VSB to explain the proposal to General Assembly members. We could see action by the General Assembly during the 2026 session.

- In what it called a budgetary move, the SCV issued an order in April 2025 directing the VSB to reconfigure its four VSB-funded conferences into four new self-supporting sections: Diversity, Young Lawyers, Senior Lawyers, and the Local and Specialty Bar. While the change was not our choice, I will continue to do all I can to create the necessary environment to grow these sections into vibrant centers of engagement for lawyers across generations and backgrounds.
- Welcoming and educating newly admitted lawyers and relocating to Virginia about the VSB, ethics, professionalism, and civility at the **VSB Harry L. Carrico Professionalism Courses** in Fairfax, Richmond, Charlottesville, and for the first time in Virginia Beach during the Annual Meeting, along with Judge David Lannetti, and a host of exceptional volunteer faculty members. VSB's Maureen Stengel, who spearheaded the Course for some 35 years, retired in October 2024, and Megan Connor, hired as the Deputy Director, Bar Programs & Engagement, now leads this important program.
- Addressing newly admitted lawyers to Virginia by speaking at two **Admission & Orientation ceremonies** at the Greater Richmond Convention Center along with Chief Justice Goodwyn, Virginia law school deans, YLC President Benjamin Shute, event co-chair Kerrigan O'Malley, representatives from Virginia Judges and Lawyers Assistance Program, and greeting Gov. Glenn Youngkin at the December session. VSB staff liaison Pamela Flynn, a new staff member, made those events run smoothly.
- Promoting the Virginia Lawyer Referral Service (VLRS), with VSB staff liaison Toni B. Dunson. Participating in the **42nd Annual Disciplinary Conference**, with keynote speaker Virginia Supreme Court Justice Cleo Powell, along with Chair Melissa Robinson, and VSB liaisons, Bar Counsel Renu Brennan and Deputy Bar Counsel Ed Dillon.
- Launching in October 2024, **free legal billing and trust accounting software** on the VSB website that offers members a tool with real potential to reduce errors and safeguard lawyers and clients.
- Hosting Ribbon-cutting Ceremony for the new **Karen A. Gould Hearing Room** at VSB Offices to be used for disciplinary hearings, etc., honoring former Executive Director and VSB President Gould.
- Introducing the **VSB Young Lawyers Conference Annual Bench-Bar Dinner** keynote speaker, the remarkable Alicia Roberts Johnson, retired chief judge of the Richmond Juvenile & Domestic Relations Court, and attending the Williamsburg event to honor new and elevated members of the Virginia judiciary, along with YLC President Shute, Dinner Co-Chairs Jordan LaPointe and Rambert Tyree, and University of Richmond School of Law's Black Law Students Association President Kathryn Threatt. VSB staff liaison Mallory Ralston.
- Attending the **5th Annual Diversity Conference Forum** at Virginia Union University, with a welcome address by former governor, the Hon. L. Douglas Wilder, event co-chairs Candace Blydenburgh and Tammy Currie, Diversity Conference Chair Zaida Thompson, and VSB staff liaison Nancy Donner.
- Welcoming participants to the **10th Annual VSB Tech Show**, held virtually for the fifth year, with co-chairs Michael Maschke and Chris Fortier, and remarks by Supreme Court Justice Thomas Mann.
- Participating in the programs of the **VSB Conference of Local and Specialty Bar Associations (CLSBA)**, led by Chair Chris Mouglin-Boal, including the **Solo & Small-Firm Practitioner Forums** serving on panels with VSB Executive Director Cameron Rountree in Smithfield, along with Chief Justice Goodwyn, and in Charlottesville, with Court of Appeals Chief Judge Marla Decker; and the **Bar Leaders Institute** in Richmond with keynote speaker Supreme Court Justice D. Arthur Kelsey. Longtime VSB staff liaison Paulette Davidson retired in October 2024, and Nancy Donner is now coordinating the forums.
- **Accepting invitations to attend/speak to local bar associations or their leaders:**
 - Alexandria Bar Association – President Xue Connelly

- Northern Neck Bar Association – President Beth Hurd
- Virginia Women Attorneys Association / Loudon County Chapter – President M. Ella Russell
- Roanoke Bar Association – President Amy Hansen Geddes; also took part in Roanoke Bar Foundation Annual Santa at the Station with VSB President-elect Brett Marston
- Culpeper Term Day Luncheon — Invited by Circuit Judge Dale B. Durrer to speak to lawyers/judges
- Newport News Bar Association – President Jordan Heath and Bar Council member Patrick Murphey
- Charlottesville Albemarle Bar Association – Met with local bar leaders, President Greg Johnson and incoming President Amy Pruet
- Eastern Shore Bar Association – Met with local bar leaders, President Jack A. Thornton, III (Commonwealth’s Attorney/Northampton County), and John Custis in Wachapreague
- **Accepting invitations to attend voluntary bar association meetings:**
 - Virginia Bar Association 185th Annual Meeting in Williamsburg, where VBA President Ryan Snow presented Chief Justice Goodwyn with the Gerald L. Baliles Distinguished Service Award, a VBA-commissioned portrait of Supreme Justice Teresa Chafin was unveiled, and new 2025 VBA President Kimberlee Ramsey was installed.
 - Old Dominion Bar Association 85th Annual Meeting opening session in Virginia Beach led by ODBA President G. Rex Flynn Jr.
- **Observing the 50th Anniversary of the Virginia Law Foundation (VLF)** by presenting with Cameron Rountree a VSB proclamation to VLF President Colleen Quinn at its 2024 Grant Recipient Luncheon and attending the VLF 50th Anniversary Gala at the Jefferson Hotel, its annual Rule of Law Event, and the annual Fellows Induction Dinner in Williamsburg, led by new VLF President Stephen E. Noona.
- **Celebrating May 1 Law Day with**
 - The Virginia Mountain/Valley Lawyers’ Alliance (CLSBA-affiliated group) by attending its spring meeting in Staunton as the Luncheon Law Day speaker with President Ilise Feitshans and President-Elect and Executive Director John Koehler.
 - The Law Day Weiner Roast, a Fairfax Law Foundation fundraiser by Weiner, Spivey & Miller, PLC. Fairfax Circuit Court Chief Judge Penney S. Azcarate led lawyers in reaffirming their oath.
- Emceeding the **2024 VSB Pro Bono Conference** celebration/awards dinner in Williamsburg, held in conjunction with the Annual Statewide Conference for Virginia’s Legal Aid Community, with keynote speaker Supreme Court Justice Stephen R. McCullough. Awards to David Neumeyer (Virginia Legal Aid Award) and Bryan Slaughter (Lewis F. Powell Jr. Pro Bono Award). VSB staff liaison Cris Gantz, and special thanks to VSB’s Natalie Gilliam and DaVida Davis.
- **Attending National Bar meetings** with VSB President-Elect Brett Marston and ED Rountree, including:
 - ALPS Bar Leaders Retreat, a biannual event in Missoula, Montana, along with other Presidents and President-Elects from 15 other states
 - American Bar Association (ABA)/National Conference of Bar Presidents (NCBP) annual summer and mid-year meetings in Chicago and Phoenix
 - Southern Conference of Bar Presidents (SCBP) in Jackson, Mississippi, along with VSB Immediate Past President Chidi James
- **Taking part in special programs/events, including:**
 - **“Constitution Day: Free Elections and the Rule of Law”** at the University of Virginia, welcoming and introducing ABA Immediate Past President Mary Smith.
 - **National Client Protection Organization Meeting** in Virginia Beach – Delivered a

welcome to representatives of 16 states' client protection organizations. VSB staff liaison Vivian Byrd.

- **The 23rd Jazz4Justice concert** in Fairfax, the brainchild of former VSB President Edward Weiner and his wife Maura, is one of eight such events in the state benefiting legal aid and music education.
- **Noting vivid reminders of our Commonwealth's legal history:**
 - Attending and making brief remarks after a remarkable special court session in Culpeper, convened by Circuit Judge Dale Durrer, who granted a request from prosecutor Russell L. Rabb III to **declare innocent three African American men who were lynched in the 19th and early 20th centuries** — local historian Zann Nelson spent 20 years researching the cases and pestering officials. The hearing was covered by *The Washington Post*.
 - **Hosting leaders of Virginia's tribal nations** and the ABA's first Native American woman president at our 2025 Bar Council dinner at the Virginia Museum of Fine Arts (VMFA), with a welcome from VMFA President and Nottoway Chief Lynette Allston and invocation by Chickahominy Chief Stephen Adkins. At our March Council meeting, Chief Frank Adams introduced us to his Upper Mattaponi's new tribal court—the first of its kind in Virginia and on the East Coast. The VSB also offered a special CLE on tribal law at the 2025 Annual Meeting.
 - Helping commemorate the **70th anniversary of the *Brown v. Board of Education*** decision in a special event at the Library of Virginia. Virginia Supreme Court Justice Cleo Powell, former Justice William Mims, Richmond lawyer George Martin, former Gov. Bob McDonnell, and former Attorneys General Mark Earley and Mark Herring shared their stories of how far we've come as a legal community and still must go.
- **Engaging with law students was among the highlights of my year, where I saw a wealth of talent, diversity, and enthusiasm, including:**
 - During Liberty Law's 20th anniversary celebration in 2024
 - Judging law students at the 54th Annual William B. Spong Jr. Invitational Moot Court tournament hosted by William & Mary Law School
 - Appalachian School of Law luncheon talk for students and dinner with honor students and faculty
 - Regent School of Law talks with students
- Learning from the VSB Section, Conference, & Committee Chairs at the Fall meeting.
- Networking with judges “off the bench” at the Judicial Conference of Virginia in Williamsburg, hearing Chief Justice Goodwyn's “State of the Judiciary”; participating in VSB Bench-Bar Relations Committee meetings; and attending biannual Federal 4th Circuit Judicial Conference in Charlotte, North Carolina.
- Attending the 13th Annual Past Presidents' Dinner, hosted by Immediate Past President Chidi James, who recognized VSB Past President Jon Huddleston for starting the event. The support and input from all past VSB Presidents were invaluable during my term — especially Jay Myerson, with whom I've shared office space in Reston for more than 25 years.
- Hosting Council dinners and chairing meetings of the Executive Committee and Bar Council in Williamsburg, Richmond, and Virginia Beach, as well as a virtual EC meeting. Thanks to Bar Council leaders for your wisdom and willingness to tackle hard issues. **Special thanks to 2024-25 Executive Committee Members** Carole Capsalis, Derek Davis, G. L. Rex Flynn Jr., Daniel B. Frankl, Ann Marie Park, Susan B. Tarley, President-elect Brett Marston, Immediate Past President Chidi James, CLSBA Chair Christine Mouglin-Boal, Diversity Chair Zaida Thompson, Senior Lawyer Chair Thomas Bell Jr. and Young Lawyers President Benjamin Shute as well as Standing Committee on Budget and Finance Chair Lonnie D. “Chip” Nunley, III and VSB Finance Director Crystal Hendrick.
- Taking part in Better Annual Meeting (BAM) committee and subcommittee meetings, along

with Chair Eva Juncker and VSB staff liaisons Maureen Stengel, Dolly Shaffner, and Mallory Ralston.

- Presiding over our successful **June 11-14, 2025, VSB Annual Meeting** in Virginia Beach with more CLE offerings than ever before and new events such as an outdoor Opening Reception, a Movie on the Beach, and Casino Night following the installation of our 87th President, Brett Marston. Congrats to the new Director, Bar Programs & Engagement, Mallory Ralston, and her team for an outstanding meeting, and to Communications Director Caryn Persinger and staff for covering the numerous events.
 - A highlight was celebrating those Virginia attorneys with **50 Years of Service** at a special brunch hosted by the Senior Lawyers Conference, led by Chair Thomas Bell Jr. A change this year: VSB now awards 50-year service awards to lawyers who may have begun in another jurisdiction but have at least 25 years as a member of the VSB. VSB staff liaison Nancy Donner.
- Joining VSB staff meetings/luncheons organized by Human Resources Director Randy Webne to recognize staff for their years of service and promotions. We sadly said goodbye to some favorite longtime staffers who interacted with our members through bar services, including Maureen Stengel, Paulette Davidson, and Dolly Shaffner, as well as *Virginia Lawyer* Editor Dee Norman, who patiently edited my President's columns and took our family photo for the August 2024 cover.

The VSB is an agency of the Supreme Court, and let me express my deep gratitude for the service of Chief Justice Goodwyn, who announced his retirement as of Jan. 1, 2026. His career has been defined by wisdom, humility, and a steadfast commitment to the rule of law. His leadership has strengthened the judiciary and inspired generations of lawyers.

I am deeply grateful to the VSB staff, led by Cameron Rountree and Deputy ED Janet Van Cuyk, whose dedication and professionalism make everything possible. My special thanks go to Cameron's executive assistant, Shawne Moore, whose steady hand and kindness were a constant support.

To Immediate Past President Chidi James, thank you for your friendship and your vision in creating EGAD VA. And to my successor and friend, Brett Marston, I pass the baton with confidence, knowing your "Can Do" attitude will make a difference. I look forward to serving as the Bar's Immediate Past President and also supporting our incoming President-Elect, Sue Tarley of Williamsburg.

One final note of thanks to two committees I served on over the years that played key roles in my year as president: the Standing Committee on Legal Ethics and the Judicial Candidate Evaluation Committee. The committee members are seldom recognized, but their work is crucial to our core missions, especially protecting the public.

And special thanks to my wife and managing partner, Becky Todd York, and our family for their support.

Report of the Treasurer

VIRGINIA STATE BAR CASH WITH THE TREASURER OF VIRGINIA AS OF JUNE 30, 2025

Cash with the Treasurer of Virginia as of June 30, 2024:		6,287,227.89
Revenue:		
Membership Dues	10,380,194.50	
Clients' Protection Fund Assessment & Restitution	173,931.37	
Professional Corporations	140,250.00	
Section Dues	344,015.00	
Virginia Lawyer and Virginia Lawyer Register	54,493.61	
Virginia Lawyer Referral Service	623,782.53	
Mandatory Continuing Legal Education	1,755,400.00	
Professionalism Course	246,995.00	
Cost Taxing & Bonds	72,999.49	
Seminars and Miscellaneous	154,087.09	
RESA Registration	17,460.00	
Administration and Finance Account	90,470.00	
Grant Revenue	15,000.00	
Attorney Wellness Fund Fee Not Transferred	30.00	
Total Operating Revenue		14,069,108.59
Expenditures:		
Salaries, Wages and Benefits	10,935,502.83	
Receivers	141,286.78	
Office Rent	473,170.65	
Furniture and Equipment	11,550.20	
Supplies, Stationery and Forms	18,683.79	
Printing and Copying	195,025.04	
Postage	202,520.63	
Communication Technology	64,967.89	
Staff Travel	64,500.67	
Computer	782,018.15	
Council, Committees and Board	351,181.47	
Professionalism Course	97,429.17	
Sections & Conferences	406,705.02	
Attorney General's Office Fees	13,041.03	
Chief Justice's Programs and Projects	33,497.75	
Other Operating Expenditures (a)	579,837.44	
Office Renovation	88,791.26	
Grant Expenditures	8,012.77	
Total Operating Expenditures		14,467,722.54
Other Disbursements and Transfers:		
Administration and Finance Account Transfers		90,375.00
Clients' Protection Fund Transfers		173,971.37
Cash Transfer		120.00

Total Other Disbursements and Transfers _____ **+264,466.37**

Cash with the Treasurer of Virginia as of June 30, 2025: _____ **5,624,147.57**

(a) Other Operating Expenditures: Dues, Subscriptions & Training - 75,635.89, Office Insurance - 15,512.00, Repairs - 18,441.95, Advertising - 9,590.84, Other Contractual - 376,056.76 (259,784.64 of Other Contractual are credit card processing fees), Online Legal Research - 84,600.00

Report of the Office of Bar Counsel

Renu M. Brennan, Bar Counsel

I. DISCIPLINARY STATISTICS — FY 2025 (July 1, 2024–June 30, 2025)¹

There were 32,517 active lawyers in Virginia. The Bar received 3,340 Bar complaints. Complaints increased 11% compared to July 1, 2023 through June 30, 2024.

Roughly 70% of the 3,340 Bar complaints were screened out early in the review process. Approximately 11% were dismissed after an Informal Investigation. The disciplinary statistics reflect that 441 cases were dismissed by Bar Counsel, the Subcommittees, a District Committee, the Disciplinary Board, and a Circuit Court. One hundred and five (105) lawyers received private (35) or public (70) discipline. Of the 70 lawyers publicly disciplined, 31 lawyers received public reprimands or admonitions; 30 lawyers' licenses were suspended; and 9 lawyers' licenses were revoked.

Recent disciplinary actions can be accessed on the [VSB website](#).

DISMISSALS AND SANCTIONS STATISTICS INFORMATION FOR FY 25

Number of cases dismissed in house by Bar Counsel	323
Number of cases dismissed by Subcommittee/District Committee	97
Number of cases dismissed by Board	5
Number of cases dismissed by Circuit Court	1
Number of lawyers who received private discipline – Admonition	17 (19) ²
Number of lawyers who received private discipline – Reprimand	18 (18)
Number of lawyers who received public discipline - Admonition	3 (3)
Number of lawyers who received public discipline – Reprimand	28 (31)
Number of lawyers who received public discipline - Suspension	30 (37)
Number of lawyers who received public discipline - Consent to Revocation	4 (5)
Number of lawyers who received public discipline – Revocation	5 (10)

¹ The Fiscal Year Statistics are provided by the Virginia State Bar Clerk's Office. The Clerk's Office's number of complaints received is slightly lower than Bar Counsel's because Bar Counsel includes complaints received, but not yet entered into the disciplinary database, as of June 30, 2025. Additionally, the Clerk's Office does not include cases decided but where an appeal is pending, nor does it include cases which have not been administratively closed. As a result, the Public/Private Discipline sanction numbers in Section II of this report do not match the Public/Private Discipline numbers in Section I of this report.

² Number of respondents (number of cases)

PUBLIC/PRIVATE DISCIPLINE (JULY 1, 2024, TO JUNE 30, 2025)³

Public Discipline – 814, five cases on appeal as of 6/30/25.	Private Discipline – 36
Diligence/Competence/Communication – 21	Diligence/Competence/Communication – 15
Dishonesty – 12	Trust Accounting/Safekeeping Property – 11
Safekeeping Property – 11	Fees - 2
Terms Violations – 9	Misconduct – 1
Conflict of Interest – 5	Conflict of Interest – 1
Criminal or Deliberately Wrongful Conduct – 4	Bar Admission and Disciplinary Matters – 1
Fees – 4	Communication with Persons Represented by Counsel – 1
Reciprocal – 4	Meritorious Claims and Contention – 1
Fairness to Opposing Party and Counsel – 4	Fairness to Opposing Party and Counsel, Candor Towards Tribunal – 1
UPL – 2	Confidentiality of Information – 1
Bar Admission and Disciplinary Matters – 1	Professional Independence of a Lawyer – 1
Additional Responsibilities of a Prosecutor – 1	
Scope of Representation – 1	
Judicial Officials – 1	
13-29 – 1	

II. PROPOSED CHANGES TO DISCIPLINARY PROCEDURE, PART SIX, SECTION IV PARAGRAPH 13 OF THE RULES OF THE SUPREME COURT OF VIRGINIA

DISCIPLINARY PROCEDURE

The Standing Committee on Lawyer Discipline (COLD) proposed the following amendments to [Part Six, Section IV, Paragraph 13 of the Rules of the Supreme Court of Virginia](#) to:

- (1) conform Paragraph 13 to Va. Code § 54.1-3935.A. by providing Bar Counsel the same procedures and deadlines already established for respondents to elect a three-judge circuit court for attorney disciplinary proceedings;

³ This chart represents each instance of public discipline issued by a Memorandum or Summary Order and each private admonition or reprimand within FY 2025. This chart includes cases that are on appeal before the VSB Disciplinary Board and Supreme Court of Virginia.

⁴ Number of respondents in each category.

- (2) clarify the sanctions available to a three-judge circuit court in district committee proceedings; and
- (3) remove restrictions on imposing terms to suspensions of one-year or less and align procedures for the disciplinary board and district committee procedures when requesting and considering a respondent's disciplinary record.

Council approved the proposed amendments at the annual meeting on June 12, 2025.

On July 24, 2025, the Bar petitioned the Supreme Court of Virginia to approve the proposed amendments.

III. CHANGES TO VIRGINIA RULES OF PROFESSIONAL CONDUCT AND PROPOSED LEGAL ETHICS OPINION

Ordered on May 16, 2025, and effective July 15, 2025, the Supreme Court of Virginia amended [Rules 1.5\(d\)](#) Fees and [6.5](#) Nonprofit and Court-Annexed Limited Legal Services Programs.

On June 12, 2025, Council approved [Proposed Legal Ethics Opinion \(LEO\) 1901, Reasonable Fees and the Use of Generative Artificial Intelligence](#). On July 24, 2025, the Bar filed a petition with the Supreme Court of Virginia seeking approval of LEO 1901.

IV. PENDING MATTERS BEFORE THE SUPREME COURT OF VIRGINIA AND COURT OF APPEALS OF VIRGINIA

Matters before the Supreme Court of Virginia

Jason Eugene Swango v. Virginia State Bar Ex Rel., Second District, Section I Committee

[By Order entered July 31, 2025](#), the Court affirmed a three-judge circuit court's public reprimand of Swango for violations of Virginia Rules of Professional conduct 1.5 Fees and 1.15 Safekeeping Property. Principal Deputy Solicitor General Kevin M. Gallagher and Assistant Solicitor General Meredith L. Baker represented the VSB.

Bradley Glenn Pollack v. Virginia State Bar Ex Rel., Seventh District Committee

On January 17, 2025, Bradley Pollack noted an appeal of a three-judge circuit court's order revoking his license to practice law in the Commonwealth of Virginia. The three-judge circuit court found that Pollack violated Rules 3.3(a)(1) Candor Towards the Tribunal, 4.1(a) Truthfulness in Statements to Others, and 8.4(b) Misconduct. Oral arguments were heard on September 9, 2025. Assistant Attorneys General Cooper Vaughn and Robert Claiborne represent the VSB.

Joseph Willis Lee, III v. Virginia State Bar Ex Rel., Third District, Section III Committee

On June 6, 2025, Joseph Willis Lee, III noted an appeal of a three-judge circuit court's order imposing a two-year suspension of Lee's license, effective May 1, 2025. The three-judge circuit court found that Lee violated Rule 3.8(d) Additional Responsibilities of a Prosecutor. Assistants Attorney General Robert Claiborne and Besa Bucaj represent the VSB.

Joseph D. Lento v. Virginia State Bar Ex Rel., Ninth District Committee

On July 28, 2025, Joseph D. Lento noted an appeal of a disciplinary board's Memorandum Order revoking his license to practice law in the Commonwealth of Virginia, effective May 16, 2025. The disciplinary board found that Lento violated Rules 1.1 Competence, 1.3(a) and (b) Diligence, 1.4(a) and (b) Communication, 1.5(a) Fees, 1.15(b)(4) Safekeeping Property, 1.16(a)(1) and (d) Declining or Termination Representation, 5.1(a) Responsibilities of Partners and Supervisory Lawyers, 8.4(b) Misconduct, and 8.5 Disciplinary Authority; Choice of Law. Assistants Attorney General Stan Hammer and Chris Bernhardt represent the VSB.

Douglas Bell Wessel v. Virginia State Bar Ex Rel., Fifth District, Section II Committee

On September 5, 2025, Douglas Wessel noted an appeal of a three-judge circuit court's order suspending his license to practice law in the Commonwealth of Virginia for thirteen months, effective July 15, 2025. The three-judge circuit court found that Wessel violated Rules 1.3(b) Diligence, 1.16(a)(1) and (3) Declining or Terminating Representation, 8.4(a) Misconduct, and 1.15(b)(4) Safekeeping Property. Senior Attorney General Pebbles Burgess and Assistant Attorney General Erin McNeill represent the VSB.

Writ of Prohibition and Mandamus

***Louis B. Antonacci v. Renu Brennan and the Virginia State Bar* Record No. 250106**

By Order entered September 8, 2025, the Supreme Court of Virginia dismissed Louis B. Antonacci's Petition for Writs of Prohibition and Mandamus against Bar Counsel and the bar. Antonacci sought a writ of prohibition enjoining the Bar Counsel and the Bar from filing any complaint under Virginia Rules of Professional Conduct 1.6 Confidentiality of Information and 1.9 Conflict of Interest for Antonacci's use and disclosure of confidential information gained during Antonacci's representation of his former client against the client's interests in two lawsuits that Antonacci filed in federal court. Antonacci sought to enjoin the proceedings on the grounds that Rules 1.6 and 1.9 are constitutionally vague. Antonacci also sought a writ of prohibition either permanently enjoining Bar Counsel and the Bar from bringing or filing a complaint against him related to Bar disciplinary proceedings for his violations of Rules 1.6 and 1.9 or temporarily enjoining the disciplinary proceedings until his federal lawsuit against his former client was fully adjudicated. Attorney General Erin McNeill and Bridget Ambrosio represented the VSB.

Appeal before the Court of Appeals of Virginia

***Justin Lee Criner v. Virginia State Bar* Record No. 0710252**

On April 8, 2025, Justin Criner's license was revoked by consent. On April 11, 2025, upon the VSB's motion, the Chesterfield Circuit Court entered an order appointing Drew Sarrett, Esq., as the receiver of Criner's former practice, the Beale Law Firm. Criner has appealed the order appointing a receiver. This appeal is pending before the Court of Appeals of Virginia. Assistant Attorneys General Erin McNeill and Chris Bernhardt represent the VSB in the appeal.

IV. FEDERAL LAWSUIT

Phillip Leiser v. Chief Justice Goodwyn and Renu M. Brennan

By Order entered September 17, 2025, the Eastern District of Alexandria dismissed, without prejudice, a lawsuit against Chief Justice Goodwyn and Bar Counsel in their official capacities and denied Leiser's motion for a preliminary injunction seeking to enjoin a disciplinary hearing against him. Leiser's federal suit sought (1) a declaratory judgment that Virginia Rule of Professional Conduct 8.2 Judicial Officials is unconstitutional on its face, or as applied to Leiser and (2) decrees granting preliminary and permanent injunctive relief against the prosecution or enforcement of Rule 8.2 and costs. The disciplinary hearing was held on September 18, 2025. Assistant Attorney General Cooper Vaughn represented the Chief Justice and Bar Counsel.

REPORTS OF THE STANDING COMMITTEES

Access to Legal Services

Scott E. Reid, Chair

The mission of the Access to Legal Services (ALS) Committee includes fostering support for free and reduced fee legal services with the goal of improving access to the legal system for all Virginians and for nonprofit charitable and civic groups that serve the public good. The Pro Bono/Access department and committee promote pro bono publico services by Virginia lawyers and encourage the integrated development of like contributions by law school faculty and students, lay mediators, court reporters, interpreters, tax accountants, paralegals, and members of related professions.

This year, the ALS Committee was composed of 15 members, including:

Scott E. Reid, Chair; Llezelle A. Dugger, Vice Chair; Donna Sue Baker, Tara L. Casey, Brandy M. Disbennett, Andrea N. E. Dunlap, Teirra M. Everette, Alexandra D. Goodpaster, Michael P. Maskell, Dale Wood Pittman, Robert J. Poggenklass, Henry Chao-Lon Su, Nicole E. Upshur, Timothy A. Freilich, and Joshua M. Peterson.

The ALS Committee held the following meetings during FY 2025:

- August 16, 2024 – Virtual; October 17, 2024 – Hybrid; January 30, 2025 – Virtual; April 15, 2025 – Hybrid
 - **Rule 1.5 (Attorney Fees):** Discussed revising Virginia's fee rules for domestic relations cases to enhance access for financially vulnerable clients.
 - **Emeritus Rule Amendments:** Approved broader eligibility for Emeritus membership to encourage more pro bono participation.
 - **Unauthorized Practice of Law (UPL) Amendment:** Proposed allowing clerks and navigators to assist self-represented litigants with forms while addressing UPL concerns.
 - **Pro Bono Conference & Awards:** Approved award recipients and decided to move to a fully virtual pro bono conference starting in 2025.
 - **CLE Credit for Pro Bono Service:** Supported proposal to grant CLE credit for pro bono work and tasked subcommittee with drafting it.
 - **Criminal Record Sealing Law:** Discussed implementation challenges of Virginia's new criminal record sealing law.
 - **Legal Aid & Access Updates:** Highlighted the need for more volunteer support and financial resources for legal aid services.
 - **Technology and Access:** Noted slow e-filing implementation and rising demand for Virginia Free Legal Answers, suggesting clinic-based support.
 - **Other Initiatives & Discussions:** Reviewed initiatives on attorney shortages, foreign

The Committee was especially delighted to present its annual Pro Bono awards, which shine a deserved light on the selfless pro bono service of Virginia attorneys and organizations, as well as the extraordinary contributions of Virginia law students in service of the public good. I am proud of our committee's successful advocacy in the amendments to Part 6, § IV, ¶ 3(f) of the *Rules of the Supreme Court of Virginia* (the "Emeritus Rule"). We look forward to promoting this increased opportunity to meet the ongoing challenge of access to legal services across the Commonwealth.

Finally, special thanks are due to our outgoing members, Henry Su, Joshua Peterson, and Dale Pittman, and we welcome our new Committee members, Colleen O'Connor, Jacqueline Smith, and Karl Doss.

Budget and Finance

Lonnie D. Nunley III, Chair

The Standing Committee on Budget and Finance met January 15, 2025, to review and approve the FY 2026 Proposed Budget, to be effective as of July 1, 2025. The Committee voted to recommend Council adopt the FY 2026 Proposed Budget.

The FY 2026 Budget projects that the VSB will collect approximately \$14.1 million in revenue and incur approximately \$16.0 million in expenditures. The FY 2026 budget is approximately \$321,000 more than the FY 2025 budget.

The Standing Committee on Budget and Finance discussed how to achieve a balanced budget considering operating deficits due to rising expenses (Salaries, Technology, Inflation, and Rent). To balance the budget, the VSB should explore ways to increase revenue and options to cut expenses. The primary means to increase the revenue is a future dues increase, supplemented by restoration of delinquency fees and increased Mandatory Continuing Legal Education fees.

Other matters discussed by the Committee included finalizing a timeline necessary to seek a dues increase. A dues increase requires the approval of Council, the Supreme Court of Virginia and the General Assembly who must increase or lift a statutory cap. Additional matters discussed included an actuarial study for the Clients' Protection Fund (CPF), reviewing the CPF investment policy, and determining if a portion of the CPF balance can be put in higher yield instruments. The Committee will continue to evaluate the financial stability of the Bar.

FY 2025 Committee members:

Lonnie Dayton Nunley, III	Chair, Council
Kenneth Brett Marston	Ex-Officio, VSB President-elect
Cullen Dennis Seltzer	Council
Nicole Elise Upshur	Council
Derek Anthony Davis	Executive Committee
Daniel Patrick Frankl	Executive Committee
Susan Bradford Tarley	Executive Committee
Craig Emerson Ellis	Member at Large
Kristopher Richard McClellan	Member at Large
Luis Antonio Perez-Pietri	Member at Large

Lawyer Discipline

Melissa W. Robinson, Chair

COLD, 10 lawyers and three non-lawyer volunteers, met with the Office of Bar Counsel, the Clerk, and Executive Director in August, September, and November 2024 and April 2025 to improve the bar's public protection mission and oversee the disciplinary system.

COLD proposed new amendments to [Part Six, Section IV, Paragraph 13 of the Rules of the Supreme Court of Virginia](#). The proposed amendments:

- (1) Conform Paragraph 13 to Va. Code § 54.1-3935.A. by providing Bar Counsel the same procedures and deadlines already established for respondents to elect a three-judge circuit court for attorney disciplinary proceedings;
- (2) clarify the sanctions available to a three-judge circuit court in district committee proceedings; and
- (3) remove restrictions on imposing terms to suspensions of one year or less, and align procedures for the disciplinary board and district committee procedures when requesting and considering a respondent's disciplinary record.

Council approved the proposed amendments at the annual meeting on June 12, 2025. On July 24, 2025, the bar petitioned the Supreme Court of Virginia to approve the proposed amendments.

COLD also monitored disciplinary dockets to ensure that cases are processed promptly and efficiently within aspirational guidelines. Additionally, as part of its oversight function, COLD reviewed complaints dismissed by staff to ensure that all procedures are followed, and COLD reviewed complaints dismissed by staff in which the complainants requested additional review of the dismissal.

In FY 2025, COLD implemented two new policies. The first policy, adopted November 7, 2024, recognizes the importance of peer-to-peer regulation and states that Bar Counsel should not invoke its statutory right to elect a three-judge circuit unless, in the judgment of Bar Counsel, the ends of justice require it, such as facilitation of the presentation of evidence or to ensure the orderly conduct of a hearing. The second policy, adopted April 9, 2025, streamlines the process of complaints deemed as "abusive communications."

COLD members attended and reported their observations of three-judge circuit court hearings. COLD members also assisted with the Solo and Small Practitioner Forum held in April.

On July 30, 2025, COLD met on the eve of the annual Disciplinary Conference for its first meeting for Fiscal Year 2026.

¹The Committee on Lawyer Discipline (COLD) is established under Part II, Article III, Section 2 of the Bylaws of the Virginia State Bar and Council and is granted, under Part Six, Section IV, Paragraph 13, Rules of the Supreme Court of Virginia, subparagraph 13-5, "all powers and duties of [the VSB] Council, with respect to the Disciplinary System," except the power to appoint District Committee members and subject to direction and control of Council.

Legal Ethics

K. Brett Marston, Chair

The Standing Committee on Legal Ethics meets regularly to consider attorneys' formal requests for advisory opinions seeking guidance on legal ethics and the unauthorized practice of law, as well as to analyze and debate proposals to amend the Rules of Professional Conduct and the Unauthorized Practice Rules.

The committee has 9 members: K. Brett Marston (chair), V. Kathleen Dougherty (vice chair), Megan Clark, Patrick Hanes, Michael HuYoung, Naveed Kalantar, Jeffery Mitchell, Michael Robinson, and Nia Vidal. VSB staff liaisons are Emily Hedrick, Dorian Dalton, Diane Ferguson, and Krista Mathis.

The committee's activities this year included:

- Amendments to Rule 1.9(c) (use of a former client's criminal history information) and the Unauthorized Practice of Law rules (court clerks, navigators, and self-help center staff assisting with selecting and completing forms) were released for public comment, with further action pending;
- Amendments to Rule 1.5(d) (contingent fees in domestic relations matters) were released for public comment, with the committee planning to undertake further study of the issues raised;
- LEOs 278, 1141, and 1324 were withdrawn by the committee because they predate RPC 4.4(a) and are inconsistent with that rule;
- LEO 1901 (Reasonable Fees and the Use of Generative Artificial Intelligence) was approved by the VSB Council in June 2025 and submitted to the Supreme Court of Virginia for approval;
- Rule 1.5(g) (prohibition on nonrefundable fees) was approved by the Court on May 16, 2025, effective July 15, 2025;
- Rule 6.5 (including counsel at first appearance and same-day bail hearing programs as limited scope programs that do not require a lawyer to conduct a conflict check before providing representation) was approved by the Court on May 16, 2025, effective July 15, 2025. This proposal was developed in response to the JLARC report on Indigent Criminal Defense and Commonwealth's Attorneys issued in November 2023.

The committee received five requests for LEOs. One request was resolved by withdrawing LEOs 278, 1141, and 1324 as noted above. One request was determined to be a request for a rule revision, which led to the proposed amendments to Rule 1.9(c) noted above. The three remaining requests were resolved by directing the inquirers to existing rules.

One request for a UPL opinion that was received in FY 2024 was carried over to this year, but no opinion was issued on the basis that existing rules and opinions resolve the question presented. One additional UPL opinion request was received this year and was also resolved by existing rules and opinions.

The committee received a proposal to amend the UPL rules referred by the Supreme Court of Virginia Access to Justice Commission. As noted above, that proposal is pending further action by the committee.

The committee thanks Michael Robinson, Patrick Hanes, and Michael HuYoung for their service on a subcommittee studying the effect of generative AI on legal fees, which led to LEO 1901.

The ethics hotline received 5,615 inquiries this year.

Michael Robinson will serve as chair for the upcoming fiscal year. Katie Dougherty continues as vice chair. The committee welcomes new members Paul Melnick and Gobind Sethi and thanks outgoing members Brett and Jeff for their service.

Professionalism

Hon. David W. Lannetti, Chair

The Standing Committee on Professionalism is charged with the execution, administration, and ongoing oversight of the mandatory Harry L. Carrico Professionalism Course, which all newly admitted active members of the Virginia State Bar (VSB) are required to attend. The purpose of the course is to encourage attorneys to uphold and elevate the standards of honor, integrity, and courtesy in the legal profession. Since the inception of the program in 1988, almost 45,000 new admittees have attended one of the **236** courses offered.

VSB staff continue to focus on ways to introduce attendees to other VSB opportunities and reduce costs. The course was held during the VSB Annual Meeting in June 2025 with the hope that it would encourage attendees to register for the annual meeting, although only a few attendees opted to do so. The course was successfully held on the campus of George Mason University in August 2024 as a cost-saving measure, and we are scheduled to hold the course there again in August 2025.

During the past year, courses were held in Roanoke, Charlottesville, Fairfax, Virginia Beach, and Richmond (2). There were approximately 810 combined attendees who attended these courses. The Committee was happy to welcome the Honorable Rossie D. Alston, Jr., the Honorable Richard E. Moore, the Honorable Doris Henderson Causey, the Honorable Marla G. Decker, the Honorable Charles N. Dorsey, and the Honorable Cleo E. Powell as luncheon speakers at the courses. Six courses are planned for the 2025-2026 course year.

The Committee coordinated a faculty training session on October 23, 2024, to train the 25 new members of the faculty, and the committee met on March 24, 2025, to review the course structure, video, and materials. In March 2025, the Committee solicited nominations for new faculty members who will be invited to serve for a three-year term and attend a faculty training session this fall.

The Honorable David W. Lannetti has agreed to continue serving as Committee chair and course moderator for the 2025–2026 year.

REPORTS OF THE BOARDS

Clients' Protection Fund

Brian D. Lytle, Chair

The Virginia State Bar's (VSB's) Clients' Protection Fund (CPF) was established in 1976 to make monetary awards to petitioners who suffered financial losses because of the dishonest conduct of Virginia lawyers. CPF is managed by a 14-member board (Board) appointed by the VSB Council (Council). The Board is comprised of 13 lawyers and one layperson. Board members investigate all claims for payments from CPF. The Board decides whether to approve or deny each claim.

The total amount paid during fiscal year (FY) 2024 was \$396,851 for 54 claims. The Board denied 16 petitions, and 14 petitions were filed and not processed for not meeting the CPF jurisdictional requirements. As of June 30, 2024, there were 62 pending claims.

The total amount paid for the operating expenses of the CPF for FY was \$13,081. In addition, CPF paid \$52,519 to reimburse expenses of receivership cases occasioned by the need for the receiver to administer, pursue or defend assets, the recovery or preservation of which would inure to the benefit of one or more clients or other members of the public who have suffered losses as a result of a Virginia lawyer.

CPF began FY 2023 with a cash balance of \$10,936,140. The annual \$5 CPF assessment on all active attorneys added \$163,575. Accumulated interest income for FY totaled \$119,489. CPF received restitution from the Office of the Attorney General's collections, debt set-off, and individual restitutions in the amount of \$16,805, net of fees for collection services. As of June 30, 2024, the cash balance in CPF was \$10,773,559.

The Board experienced an upswing in claims in FY 2024, with more claims than any year since 2010. The Board received 109 claims in FY 2024 and re-opened 9 claims. The rise in claims was primarily due to claims relating to a deceased family law attorney; an impaired family law attorney; a disbarred criminal defense attorney; and unearned fees charged by a disbarred estate planning lawyer who for years charged clients prepaid fees for managing estates after they died. Some claims involving these attorneys were large, \$10,000 to \$50,000; consequently, the sum of the Board's restitution payments was higher than previous years.

The Office of Bar Counsel initiated receiverships regarding deceased or disbarred attorneys and the receivers attempt to locate and distribute funds that might belong to clients. As a remedy of last resort, CPF monitors the status of these receiverships in case they recover funds to benefit the subject lawyers' clients.

The Board continues to work on efforts to raise awareness and educate the public regarding CPF. We will be hosting the 2024 National Client Protection Organization, Inc.'s (NCPO's) Annual Workshop in Virginia Beach on September 19-20, 2024.

The Board is to be commended for the many hours spent investigating and deliberating claims and for the work of its various committees including the public awareness and strategic planning committees.

Departing Members: Charles Franklin (Frank) Hilton and Melissa W. Robinson. The Board wishes to extend its appreciation to these volunteers. Their service was very valuable, and they will be missed.

New Board Members FY 2024-2025:

- Elizabeth (Lily) Engle
- Mary K. B. Owens

Officers for the FY 2025:

- Joseph M. Bowen, Chair
- Yvonne S. Gibney, Vice Chair

CPF Board members for the 2024 FY included Chair, Brian D. Lytle; Vice Chair, Joseph M. Bowen; James L. Banks, Jr.; Lori J. Bentley; Yvonne S. Gibney; Steven R. Grant; Sandra L. Havrilak; Charles F. Hilton; Jonathan R. Hyslop; Peter M. Mellette; Richard B. Orsino; Jacqueline M. Reiner; Melissa W. Robinson; and Nancy L. Bloom.

I would like to thank the VSB's CPF staff, Vivian Byrd, Administrator and Jane Fletcher, Counsel, who carry out the Board's daily administrative operations, and all of the CPF Board members for their voluntary contributions of both time and knowledge.

Mandatory Continuing Legal Education

Alison R. Mullins, Chair

The Mandatory Continuing Legal Education Board (Board) was established by the Supreme Court of Virginia in 1985 to administer the Mandatory Continuing Legal Education regulatory program (MCLE) in the interest of public protection. The Board is authorized to adopt regulations and provide general oversight of the program.

The MCLE Board consists of twelve members appointed for three-year terms by the Virginia Supreme Court. MCLE Board members for the 2025 fiscal year included (Chair), Alison R. Mullins of Fairfax (Chair), Kevin Martingayle of Virginia Beach (Vice Chair), Thomas Armstrong of Alexandria, Jessica Carmichael of Alexandria, Carolyn P. Desai of Warrenton, Matthew D. Green of Richmond, Deanna H. Hathaway of Richmond, Jessica Lehman of Springfield, Johnny A. Martin of Bristol, Raymond Obregon of Fairfax, William Hunter Old of Williamsburg and Scott Stephenson of Roanoke. Cameron M. Rountree, Executive Director of the Virginia State Bar, serves as an ex officio member of the Board, Justice Stephen R. McCullough serves as the Supreme Court's liaison to the Board, and DaVida M. Davis, Director of Regulatory Compliance for the Virginia State Bar, serves as the staff liaison to the Board.

The MCLE Board met 6 times during FY2025 to consider course applications, attorney requests for extensions and waivers, and other matters integrally related to the administration of the MCLE program in Virginia. Meetings were held virtually and in person. Over the last MCLE reporting cycle, the MCLE staff and Board reviewed 22,215 courses and considered 33 waiver/extension requests.

During this fiscal year, the MCLE Board established a Rules Subcommittee to review the current regulations, to maintain the high standards of Virginia MCLE while streamlining processes and maximizing opportunities for its members. The Rules Subcommittee will continue its work in FY2026 and will be submitting substantive recommendations to the full Board.

On October 9, 2024, the MCLE Board convened a special session and voted unanimously to grant an extension of the MCLE deadline for over 1,500 members of the Virginia State Bar affected by Hurricane Helene (specifically those with an address of record in the affected jurisdictions, as determined by FEMA).

The leadership of the MCLE Board for the upcoming fiscal year will be Kevin Martingayle as Chair and Jessica Carmichael as Vice Chair.

I would like to express my sincere appreciation to the staff of the Virginia State Bar's Regulatory Compliance Department for their dedicated management of the Board's daily administrative operations, as well as to the members of the MCLE Board for their generous, voluntary contributions of time and expertise.

REPORTS OF THE SPECIAL COMMITTEES

Bench-Bar Relations

Bruce H. Russell II, Chair

The mission of the Bench-Bar Relations Committee (BBRC) is to support and improve the administration of justice, enhance service to the community, and increase professionalism within the legal system by exploring emerging issues of concern or interest affecting the bench and the bar.

This year, the BBRC was composed of 15 members, including:

- **Officers:** Bruce H. Russell II, Chair; Robert B. Walker, Vice Chair
- **Judicial Members:** Hon. Cleo E. Powell; Hon. Marla G. Decker; Hon. Lawrence R. Leonard; Hon. Dominique A. Callins; Hon. Mary Jane Hall; Hon. Steven C. McCallum
- **Attorney Members:** Michael E. Hollingsworth Jr.; Kelly B. Martin; Molly Elizabeth Newton; Michael G. Phelan; Emily C. Russell Bitner; Michelle Rene Parker; Pia Janine Miller
- **Ex Officio Members:** Michael K. York (VSB President); K. Brett Marston (President-Elect); Chidi I. James (Immediate Past President)

The BBRC held the following meetings during FY 2025 (July 1, 2024 – June 30, 2025):

- September 11, 2024 – Hybrid
- January 14, 2025 – Virtual
- March 25, 2025 – Hybrid
- May 6, 2025 – Virtual

Significant activities the BBRC undertook from July 2024 to June 2025 include:

- Finalized and distributed a *Successful Bench-Bar Programs* resource, highlighting effective practices across Virginia and providing guidance for improving local judicial-attorney engagement.
- Collaborated with the Supreme Court of Virginia to issue a letter encouraging judges to participate in bench-bar activities.
- Developed a statewide *Bench-Bar Relations Survey*—in coordination with the Office of the Executive Secretary—to identify areas needing support and guide future committee initiatives.
- Organized a CLE session for the 2025 VSB Annual Meeting titled “*Rating Scales and the Scales of Justice*,” addressing judicial performance evaluations and legal ethics.
- Explored strategies to improve bench-bar relations in underserved or strained jurisdictions, with work underway to develop potential models for targeted intervention.
- Updated the *Bench-Bar Beyond Chambers* guide to reflect changes in judicial canons and ethics standards, with versions tailored to judges and attorneys.
- Continued collaboration with the EGAD VA initiative to address legal deserts and examine the role of local bench-bar partnerships in expanding access to justice.
- Promoted increased participation in judicial performance evaluations and distributed an ethics guide to support appropriate completion of surveys.
- Introduced the concept of *Bench-Bar Opportunity Zones* to encourage early, informal resolution of concerns between attorneys and judges.
- Discussed implications of the transition of VSB conferences into sections and potential opportunities for expanded collaboration.
- Expanded outreach to judges and bar associations and began developing a strategic plan to support proactive, regionally tailored bench-bar engagement in the coming year.
- The third annual *Coffee with the Judges* at the VSB Annual Meeting was a huge success, with many judges participating and engaging in open, informal dialogue with attorneys.

Serving as Chair of the BBRC this year has been a true joy—equal parts teamwork, strategy, and coffee-fueled collaboration. I'm grateful to our incredible members for their energy, creativity, and commitment to strengthening the ties between bench and bar across Virginia. Thank you to our outgoing members for a job well done, and welcome to the new recruits—we're glad to have you aboard!

Lawyer Insurance

James A. Cales, Chair

Since 2000, ALPS Property & Casualty Insurance Company has served as the VSB’s endorsed professional liability insurance carrier. The Lawyer Insurance Committee (LIC) continues monitoring ALPS’ financial stability and its work to aid Virginia lawyers better manage risk, and oversees the VSB Members’ Insurance Center’s (VSBMIC’s) efforts to help VSB lawyers obtain and manage personal lines of insurance (e.g., health, life, and disability).

The LIC met 4 times in fiscal year (FY) 2025:

- September 17, 2024, at the VSB office in Richmond
- November 12, 2024, at the VSB office in Richmond
- February 13, 2025, held virtually via MS Teams
- May 15, 2025, at the VSB office in Richmond

VSB Lawyer Insurance Committee Members

James Arthur Cales, III	Chair
Althea Hurt Randolph	Member
Andrew Shane Gerrish	Member
Danny Mark Howell	Member
David Lyndon Marks	Member
Drake William Hudgins	Member
Jacquelyn Fromal Gerlach	Member
Joan Bellefield Davis	Member
Kathryn Elizabeth Bonorchis	Member
Marialuisa Sabina Gallozzi	Member
Matthew William Lee	Member
Stewart Ryan Pollock	Member
Tamika Dawn Jones	Member
Timothy Stephen Baird	Member
Wells Huntington Byrnes, Sr.	Member

The terms of David L. Marks expired on June 30, 2025. Tamika Jones’ term ended in FY 2025 when she was appointed to serve as a General District Court judge. They will be replaced by Lawrence Alexis Dunn, of Richmond, and Barry Jay Waldman of Fredericksburg in FY 2026.

VSB Members’ Insurance Center

Debbie Stocks, Senior Client Executive for OneDigital and the Manager of the VSBMIC, along with Jennifer Stevens, OneDigital Senior Business Development Associate, continue to serve as the LIC’s points of contact for individual insurance policies. At the conclusion of fiscal year (FY) 2023, Debbie presented recommendations to change the third-party administrator (TPA) for the VSB Members’ life and long-term disability insurance plans and to offer new products, including critical illness insurance. The Committee approved the change in TPA and the additional product offering on September 26, 2023, and the new TPA was transitioned as of January 1, 2024. A critical illness policy is now active and available to all VSB members, and the first VSB member enrollment occurred in July 2024 at the beginning of FY 2025. A proposed change to the long-term disability carrier from Sun Life to Prudential was also completed as of July 1, 2024. All VSB members with Sun Life long-term disability policies were contacted regarding the carrier change and billed according to their plan choice as of

July 1, 2024. After the TPA change in FY 2025, there are no planned changes to VSB Members' insurance plans or TPAs in the near future.

The calendar year (CY) 2024 Semi-annual mail campaigns for VSB Life and LTD were successful. The VSBMIC received an increase in applications in 2024, over the same periods in 2022 and 2023. The move to Prudential as the long-term disability carrier, along with their marketing efforts, will help avoid adverse selection and ensure this plan is available to members in the future.

Key results from the Prudential 2024 mail campaigns included:

- Life applications for the 12-week campaign up 31% over the same period in 2023 (24 life applications exceeded forecast of 17).
- 115 total applications; up 27% from 2023.
- New Critical Illness product introduced in 2024.

Ameritas and Anthem wish to consider a dental and vision plan for the VSB. The VSBMIC will pursue the LIC's interest regarding these plans in FY 2026.

ALPS and Lawyer Malpractice Insurance

ALPS operates on a CY basis. As of December 31, 2024, ALPS insured 1,979 Virginia firms and 4,010 Virginia lawyers. The gross written premium in Virginia was \$10,636,441; net written premium was \$7,734,067. The ALPS Virginia book performed strongly in CY 2024 with respect to key insurance benchmarks such as combined ratio and claims frequency. ALPS posted assets of \$181,454,546 with a policyholder surplus of \$72,149,406. Reported Virginia claims increased 20% in CY 2024 compared to 2023.

ALPS' AM Best Financial Strength Rating remained an A (Excellent) after an upgrade in CY 2023 (from A- (Excellent) to A (Excellent)). AM Best is generally regarded as the preeminent rating agency of insurance companies nationwide.

Risk Management Report for Calendar Year 2024

Pursuant to the VSB's endorsement agreement, ALPS sets aside 3% of Virginia gross written premiums to invest in activities designed to aid Virginia lawyers become better practitioners, reduce claims risk, and otherwise be aware of growing malpractice traps. ALPS maintains RM funds in its accounts pursuant to the endorsement agreement. In CY 2024, ALPS set aside and expended, in full, in consultation with the LIC, nearly \$308,000 in funds. In CY 2025, the RM budget will tick down slightly to \$303,500.

FY 2025 Risk Management (RM) Priorities

The LIC actively works with ALPS in a healthy collaboration to establish RM priorities annually.

This year, RM priorities fell into the following areas:

- ***Annual VSB/ALPS Ethics and Professionalism Tour.*** The 2024 tour was our fourth hybrid tour event with eight in-person live sessions in four cities, and four live virtual webcasts which aired in three one-hour sessions on October 1, 2, and 3, and then aired again live on October 10 in a 3-hour full run-through. All four iterations were also made available on demand. "The Guardian" program transports participants to a boutique law firm in Virginia that serves the legal needs of clients in the tech sector. One of the firm's clients has asked if a few members of the firm would be willing to evaluate a beta version of its cutting-edge Ethics

and Risk

Management AI tool called Guardian AI, designed to evaluate and enhance ethical and RM decision-making in a variety of industries. The firm agreed, and the testing is about to begin... A panel of legal peers applies the Virginia Rules of Professional Conduct to their analysis of the issues presented. During the panel discussions, attendees are encouraged to ask questions and share comments. Ultimately, the goal of this program is for attorneys present to leave with a greater sensitivity to the many ethical issues that can be in play any day of the week, be better prepared to view these issues as learning opportunities, and be more willing to take advantage of these opportunities to see that the issues are responsibly addressed and resolved. The course this year was one of the best programs ever offered. The feedback received was excellent, and as this course contained lots of timely considerations on the use of AI in legal practices, it will be offered again as a live webcast in early 2025 for any Virginia attorneys who may have missed it.

- **Webinars.** ALPS generally offers 4-6 webinars to Virginia lawyers on trending ethics, professionalism, law practice management, and wellness topics. In CY 2024, ALPS hosted 15 webinars and had 2,105 Virginia registrants for live webinars with 1,166 ALPS insureds and 939 non-ALPS insureds.
- **On-Demand Library.** Currently, 36 programs exist in the Virginia on-demand library. They range in length from 60 minutes to three hours. New on-demand programs were added throughout the year. Charges for the on-demand seminars were as follows: one-hour programs were \$40 for insureds, \$70 for noninsureds; two-hour programs were \$50 for insureds, \$80 for non-insureds; and three-hour programs were \$70 for insureds, and \$100 for non-insured.
- **Operational Support for the Virginia Judges and Lawyers Assistance Program.** For over 20 years, ALPS has provided \$30,000 annually to support this important Virginia program helping lawyers and judges in need at their most vulnerable point. This contribution continued in CY 2024. After conferring with Tim Carroll of Virginia Lawyers and Judges Assistance Program, ALPS recommended continuing its historical \$30,000 in operational support.
- **Risk Management Prevention Hotline.** John Brandt continues to serve the Virginia RM hotline on an outsourced basis. Based on his average hours and an increased demand for this service in CY 2024, we recommended increasing the RM Hotline budget from \$18,000 to \$35,000 to account for succession plan development, an electronic question on-ramp integrated into the VSB website, and a projected increased demand based on 2024 marketing activities by both ALPS and the VSB. This included the LIC-approved budget expenditure to allow for the creation of an online portal to augment access to the malpractice avoidance hotline (the aforementioned question on-ramp) that is expected to be deployed during FY 2026.
- **Local Bar Grant Program.** ALPS administers a Local Bar Grant Program whereby local Bars can apply to ALPS for funding on initiatives with a nexus to RM content. This may include inclusion of RM content at conferences, mentorship programs, wellness programs, etc.
- **Marketing Risk Management Offerings.** ALPS sets aside approximately 10%-12% of the budget to ensure all its quality offerings are known and ultimately utilized by VSB members.

Lawyer Referral

Joseph M. Bowen, Chair

July 1, 2024 – June 30, 2025

The Special Committee on Lawyer Referral met on December 16, 2024, and June 12, 2025. The Committee supports the growth and improvement of the Virginia Lawyer Referral Service (VLRS) through the dedicated work of its volunteer Committee members.

FY 2025 Members

- Joseph M. Bowen, Chair
- Amy M. Harber, Vice Chair
- Deanna H. Hathaway
- Mary K. Hayburn
- Eden B. Heilman
- Angela T. Isabell
- Hon. Tamika D. Jones
- Lena S. Munasifi

The Committee extends heartfelt thanks to departing members Judge Tamika D. Jones and Angela T. Isabell for their dedicated service and extends congratulations to Judge Jones on her well-deserved elevation to the bench and wishes her continued success in her new role.

Upon appointment by incoming President K. Brett Marston in April, the Committee welcomed two new members, Mark S. Brennan and Dana W. Traynham, and looks forward to their future service beginning in July 2025.

The Committee is proud to celebrate the successes of the VLRS program it supports. This year, the VLRS celebrated its 48th anniversary of service as the consumer arm of the Virginia State Bar (VSB). Since its launch on January 1, 1977, the dedicated VLRS staff have served the core access mission of the VSB by connecting legal consumers with information, consultations, and referrals to Virginia lawyers.

In the fiscal year 2024-2025, the VLRS received more than 68,689 inquiries, answered 19,620 telephone calls, responded to 700 emails and 105 letters, and provided 2,662 online referrals. VLRS staff assisted over 5,500 consumers with prescreened and prepaid referrals, resulting in 3 million dollars in net legal fees for participating attorneys and \$623,782 in revenue for the VSB.

The VLRS welcomed 39 first-time lawyer panel members and five returning panel members this fiscal year. The VSB Special Committee on Lawyer Referral thanks the 155 VLRS lawyer panel members (past and present) for their service to the VSB and their communities.

The VLRS goals for FY25 included:

1. Refining the VLRS Mission.
2. Advancing VLRS Technology, and
3. Expanding panel membership by highlighting the benefits of panel membership to support the VSB mission.

The goals were met by:

- Reviewing recommended amendments to VLRS Rules on fees, consumer complaints, and membership qualifications. Amending the VLRS Rules to clarify membership terms, support best practices, and improve the service.
- Development of a new VLRS referral tool through integration with the VSB membership database of record (iMIS).
- Analyzing the potential impact of AI on the service.
- Promoting the service and related benefits through VSB executive leadership and VLRS staff outreach at bar-sponsored events throughout the Commonwealth.
- Raising awareness of the service through VSB publications, including Cameron Rountree’s Executive Director’s Message ‘*Increase Access, Grow Your Business, Connect with Colleagues.*’ (VL June 2025), and highlighted by VLRS panelist Brittany Johnson in her featured article, ‘*Where Have All the Lawyers Gone?*’ (February 2025).

In coordination with the VSB Conference of Locality and Specialty Bar Associations (CLSBA) and Bar Engagements and Programs, the VLRS staff attended Solo and Small-Firm Practitioner Forums in Smithfield (September 2024), in Wytheville (October 2024), and in Charlottesville (April 2025); and the Bar Leaders Institute (BLI) in Richmond (March 2025). Staff also attended the VSB A&O Ceremonies in Richmond (December 2024 & June 2025), and the Annual Meeting in Virginia Beach (June 2025).

The VLRS continued panel membership promotion with written materials at VSB Professionalism Courses throughout the fiscal year.

VLRS Marketing Campaigns

With the assistance of the communications department, the VLRS ran semi-monthly ads in all issues of the Virginia Lawyer magazine: “*We take the calls, you get the clients – Membership Benefits.*” (August 2024 and June 2025), and “*How many people call the VLRS each year?*” (October 2024, December 2024, February 2025, April 2025 and June 2025) that highlighted the amount legal fees generated for participating lawyers since July 1, 2020.

The VLRS posted ads in the VSB conference and section newsletters and in the Virginia Lawyers Weekly VSB Annual Meeting double issue (June 2025). These marketing efforts generated much-needed attention for the VLRS.

VLRS increased consumer awareness by:

- distributing over 1,000 bookmarks.
- promoting the service and running informational ads on social media platforms (Reddit, Twitter, and LinkedIn).
- Providing emergency legal services in October 2024 during the Governor’s state of emergency in response to Hurricane Helene.

Resolution of Fee Disputes

Johneal M. White, Chair

The Special Committee on the Resolution of Fee Disputes (SCRFD) met regularly and engaged in a range of important initiatives during FY 2025 to support its mission of providing an efficient and accessible method for resolving attorney-client fee disputes. The committee advanced improvements to procedural rules and expanded outreach to legal professionals and the public throughout the year.

The committee has nine members: John M. White (Chair), Timothy S. Baird, Marialuisa S. Gallozzi, Jacquelyn F. Gerlach, Joseph M. Jacob, Curtis L. Schehr, Daniel C. Yates, Michael Blumberg, and Marian Wiggins.

The committee's activities this year:

- Monitored program activity, including inquiry volume, case flow across regions, and challenges with attorney participation in certain circuits.
- Conducted a comprehensive review and approved updates to the Rules and Guidelines Manual to enhance clarity, efficiency, and consistency in program procedures.
- Considered the establishment of a Vice Chair position to be added to committee leadership.
- Implemented targeted outreach to recruit arbitrators and mediators, including contact with bar associations and mediation organizations.
- Distributed brochures at local bar association events and the Virginia Association of Defense Attorneys (VADA) conference.
- Advertised in the June issue of Virginia Lawyer magazine.
- Planned outreach to professional organizations such as the Virginia Trial Lawyers Association and family law groups.
- Supported collecting testimonials from past participants for use in promotional materials.
- Explored strategies to increase program utilization, including promoting judicial referrals, incorporating program details in "intent to sue" notices, and encouraging regional chairs to use satisfaction surveys for feedback and volunteer recruitment.
- Supported informal education and awareness through participation in conferences and collaboration with bar associations.

Chair's comments: I was very happy to have a strong presence of District Committee Chairs at our fall and spring meetings. Their perspective on what is needed for the program is invaluable, and I hope we continue to have strong participation in our meetings with these folks.

Johneal M. White will continue to serve as chair for the upcoming fiscal year. The committee welcomes Joseph M. Jacob as vice chair and new member Patricia A. Johnson, and thanks outgoing member Marian Wiggins for her service.

Technology and Future Practice of Law

Reid Trautz and Lisa Brook, Co-Chairs

The mission of the Special Committee on Technology and the Future Practice of Law is to improve the legal profession and judicial system by guiding Virginia’s legal professionals in navigating emerging technological advancements and changing trends shaping the practice of law. We aim to provide guidance that enhances the competency, efficiency, and ethical use of technology within the legal field, thereby protecting the public and promoting justice in Virginia’s legal realm. Through research, education, and cooperation and advocacy with other committees, we strive to position Virginia’s legal professionals at the forefront of legal innovation to continually improve the field while upholding the highest professional standards in an evolving legal landscape.

The committee has 14 members: Reid Trautz, co-chair; Lisa Brook, co-chair; Anthony Bessette, Meredith Carpenter, Zoë Dye, Brandan Goodwin, John Koehler, Seth Lindberg, Margaret Matavich, Austin Palmore, Kimberly Phillips, Jon Praed, Christopher Suarez, and David Tisel. VSB staff liaisons are Emily Hedrick and Krista Mathis.

This year, the committee issued its fourth report on Technology and the Future Practice of Law, following previous reports issued in 2016, 2019, and 2022. Release of the report was accompanied by a showcase CLE at the VSB annual meeting to discuss key topics from the report. The committee also updated its mission statement, as reflected above, and continued to submit articles for publication in the Virginia Lawyer and to serve as the home for planning and implementation of the VSB Techshow. The 2025 VSB Techshow was held virtually on April 28, 2025, to an audience of over 400 attendees.

Reid Trautz will continue as chair for the next year, with Zoë Dye as vice chair. The committee thanks Lisa, Kimberly, Jon, and Christopher for their service and welcomes new committee members Patrick Austin, Rebecca Caruso, Nicole Hampton, and Mark Loftis.

REPORT OF THE STUDY COMMITTEE

Entry, Growth and Distribution of Virginia Attorneys (EGAD VA)

David Neumeyer, Chair

The Entry, Growth and Distribution of Virginia Attorneys Study Committee’s mission is to examine and raise awareness of the declining number of lawyers practicing in Virginia, resulting impacts on the population and economy of the Commonwealth, particularly in geographic areas that may be described as “legal deserts,” and to make recommendations to address these trends, mitigate adverse impacts, and improve access to legal services, the legal profession and the justice system for all Virginians.

The committee was created by VSB President Chidi James in early 2024, and the committee completed its first full bar year of work in 2024-25. The following are the dates of committee meetings since inception:

May 14, 2024
June 20, 2024/Meeting of the chairs
July 10, 2024
January 28, 2025
April 11, 2025
May 21, 2025

Since its formation, the EGAD VA Study Committee has undertaken a comprehensive review of the declining number of lawyers in Virginia, particularly in underserved rural areas or “legal deserts.” The committee established two subcommittees—Optimizing Access to Attorney Services in the State (OASIS) to study legal deserts and Lawyers Enhancing General Access to Legal Services (LEGAL) to study the declining number of lawyers—and adopted a mission, scope of work, and collaborative structure to explore causes, impacts, and solutions.

Key initiatives have included the following:

- **Survey Development and Data Collection:** Tailored surveys for attorneys, law students, courts, and legal service consumers; analysis of nearly 2,000 attorney responses and over 300 student responses; efforts to increase participation in legal desert regions.
- **Field Hearings:** Public rural field hearings, marketed to the public, the bar and the bench at nine locations¹ across Virginia, generating transcripts and AI-powered summaries. A matrix tracks issues such as access to counsel, economic barriers, and infrastructure gaps.
- **Law School Engagement:** One-on-one meetings by VSB president Michael York and committee chair David Neumeyer with the deans of Virginia’s seven law schools, investigating declining interest in Virginia practice among graduates; proposed new educational models, including a public-service-focused law school with tuition forgiveness.
- **Regulatory and Policy Review:** Explored bar exam changes (NextGen 2028), out-of-state attorney reforms (reciprocity, military spouse rules), and court system challenges, including a meeting with the Virginia Board of Bar Examiners by VSB leadership.

- **Strategic Recommendations:** Explored economic incentives, community justice worker programs, and regional recruitment strategies to retain legal talent in underserved areas.
- **Committee Output:** The committee will publish an interim report with research summaries and findings in July 2025, having presented a verbal summary to the Bar Council in June 2025, and plans to publish a final report on September 30, 2025, following decisions made by the committee earlier that month. The committee will present its final report to the Bar Council in October 2025. The report will help implement the State Bar's strategic plan to expand access to legal services across the Commonwealth.

Respectfully submitted, with great thanks to committee staff director Crista Gantz and Kristi Hall, executive assistant to VSB operations, for all their work.

David Neumeyer
Committee chair

REPORTS OF THE CONFERENCES

Conference of Local and Specialty Bar Associations Christine Mougin-Boal, Chair

The Conference of Local and Specialty Bar Associations (CLSBA) continues to serve the needs of Virginia lawyers by maintaining a mutually beneficial relationship between the VSB and the local and specialty bar associations in the Commonwealth. It sponsors a Bar Leaders Institute each year to help new local and specialty bar officers plan their bar year and assists them with ethical issues, various programs and internal management policies and procedures; sponsors free Solo & Small-Firm Practitioner Forums open to all VSB members; sponsors the following awards: Awards of Merit, Local Bar Leader of the Year, Specialty Bar Leader of the Year, Bar Association of the Year, and Wellness Award; maintains an information database; and makes executive committee and staff members available for technical assistance or presentations to local and specialty bars. The conference publishes The Connection online newsletter with information of interest to bar leaders. The CLSBA also edits, prints, and distributes the So You're 18 handbook, and provides the soyoure18.com website, both of which are used by many groups to inform young adults of their rights and responsibilities upon turning 18.

The CLSBA currently has 136 member bars. The annual budget for the past fiscal year was \$35,535.00 and has a remaining balance of \$21,691.40 as of April 2025. The annual budget for Solo & Small-Firm Practitioner Forums was \$40,000 and has a remaining balance of \$14,501.32 as of April 2025.

In addition to scheduled Board Meetings, the CLSBA held the following events this year:

- The Bar Leaders Institute was presented on Friday, March 7, 2025, at the Virginia Museum of History and Culture. Justice D. Arthur Kelsey, Supreme Court of Virginia, was our keynote speaker. Topics for the day included The Interplay Between Bar Leadership, AI, and Emerging Technologies; Promoting Judicial Evaluation Through Bar Leadership; Bar Projects Showcase; Legal Deserts; Promoting Wellness Through Bar Leadership; Ethics and Mechanics of Providing Pro Bono/Low Bono Events; VJLAP and Ethics for the Bar Leader.
- The CLSBA presented three Solo & Small-Firm Practitioner Forums this year: Smithfield on September 30, 2024; Wytheville on October 18, 2024; Charlottesville on April 8, 2025. Many thanks to the Virginia Supreme Court for its continued support of these programs.
- The CLSBA Annual Meeting and Breakfast was held on Friday, June 13, 2025, at the Hilton Garden Inn, Virginia Beach. The 2025-2026 CLSBA Executive Committee was elected, Lori J. Bentley received the Local Bar Leader of the Year Award, the Newport News Bar Association was named the Bar Association of the Year, and several bar associations were recognized for their projects with Awards of Merit.
- The So You're 18 pamphlets continue to be presented as part of driver's licensing ceremonies in the Juvenile & Domestic Relations District Courts in many venues across the state. They are also distributed through local bars, schools, detention centers, voter registrars, social services agencies, and other interested groups.

Considering the April 16, 2025, Order of the Virginia Supreme Court requiring that all conferences be converted to sections as of July 1, 2025, the Board will be actively working this year on how to work through this transition and continue providing support to local and specialty bar associations. This transition creates a significant change in how the new Section of Local and Specialty Bar Associations will be moving forward because, unlike the other conferences, our “members” are not individual attorneys but rather bar associations. While our budget for the 2025 – 2026 fiscal year has already been approved and will not change, we will have to begin collecting some form of dues or funding for the 2026 – 2027 fiscal year. To plan for this restructuring, our conference will be conducting an in-depth review of the services this new Section will be providing to our member bar associations. One project we will be working on is a detailed survey that will be sent to each local and specialty bar association to get further feedback about their needs and what services they would like to see from the Virginia State Bar.

The leadership of the CLSBA for the upcoming year is Nicholas Gehrig, chair; Rachel Wolfe, chair-elect; Llezelle Dugger, secretary; Chris Dadak, treasurer; Chris Mougin-Boal, immediate past chair; Allison Anders; Veronica Brown-Moseley; Rex Flynn; Lindsey Komisin; Patrick Murphrey; Levi Norton; Bruce Russell; Tara Umbrio; Michael Sharp

In closing and on behalf of the CLSBA, I would like to thank all my fellow board members and Nancy Donner for an excellent year. Nancy has done an amazing job this year in her new role as VSB liaison for the CLSBA. I also want to thank Mike York, Brett Marston, Chidi James, and Stephanie Grana this past year in their unfailing support of our Conference. Their willingness to share their experience and knowledge for the benefit of the CLSBA is greatly appreciated. Thank you also to Cameron Rountree and Janet Van Cuyk, and all of the amazing staff at the Virginia State Bar who have helped us address and work through the transition from conference to section. We certainly did not know at the beginning of this past year that this would be our last year as a Conference. However, we are pleased that we ended on such a good note with a full year of excellent programs. We look forward to a new year of service and support for Virginia’s bar associations and all the great attorneys in our Commonwealth.

Diversity Conference Zaida C. Thompson, Chair

The Diversity Conference brings together VSB members from all perspectives to enhance outreach and engagement, promote the principles of justice and integrity in which all individuals are treated with dignity and respect, and elevate the public's trust in the legal profession.

The SLC currently has 1,504 members. The annual budget for the past fiscal year was \$60,050 and has a remaining balance of \$8,948.38 as of the end of April 2025.

In addition to its regularly scheduled Governing Board Meetings, the Diversity Conference held the following activities, meetings, and events between July 1, 2024, and June 30, 2025:

- **2025 Annual Forum** – April 4, 2025 at Virginia Union University. Participants were eligible to receive 5.0 hours of CLE credit. Topics included:
 - a) *Forging Pathways for the Betterment of the Legal Practice*
 - b) *Practicing in VA with AI*
 - c) *Practicing Law with Stressors and Protecting our Mental Health*
 - d) *Emotional Intelligence in the Legal Industry*
 - e) *Diversity, Equity, Inclusion, Civil Rights, and the Constitution – Yesterday, Today, and Tomorrow*
- **Annual Showcase CLE at Annual Meeting** – June 13, 2025, Virginia Beach. **Virginia Indian Tribes: Federal Recognition, State Recognition, the Law, and How it May Affect Your Practice.** Debra Powers spearheaded the program, and it was the first time this area of law was presented at the Virginia State Bar Annual Meeting.
- **Diversity Conference Welcome Reception** – June 12, 2025, Virginia Beach – The DC hosted a welcome reception for all attendees of the Annual Meeting. This was a great opportunity for the Law School Mentees to socialize and meet members of the bar, judges, and VSB council members in attendance.
- **2024 Law School Mentor/Mentee Initiative** – Two law school students from all eight of Virginia's law schools were invited by the Diversity Conference to participate in the Mentor/Mentee Initiative. They were invited to various Annual Meeting events such as CLE sessions, law school alumni breakfasts, the Dunnaville Award presentation, and other networking events. This year, the Mentees had a variety of practicing attorneys to guide them and serve as mentors. Special thanks to Brian Wesley and Latoya Asia for the law school outreach and ensuring an enriching experience for the future lawyers.
- **2025 Clarence M. Dunnaville Jr. Achievement Award** – This year's recipient was Eva N. Juncker. It was an honor to present this award to Ms. Juncker, who embodies the principles of equity, inclusion, and leadership in our legal community.
- **Oliver Hill/Samuel Tucker Pre-Law Institute (HTI)** – July 6 – July 11, 2025, at the University of Richmond. HTI is a weeklong camp that teaches high school students about life and careers in the law. Students learn how to put on a trial, meet local officials and judges, learn etiquette and social norms of attorney life, and apply their lessons through a mock trial and networking reception. This program is a joint initiative between the Diversity Conference and the Young Lawyers Conference. The HIT could not be a success without the help of co-directors Mikaela Phillips and Courtney Frazier.

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This coming year will bring some changes and challenges. The Virginia State Bar presented its annual budget to the Supreme Court of Virginia (SCT-VA) for approval. After reviewing the proposed budget, the SCT-VA issued an order that will terminate the conference status of the Diversity Conference, along with the three other Conferences. As a result, the Diversity Conference will lose funding except for certain programs effective fiscal year 2026-2027.

Having said that, the Diversity Conference will be able to continue as a Virginia State Bar Section and must raise funds to support the remaining programs that have been well-received by bar members and members of our community.

While this presents some challenges, we want to reassure you that the heart of the Diversity Conference mission remains strong. With the continued support of our members, we will carry on with several of our valued core programs and serve our community. Please consider joining the Virginia State Bar Diversity Section when renewing your annual dues.

The leadership of the Diversity Conference for the upcoming year will be:

- Debra L. Powers, Chair; Brian L. Buniva, Vice Chair; G. Rex Flynn Jr., Secretary; Zaida C. Thompson, Immediate Past Chair
- New Board Members: Christianne Quiroz, Terrance Robinson, Brian Goodman

I want to sincerely thank the Virginia State Bar Diversity Conference Board members and volunteers for their invaluable contributions, time, and unwavering commitment. Their guidance, support, expertise, and leadership have been instrumental in helping the Diversity Conference navigate challenges, achieve its goals, and stay true to its mission.

The Diversity Conference would be remiss if we did not mention the hard work, dedication, and reliability of the Virginia State Bar liaison, Nancy Donner. The Diversity Conference could not thank her enough for all the support and for the many times she went the extra mile.

Senior Lawyers Conference Thomas G. Bell, Chair

The Senior Lawyers Conference (SLC) continues to serve the needs of Virginia lawyers by focusing on issues of interest to senior lawyers and promoting the welfare of senior Virginians.

The SLC currently has 25,414 members. The annual budget for the past fiscal year was \$47,700 and has a remaining balance of \$30,182 as of the end of April 2025.

In addition to its regularly scheduled Governing Board Meetings, the Senior Lawyers Conference held the following activities, meetings, and events between July 1, 2024, and June 30, 2025:

- The Senior Virginian Law Day committee provided support for Senior Law Day programs. A guide to presenting a Senior Law Day program, a sample agenda, and a list of curriculum modules is available on request. (Bruce Robinson, Chair)
- SLC Pro Bono Committee created a study group to explore how the SLC can best assist senior lawyers in contributing to pro bono work. (Andrea Bridgeman, Chair)
- SLC Succession Planning committee put on programs to provide information to attorneys who are closing their practice, retiring, etc. (Barbara Anderson, Chair)
- *Senior Virginians Handbook* updates were solicited to reflect changes in Virginia law and created new print editions (Veronica Williams and Martin Wegbreit)
- *Senior Lawyers Newsletter* Summer 2025 issue, with 29 pages of remembrances, articles, announcements. (Frank O. Brown, Editor)
- The Senior Lawyers Conference was featured in the June 2025 issue of the *Virginia Lawyer* magazine
- SLC's Annual Meeting was held at the VSB Annual Meeting on June 14, 2025. There were 480 50-year award recipients; certificates and lapel pins were presented to the over 40 honorees in person.

The leadership of the Senior Lawyers Conference for the upcoming year will be:

- Barbara S. Anderson, Chair; Richard A. Gray, Vice Chair; Nancy Reed, Secretary; Thomas G. Bell, Immediate Past Chair
- New Board Members: Joe Bowen, George Shanks, James McCauley, Jean Kelleher, Jack "JB" Burch, Maxanne Witkin, the Honorable Doris Causey

Young Lawyers Conference

Benjamin A. Shute, President

The Young Lawyers Conference (YLC) consists of active and associate Virginia State Bar lawyers in good standing, age 36 and under, and those admitted to their initial bar for fewer than three years. No additional dues are charged for membership in the YLC. The YLC serves as a voice of Virginia's young lawyers for the Virginia State Bar and the American Bar Association. Through its projects, events, and standing committees, the conference provides opportunities for young lawyers to participate in governing the Virginia State Bar, serve the profession and the public, and enhance the public awareness of the legal profession.

The Young Lawyers Conference currently has 7,161 members. The annual budget for the past fiscal year was \$99,500.00 and has a remaining balance of \$17,598.03 as of May 31, 2025.

This year, the Young Lawyers Conference hosted the following programs:

July 2024

- Oliver Hill/Samuel Tucker Pre-Law Institute at the University of Richmond. (Coordinated by the Diversity Conference with support from the YLC)

August 2024

- YLC Remote Meditation Meeting
- YLC Leadership Institute at the Hilton Richmond Downtown in Richmond.

September 2024

- YLC Remote Meditation Meeting

October 2024

- Bench-Bar Celebration Dinner at Williamsburg Lodge in Williamsburg, VA. The keynote speaker was the Honorable Angela E. Roberts, retired chief judge of the Richmond Juvenile & Domestic Relations Court.
- District 4 hosted a networking event at Rudy's Golf & Sports Bar.
- YLC Remote Meditation Meeting
- YLC Board Meeting in McLean, VA.

November 2024

- YLC Board Meeting to approve the proposed budget for FY26
- YLC Remote Meditation Meeting

December 2024

- A&O Ceremony in Richmond, VA
- YLC Remote Meditation Meeting
- YLC Board Meeting in Wintergreen, VA
- District 7, along with the Harrisonburg-Rockingham Bar Association, hosted a holiday social for young lawyers in Harrisonburg.

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January 2025

- The YLC hosted a Wills for Heroes program with 41 volunteer lawyers who provided services to 74 first responders and 44 spouses and prepared about 350 documents. The YLC worked with the Virginia Women Attorneys Association, with support from the Virginia Law Foundation, to provide simple wills, powers of attorney, and advanced medical directives to sworn law enforcement, firefighters, and emergency medical technicians, and their spouses, for the Loudoun County Fire and Rescue and the Virginia State Police.

February 2025

- YLC Delegate, Brianna Weiner, attended the ABA Midyear Meeting
- YLC hosted a VA Free Legal Answers Clinic in Richmond.
- YLC partnered with the VSB Criminal Law Section to award five Criminal Law Fellowships to VA young lawyers for the Criminal Law Seminars in Charlottesville and Williamsburg.
- YLC Board Meeting in Roanoke, VA

March 2025

- YLC Rule of Law Day, where a group of middle school and high school students were educated about the principles and operations of their state government. Students took a field trip to the Virginia Capitol and learned about the legislative, executive, and judicial branches from government officials.
- YLC Virtual Board Meeting

April 2025

- Diversity Pre-Law Conference at Virginia State University.
- YLC Board Meeting in Norfolk, VA

May 2025

June 2025

- VSB Annual Meeting - YLC events included the Run in the Sun 5k, YLC Dinner & Awards, YLC Members Reception, and sponsored CLE: Judicial Squares. Shellie S. Reid received the R. Edwin Burnette, Jr. Young Lawyer of the Year Award.
- A&O Ceremony hosted at the Greater Richmond Convention Center
- YLC Professional Development Conference: free, webinar CLE
- Docket Call released new articles periodically throughout the year.
- We redesigned the YLC Brochure that will be used to market the conference to incoming attorneys, especially at the Admission & Orientation Ceremonies. One of our board members created a YLC challenge coin that will be used to show appreciation to our many volunteers.

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The leadership of the Young Lawyers Conference for the upcoming year includes the following officers and board members:

Simone T. Williams, *President*
Christy A. Compagnone, *President-Elect*
India L. Richardson, *Secretary*
Ben A. Shute, *Immediate Past President*
Dante J. Wright, *1st District Board Member*
Vacant position, *2nd District Board Member*
Courtney M. Frazier, *3rd District Board Member*
Brittany S. Johnson, *4th District Board Member*
Amanda H. Rudolph, *5th District Board Member*

Vacant position, *6th District Board Member*
Vacant position, *7th District Board Member*
Vacant position, *8th District Board Member*
Michael N. Maunder, *9th District Board Member*
Aaron L. Foster, *10th District Board Member*
Dylan D. Bishop, *At-Large Representative*
Sarah Kathryn Stahling, *At-Large Representative*
Etahjayne J. Harris, *At-Large Representative*
Mary Margaret Thacker, *At-Large Representative*
Xijia Yuan, *At-Large Representative*

A heartfelt thank you to Mallory Ralston for her outstanding service as our Section Staff Liaison. We deeply appreciate her dedication and support. As Mallory passes the torch to Pamela Flynn, we are excited to begin this new chapter. Pamela brings a wealth of great ideas and energy to the role, and we're grateful to have her as our new liaison. We look forward to working together to continue our success.

REPORTS OF THE SECTIONS

Administrative Law Section

Hon. C. Mitch Burton, Jr., Chair

The Administrative Law Section continues to serve the needs of Virginia lawyers by focusing on the practices and interests of Administrative Law and regulatory industries.

The Administrative Law Section currently has 444 members. The annual budget for the past fiscal year was \$7,136.00 and has a remaining balance of \$6,319.61 as of May 31, 2025.

The National Regulatory Conference was not held this year due to the transfer of its monetary fund from the Virginia State Corporation Commission to the Virginia Bar Association. The Board of Governors plans to resume the conference in May 2026.

We signed a Memorandum of Understanding with the Virginia Bar Association, as they will now be responsible for administering and hosting the National Regulatory Conference, including managing funds previously maintained by the Virginia SCC.

The leadership of the Administrative Law Section for the upcoming year is Timothy G. L. McCormick as Chair; Hon. Kati Kitts Dean as Vice Chair; John E. Farmer, Jr. as Secretary; and the Hon. C. Mitch Burton, Jr. as Immediate Past Chair.

I wish our new leadership all the best. I remain thankful to everyone who served on the Board and the NRC planning committee this year for another successful year serving our membership.

Antitrust, Franchise, and Trade Regulation Law Section

Brian E. Scarpelli, Chair

The Antitrust Law Section continues to serve the needs of Virginia lawyers by sponsoring projects and programs of special interest and relevance to the members of the Section and the Virginia State Bar in the field of antitrust and franchise law, and to further and promote public understanding of antitrust, franchise, and trade regulations.

The Antitrust Law Section currently has 124 members. The annual budget for the past fiscal year was \$1,400.00 and has a remaining balance of \$1,400.00 as of May 31, 2025.

The Antitrust Law Section co-sponsored a CLE program with the Business Law Section on April 29, 2025, entitled “The Google Ad Tech Case: Legal and Business Implications for Virginia Technology”. The hybrid event was held at the Wilcox Savage Conference Center in McLean, VA. There were 91 registrants (18 in-person and 73 webcast) with an overall attendance of 64 (15 in-person and 49 webcast). Overall, the attendees felt the panel discussion was in-depth and timely. This section looks forward to co-sponsoring future CLE offerings in the next fiscal year.

The Antitrust Law Section is looking to build on new developments and expanded interest in antitrust law to invigorate the Section moving forward. The Section is well-positioned to grow its membership and support its mission moving forward.

Looking forward, the leadership of the Antitrust Law Section for the upcoming year is Brian Scarpelli, Chair; William DeVinney, Vice Chair; and Spencer Cox as Secretary.

I want to conclude by thanking Pamela Flynn of the VSB for so much help in supporting the Section.

Bankruptcy Law Section

Janice R. Hansen, Chair

The Bankruptcy Law Section continues to serve the needs of Virginia lawyers by enhancing communication and exchange of ideas and information involving bankruptcy issues.

The Bankruptcy Law Section currently has 365 members. The annual budget for the past fiscal year was \$7,632.00 and has a remaining balance of \$5,804.70 as of April 2025.

The Board held monthly virtual meetings during the year. The section put out the *Bankruptcy Law Newsletter* – Winter 2024 and Summer 2025 editions facilitated by Editor Caleb Chaplain. The section was able to meet in person on April 26, 2025, at The Tobacco Company in Richmond, where they held their Annual Dinner/Meeting. The Bankruptcy Law Section was a sponsor at the WDVA Conference, held on May 30, 2025, at Roanoke College. The Annual Meeting Section lunch was held remotely on June 10, 2025. Several members of the Bankruptcy Law Section were in attendance; the 2025-2026 slate was voted upon and approved.

The leadership of the Bankruptcy Law Section for the upcoming year includes the following officers:

Nancy R. Schlichting, *Chair*

Dana Power, *Vice Chair*

Paula Beran, *Secretary*

Janice R. Hansen, *Immediate Past Chair*

Business Law Section

Joseph B. Allen, Chair

The Business Law Section continues to serve the needs of Virginia lawyers by providing programming and collaboration for those members who practice or have an interest in substantive areas relevant to business law practice.

During the 2023-2024 bar year, the Business Law Section had 1,136 members and an annual budget of \$49,500, with a remaining balance of \$17,616.49 as of the end of April 2025.

This year, the section hosted the 50th annual Advanced Business Law Conference as an in-person event on September 20 and 21, 2024, at Williamsburg Lodge. Panel topics included: Start With the End in Mind: Corporation and LLC Structuring for Capitalization, Succession and Exit; M&A and PE Today: Lawyering to Preserve the Bargain of the Deal and Avoid an Ambush at the Finish Line; VBA Panel – Developments and Practice Tips to comply with the Corporate Transparency Act; Updates on the legal landscape of Crypto Assets; Knowledge is Power: Doing Business in a Data-Driven Economy; U.S. Economic Sanctions and Export Controls Update (2024): A Reality Check, Perspectives, and Practical Tips for Business Lawyers; The Ethics of AI. Attendees were eligible to receive 10 hours of CLE and 2 hours of ethics credit. The board began planning the 51st Annual Advanced Business Law Conference, which will be held September 5 and 6, 2025, at Williamsburg Lodge.

Additionally, the Business Law Section co-sponsored a joint CLE with the VSB Antitrust Section, The Google Ad Tech Case: Legal and Business Implications for Virginia Technology Companies. This hybrid webinar was held on April 29, 2025, in McLean, VA, and offered participants 1.5 hours of CLE.

The Business Law Section held its Annual Meeting on Friday, June 13, 2025, during the VSB Annual Meeting at Virginia Beach. A recap of the section's activities from the past year was discussed, as well as approval of the 2025-2026 slate.

The Business Law Section board prepared an amended and restated version of its Bylaws following the VSB Bar Council's directive for sections to update their bylaws. The new Bylaws were approved by both the board and the section members in late 2024. In April 2025, the Chair of the Section had a dialogue with the VSB Executive Committee regarding the Section's proposed changes to the form of Bylaws that the VSB Bar Council had provided sections, and in June 2025, the board resubmitted an updated version of the Bylaws to the VSB Executive Committee for approval. The Chair and board appreciated the constructive dialogue with the Executive Committee and look forward to finalizing the new Bylaws in the 2025-2026 fiscal year.

Officers for the 2025-2026 year will be Todd M. Lynn, Chair; Jonathan D. Puvak, Vice Chair; Justin A. Ritter, Secretary; Tatsiana Y. Seliazniova, Treasurer; and Joseph B. Allen, Immediate Past Chair.

The Chair and board of the Business Law Section very much appreciate the great support that it received from the VSB and its staff liaison, Nancy Donner, for the 2024-2025 fiscal year, and we look forward to continuing the work of the Section in the next fiscal year.

Construction Law and Public Contracts Section

Spencer M. Wiegard, Chair

The Construction Law and Public Contracts Section continues to meet and exceed the needs of Virginia lawyers by providing a forum for its members to share research, experiences, and ideas. Section members receive a discounted registration fee for the annual Fall seminar in Charlottesville, which fulfills the complete annual requirement for Virginia continuing legal education credit. Members also receive the Construction Law and Public Contracts News, the Section's semiannual newsletter, and the Construction Law Handbook, an online compilation of construction and public contracts-related case summaries from Virginia state and federal courts updated annually. In addition to the Section's annual Fall seminar, the Section also sponsors a seminar on Federal Contracting in Fairfax.

The Construction Law and Public Contracts section currently has 538 members. The annual budget for the past fiscal year was \$10,175.00 and has a remaining balance of \$4,693.89.

The Construction Law and Public Contracts Section held the following events this year:

- **45th Annual Construction Law and Public Contracts Seminar**
This seminar was held at Boar's Head Inn, Charlottesville on November 7 and 8, 2024. There were 117 attendees at the live seminar, 4 on the phone and 37 on the webcast plus 21 faculty members, moderator, and planners. The committee for this program included Tara Chadbourn, Josh Johnson, Jesse Gordon, and Joe Guarino. The planning committee for the 2025 seminar includes Sarah Kathryn Stahling, Andrew Gay, and Christopher Hill.
- **8th Annual Federal Contracting Seminar**
This seminar was presented on September 10, 2024, at the Hilton Fairfax. There were 18 attendees at the live seminar, 8 phone attendees, 96 webcast attendees, plus 6 faculty members, a moderator, and planners. The committee for this program included Jonathan Wright and Jonathan Straw. The Planning committee for the 2025 seminar includes Jonathan Wright and Dan Rounds.
- **VSB Annual Meeting CLE Panel**
The Construction Law Section co-sponsored a CLE panel with the Litigation and Criminal Law Sections titled "*I Have to Produce What?!*" *The Ins and Outs of eDiscovery in Civil and Criminal Cases*. The program provided an in-depth overview of the eDiscovery process, beginning with pre-litigation or indictment and continuing through discovery and trial. Panelists discussed the responsibilities of both parties and counsel regarding the preservation, collection, and review of electronically stored information (ESI), as well as best practices for the production and examination of eDiscovery materials.

The Section continues to provide valuable written materials to its membership. The Section published its Winter edition of its newsletter under the editorship of Arnie Mason and Josh Johnson. The Section updated its Construction Law Handbook to include recent Virginia state and federal court decisions affecting our members' practices under the leadership of Mark Burgin.

The leadership of the Construction Law and Public Contracts Section for the upcoming year is, Arnie Mason, Chair; Tara Chadbourn, Vice Chair; Joshua Johnson Secretary; Spencer Wiegard, Immediate Past Chair; As well as Board Members Mark Burgin; Andrew Gay; James Harvey; Christopher Hill; Dan Rounds; Sarah Kathryn Stahling; Jonathan Wright; Emma Greger; Zahra Syed, Joseph Cooch,

Hon. Frederick Watson Ex-Officio Judicial; and, Erica S. Beardsley, Ex-Officio Judicial. YLC liaisons to the section are Parwiz Esmati and Luke Marston.

Finally, I would like to conclude by wishing the best of luck to a past Chair of our section, Brett Marston, my mentor and friend, as he takes the mantle as the President of the Virginia State Bar! Can Do!"

Corporate Counsel Section

George L. Washington Jr., Chair

The Corporate Counsel Section continues to serve the needs of Virginia lawyers by sponsoring events and facilitating the exchange of information and ideas among in-house attorneys.

The Corporate Counsel Section currently has 1,143 members. The annual budget for the past fiscal year was \$19,872, and it has a remaining balance of \$12,598.91 (as of April 2025).

The Corporate Counsel Section held nine board meetings this year; eight were held via video conference, and one was held as part of the Virginia State Bar's 2025 Annual Meeting in Virginia Beach. The section coordinated the following programs this year:

- The section continued to offer discussion panels at Virginia's law schools to inform law students about the roles, experiences, and career paths of corporate counsel. The section conducted panel discussions at six law schools this year, including William & Mary, Regent, George Mason, Richmond, Liberty, and Appalachian.
- For the second year in a row, the Corporate Counsel Section was a Platinum Sponsor of the VSB Business Law Section's Advanced Business Law Conference on September 20-21 in Williamsburg.
- The Corporate Counsel Section awarded one Corporate Counsel Award this year to law student Isabella Capanna, who sat for the July 2024 Virginia Bar Exam. This is a \$3,000 award given to a law student or recent law school graduate who intends to sit for the Virginia Bar Exam and to begin work as an in-house lawyer. The award is intended to help the recipient offset costs relating to studying for and taking the bar exam and to first-year bar dues. This will continue to be offered for both the February and July bar exams each year.
- The Board created a new initiative this year, the Section Member of the Year Award. The inaugural award was presented to Jessica Lehman during the Section's Business Meeting at the VSB Annual Meeting. This award recognizes a section member who has made outstanding contributions to the Corporate Counsel Section and helped improve the practice of law in Virginia through education, networking, mentoring, and other forms of engagement. The award includes reimbursed registration fees for the Annual Meeting. This will be awarded annually moving forward.
- The Corporate Counsel Section published two newsletters this year. (Winter 2024 and Spring 2025)
- The Corporate Counsel section sponsored a CLE program on Friday, June 13th, as part of the VSB Annual Meeting: Effectively (and Ethically) Incorporating Generative AI Into Your Practice.

Finally, the section hosted a luncheon at the VSB's Annual Meeting on June 13, 2025, to which section members were invited to participate in year-end business.

The Board of Governors of the Corporate Counsel Section for the upcoming year includes the following members and officers:

Taylor A. Brown, <i>Chair</i>	Lisa C. White
Peter V. Hilton, <i>Vice Chair</i>	Blake B. Hegeman
Bjoern Hansen, <i>Secretary</i>	Jessica Lehman
George L. Washigton, Jr., <i>Imm. Past Chair</i>	Adam B. Hark
Mason E. Heidt	Sarah E. Houck
Emily S. Petrovic Li	Adam J. Yost
Naoina C. Gartee	Angel Lewis (YLC Liaison)

It's been an honor serving as Chair this past year. I am deeply grateful for the support and dedication of our Board members and for the outstanding and unwavering support we received from our exceptional VSB staff liaisons, Jordan Harris and Dolly Shaffner, and from longtime friend of the section and Director of Bar Programs & Engagement, Mallory J. Ralston. Our achievements this year are a direct result of the hard work and commitment we contributed as individuals and as a team, and I'm incredibly proud of what we've accomplished together. I look forward to continuing to support the section's mission next year as Immediate Past Chair, and I am excited to see what unfolds under the leadership of our new officers for 2025-2026: **Taylor A. Brown, Peter V. Hilton, and Bjoern Hansen.**

Criminal Law Section

Joseph D. Platania, Chair

The Criminal Law Section continues to serve the needs of Virginia lawyers by bringing together both defense and prosecution attorneys to produce programming for Virginia lawyers and to share knowledge of the profession.

The Criminal Law Section currently has 1,344 members, including 69 judicial members. The annual budget for the past fiscal year was \$37,200.00 and has a remaining balance of \$16,899.36 as of May 31, 2025.

The section hosted a highly successful 55th Annual Criminal Law Seminar, held in both Williamsburg and Charlottesville, with approximately 150 attendees at each location. Feedback was overwhelmingly positive, with a few thoughtful suggestions for improvement that the Board is currently reviewing.

Unfortunately, due to a lack of candidates, the prestigious Harry L. Carrico Professionalism Award was not presented this year. However, the Board approved to posthumously honor Jess Aber with the Harry L Carrico Professionalism Award.

This year, the section sponsored one CLE at the VA Beach Annual Meeting in conjunction with the Litigation and Construction Law Sections. Chairman Joseph Platania participated as a panelist on the topic “I have to produce what? The Ins and Outs of eDiscovery in Civil and Criminal Cases.” The CLE on E-Discovery and Electronically Stored Information (ESI) was well attended and well received.

Newsletter editor Professor Ron Bacigal, of the University of Richmond, published three issues of Criminal Law News during the year.

As part of its ongoing partnership with Virginia law schools, the Section awarded stipends of \$3,500 in June 2025 to the Antonin Scalia Law School and the William & Mary Law School to fund student internships in the field of criminal justice for the summer of 2026.

The leadership for the upcoming year will be Alison G. Powers, Chair; Chuck Slemple, Vice-Chair and Seminar Chair; Nia Vidal, Secretary; and Joseph D. Platania, Immediate Past Chair. Ron Bacigal will continue as newsletter editor.

Finally, I would like to conclude by thanking Pamela Flynn, the VSB Staff liaison, for doing such a marvelous job of supporting our board and section this year.

Education of Lawyers in Virginia

Lee Livingston, Chair

The Section on the Education of Lawyers continues to serve the needs of Virginia lawyers by uniting law school deans, professors, judiciary members, and practicing lawyers in collaborative efforts to enhance every aspect of legal education in Virginia.

The Section currently has 200 members. Our annual budget for the 2025-2026 fiscal year is \$5,725.

This year, the Section met via video conference in September and November 2024, as well as in January and March 2025, to conduct regular business and explore innovative ways to serve its members.

Programs and Accomplishments

After 29 years, we dusted off our bylaws and updated them, as other sections did this year. The Professionalism for Law Students program successfully engaged students across all Virginia law schools.

Our esteemed Legal Writing Workshop continued to provide high-quality education, with a successful event hosted in collaboration with Virginia CLE.

At the VSB Annual Meeting in June 2025, we will present the annual Rakes award to Kevin Martingayle. Kevin's tireless efforts to improve the education of lawyers at every level set a standard for us all.

We devoted our efforts to a **Symposium Initiative for 2026**:

Historically, this Section was born from two groundbreaking conclaves, the most recent of which I attended more than a decade ago. Championed by the esteemed Chief Justice Donald Lemons, these conclaves sparked successful initiatives, including our highly regarded legal writing workshop, which addressed the longstanding need for better preparation of new lawyers in legal writing.

After reviewing survey results and engaging in robust committee discussions this year, we recognized strong continued interest in gathering stakeholders, but also a need for clarity around objectives. Factors such as the decline in law school graduates taking the Virginia bar, logistical challenges, and the need for targeted discussions encouraged us to explore new avenues.

As a result, rather than re-creating a standalone conclave, we are on an ambitious path forward: comprehensive programming at the Virginia State Bar Annual Meeting in June 2026, preceding and in conjunction with the Rakes Award. We envision a moderated roundtable among representatives from the judiciary, academia, and practitioners, with breakout groups reporting their insights. Think of this new approach as preventive medicine for our legal community—addressing critical educational issues before they become chronic problems.

Special Recognitions:

Hon. Linda Bryant deserves our heartfelt gratitude for leading the working group to develop our ambitious symposium initiative for the 2026 VSB Annual Meeting. Judge Bryant's dedication and vision are guiding us toward an innovative and impactful event.

Professor Laura Heymann provided invaluable leadership and insight, successfully spearheading the much-needed revision of our Section bylaws. After 29 years without updates, Laura skillfully navigated our Section through the modernization process, proving that while the law evolves slowly, our bylaws had been practically fossilized.

Special thanks to our capable Chair-Elect, Michael Finney, who has enthusiastically stepped forward to lead our Section in 2025-2026. His energy and commitment promise continued excellence for our Section.

Susan Butler rotated off as co-chair of the Professionalism for Law Students program, where she provided exemplary service, because she has been elevated to the Prince William J&DR court. Congratulations to Judge Butler!

I also extend deep appreciation to our exceptional VSB liaison, Megan Connor. Despite being relatively new to the VSB, Megan seamlessly filled the enormous shoes left by Mallory Ralston, who was deservedly promoted within the VSB. Megan's efficiency, professionalism, and dedication have already proven indispensable.

Looking ahead, our focus remains fixed on enhancing the professional formation, diversity, wellness, and competence of lawyers. Our planning for the 2026 symposium aims to foster greater collaboration and tangible improvements in legal education, benefiting the Commonwealth and the nation for decades to come.

We invite all Section members to contribute their ideas and suggestions directly to me or Chair-Elect Michael Finney as we finalize our proposal this fall.

Thank you all for your ongoing dedication and support.

Environmental Law Section

Michael W. McLaughlin, Chair

The Environmental Law Section had another successful year providing programming, education, and fellowship, and fostering future Virginia attorneys. The Section sponsored projects and programs related to environmental law in Virginia and kept Section members up to date with recent developments in environmental law so they can better serve the public.

The Environmental Law Section currently has 271 members. The annual budget for the past fiscal year was \$5,232.00 and, as of April 30, 2025, has a balance of \$3,407.83.

The Environmental Law Section Board of Governors held ten meetings via video conference and two in-person meetings to effectively plan for the 2024-2025 bar year. The Board supported the following initiatives to serve our members and the public throughout the year:

- The Newsletter committee continues to produce a monthly issue of *The Oyster*. This news update filters many different sources that share environmental law updates, such as the DEQ, EPA, the Courts, etc., and shares pearls of information with section members monthly, via email.
- The section partnered with the VSB Administrative Law Section to offer a free webinar CLE program to VSB members on September 26, 2024, highlighting the Supreme Court's New Administrative Law Doctrine. Professors Joel Eisen and Noah Sachs presented. 345 people attended the live CLE course. 80 people viewed the on-demand CLE course before the MCLE deadline on October 31, 2024.
- The Public Service committee hosted an Earth Day River Cleanup on April 22, 2025, followed by a networking event at Legend Brewery in Richmond.
- The Environmental Lawyers' Road Show Committee coordinated panels of environmental lawyers at the following Virginia law schools: UVA (Spring 2024), GMU, and UofR. Panelists spoke with students about different career paths within environmental law and answered students' questions.
- The Fellowship Committee awarded its first \$2,000 Environmental Law Fellowship to Jack Magner of UVA Law.
- The Section was featured in the December 2024 *Virginia Lawyer* and authored a Chair's column and three substantive articles for the issue. Their cover photo was captured on the Pipeline Trail above the James River in downtown Richmond, shortly before its closure.
- Mike McLaughlin represented the Section as an exhibitor at the Environment Virginia conference in Lexington, VA, in April 2025, and hosted a small networking event for attendees and law students from W&L.
- Per instructions from the VSB to standardize bylaws across the 20 sections, an ad hoc committee was established to review the sections' bylaws and propose amendments. The committee's amendments were approved by the board, the section, and the VSB Council and were adopted beginning July 1, 2025.

The Section held its annual meeting in May 2025 in Richmond. Section members were invited to participate in the year-end business that included voting in the 2025-2026 board of governors.

The 2024-25 Bar year was an eventful one for the Environmental Law Section. Environmental law was at the center of significant decisions by the U.S. Supreme Court, and the recent change in

administrations at the federal level resulted in several evolving changes to the practice of environmental and energy law. These have been interesting times.

The Oyster newsletter provided our members with monthly summaries of matters of interest in environmental law throughout the year. It remains a popular benefit for Section members. The CLE we co-sponsored with the Administrative Law Section was both popular and timely, as it dealt with changes to how environmental law is to be interpreted and enforced. We continued our public service activities on Earth Day and sponsored several networking events in different parts of the Commonwealth that were well received.

A highlight was awarding our first Environmental Law Fellowship. Several applied for the Fellowship, which is awarded to a law student planning to work over the summer with an environmental nonprofit in Virginia. Another was exhibiting at Environment Virginia, a premier annual conference focusing on environmental law.

I thank the Virginia State Bar for the opportunity to serve and for allowing our Section to serve its members and the Commonwealth.

The leadership of the Environmental Law Section for the upcoming year includes:

Rachel M. James, *Chair*
Marvi R. Ali, *Vice Chair*
Emile P. Khatter, *Secretary*
Michael W. McLaughlin, *Immediate Past
Chair*
Astrika W. Adams
Alexander G. Cattermole
D. Nelson Daniel

Susan L. French
Jerald R. Hess
Kerry B. Hutcherson
Eric M. Lansing
Maureen F. R. Matsen
Christopher J. McDonald
Katherine E. King, *YLS Liaison*

Family Law Section

Craig W. Sampson, Chair

Among the most visible duties of the Board of Governors for the Family Law Section is coordinating the Annual Family Law Seminar in the Fall and the Advanced Family Law Seminar in the Spring. Both seminars are provided in conjunction with Virginia CLE.

In October 2024, the 43rd Annual Family Law Seminar was presented in Richmond, Fairfax, and Virginia Beach. The topics covered were the Bi-Annual Case Law Update, the Bi-Annual Legislative Update, as well as Anything but Standard: Tips for Crafting a MSA That Is Tailored to Your Client's Needs; An In-Depth Look at Child Support Calculations; Attorney Fees for Your Client and from Your Client; and Ethical Considerations in the Use of Improperly Obtained Evidence.

The 41st Annual Advanced Family Law Seminar was held on April 10, 2025, at the Hilton Richmond Hotel & Spa/Short Pump in Richmond. We had a strong turnout with 135 attending in person, 208 by webcast, and 4 by phone. I presented the Bi-Annual Case Law Update, and Daniel Gray delivered the Bi-Annual Legislative Update. Judges Baugher and Johnson, along with Steve Shedlin and Mitchell Broudy, participated in a panel on the use of evidence and experts. Judge Ayers, Paul Mungo, and Lori Battistoni led a panel on drug testing in custody matters, while Amanda Sams presented common pitfalls in deed drafting during divorce. Judge Ortiz, Bruce Russell, and Barry Waldman wrapped up the day with an engaging ethics session on managing high-risk clients.

The 2025 Family Law Awards were presented at the Advanced Family Law Seminar. The Honorable Joanne Alper received the Betty A. Thompson Lifetime Achievement Award, and Rich Garriott received the Service Award. The winners of the Fourth Annual Family Law Writing Competition were recognized and received certificates, while the first-place winner received a cash prize provided and presented by the American Academy of Matrimonial Lawyers.

The winning law students were:

- 1st place – Michael Wahl
- 2nd place – Allison Altman
- 3rd place – Alyssa Schiefer

At the Virginia State Bar Annual Meeting in June in Virginia Beach, the Family Law Section held a Board meeting and invited section members to participate in year-end business.

The Virginia Family Law Board continues to produce the Virginia Family Law Quarterly, providing practitioners with excellent articles and information regarding the practice of family law. Editor Jennifer Bradley is to be commended for her tireless work on this publication.

In addition to all of the activities noted above, the Board set a goal of increasing participation from parts of the Commonwealth that have not been fully represented, namely the western part of the state. Over time, the Board had come to be populated by representatives primarily from Richmond, Northern Virginia, and the Virginia Beach area. This was largely a function of geography - attendance at Board meetings and Bar functions is more difficult for those who live further away. The Board recognized the need for representatives from more rural jurisdictions to better identify and address their particular needs. With the help of member Nanda Davis, who practices in Roanoke, the Board undertook a process of identifying and recruiting new members

from the western part of the state. As a result of these efforts, we have two new Board members from west of Richmond who will soon begin their terms of service.

The Family Law Section currently has 1,408 members. The annual budget for the past fiscal year was \$36,672.00, and there was a negative balance of \$2,005.63 as of June 30, 2025.

I wish to thank the members of the Board of Governors for their service, enthusiasm, and organizational skills. Carole Krogmann will take over as Chair on July 1st, Kristen Kugel will become Vice Chair, and Barry Waldman will join the officers as Secretary. I thank Dolly Shaffner for her years of dedicated service, valuable guidance, and support in planning. She retired in April of this year. I am excited to welcome Jordan as our new liaison and look forward to working with her. It has been my privilege and honor to serve as Chair of the Board of Governors of the Family Law Section for the 2024–2025 term.

General Practice Section

Hunter R. Wells, Chair

The General Practice Section continues to serve the needs of attorneys in the general practice of law and has done so since 1986. We continue to conduct legal education seminars and other activities to enhance the skills of Virginia lawyers.

The General Practice Section has 656 members. The annual budget for the past fiscal year was \$8,000 and has a remaining balance of \$7646.34 as of the end of April 2025.

In addition to regularly scheduled Board of Governors meetings, the General Practice Section held its yearly retreat on April 25 - 26, 2025, in Fredericksburg, VA. The slate for the upcoming year was presented and approved.

The General Practice Section held their Annual Meeting on Friday, June 13, 2025, at the VSB Annual Meeting in Virginia Beach. During the General Session, the Tradition of Excellence Award was presented to G. William "Bill" Watkins of Waynesboro, VA.

The Officers for the 2025-2026 Year are: John C. Johnson, Chair; Jeffrey C. Flax, Vice-Chair; Hunter R. Wells, Immediate Past Chair. The Secretary position will be filled after the start of the new fiscal year.

Health Law Section

Karla L. Palmer, Chair

The Health Law Section continues to serve the needs of Virginia attorneys by promoting pro bono publico objectives of the Virginia State Bar within the field of Health Law; to foster interest, scholarship, advocacy and research in health law; to furnish the public with an understanding of its rights and obligations; to enhance civility, collaboration, and understanding among lawyers interested in health law; and to cooperate with other bar organizations in each respective area of law. In addition, the purposes of this Section are to sponsor programs and seminars on health law, promote writing opportunities, and hold an annual writing competition for law students on a relevant health law topic.

The Health Law Section has 421 members as of June 30, 2025. The FY2025 section budget for the bar year ending June 2025: \$8,320.00

The leadership of the Health Law Section for the upcoming year is: Harrison Gibbs, Chair; Andrew Shutte, Vice Chair; Michael Newby, Secretary; Karla Palmer, Immediate Past Chair; Kimberly Day; Kyle Elliott; Elizabeth Heddleston; Sarah Jessee; Troy Johnson; Kambria Lannetti; and Amy Mogetz.

Intellectual Property Section

P. Andrew Riley, Chair

The Intellectual Property Section continues to serve the needs of Virginia lawyers by providing continuing legal education programming and by creating opportunities for its members.

The Intellectual Property Section had 867 members this year. The annual budget for the past fiscal year was \$16,944.00 and has a remaining balance of \$10,624.84.08.

Typically, the Intellectual Property Section holds virtual board meetings every other month, which are open to all section members. To attend, please contact a member of the leadership team for the meeting information.

The section sponsors an Annual IP Writing Competition with a cash award for Virginia law students. The section awarded Darius Adel, from the University of Virginia School of Law, the Section's writing competition award for his paper titled, "Adaptive Contracting and the Unilateral Modification Clause." Mr. Adel's winning paper is posted on the Section's website.

The Section held its annual CLE on October 17, 2024, in Richmond and plans to hold this year's CLE in Alexandria.

The leadership of the Intellectual Property Section for the upcoming year includes the following board members and officers:

Chair – Robert Michaux
Vice Chair – Amy Pruett
Secretary – Martha Weis
Imm. Past Chair – Andrew Riley

Board Members:

Will Dickinson
Charles B. Molster, III
Aaron L. Parker
Courtney Reigel
Kevin Springer
Larua Whitworth
Andrea Z. Warmbier
Shawwna M. Yashar

International Practice Section

Geoffrey M. Goodale, Chair

The International Practice Section continues to serve the needs of Virginia lawyers by providing members with information on important developments in matters that are international in nature or which have transnational implications.

The International Practice Section had 249 members in June 2025. The annual budget for the past fiscal year was \$2,296.00 and had a remaining balance of \$1,482.48 as of June 30, 2025.

The Board of Governors of the International Practice Section met regularly this past year. The board reviewed the section's bylaws and will soon propose amendments. The section co-sponsored the 50th Annual Advanced Business Law Conference in Williamsburg over September 20-21, 2024, and hosted a virtual "Fireside Chat with Claudia Salomon" on September 23, 2024. On June 4, 2025, the board held a hybrid Annual Meeting to which section members were invited to participate and to elect the 2025-2026 Board of Governors.

The leadership of the International Practice Section for the upcoming year includes the following board members and officers:

Geoffrey M. Goodale, *Chair*
Melissa S. Gorsline, *Vice Chair*
Jennifer K. Mammen, *Secretary*
Jana L. King Allen

Megan A. Barnhill
Chenxi Lu
Brian H. Pandya
Tatsiana Y. Sellazniova

Litigation Section

Jonathan P. Lienhard, Chair

The Litigation Section continues to serve the needs of Virginia lawyers by providing a forum for the discussion of matters affecting how litigation is conducted in the Commonwealth of Virginia, to sponsor projects and programs of educational value or special interest and relevance to the members of the Section; and to promote efforts aimed at improving the efficient, affordable, ethical, and just resolution of societal disputes.

The Litigation Section's membership as of June 30, 2025, was 2,264, making this the largest section of the Virginia State Bar. Our budget for 2024-25 was \$31,068, and there is a remaining balance of \$27,850.60.

The Litigation Section held five board meetings this year to coordinate its programs and activities. The board had its dinner at Steinhilber's in Virginia Beach on June 12, 2025, and its section meeting during the VSB Annual Meeting, where the new board of governors was approved.

The Section co-sponsored a 1.5-hour CLE program with the Construction Law and Criminal Law Sections at the VSB Annual Meeting, titled "*I Have to Produce What?! The Ins and Outs of eDiscovery in Civil and Criminal Cases.*" The panel featured speakers Joseph Platania, John Cycon, and Ian Wilson, with me serving as the moderator. The audience asked great questions and seemed to enjoy the panel discussion.

The Honorable Cleo E. Powell, Associate Justice of the Supreme Court of Virginia, led the Rule of Law programs at local schools throughout the Commonwealth. The section earmarks \$5,000 to assist every year.

The leadership of the Litigation Section for the upcoming year is: Darius K.A. Davenport, chair; Brian J. Schneider, vice chair; William B. Jackson, secretary; Jonathan P. Lienhard, immediate past chair; Prof. Jennifer R. Franklin, newsletter editor; Ashley T. Davis, appellate committee chair; Tara A. Enix; Stephen A. Grim; Roy M. Jessee; Erin E. Jewell; David W. Thomas; Melissa Y. York; Glenn B. Williams, Sean P. Roche, William L. Spotswood, Lynn L. Robinson; SLC Liaison, Hon. James P. Fisher, ex-officio judicial; and Hon. Jane M. Reynolds, ex-officio judicial.

Finally, a big thank you to Jordan Harris, Dolly Shaffner, and Mallory Ralston, of the VSB Staff, for their guidance and direction this year. I wish Darius the best as he becomes chair of the Section.

Local Government Law Section

Brian J. Lubkeman, Chair

The Local Government Law Section continues to serve Virginia lawyers by providing a forum to share resources for public and private practitioners of local government law.

The Section currently has 671 members. The annual budget for the past fiscal year was \$18,172.00, and expense reports show a final balance of \$16,157.41 as of June 30, 2025. The July 2025 statement will include expenses for the section's Fellowship. This \$4,000.00 expense typically occurs in the Spring, but this year's recipient was selected in June, and the funds were distributed after the fiscal year ended.

The Section held five board meetings this year and released Winter 2025 and Spring 2025 issues of its newsletter, *The Journal*.

The Section hosted two free CLE webinars this past year:

August 15, 2024: **2024 VSB Election Law Update**

Panelists: John C. Blair, II – City Attorney for Staunton
Martin R. Desjardins – Assistant County Attorney for Fairfax County
Walt Latham – York County's General Registrar
Megan E. Kelly, Moderator
1.5 CLE credit hours
306 attended

April 23, 2025: **An Introduction to Child Dependency Cases**

Speaker: Patrick C. Murphrey, Senior Assistant City Attorney for the City of Newport News
Megan E. Kelly, Moderator
1.0 CLE credit hour
20 attended

The Webinar Committee is planning additional webinars for the coming months.

The Section continues to offer a Fellowship to a law school student who works for a local government office during the summer months. The Section received several applications this year. One applicant stood out, and the Section awarded the budgeted amount of \$4,000.00. This year's recipient was Audra Jones, who will be working at the Suffolk City Attorney's Office this summer.

The Section hosted its annual meeting on June 25, 2025, in an all-virtual format via Microsoft Teams. This method seems to be more practical for both board and section members to attend, since the section does not usually sponsor a CLE at the VSB's Annual Meeting. All section members were invited to attend this meeting and participate in the end-of-year business.

A 2024 initiative, the Leadership Training program for up-and-coming lawyers in the local government area of practice, continued into the second year of its initial two-year implementation and produced its first round of graduates. The demands of a chief legal counsel for a governmental entity include many of the skillsets of a transactional attorney, a litigator, a corporate general counsel, an administrator, and a politician. Learning this skillset has historically been a matter of having the right

temperament, on-the-job training, and not a small amount of luck. Having a structured program for those who wish to become chief or deputy chief counsel to local governments and private practitioners who represent government entities or deal with them on major cases and transactional situations regularly was an extraordinary achievement for which the section can continue to be proud.

The leadership of the Section for the upcoming year consists of the following board members and officers:

Wahaj Memon, *Chair*
Wade T. Anderson, *Vice Chair*
Blair H. O'Brien, *Secretary*
Brian J. Lubkeman, *Imm. Past Chair*
Susan W. Custer, *Newsletter Editor*
Ellen F. Bergren

Meredith C. Harlow
Megan E. Kelly
Michael W.S. Lockaby
Lauren Lucian
Lauri Sigler
Dennis A. Walter

Military Law Section

Wilson T. Mustian, Chair

The Military Law Section continues to serve the needs of Virginia lawyers who have an interest in how Virginia law affects military and veteran personnel, functions, and operations, and is thus suitable for attorneys whose clients are members of the military.

The Military Law Section currently has 194 members. The annual budget for the past fiscal year was \$11,148.00 and has a remaining balance of \$8,367.64 as of May 31, 2025.

The Military Law Section held five board meetings this past Bar year to coordinate its programs. This year's Annual Military Law Symposium was held in the 3rd Floor Conference Room of the Bank of America Building in Richmond on April 4, 2025. We had 34 of 48 registrants attend either in-person or virtually.

This year, the section teamed up with the Access to Legal Services Committee to present the Military Law Pro Bono Award at the committee's Pro Bono Awards Luncheon during the Annual Meeting. This year's winners, David J. DePippo and Timothy L. McHugh, attended the ceremony and were recognized for supporting our veterans. The Military Law Section's Annual Meeting was held just before the Pro Bono Luncheon.

The section membership approved the new bylaws, and the section name was changed to the Military and Veterans Law Section. The Executive Council approved these changes at their June meeting.

Thank you to our Board, membership, participants, and supporters throughout this year. Our past Section leadership, notably Katherine Feinberger, Jim McNider, and Richard Prevost, set the conditions in which we were able to pursue three significant changes to the Section: our name, our by-laws, co-sponsoring an Annual Meeting CLE, and the creation of our e-newsletter over email vice a standalone pdf/mailer. Section engagement indicates an upward trend, and through our continued delivery of value to our membership, membership numbers should increase.

Section leadership for the upcoming year is Brandy M. Disbennett-Albrecht, Chair; John Alexander Chudoba, Vice Chair; Jefferson L. Kaster, Secretary; and Wilson T. Mustian, Immediate Past Chair.

A tremendous thank you and appreciation to Pamela Flynn, our section Staff Liaison. Pamela stepped into the role and ensured we were successful. She has terrific ideas for our section, and we are thankful she is our liaison.

Congratulations to our incoming leadership team! Brandy DisBennett has been a driving force behind our section for many years, and we're excited to see the remarkable accomplishments that lie ahead under her leadership as Chair.

Real Property Section

Robert E. Hawthorne Jr., Chair

It has been a great honor for me to serve as Chair of the Real Property Section, to follow a long line of outstanding former chairs, and to lead the Section for the 2024-2025 year, along with my terrific colleagues, Vice Chair Richard B. Chess and Secretary-Treasurer Cynthia A. Nahorney.

The Real Property Section currently has 1,359 members. The annual budget for 2024-2025 was \$45,696.00 with a balance of \$14,668.08 as of April 30, 2025.

The Real Property Section held four board meetings during the past Bar year to coordinate its programs and activities. The Fall meeting took place in Charlottesville in September, followed by the Winter meeting in Williamsburg in January. The Spring meeting was again held in Charlottesville in March, scheduled just before the Advanced Real Estate Seminar. The Summer meeting was conducted in June as part of the Virginia State Bar Annual Meeting.

The Living Library Project

The Membership Committee released two new videos on Community Associations Law for the Living Library Project, featuring Lucia Anna “Pia” Trigiani and Deborah Casey. Trigiani provides an overview of key legal frameworks, including the Virginia Condominium Act, the Property Owners’ Association Act, and the Nonstock Corporation Act. Casey builds on this by examining the structure and governance of community associations, including the roles of attorneys, types of associations, and the importance of declarations.

The Fee Simple

The Section continued its tradition of publishing its journal, *The Fee Simple*, twice a year (Fall 2024 and Spring 2025).

The Fee Tail

The *Fee Tail* is an email newsletter with current and timely updates to case law pertinent to the practice of real estate law in the Commonwealth. The *Fee Tail* is meant to be a “junior” form of the *Fee Simple*—it is a short update with very current cases, preferably drawn from the section membership. The section published 3 editions of the newsletter in August 2024, October 2024, and April 2025.

The Real Property Section co-sponsored two Seminars with Virginia CLE. The 29th Annual Advanced Real Estate Seminar was held March 7-8, 2025, at The Kimpton Forum Hotel in Charlottesville. The 42nd Annual Real Estate Practice Seminar was held in Fairfax, Roanoke, and Richmond in May 2025.

The Traver Scholar Award

This year, we honored the 2025 recipient of the Traver Scholar Award, Sarah Louppe Petcher. The award is named for Courtland L. Traver, whose outstanding legal ability and willingness to share his knowledge and experience were an inspiration to others. Sarah is a past chair of the Real Property Section of the Virginia State Bar (2023-2024) and is currently an Area Representative and co-chair of the Education Committee. In this role, she has assisted the Section and VaCLE in putting

together CLEs targeted towards real estate practitioners. She is a speaker for VaCLE on real estate brokerage issues as well as other matters. Sarah teaches extensively around Virginia and the country to real estate agents and brokers, covering diverse topics such as ethics, code of ethics enforcement process, real estate transactions, fair housing, and 1031 exchanges.

At the Annual Meeting in June in Virginia Beach, we elected our new slate of officers. For the 2025-2026 year, the Section's officers are: Richard B. Chess, Chair; Cynthia A. Nahorney, Vice-Chair; and James L. Windsor, Secretary-Treasurer.

Taxation Law Section

Scott Seymour, Chair

After a year of transition, the Taxation Law Section continues to encourage improvement and efficient administration of the tax law of the state and promotes the exchange of ideas between practitioners and administrators.

The Virginia State Bar's Taxation Law Practice Section had 492 members this year. The annual budget for the 2024-2025 fiscal year was \$8,864.00, and the remaining balance was \$4,906.20.

The Taxation Law Section held board meetings every other month this past Bar year virtually, with committee meetings for the CLE and Newsletter Committees held on non-board meeting months.

The Section sponsored a writing contest, awarding cash prizes to the winning papers. The top prize winner was published in the Section Newsletter. The Board approved continuing the writing contest for the 2025-2026 fiscal year.

The Section sponsored three CLE programs during the past bar year, providing a broad variety of tax topics to the general membership of the VSB. We plan to continue to provide CLE programs and our semi-annual newsletter during the current Bar year.

The leadership of the Taxation Law Section for the upcoming year is:

Jacob Hunter Snow, *Chair*
Henrik B. Haeckel, *Vice Chair*
Chenxi Lu, *Secretary*
Tiffany Burton, *Imm. Past Chair*
Linwood S. Seymour, *Imm. Past Chair*

Mark D. Lansing, *Ex-Officio*
Jennifer A. Lucey, *Ex-Officio*
John P. Morgan III, *Ex-Officio*
Kelly Chappell Scanlon, *Ex-Officio*

Stephen A. Grim, *Board of Governors*
Thomas T. Moses, *Board of Governors*
Aaron R. Moshiaswili, *Board of Governors*
Brandon N. Mourges, *Board of Governors*
Timothy M. Todd, Jr. , *Board of Governors*
George Christopher Wright, *Board of Governors*

Trusts & Estates Section

Brooke C. Tansill, Chair

The Trusts and Estates Law section continues to serve the needs of Virginia lawyers by promoting the exchange of ideas among lawyers who deal with wills, estates, trusts, and related matters.

The Trusts and Estates Law section currently has 1,686 members. The annual budget for the past fiscal year was \$14,700.00 and has a remaining balance of \$8,040.92 as of May 31, 2025.

In October, the Trusts and Estates Section co-sponsored the 43rd Annual Trusts & Estates Seminar with Virginia CLE. This year's conference featured topics that provided updates for a Virginia estate planning practice. The downloadable e-book seminar materials serve as a great reference tool for many, many years in the office.

This year's topics included:

- Important updates on federal and Virginia tax developments, cases, and legislation.
- A review of retirement plan changes from the SECURE Act and SECURE Act 2.0.
- Benefits of QTIP trusts for estates.
- Ethical issues lawyers face in the trusts and estates field.
- Tools to enhance your practice and make you a better lawyer.

The Trusts and Estates Sections published two newsletters in fiscal year 2024 - 25. Our Fall 2024 issue featured articles “Virginia Reforms Its Statutory Rule Against Perpetuities”, “529 Plans...More Exciting Than You Think”, and “Beneficiary Consent, Release and Ratification, Virginia’s Revisions to Va. Code § 64.2-800.” Our Spring 2025 Issue contained two articles on “Supported Decision-Making: Less Restrictive Alternative to Guardianship” and “The Hidden Perils of Arbitration Clauses in Nursing Home Contracts”.

Section leadership for the upcoming year is Emily A. Martin, Chair; Peter Holstead Davies, Vice Chair; James A. Gillis, Secretary; and Jennifer A. Lucey, Newsletter Editor. I thank them for their ongoing service to our Section and wish them luck in the upcoming year.

I'd also like to extend my heartfelt thanks to Pamela Flynn, our Staff Liaison at the VSB, for her invaluable support and for keeping us organized and on track throughout a busy year.