

A N N U A L R E P O R T

2 0 2 4

**TOTAL
MEMBERS**
including judicial,
retired, inactive and
in-house counsel

26,276

**TOTAL
ACTIVE
MEMBERSHIP**

19,832

**CALLS
HANDLED BY
PHOENIX
RESOURCE
CENTER**

22,582

**ATTENDANCE
AT CLE
SEMINARS**
including OnDemand
programs

21,955
live-only attendance was
7,822

**OUT-OF-
STATE
ACTIVE
MEMBERS**

6,985

STATE BAR BOARD OF GOVERNORS

PRESIDENT
Ted A. Schmidt

PRESIDENT-ELECT
Samuel Saks

VICE PRESIDENT
Doreen M. Paul

**SECRETARY-
TREASURER**
Kelsi Taylor Lane

District 1
(Apache, Coconino,
Mohave,
Navajo Counties)

David J. Johns

District 2
(Yavapai County)

Henry Whitmer
(*resigned, November 2024)

District 3
(Gila, Graham,
Greenlee Counties)

Preston L. Pollock

District 4
(Cochise County)

D. Christopher Russell

District 5
(Pima, Santa Cruz
Counties)

Louis Fidel
Amy Hernandez

District 6
(Maricopa County)

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Baker-Mushkatel*
Diandra D. Benally
Jena Decker-Xu
Robert J. McWhirter
John W. Moody
David B. Rosenbaum
Benjamin P. Taylor, II
Chloé Woods

District 7
(La Paz,
Yuma Counties)

Jimmie Dee Smith

District 8
(Pinal County)

Denis M. Fitzgibbons

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Dean Stacy Leeds
Dean Marc L. Miller

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Benjamin P. Taylor, II



Dear Members,

As you review this Annual Report of your State Bar, you will see that we are financially strong and engaged as ever in executing our mission to serve and protect the public and promote access to justice.

In fact, our new Access to Justice committee is up and running strong. We have endorsed and supported the Supreme Court's new Arizona Lawyer Apprentice Program designed to increase the number of lawyers serving our less-populated communities.

Our Public Service Center led the way in providing mission-driven access to justice. Through free legal events, 175 attorneys volunteered 550 hours, benefiting 1,854 members of the public. Through a now longstanding and much-valued partnership with ABC15 Arizona, the State Bar recruited 76 volunteer attorneys, who served 1,222 members of the public during monthly live legal hotline segments. We have expanded this program, establishing a partnership with KGUN 9 in Tucson, where in our inaugural event we responded to 77 calls with free legal advice on family law issues. That's a great start to what will be an impactful long-term relationship!

ANNUAL REPORT 2024

In 2024, the State Bar's Continuing Legal Education Department provided 150 new live seminars. The CLE catalogue offered 462 hours of programming, including 168 hours of ethics training.

We also provided support to many of our affiliate and affinity bars in 2024 via donations to the Arizona Women Lawyers Association, the Arizona Black Bar's Hayzel B. Daniels Scholarship Gala, the Pima County Bar Association, as well as Southern Arizona Legal Aid and Community Legal Services and many others. This strengthens the legal community, fosters knowledge sharing, extends networking opportunities, and ensures professional development.

This last year we began work to launch our free Wellness program for lawyers to provide independent professional counseling to members who might benefit from help dealing with the stress of practice. Simultaneously, we launched the Advancement and Improvement Committee to assist us in assuring we deliver the best services possible to our members.

To expand our reach, we are recommending a rule change to Rule 32 to allow a Senior Lawyer Division representative on our board and expanding our mission to include protecting and promoting the Rule of Law.

Finally, our robust Bar Convention at the Sheraton Grand at Wild Horse Pass includes Tucson's own Academy Award winner Cord Jefferson, author and director of *American Fiction*. Thank you to Cord and all those who make the Convention a must-attend event.

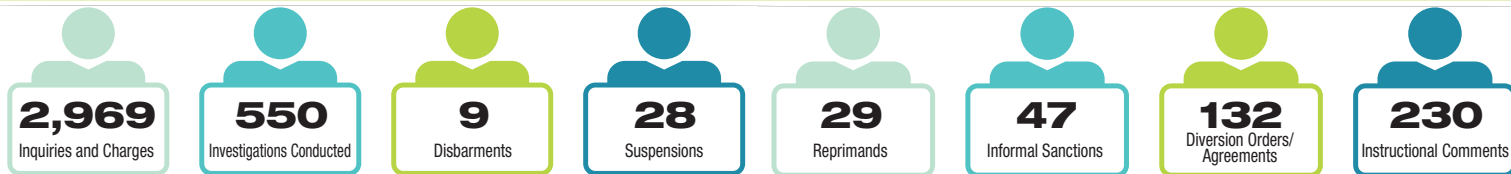
— Ted A. Schmidt, State Bar of Arizona President

Access to Justice Programs and Statistics

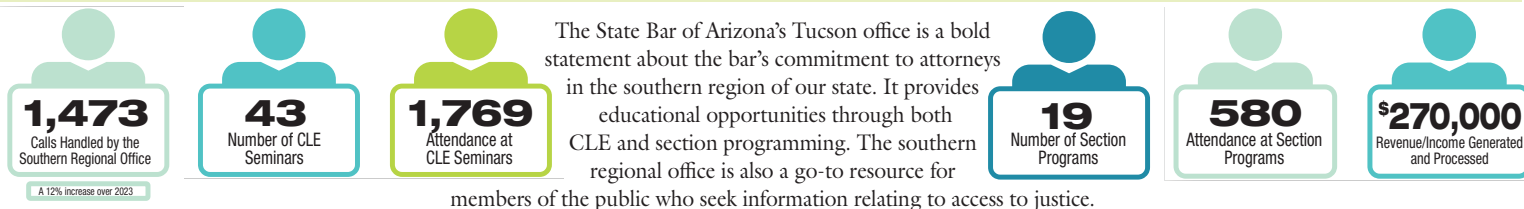
- The Public Service Center (PSC) received the Arizona Supreme Court Strategic Agenda Award for Promoting Access to Justice in the state.
- The PSC handled approximately 1,255 calls from the public seeking help for hiring a lawyer or direction to legal resources.
- The PSC met with members of the Legal Services Advisory Panel two times to discuss ways in which the State Bar could support Legal Service Organizations in their endeavors to connect members of the public with free legal resources.
- The PSC met with members of the Military Legal Assistance Panel six times to discuss ways in which the State Bar could support military members.
- In 2024 the PSC partnered with Maricopa County and the City of Glendale along with the Triple M Military and Veterans Committee to provide veterans with free legal resources.
- The PSC coordinated a variety of free legal help events. In all, 175 volunteer attorneys provided 550 hours benefiting 1,854 members of the public.
- The PSC launched new community partnerships with Fresh Start Foundation and the City of Tolleson in the form of information sessions and free legal clinics to target diverse social economic groups in Arizona.
- The PSC recruited 76 volunteer attorneys for the Let ABC15 Know TV station partnership. A total of 1,222 consumers benefited from the televised free legal hotline.
- The PSC expanded its televised legal hotlines to Southern Arizona through a new partnership with KGUN News 9, which launched in December of 2024. For this event, the PSC recruited six legal professionals and a total of 77 consumers benefited from the hotline.
- The PSC and the Arizona Bar Foundation (AzBF) recruited 21 active attorneys to participate in the Modest Means program providing discounted legal services to qualifying consumers – 3,174 individuals applied to receive a list of participating attorneys.
- 43+ volunteer attorneys answered 460 civil legal questions from members of the public were answered on the Arizona Free Legal Answers website.
- The Bar helped AzBF recruit attorneys to participate in law related education programs 27 times in the Bar's bi-monthly newsletters with the goal to increase civic engagement. 589 students participated from 35 schools in the Mock Trial program. 113 attorneys volunteered as judges at regional and state competitions, and more than five



LAWYER REGULATION



SOUTHERN REGIONAL OFFICE



Access to Justice Programs and Statistics (cont.)

attorneys volunteered as Mock Trial coaches to specific teams in 2024.

- The Bar assisted AzBF 27 times in recruiting attorneys and volunteers for the *We the People: Citizen and the Constitution* program, which teaches institutions of American constitutional democracy with a simulated congressional hearing as the culminating activity. In total, 340 students from 15 schools participated in the We the People competition, and 95 attorneys and experts volunteered their time as judges at regional and state competitions.
- In other recruitment efforts, the Bar worked with AzBF to garner participation in the Connecting with Classrooms program, which connects judges and attorneys with teachers across the state to provide classroom presentations and encourage civic engagement. In total, 3,400 students from 45 schools participated, with 42 attorneys and judges volunteering their time to speak

with students about the law and constitution.

- In partnership with AzBF through the Wills for Heroes program, 23 attorneys donated 101 hours of their time to provide 59 first responders with free wills. This program had been on hiatus but resumed in October.
- The Bar supported the Foundation's pro bono legal services and programs, including their Mock Trial Competition. The contribution in 2024 totals \$119,667.
- In Pro Bono efforts
 - 50 attorneys were recognized for their extraordinary Pro Bono contributions.
 - 719 attorneys learned about pro bono opportunities during the professionalism course required for those new to the practice of law.

Competency

- Practice 2.0, the Bar's free, confidential practice management advice program available to members and their staff, provided in-depth virtual consultations to 44 members, provided advice on practice management, legal technology, and best practices through 859 advice-line calls, and provided advice on trust accounting and related issues through 310 calls to the helpline, as well as providing rich resource materials, guides and forms on the Practice 2.0 website. Practice 2.0 also worked with AZCLE to create programming on practice management, legal technology, and trust account management.
- The State Bar's Continuing Legal Education Department continued to lead the way in education and training with 150 new live seminars.
- The State Bar's 2024 CLE catalog offered 462 hours of live seminars, including 168 hours of ethics training, and 55 hours of law practice management courses.
- AZCLE® partnered with organizations including Step Up to Justice, Arizona Lawyers for Equal Justice, Arizona Black Bar, The American College of Trial Advocacy, AZ Chapter of the American Academy of Matrimonial Lawyers, Tribal In-House Counsel Association, American Planning Association, Rocky Mountain Land Use Institute, Cochise County Bar, and Coconino County Bar.
- 594 professionals volunteered to act as faculty and share their expertise for the various CLE programs the Bar offers.
- AZCLE® demonstrated our commitment to supporting Board-Certified Specialists by offering over 189 hours of advanced CLE courses, providing valuable opportunities to earn specialization credit.
- The State Bar's Publication department issued updates to 2 treatises: *AZ Probate Practice Manual* and *Arizona Appellate Handbook 2.0*.

Ethics

- The Ethics Hotline is accessible to members every business day, free of charge — an invaluable resource to lawyers seeking outside ethics advice. Member callers range from solo, small-firm practitioners to those in larger firms. Similarly, although the Ethics Hotline addresses calls from any practice area, it received the highest volume of calls from family and criminal law

Ethics (cont.)

attorneys.

- In 2024 the Ethics Hotline received 1,718 calls; 310 were routed to Practice 2.0 or the Trust Account Hotline and 1,447 calls were handled by the Ethics Department. The Ethics Advisory Group assisted with 140 Ethics Hotline calls. Trending topics included confidentiality, terminating representation and conflicts.
- The Ethics Department presented 9 CLE seminars and worked in conjunction with the Ethics Advisory Group to host an additional 6 Ethics Café CLEs. Over 372 members attended an Ethics Café CLE in person or via live webcast in 2024. Another 257 members viewed the Ethics Café CLE OnDemand.
- The Ethics Department also prepared biweekly question and answer summaries of relevant ethics issues in Eye on Ethics, reaching members through the SBA's e-Legal email.
- The Ethics Advisory Group further continued publishing its Best Practices series on azbar.org in an effort to provide members with free ethics information impacting their daily practice.

Professionalism

- The State Bar's Member Assistance program staff and peer support volunteers provided support and resources to members struggling with substance use disorder, mental health challenges, stress, depression and anxiety.
- The Bar Leadership Institute helps develop future leaders in the legal community. The 2024 class of 16 graduates completed two projects focused on lawyer well-being and stress management. BLI members also participated in Bar advisory groups and graduates continue to serve through the Board of Governors, judiciary, legislature, and other community organizations.
- The Bar engaged over 7,100 members by supporting 30 Sections, organized around substantive practice areas, the Young Lawyers Division which has approximately 3,732 members, and the Senior Lawyers Division, with approximately 6,468 members. State Bar Sections produce

(continued)



STATE BAR ANNUAL AWARD RECIPIENTS

AWARD OF APPRECIATION

*Gabe Goltz,
Arizona Administrative
Office of the Courts*

AWARD OF SPECIAL MERIT

Chris Russell, The Russells Law Firm PLC

DIVERSITY AND INCLUSION LEADERSHIP AWARD

*Hon. Joseph C. Welty,
Maricopa County Superior Court*

HON. JOHN R. STICHT EXCELLENCE IN DISABILITIES ACCESSIBILITY AWARD

Disability Rights Arizona

JAMES A. WALSH OUTSTANDING JURIST AWARD

*Hon. Robert M. Brutinel,
Arizona Supreme Court*

MARK I. HARRISON EXCELLENCE IN MENTORSHIP AWARD

*Debbie Weecks,
Law Office of Debbie Weecks*

MEMBER OF THE YEAR AWARD

*Regina L. Nassen,
Tucson City Attorney's Office*

MICHAEL C. CUDAHY CRIMINAL JUSTICE AWARD

Bill Ring, Coconino County Attorney

OUTSTANDING IN-HOUSE COUNSEL OF THE YEAR AWARD

Matt Meaker, Sundt Construction

SHARON A. FULLMER LEGAL AID ATTORNEY OF THE YEAR AWARD

*David J. Newstone,
Defenders of Children*

TOM KARAS CRIMINAL JUSTICE AWARD

*Susan L. Corey,
Law Firm of Susan Corey*

PRESIDENT'S AWARD

*Hon. David Allen,
the Arizona Black Bar,
Dominic Gomez,
Attorney General Kris Mayes
and
Barry Wong*

Professionalism (cont.)

hundreds of hours of continuing education, provide networking and engagement opportunities and provide a forum for the ongoing discussion of law.

- The Arizona Supreme Court requires the State Bar to ensure that all members have met their mandatory continuing legal education requirement. In 2024, Bar staff processed 18,622 affidavits, with 98.91% of members filing. That includes late filers and those who paid late fees.

Notable Highlights

- In recognition of Domestic Violence Awareness Month, AZCLE® and the Public Lawyer's Section offered a day-long seminar entitled, "Domestic Violence 2024: Developments in Protective Orders; Risk Assessment and Traumatic Brain Injury" and offered a significant discount to volunteers with the Modest Means Project and complimentary registration for Legal Aid organizations.
- AZCLE® partnered with the Tribal In-House Counsel Association and the Bar's Indian Law section to continue offering the Lunch in Indian Country series. The annual, ten-part series focuses on the latest in Indian Law and features both local and national speakers. In 2024, nearly 300 people attended the series.
- AZCLE® co-sponsored with Step Up to Justice for "Boundaries for Success: Nurturing Healthy Client Relationships and Establishing Realistic Expectations" which drew an audience of 92 attendees.
- AZCLE® provided 14 hours of free CLE to lawyers who work for legal aid organizations in Arizona.
- AZCLE® offered 7 virtual Professionalism courses, and 719 members attended.
- The Senior Lawyers Division continues to focus its attention on keeping retired lawyers engaged with the Bar and focusing on topics of interest to those still engaged in the practice of law and those transitioning out of the practice. The Division holds virtual drop-in sessions on a variety of legal and lifestyle topics.
- In 2024, the Client Protection Fund maintained the integrity of our self-regulated profession by refunding \$171,109 to clients who suffered financial losses due to the misconduct of their lawyer.

Financial Information

Bar's Income in 2024

\$19,324,901*

Bar's expenses in 2024

\$17,674,803*

Bar Net Investment Gain (includes unrealized loss)

\$799,319*

* The Bar has a reserve policy which requires that at the end of the year, any surpluses shall be added to reserve accounts to pay for capital improvements, avoid increases to annual member fees in a future year(s), and provide needed cash resources for unexpected emergency needs.

Savings for Retired Members*

Starting in 2023, the State Bar began offering a reduced annual fee for lawyers in retired status who have practiced in Arizona for 35 years or more. In 2024, the reduced fees allowed 1,261 retired attorneys to remain members while saving them \$145,015.

*Based on member count in Retired 35+ Year category as of 6/30/2024.

What does it cost the State Bar to Publish Arizona Attorney Magazine?

Arizona Attorney Magazine is published 11 times per year by the State Bar of Arizona. It has long been considered one of the Bar's most valuable member benefits with its award-winning legal content and appealing design. In 2024, the direct cost of producing the magazine was \$797,007. Advertising revenue totaled \$1,250,817, resulting in \$453,810 in net profit for the Bar.



For a complete report of the Bar's finances, go to:
<http://www.azbar.org/AboutUs/FinancialStatements>