



Affiliate Membership Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Affiliate Membership Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight of Accomplishments

Paralegal Symposium Breaks Attendance Record

The Affiliate Membership Committee's annual Paralegal Symposium continues to grow in both reach and impact. This year, the program set a new record with 117 participants, including 49 non-members—the largest non-member turnout of any ISBA event. Designed by paralegals for paralegals, the six-hour, two-day seminar featured timely sessions on essential skills and professional development. A standout highlight was the discussion on Indiana's allied legal professional model, an emerging part of the statewide effort to address the attorney shortage.

Attendees continue to praise the program for its relevance and community-building spirit. As one participant shared, "Not that all the other symposiums were not outstanding, but this one was knocked out of the park. Outstanding job. The paralegals in my office met after, and talked about how we can work to encourage each other more. This is so helpful, thank you!"

Highlight of Accomplishments continued ...

Tammy Munchel, a paralegal at McNeely Law in Shelbyville, was selected as the 2025 recipient of the Affiliate Membership Committee's Cathy Canny Award of Excellence.

On Sept. 3, 2025, the firm held its annual end-of-summer luncheon at the local park, where Chair Lauren Jones, along with Tracy Clark, presented the award to her in front of her entire team at McNeely Law.





2024-25 Overarching Goals

- Continue to publish e-newsletter (Affiliate News) on a monthly basis
- Stand ready to serve as a sounding board for ISBA leadership as it explores the allied legal professional model
- Sponsor 2025 Paralegal Symposium
- Sponsor summer/fall social event
- Present 2025 Cathy Canny Award of Excellence



Scholarships & Awards

The Cathy Canny Award of Excellence honors ISBA affiliate members (to include paralegals; court administrators; law librarians; and legal administrators) who best exemplify Cathy's courageous, visionary leadership in raising the bar of professionalism for paralegals throughout Indiana.

Prior Cathy Canny Award of Excellence Winners

****Formerly known as the ISBA Affiliate Membership Award***

- 2010 – Edna Wallace, Paralegal, IRP
- 2011 – Cathy Canny, Paralegal, IRP
- 2012 – Lauren Jones, Paralegal, IRP
- 2013 – Cheryl Niemeier, Legal Administrator
- 2014 – Debra L. Elsbury, Legal Administrator
- 2015 – Lori Wagner, Paralegal, IRP
- 2016 – Monica Dabio, Paralegal, IRP
- 2017 – Howard E. Trivers, Law Librarian
- 2018 – Karin L. Fowler, Legal Administrator
- 2022 – Roberta J. Kickbush, Paralegal, IRP
- 2023 – Angela R. Hopson, Paralegal, IRP
- 2024 – Tracey M. Clark, Paralegal, IRP
- 2025 – Tammy Munchel, Paralegal, IRP



This report is respectfully submitted by:

Lauren K. Jones, RP, IRP

Paralegal, Dentons

Chair, ISBA Affiliate Membership Committee

lauren.jones@dentons.com

Alternative Dispute Resolution (ADR) Section

Indiana State Bar Association
Report to the ISBA House of Delegates

October 9, 2025

Indianapolis, Indiana

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Upcoming ADR Section CLE / CME

- Remote CLE/CME on October 21, 2025.
 - The Understanding Model of Conflict Resolution – Business as Usual or Something Different?
 - A focus on non-coercive dialogue when helping participants help each other and understand each other
 - This is a virtual learning opportunity with in-person watch parties occurring in various locations.
- Presenter: Gary Friedman

ISBA ADR Section Connected with Other Bar Associations

- The Section Updated Members Via Inbar_ADR Listserv
- ADR Council Members held the inaugural Lake County ADR meeting
- ADR Council Members have collaborated with the Judicial ADR Committee

Alternative Education Opportunities

- The Indiana Mediation Hub: The Mediation Hub is a resource for Mediators to network, find CLE/CME and inform Mediators about the yearly Maple Tree Mediation Retreat (just for Mediators). ADR Section Member, Marsha Hackenberg, Attorney/Mediator and Marla Hylton MSW, LCSW/Mediator teach two accredited 40-Hour Domestic Relations Mediation trainings per year, various accredited Continuing Mediation Education (CME) follow up classes and hold a yearly retreat for trained Mediators. Registration is open for all events on IndianaMediationHub.com.
- The Fundamentals of Parenting Coordination: parenting coordination training through AFCC via Zoom December 1 – 4, 2025.

Scholarships & Awards

- Sponsored an ISBA ADR Member Attendance at the Solo and Small Firm Conference

Looking to the Future

- October 21, 2025 Virtual CME/CLE with watch parties
- Strengthening the ISBA ADR Council connection with the Judicial ADR Committee
- Host another National Speaker to Present on Advanced ADR Topic(s)
- Opening dialogue regarding non-attorney mediators and the expansion of documents mediators are permitted to draft.

This report is respectfully submitted by:

Rebecca L. Billick
Chair, ISBA ADR Council
BILLICK MEDIATION & FAMILY LAW



INDIANA STATE
BAR ASSOCIATION

Animal Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Animal Law Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight of Accomplishment

- We hosted numerous networking events this year that were well-attended by section members, including law students. We are a small, but mighty section and find in-person meet ups invaluable to connecting with other like-minded attorneys and future lawyers.



CLE

- On December 12, 2024, we hosted a two-hour CLE: Family Violence and Animal Cruelty: How Prosecuting Animal Abuse Can Save Lives.
- We are in the process of finalizing a documentary viewing and panel discussion CLE on legal personhood for dogs and the importance of the human-animal bond.
- We plan to host another CLE toward the end of 2025 for members and law students.



Social & Connection Opportunities

- We hosted two Animal Law Section social events throughout the year, giving members a chance to connect and network with one another, including law students.
- The section also co-sponsored the Indy Bar Young Lawyer Division's Pups and Brews event for the fifth year in a row and have played an influential role in selecting the animal welfare non-profit organization who receives the proceeds from the event.



Council Members/Committee Members

- Samantha Chapman
- Erin Huang
- Rebecca Critser
- DeAnna Poon



Looking to the Future

- We look forward to hosting two more CLEs in 2025 for our members to learn more about the various aspects of Animal Law and the interconnectedness with other areas of practice.
- We look forward to future opportunities to weigh in on Animal Law related legislative efforts for the 2026 session.
- We look forward to working with law students to inspire interest and practice in Animal Law and grow membership in the section.

This report is respectfully submitted by:

Samantha Chapman
Chair, Animal Law Section
schapman@humaneworld.org
August 11, 2025



INDIANA STATE
BAR ASSOCIATION

Appellate Practice Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlights of Accomplishments

- Appellate Rules proposed amendments completed and submitted to rules committee.
- Overhaul of Bylaws reviewed and to be submitted to house for approval
- Added a representative from the newly formed ISBA Law Clerk group
- Created two new task forces
 - Judicial Notice Taskforce
 - Supreme Court Transfer Taskforce
- Adopted a budget for 2024-2025



CLE

- Court Insider (*May 19, 2025*)
 - *48 attendees*
 - *Profit estimate of \$9700*



Social & Connection Opportunities

- Attended Indian's game with Criminal Law Section (July 2025)
- Cocktail Hour with Appellate Judges after CLE (May 19, 2025)



New Council Members

- District 3: Hon. Mary DeBoer, Indiana Court of Appeals
- Law Clerk Representative: Ryan Schwier

This report is respectfully submitted by:

Hon. Leanna Weissmann
leanna.weissmann@courts.in.gov
August 14, 2025



INDIANA STATE
BAR ASSOCIATION

Bankruptcy & Creditors' Rights Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- CLE Programs to provide benefits to membership
- Interactions with local bars, bankruptcy judges, and law students
- Continued law student externship stipend program

CLE

The Section has planned the following events:

- Paralegals in Bankruptcy - 1.0 hour CLE November 12, 2024
- Breakfast Briefing on MCAs with Judge Andrea A. McCord - 1.0 hour CLE August 22, 2025
- Intersection Between Construction Law and Bankruptcy Law - 2.0 hour CLE in partnership with Construction and Surety Law Section
Currently scheduled for November 13, 2025

Social & Connection Opportunities

- Section Members have participated in or presented at:
 - Solo and Small Firm Conference
 - Law Student Etiquette Dinners
- Co-Sponsored wine and cheese event in Judge Grant's courtroom in Fort Wayne
- Co-Sponsored St. Joseph County Bar Association fall practice seminar

Scholarships & Awards

The Council awarded a \$1,000 stipend to the following law student who was an extern in a United States Bankruptcy Court during the 2024-25 bar year:

- Lai Yu (IU McKinney)

Another stipend request will be reviewed in our October meeting.

Contributions

The section made the following contributions during the 2024-25 bar year:

- ISBA Small and Solo Firm Conference (\$723 scholarship)
- Etiquette Dinner Sponsorship (\$1,100)
- Leadership Development Academy (\$2,000 sponsorship)

New Council Members

- April M. Geltmaker and Angela L. Marshall joined as new council members this year.
- April Satow became Treasurer midway through the year.

Looking to the Future

- CLE programming: the Section will continue to provide benefit to its members and others through quality CLE events.
- The Section will continue to explore membership outreach opportunities throughout the state, and to foster positive interactions between bench and bar.
- The Section will continue to encourage Indiana law students to consider careers in bankruptcy law by providing opportunities for Council participation, through participation in etiquette dinners, and through the externship stipend program.
- Supporting other ISBA initiatives through budgeted donations.

This report is respectfully submitted by:

Shawn D. Cox
Section Chair 2024-25 year

September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Business Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Business Law Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight(s) of Accomplishment

- Continued to conduct regular monthly meeting dates and annual meeting dates by zoom.
- Continued to support and request topics and solicit speakers for one hour CLEs throughout the year and prior to regular quarterly meetings.
- Ended the year with 442 paid members and 130 law students/new admittees, a small decrease from 2024, but we continue to reach out to our existing and potential members.

CLE

- A 1-hour CLE was offered April 24, 2024 to the Business Law Section – topic: “What Trial Lawyers Wish Business Lawyers Knew About Commercial Courts”, presented by Expert Panelists Tracy Betz of Taft Stettinius & Hollister LLP , Irwin Levin of Cohen Malad LLP and Alice Morical of Faegre Drinker Biddle & Reath LLP with Ricardo Simmonds moderating.
- The Council is currently working on a joint CLE program for with the ISBA’s Intellectual Property Law Section and Employment Law Section.

Social & Connection Opportunities

- Pursue collaboration with other sections to seek mutually beneficial interests, specifically.
- Participated in a social event with the IP section in October 2024 at The Tap.
- Continue to reach out to members to identify interests and are seeking to hold Social Events in each section of the State in 2025 and 2026.

Scholarships & Awards

- Gave one (1) scholarship at \$723 a-piece for the annual Solo and Small Firm Conference.
- Continued to support and sponsor LDA.
- Sponsored “We the People”.

Contributions

- Sponsored \$2,000 for the 2024 Leadership Development Academy
- Sponsored \$1,100 for the annual etiquette dinners at Maurer, McKinney and Notre Dame law schools.

New Council Members

- Randall Cloe, Cloe Legal LLC
- Mary Kleiman, Mkleiman Corporate Consulting LLC
- Amanda R Wilhite, Dentons
- Morgan Brading, Harshman Ponist Smith & Rayl, LLC
- Ricardo Simmons, Lighthouse Legal LLC
- Ross T. Yates, Gutwein Law LLC
- 2026 is the biennial year in which the Chair is replaced. Randall Cloe will assume the Chair following the 2026 annual meeting.

Looking to the Future

- Encourage increased use of the Business Law Sections use of the Listserv.
- Re-engage membership through meaningful meetings, CLE opportunities and annual meeting locations.
- Collaboration with other sections to offer meaningful CLEs and increase interest in Business Law Section topics.

This report is respectfully submitted by:

Paraskevi Xidias
Griffith Xidias Law, LLC
August 27, 2025



INDIANA STATE
BAR ASSOCIATION



CFAF Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA).
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CFAF Committee Membership Summary

From July 2024 to September 2025:

- Starting # of members: 7
- Over half of current members have been on the committee for over a decade.
- All committee members are passionate about the Fund's purpose and look forward to continually serving the public to give them some monetary relief due to attorney misconduct.



Committee Guidelines

The Clients' Financial Assistance Fund (the Fund) of the Indiana State Bar Association (ISBA) provides compensation to qualified applicants who have suffered a monetary loss as a result of the dishonest acts of an ISBA member acting as a lawyer or fiduciary.

- **Jump to Section:**
- [How the Fund Works »](#)
- [Eligibility »](#)
- [Review Process »](#)
- [FAQ »](#)
- [How to Apply »](#)

Claims Paid Out To Claimants

- **Claimants:**

- Noelia Rodriguez Valdez
- Irene Erwin
- Kimberly Hickman
- Betty Bolin

- **Attorneys:**

Cecilia Monterrosa
James Wisco
James Wisco
James Wisco

- **Amounts:**

\$1,500
\$2,675
\$15,000
\$15,000

Fund Finances: July 2024 – June 2025

Starting Balance: \$354,061.98

Ending Balance: \$354,918.26

Summary of *Income/Expenses*

Income from Dues	Other Income*	Applications Paid**	Other Expenses
\$14,296.00	\$9,071.57	\$34,175.00	\$1,656.21

*Income from the investment of and interest earned from the Fund.

**Due to the collection of subrogation agreements and other documents or information needed from applicants, payments on approved applications may occur in a later fiscal year from when the application was approved.



Contributions

2024 – 2025 CFAF Payments Overview

- 12 applications resolved: 4 approved, 8 denied
- \$34,175 total in payments approved and paid

Note: We have two claims on the agenda to review.

Chair Thoughts/Comments

In my experience serving on the CFAF committee, I find that in most instances, the applicants may be dissatisfied with their attorney for many different reasons, not least of which is the lack of communication. As attorneys, we are required to have regular communication with our clients and keep them informed of the legal matter, and when a client makes a reasonable request for information, we are required to respond. Oftentimes, however, a lawyer's workload hinders his or her ability to respond to client inquiries in a timely manner. This lack of communication leads to client dissatisfaction, which may serve as a basis for filing an application with the Fund to seek reimbursement of fees paid. The members of the committee are charged with the task of investigating the facts and circumstances set forth in an application and determining whether the lawyer committed a dishonest act. While one or two instances of lack of communication with a client, in and of itself, may not constitute a dishonest act, a lawyer's repeated and continuous failure to respond to client inquiries, coupled with a failure to act with reasonable diligence in representing said client, may serve as a valid basis for the committee to find that the lawyer acted dishonestly.

For example, I was asked to review an application filed by a person who paid an advance fee to an attorney to represent her in a post-dissolution child custody dispute. After meeting with the client and receiving the advance fee, the lawyer failed to take any meaningful action, such as filing a petition with the court or gathering evidence in support of the petition, for a period of several months. Significantly, the lawyer also refused to respond to the client's several phone calls and emails. When the client sought to terminate the engagement and requested the attorney for a refund of the advance fee, the attorney refused, without providing any meaningful explanation as to why the advance fee would not be refunded, either in whole or in part. Based on the facts presented, the committee determined that the attorney's acceptance of the advance fee, failure to act with reasonable diligence following engagement, and refusal to refund any part of said advance fee without providing any explanation as to the same constituted a dishonest act that warranted an award of compensation from the fund.

Continual Thoughts/Comments

- The Fund serves a critical public function of reinforcing confidence in the legal system at a time when public trust in that system is at an all-time low.
 - Every state has a similar fund serving this purpose. At a time when Indiana and the ISBA are seeking to promote legal services to underserved communities, eliminating or reducing this fund has secondary negative impacts that undermine that goal.
 - Discontinuing the fund would also create negative public relations impacts for the ISBA and the Indiana bar generally.
 - The ISBA should consider whether eliminating a historically underfunded, decades-old, public-focused committee, rather than increasing its funding from the extremely modest increased dues amount or through other opportunities, would create a negative impression to its members, the bar at large, or the public, in conjunction with other areas where the ISBA chooses to spend member fees or raise money.
-
- This should also be carefully considered in light of the extent to which the ISBA conducted studies into other options aside from terminating the program, such as the ones recommended by the CFAF investigator committee in May of 2024.



New Council Members

- Aaron Cook Co-chair
- Adam Decker Co-chair
- Nicolette Mendenhall
- Dustin DeNeal
- Rori Goldman
- Josh Radicke
- Adam Kornya

This report is respectfully submitted by:

Aaron Cook
Co-chair

Adam Decker
Co-chair

October 9, 2025



INDIANA STATE
BAR ASSOCIATION

Construction & Surety Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- Received ISBA Board of Governors' approval to the section's 2024 bylaw revisions.
- Added four new at-large Council members.
- Published another edition of section newsletter, *Construction Cites*, in Spring 2025.
- Section membership at 87 in 2025.
- Drafted and approved new "Value Statement" for the Section.

CLE

- CLE focused on Builders Risk Insurance at ISBA Headquarters, on December 3, 2024.
- Joint virtual CLE planned with Bankruptcy section in November 2025.
- CLE/Annual Holiday Reception planned for December 2025. Topic TBD.

Legislative Activity

- Monitoring/discussing 2025 statutory changes regarding Construction Manager at Risk bidding, retainage, and Construction Manager at Risk self-performance.
- Discussed impacts of Senate Bill 1 on public construction improvements.
- Focus and discussion on potential statutory improvements of the process for bonding over mechanic's liens.

Social & Connection Opportunities

- Annual Holiday Reception at ISBA Headquarters on December 3, 2024.

Alternative Education Opportunities

- Published the section's newsletter, *Construction Cites*, in Spring 2025.

Looking to the Future

- Increasing membership across the State, and with Law Students.
- Offering an opportunity for section members to learn and socialize.
- Considering section's support/lobbying efforts for statutory changes to process for bonding over mechanic's liens.
- Publish another issue of *Construction Cites*.

This report is respectfully submitted by:

Brian M. Falcon, Chair
bfalcon@meyer-Najem.com
September 29, 2025



INDIANA STATE
BAR ASSOCIATION



Courthouse Art Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Courthouse Art Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight of Accomplishments

Established in 2007 by ISBA Past President Douglas D. Church, the Courthouse Art Project is an initiative to collect original artwork of courthouses in all of Indiana's 92 counties. This year, the remaining six paintings were added, completing the project after 18 years!



Highlight of Accomplishments

This year, the remaining six paintings from the counties listed below were added, completing the project after 18 years!

- Cass
- Clinton
- Greene
- LaPorte
- Rush
- Spencer



Highlight of Accomplishments

To celebrate this milestone, Indiana Landmarks, Church Church Hittle and Antrim, and the ISBA hosted a special exhibition of the full collection and a program on Aug. 1 at the Indiana Landmarks Center.

More details:

- Special exhibit was on display for members of the public to view for six weeks – Aug. 1 to mid-Sept.
- Panel Discussion: Moderated by Past President Clay Miller, speakers included Doug Church and Elizabeth Osborn (IU).
- Reception: Full exhibition, string quartet, hors d'oeuvres, cash bar





Looking to the Future



Goals for 2025-2026:

- Design & print a coffee-style book featuring all 92 pieces of art
- Find a permanent home for artwork to be on display

For anyone interested in learning more about this project, please contact ISBA Past President Douglas D. Church at dchurch@cchalaw.com.



This report is respectfully submitted by:

Douglas D. Church

Partner, Church Church Hittle + Antrim

ISBA Past President, 2007-2008

dchurch@cchalaw.com

Criminal Justice Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the Criminal Justice Section submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlights of Accomplishment

- Created an annual criminal justice scholarship.
- Hosted and planned CLEs on topics of importance to Indiana criminal justice practitioners.
- Connected with Indiana law schools and student organizations to engage law students in topics related to criminal justice practice.
- Jointly hosted a social event for Criminal Justice Section and Appellate Section members.

CLE

- Sentencing Refresher: Key Considerations Before, During, and After a Trial.
- Upcoming “Distinguished Speaker Series” CLE November 19, 2025 featuring Judge Candace Jackson-Akiwumi, U.S. Court of Appeals for the Seventh Circuit

Social & Connection Opportunities

- The Criminal Justice Section partnered with the Appellate Section to host a social evening at an Indianapolis Indian's game at Victory Field's Yuengling Landing.

Alternative Education Opportunities

- Upcoming October 20, 2025 “Immigration Rights in a Changing Landscape” panel discussion in conjunction with IU McKinney School of Law student organizations.

Scholarships & Awards

- CJS awarded two scholarships for members to attend the Solo and Small Firm Conference.
- CJS created the Jessie A. Cook Criminal Justice Scholarship in honor of a beloved member of the Indiana criminal law community. Jessie's legacy lives on in the lawyers who knew her, learned from her, and were inspired by her excellence.

Contributions

- CJS contributed \$1500 to the ISBA Leadership Development Academy.

Council Members

Amy Karozos	Chair	Steve Dillon
Michael Cunningham	Vice-Chair	Andy Fogle
Kristy Gordon	Treasurer	Bradley Keffer
Ann Sutton	Secretary	Dan Murrie
Jeff Baldwin		Joel Schneider
Scott Bradtmiller		Grant Hawkins
Mark Clark		Angka Hinshaw
Amy Commean		Zach Stock
Justice Steve David		Andrew Wolf

Looking to the Future

- Encourage participation among Section members and continue to build a diverse membership that can effectively carry out the purposes of CJS.
- Offer practical CLEs to improve Indiana's Criminal Justice System.
- Actively involve CJS in solutions to the attorney shortage.
- Promote interest in criminal justice career paths among law students.
- Continue the "Speaker Series" to provide ISBA members with insights from prominent figures in criminal law on key legal issues.
- Continue to support and promote improvements to criminal law through legislative advocacy and rulemaking efforts.

This report is respectfully submitted by:

Amy Karozos
Criminal Justice Section Chair
State Public Defender's Office
One North Capitol, Suite 800
Indianapolis, IN
akarozos@pdo.in.gov
(317)232-2475
September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Diversity Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- Committee continues to assist the ISBA communications team to populate the DEI portion of the addendum.
- Committee meets approximately monthly for 10-11 months of the year

CLE

- Resilience in the Face of Adversity – panel discussion about how to keep going when every battle feels like it is uphill.
 - Overall positive feedback
 - Incredible pannelists

Social & Connection Opportunities

- Diversity Dinner at McKinney
- ICLEO Speaker

Alternative Education Opportunities

- List any non-CLE offerings you provided members. These could include publications, *Res Gestae* articles, web posts, guides, manuals, conversations on your section listserv, etc. ← delete this text if you use this slide

Scholarships & Awards

- List any scholarships or awards given out ← delete this text if you use this slide

Contributions

- Diversity Dinner at McKinney (table sponsorship)
- Diversity Job Fair through IndyBar

Council Members/Committee Members

- Shelley Gupta – co-chair (2025)
- Alex Van Gorp – co-chair (2025)

Looking to the Future

- More CLEs

This report is respectfully submitted by:

Shelley Gupta
Co-Chair Diversity Committee

9/26/25



INDIANA STATE
BAR ASSOCIATION

Elder Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- Approval of our amended Bylaws
- Annual Holiday Party held on October 2, 2025
- Sponsor and attend Etiquette Dinners at law schools around the state
- Fund scholarships for solo practitioners to attend conference
- Host a meeting in conjunction with NAELA's annual Unprogram
- Begin planning pro bono service coordination among section members

Social & Connection Opportunities

- Annual Holiday Party and Business Meeting on October 2, 2025

Alternative Education Opportunities

- The section utilizes the list serve on a near-daily basis to provide insight into the law and guidance on how to advise clients and provide solutions

Scholarships & Awards

- Awarded 2 full scholarships to the 2025 Solo and Small Firm Conference

Contributions

- Sponsored Law School Etiquette Dinners
- Sponsored Scholarships to Solo and Small Firm Conference
- Sponsored LDA

Council Members/Committee Members

- President: Cara Chittenden
- President-Elect: Tamara Carpenter
- Vice-Chair: Connie Bauswell
- Secretary/Treasurer: Abigayle Hensley

Looking to the Future

- Continue to provide insight and potential solutions to practive problems faced by members of the section
- Continue to develop resources available to the community at large

This report is respectfully submitted by:

Cara Chittenden
President, Elder Law Section
September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Employment, Labor & Benefits Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- 2024 – 25 Section consisted of 293 paid members and 27 law student members
- CLE, lunch, and social at the Indianapolis Motor Speedway
- Volunteered at the Food Bank of Northwest Indiana
- Issued The Workplace Lawyer newsletter

CLE

- “Comprehensive Overview of Employment Leave Laws” & “Navigating Stress as a Lawyer” CLE on May 13, 2025, in Gasoline Alley at the Indianapolis Motor Speedway

Legislative & Rules Activity

- HB 1214: Worker's Compensation
- HB 1289: Employment Social Enterprises
- SB 289: Unlawful Discrimination
- SB 371: Workforce Matters including Unemployment
- SB 405: Labor Organization Membership
- SB 409: Employee Absent for Certain Meetings
- SB 475: Physician Non-Compete Agreements

Social & Connection Opportunities

- Midway through the May 13, 2025 CLE, attendees enjoyed lunch together and then after the CLE, attendees toured the garages and watched the Indy 500 practice.
- The section volunteered on September 5, 2025, at the Food Bank of Northwest Indiana.
- The section will have dinner together for their last meeting of the year (November 2025).

Alternative Education Opportunities

- Issued The Workplace Lawyer: A Newsletter of the ISBA Employment, Labor & Benefits Section to members which contained various labor and employment related articles

Scholarships & Awards

- Law Student Etiquette Dinner Sponsorship
- Attempted to sponsor a Solo & Small Firm Conference Scholarship but applicants already supported

Contributions

- Law student etiquette dinners: \$1,100

This report is respectfully submitted by:

Elizabeth M. Roberson, Chair
Elizabeth.Roberson@subaru-sia.com



INDIANA STATE
BAR ASSOCIATION



Family and Juvenile Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Family and Juvenile Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight of Accomplishments

- The Council Members of the ISBA Family and Juvenile Law Section met monthly via Zoom.
- We worked closely with our legislative liaison, Paje Felts, to monitor and provide input as to pending legislation which could affect family law or those involved in the juvenile justice system.
- We held our fourth outdoor networking event, free for members and the judiciary, at Spencer Farm Winery
- We awarded the Nanette K. Raduenz to Judge Andrea R. Trevino of the Allen County Superior Court.
- We continue to support the legal community and legal education in the public with scholarships and donations.
- We offered a free CLE to educate members of the bar regarding the new Guardian Ad Litem guidelines.



Strategic Planning Activities

- The executive committee met at the beginning of 2025 to discuss goals for the upcoming year and will continue to meet annually before each year to create an outline.
- The executive committee met prior to monthly section meetings to streamline our agenda and work on action items.
- The executive committee is continuing to working on revising the section by-laws. We have looked to the updated by-laws of other sections for more streamlined and modern language to include in our by-law. The executive committed has met to review and revise the language together.



Legislative Activity

We have not seen as much legislative activity in 2025 as we have in past years. The following legislation or possible legislation has come to our attention:

- Senate Bill 2 – Notification of Medicaid benefits.
- House Bill 1044 – Reduction of courts.
- We discussed the possibility of legislation for mandatory findings of fact in custody cases.
- We have also been discussing the lawyer shortage and the concept of allied legal professionals to help alleviate the shortage.

The Guardian Ad Litem Guidelines that we supported were approved and ratified. We offered our members an educational opportunity to learn more about the new guidelines.



Social opportunities

- We held our fourth annual summer social at Spencer Farm Winery in Noblesville, Indiana on Friday, May 30, 2025. It was free to members plus one guest, and the judiciary.
- The venue is indoor/outdoor and we provided our guests with a complimentary wine glass they could use for a free glass of wine, tokens for wine tasting and great food. There was a live band there that night following our event if people wanted to stay.



Alternative Education Opportunities

- Debra Dubovich and Magistrate Ana Osan presented a Town Hall for GALs to review the new Guardian Ad Litem rules.
- We continue to have a committee that publishes updates on family law case law to the Res Gestae.
- We continue to support a community list-serv to provide our section members a forum to ask questions and seek assistance in their day-to-day family law legal matters.
- Members were made aware of crossover opportunities for education regarding mediation offered by the ADR section.



Scholarships & Awards

- We awarded five scholarships to the ISBA Small and Solo Firm Conference in 2025. We have renamed these scholarships in honor of Magistrate Deb Shook.
- We gave donations to the Civics Legal Assistance, Mock Trial Initiative, and We the People of the Indianapolis Bar Foundation.
- We sponsored three dinners for recipients to attend the Young Lawyer Section Etiquette Dinner.
- We provided a donation to the Leadership Development Academy.



New Council Members

All council members are in the second year in their position. We have convened the committee to select a new treasurer. A new council member will be added in 2026, and the current members will move up to the next position on the council.



Looking to the Future

We are considering different ways to attract young and new lawyers to our section. We are discussing how to provide value to our current members through continuing legal education opportunities and in bringing in new members.



This report is respectfully submitted by:

Lana Lennington Pendoski

GP, Solo & Small Firm Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **GP, Solo & Small Firm Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight(s) of Accomplishment

- The Section's most awaited event, the ISBA Solo & Small Firm Conference, took place June 3-5 at French Lick Resort. This year's conference was a resounding success, achieving record-breaking attendance and sponsorship numbers while continuing to deliver meaningful, connection-driven experiences to ISBA members. With over 325 attendees, this year's event exceeded last year's participation by more than 40 individuals and continued its reputation as a signature offering of the ISBA. In recent years, SSFC has been intentionally designed to prioritize networking and community-building opportunities over traditional CLE programming. While continuing to provide valuable education, the conference recognizes that for solo and small firm practitioners, peer connection and collegiality are the primary drivers of attendance. The schedule was structured to facilitate organic and purposeful engagement, including interactive sessions, small group events, and informal networking opportunities. The result is a conference that offers both professional development and a strong sense of community. (think: family reunion)
- The Solo & Small Firm Conference continued its years long partnership with McKinney Law School and Maurer Law School. Both law schools send students to the conference, covering their registration fee along with their hotel room. 26 law students participated this year, each paired with a planning committee member to guide them through the event.
- The Section's LPM committee continues to grow and excel. The LPM Starting Your Own Practice page is now live! **Check it out at:** <https://www.inbar.org/page/LPM>



CLE & Social Opportunities

- On March 20, 2025, the ISBA Solo & Small Firm Conference hosted a virtual CLE open to all ISBA members, Automation and AI for Solo and Small Firms.
- The Section hosted the 2025 ISBA Solo & Small Firm Conference June 5-7, 2025. Next year's conference will be held June 4-6, 2026, at French Lick. Planning began in August.
- Following this year's Solo & Small Firm Conference, the conference hosted a virtual CLE on Maximizing Mediation.

Scholarships & Awards

- The 2025 GP Section Hall of Fame Award was presented to Ann Marie Waldron of Waldron Tate Land LLC, during the section's annual business meeting at the Solo & Small Firm Conference.
- The section funded four (4) scholarships to this year's Solo & Small Firm Conference.
- 23 scholarships were awarded to this year's Solo & Small Firm Conference through the generous support of the following sections:

**ADR Section
Bankruptcy & Creditors' Rights Section
Business Law Section
Criminal Justice Section
Elder Law Section
Employment Benefits & Labor Law Section
GP, Solo & Small Firm Section
Family & Juvenile Law Section
Litigation Section
Probate, Trust & Real Property Section
Young Lawyers Section**



Contributions

- The section contributed to the following groups this past year: Leadership Development Academy (\$1,700), Law Student Etiquette Dinners (\$1,100) and IBF's We the People Program (\$1,500).
- The section participated as a sponsor (\$500) for the 2025 Solo & Small Firm Conference.
- Additionally, the section offered four (4) scholarships totaling \$2,892 for the 2025 Solo & Small Firm Conference

Total contributions by the section = \$7,692

June 2025 – June 2026 Council

Chair: Sundeep Singh, RileyCate LLC

Chair-Elect: Patty Xidias, Attorney at Law

Secretary/Treasurer: Kevin Bowen, KMB Legal LLC

District Reps

1 Jacquelyn Pillar, Crist, Sears & Zic, LLP

2 Thomas Peterson, TWPeterson Law Office

3 Open

4 Cory Sprunger, Sprunger & Sprunger/Sprunger Alliance

5 Tess Worrell, Resolution Mediation LLC

6 Cyndi Helfrich, Helfrich Law Offices

7 Matthew Schulz, Schulz Reagan

District Reps

8 Terry White, Attorney at Law

9 Thomas Scifres, Attorney at Law

10 Devin Norrick, Adler Attorneys

11 Hannah Brady, Hume Smith Geddes Green & Simmons LLP

YLS Rep: Holt Hovde, Waldron Tate Land

SSFC Conference Chair: Brandon Tate, Waldron Tate Land

LPM Committee Chair: Cyndi Helfrich

Immediate Past Section Chair: Katherine Piscione, Waldron Tate Land

Looking to the Future

- The LPM committee continues to work on resources for solo and small firm practitioners on opening your own practice to assist with ISBA's rural attorney shortage efforts.
 - The webpage is evolving and will continue to be updated as more resource and content is added to the website such as setting up IOLTA Account, setting up business/operating account, budgeting, technology, etc.
- The 2026 ISBA Solo & Small Firm Conference will be held June 4-6 at French Lick Resort where the section's annual business meeting will also take place.

This report is respectfully submitted by:

Sundeeep Singh
Chair

GP, Solo & Small Firm Section

317-801-1603

ssingh@rileycate.com

September 20, 2025



INDIANA STATE
BAR ASSOCIATION

IndianaDocs Special Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **IndianaDocs Special Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight(s) of Accomplishment

- The Indiana Docs Committee continues its efforts to maintain a relevant, and high quality library of forms for use by its subscribers, which are mostly small and solo Indiana lawyers.
- The Committee continues to succeed in its goal of keeping the service fully funded by subscription revenue.

Headwinds the Committee Faces

- Keeping over 250 legal forms up to date with ever changing laws, regulations, and court rules is a labor-intensive effort that requires significant input from subject matter experts. Unfortunately, the committee's efforts to recruit subject matter experts who will participate in this effort have been unsuccessful so far.
- In addition to subject matter experts, maintaining the forms collection also requires some programming expertise. Of course, the programming can be outsourced to third parties at significant expense, which would put the program into significant red ink that the ISBA would be reluctant to fund. To avoid that two committee members have been doing the programming. However, both are not retired lawyers and will not be able to continue to perform that service indefinitely. Accordingly, for the long-term success of the program, it will be necessary to recruit younger members who can both learn the XpressDox programming language, but also devote at least 5 – 10 hours a month to doing the programming tasks.

Council Members/Committee Members

- Committee members:
- Robert L Hartley, Chair
- Maria Matters, Vice-Chair
- Monty Harris

Looking to the Future

- Updating Family Law forms, Real Estate forms, and Wills & Trust forms
- Continue deployment of universal common elements of pleadings (caption, signature blocks, certificates of service, affirmations, etc.) across all pleading forms
- Create online CLE presentation on probating an estate using the IndianaDocs forms library.
- Create multiple short (2 minute) help videos addressing specific elements of IndianaDocs.

This report is respectfully submitted by:

Robert L Hartley
Committee Chairman
317-691-7321
rhartley2152@gmail.com
September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Intellectual Property Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Intellectual Property Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight(s) of Accomplishment

- Hosted event with law students at IU McKinney School of Law to discuss careers in IP law.
- Planning to host a joint CLE event with the Business Law & Employment, Labor & Benefits Law Sections at the IU Maurer School of Law.
- Ended the fiscal year with 229 paid members.



CLE

- **November 5, 2025 (Planned): Right of Publicity and NIL law**
- Presented by Jaclyn Flint of Riley Bennett Egloff LLP & Jonathan Faber of Luminary Group LLC & McNeelyLaw LLP
- Joint event with Business Law & Employment, Labor & Benefits Law Sections
- 1.5 CLE hours
- Hosted on site at IU Maurer in Bloomington with free access to students & faculty as well as CLE for attorneys
- Goal is to address right of publicity & NIL topics with particular focus on collegiate athletes



Social & Connection Opportunities

- **February 4, 2025: IU McKinney Event**
- Social event with the IP Section Council and other members of the IP Section to discuss careers in IP law with law school students
- Included participation from the IU McKinney Intellectual Property Student Association (IPSA)
- Special thanks to Alesia Nettesheim from IU McKinney and Law School IP Representative with the IP Section Council

New Council Members

- Secretary Treasurer: Justin L. Sage (Krieg DeVault LLP)
- At large member: Rachael R. Taylor (Frost Brown Todd LLP)



Looking to the Future

- Will continue to host events that serve the interests of section members
- Interest in collaboration with other sections, outside IP groups, law schools
- Election of new officer slate at IP Annual Meeting

This report is respectfully submitted by:

Charles M. Fox
Intellectual Property Section Chair 2024-2025
Charles.Fox@Roche.com
September 8, 2025



INDIANA STATE
BAR ASSOCIATION

Leadership Development Academy

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA).
Any opinions or recommendations herein expressed or made are those of the **LDA Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- In May, graduation was held in South Bend. The program added 24 more alumni to the program.
- The class had a variety of opportunities to network and learn from leaders around the state.
- We have found that our alumni e-newsletter has helped foster engagement after graduation.



Looking to the Future

- Applications are now open for Class 14.
- Session dates & locations:
 - January 22–24, 2026 | Fort Benjamin Harrison/ Indianapolis
 - February 18–19, 2026 | Indianapolis/ Indiana Statehouse
 - March 26–27, 2026 | Muscatatuck Urban Training Center/ North Vernon
 - April 16-17, 2026 | Speedway
 - May 14-16, 2026 | Santa Claus/ Jasper

This report is respectfully submitted by:

April Keaton/Katherine Tapp
LDA Chair

October 1, 2025



INDIANA STATE
BAR ASSOCIATION

LEGAL ETHICS COMMITTEE

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Legal Ethics Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Looking to the Future

- We are preparing an online CLE for the first or second week in November 2025.
- We continue to run the Ethics Hotline. That is likely our most valuable service.
- We will continue to issue ethics opinions over time as needed.
- We continue to have low participation in weekday Zoom meetings (5 people on the last call).

This report is respectfully submitted by:

Patrick Olmstead
Chair, Legal Ethics Committee
polmstead@patrickolmsteadlaw.com
8/14/2025



INDIANA STATE
BAR ASSOCIATION

Litigation Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA).
Any opinions or recommendations herein expressed or made are those of the **Litigation Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- 2024 – 25 Section, as of the August meeting, consisted of 651 paid members and 134 law student members
- Consistently held well attended monthly business meetings via Zoom
- Participation in the meetings was active amongst the members
- Litigation Council provided helpful insight and commentary on pending legislation and rule changes
- Will begin conducting regular monthly or bi-monthly virtual CLE's for the membership in with the first CLE planned to occur in November, 2025 and the second for December, 2025.



CLE

- This year, the Section will begin to transition away from one large day-long symposium CLE to numerous shorter CLE's conducted via Zoom.
- The hope is that we will be able to reach more members, attract additional members, add value to the section membership, and be able to address a wider variety of topics.
- The first CLE is tentatively planned for November 10, 2025 and will be a judicial panel including Judge Thomas Felts. The second is scheduled for December 3, 2025 and will be given by Sam Ardery on alternative dispute resolution and include an hour of ethics.



Legislative & Rules Activity

- Amicus in *Miller v. Tran*
- General discussions on legislative updates
- General discussions on changes to rules



Social & Connection Opportunities

- Council members are discussing the scheduling of a social opportunity in 2026—potentially to go along with the annual meeting.



Scholarships & Awards

- Solo & Small Firm Conference Scholarships: the council approved scholarships for this event



Contributions

- Law student etiquette dinners
- Leadership Development Academy
- Indiana Bar Foundation



New Council Members

- Thomas Bright
- Matthew Foster

This report is respectfully submitted by:

Patrick I. Jones, Chair
pjones@witheredlaw.com
September 2, 2025



INDIANA STATE
BAR ASSOCIATION

PRO BONO Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Pro Bono Committee** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- We have conducted 14 pro bono legal clinics and have assisted over 350+ individuals with legal matters since October 2024.
- We partnered with the Immigrant Welcome Center and our Burmese community members to develop additional pro bono clinics in 2025.
- The ABA awarded the ISBA with the 2025 Harrison Tweed Award. This award Named for an outstanding leader in the promotion of free legal services to the poor, the Harrison Tweed Award was created in 1956 to recognize the extraordinary achievements of state and local bar associations that develop or significantly expand projects or programs to increase access to civil legal services to persons living in poverty or criminal defense services to indigents.

CLE

- **Talk-to-a-Lawyer-Today Prep CLE” will be available at the end of October 2025. This will be a 5-hour CLE with 1 Ethics credit**

Immigration: Immigrant Safety Planning 101

Speaker: Ritu Choshi

Housing: Addressing Habitability Issues

Speaker: Judy Fox

Family: Benefit Changes Impacting Vulnerable Adults

Speaker: Jennifer VanderVeen

Civil Procedure: How to Prepare for a Civil Trial

Speaker: Chris Ripley

Ethics: Technology, Ethics, and the Low-Income Client

Speaker: Marc Matheny



Looking to the Future

- The Pro Bono Committee will be collaborating with other ISBA committees and sections to coordinate legal information sessions on immigration law, employment law, criminal conviction expungements, and eviction expungements.
- We plan to partner with Indiana Free Legal Answers again this year to help reduce the backlog of legal questions from the public by hosting another “Clearing the Que” during our annual Talk to a Lawyer Today program in January 2026. The Committee plans on hosting 12 pro bono clinics in 2026 and is working to establish clinics with other non-profits and courts across the state.
-

This report is respectfully submitted by:

Derrick McDowell, Co-Chair
Tarah M.C. Baldwin, Co-Chair

October 9, 2025



INDIANA STATE
BAR ASSOCIATION

Social Security Disability Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Social Security Disability Law Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- Revived dormant section
- Initiated planning of upcoming CLE for later this year and next year
- Resumed more regular meetings



Social & Connection Opportunities

- Renewed more regular meetings, have had one informal social event, in discussion with group for more formal events upcoming



Committee Members

- **Chair:** Eric Farr
- **Vice Chair:** Joe Wambach
- **Secretary:** Katie Brinkmeyer
- **Treasurer:** David Ferency



Looking to the Future

- More opportunities for Social Security disability law practitioners to get together
- Using ISBA Community in Inbar Connect as a more in-depth resource
- Planned CLEs
- In short, increasing engagement as we revitalize the section and figure out where we want to go as a group in the future

This report is respectfully submitted by:

Eric Farr
Chair, Social Security Disability Law Section
Ph: 317-275-3062
Email: efarr@2keller.com
September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Tax Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Tax Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.

Highlight(s) of Accomplishment

- The Tax Section has been focused on increasing member engagement and enhancing the value offered to section members. We established an executive committee as well as four standing committees (CLE, Law Student Engagement, Scholarships, and Legislation & Policy) to help expand the reach of the Section.
- The Section visited all three Indiana law schools this year. We partnered with tax-focused student groups to host career panels and a trivia mixer.
- The Section awarded three scholarships to law students interested in tax.
- The Section has organized four CLEs this year with the goal of offering one event each quarter.
- The Section established the “Excellence in Taxation Award” this year to celebrate outstanding achievements and contributions to the tax community. The first award is planned for 2026.
- The Section is currently developing a section survey to better understand section member interests and preferences.

CLE

The Tax Section has organized four CLEs in 2025:

1. Mar. 31, 2025 – Understanding IBTR Appeals & POPLAR: Key Insights on Property Tax Disputes (virtual)
2. Aug. 21, 2025 – Avoiding Tax Traps and Gift Planning: Practical Steps to Minimize Clients' Tax Burdens (virtual) (co-sponsored w/ Probate, Trust, and Real Property Section)
3. Oct. 14, 2025 – Luncheon with U.S. Tax Court Judge Courtney D. Jones
4. Nov. 19, 2025 – Annual State Tax Reception

Legislative Activity

- **Federal Legislation:** The Tax Section signed onto a letter by the Indiana Chamber of Commerce to Senator Todd Young urging him to oppose a provision in the One Big Beautiful Bill because it would raise federal taxes on Indiana pass through businesses.

Social & Connection Opportunities

Networking opportunities were provided with the following Tax Section sponsored events:

- Nothing is Certain but Trivia & Taxes: A Night with the ISBA Tax Section – reception & trivia w/ IU McKinney Tax Law Society (Mar. 24, 2025)
- Luncheon with U.S. Tax Court Judge Courtney D. Jones – CLE and Luncheon (Oct. 14, 2025)
- Annual State Tax Reception – CLE and networking event (Nov. 19, 2025)

This is an area of ongoing development. We are considering the following events for 2026:

- Establishing an annual section-wide dinner and cocktail event
- Establishing an annual tax day (April 15) social mixer at Taxman Brewing Co.

Scholarships & Awards

Scholarships

The Judge Martha Blood Wentworth Excellence in Tax Scholarship was awarded to three applicants in the amount of \$500 per student:

- Joy Atadoga, LL.M. candidate, Class of 2025, Indiana University Maurer School of Law
- Joshua Brandle, J.D. candidate, Class of 2026, Indiana University Robert H. McKinney School of Law
- Bryce Hull, J.D. candidate, Class of 2026, Indiana University Robert H. McKinney School of Law

The Section also awarded Honorable Mentions for the Scholarship to two students:

- Kyle Carlson, J.D. candidate, Class of 2027, Indiana University Robert H. McKinney School of Law
- Amanda Kurteff, J.D. candidate, Class of 2027, Indiana University Robert H. McKinney School of Law

The Scholarship Committee is developing a structured mentorship program for award recipients that includes invitations to all section events, opportunities to engage with members through lunch or coffee, job shadowing, and other informal professional support.

Scholarships & Awards

Awards

The Section established the “Excellence in Taxation Award” to celebrate outstanding achievements and contributions to the tax community. The first award is planned for 2026.

Contributions

- The Tax Section donated \$600 to the ISBA's Etiquette Dinner program for law students.

Council Members/Committee Members

Executive Committee

Chair	Hon. Justin McAdam
Chair-Elect	Dan Shackle
Vice Chair	Chris Russell
Secretary/Treasurer	Brandee Chanin
Past Chair	Adria Price

Council Members

Delainey Deitch, Christopher Clerc, Matt Ehinger, Scott Frissell, Mike Gould, Nathan Hagerman, Prof. Stephanie Hoffer, Randy Kaltenmark, Tyler Macik, Paige McHugh, Andrew Nguyen, Mark Pfeiffer, Ed Satchwill, Josh Schlake, Hon. Martha Blood Wentworth

Advisory Members

Nick Anderson, Mark Richards

Council Members/Committee Members

CLE Committee

Adria Price
Brandee Channin
Rhonda Cook
Matt Ehinger
Mike Gould
Hon. Martha Blood Wentworth
Mike Yuhas

Law Student Engagement Committee

Christopher Russell
Dan Shackle
Josh Brandle
Christopher Clerc

Scholarships & Awards Committee

Brandee Chanin
Adria Price
Patrick Thomas

Legislation & Policy Committee

Adria Price
Dan Shackle

Looking to the Future

- The Tax Section has seen a lot of active engagement from members and is actively working to expand opportunities for section members to be involved in section events.
- The Section is actively looking for additional opportunities to partner with other ISBA Sections and law schools to sponsor CLE and networking events.
- The Section plans to continue engagement with law students interested in tax at Indiana's law schools. The goal is to establish annual events at all three schools.
- The Section plans to award the first "Excellence in Taxation Award" in 2026.
- The Section is considering adding an annual section-wide dinner in 2026.
- The Scholarship Committee is developing a structured mentoring program for scholarship recipients.

This report is respectfully submitted by:

Hon. Justin L. McAdam
Chair
justin.mcadam@courts.in.gov
(317) 232-4694
September 4, 2025



INDIANA STATE
BAR ASSOCIATION

Utility Law Section

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the **Utility Law Section** submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- The Utility Law Section held a successful seminar in May 2025 in Indianapolis that provided relevant, quality continuing legal education content to its members with a second seminar scheduled in late October in French Lick, Indiana.



CLE

- May 2, 2025 seminar held in Indianapolis with 6.0 hours of CLE/1.0 hours ethics
- October 30-31, 2025 seminar scheduled in French Lick with 6.0 hours of CLE/1.0 hours ethics



Social & Connection Opportunities

- Each of the Section's seminars includes a reception, which encourages networking and social engagement with members.
- Holiday party held December 2024 in downtown Indianapolis



Contributions

- Financial support of the ISBA Leadership Academy and Law Student Etiquette Dinners at Notre Dame, IU Maurer, and IU McKinney as well as the We the People program.

This report is respectfully submitted by:

Tiffany Murray, Northern Indiana Public Service Company LLC

ULS Section Chair, 2024 - 2025



INDIANA STATE
BAR ASSOCIATION

Unauthorized Practice of Law Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

Nothing contained herein shall be construed as the action of the Indiana State Bar Association (ISBA). Any opinions or recommendations herein expressed or made are those of the Unauthorized Practice of Law Committee submitting this report and do not necessarily reflect the views of the Indiana State Bar Association until such time as the ISBA has duly adopted them as policy of the Association.



Highlight(s) of Accomplishment

- UPL Complaints are submitted through the website and reviewed by the committee on a regular basis.
- Since January 1, 2025, the UPL Committee has reviewed more than 20 complaints.



Council Members/Committee Members

- Regular attendees at meeting include only the following:
 - Alex M. Beeman – President
 - Timothy Kalamaros
- There has been lackluster participation in the UPL Committee this year.

Looking to the Future

- Informal discussions with the Ethics Committee have occurred but it maybe time to discuss putting the UPL Committee under or alongside the Ethics Committee, or some other Committee as the ISBA deems fit.
- The President of the UPL Committee will be raising and presenting at the next Probate Trust and Real Property Committee regarding any interesting unauthorized practice of law topic – out-of-state creditors submitting claims in estates without an attorney.

This report is respectfully submitted by:

Alex M. Beeman
UPL President
abeeman@reminger.com
September 26, 2025



INDIANA STATE
BAR ASSOCIATION

Well-Being Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishments

- The Well-Being Committee continued pursuing its vision of moving a well-being cultural shift from an idea of “nice to have” to a must have.
- Sponsoring healthy refreshments and disseminating well-being advice featured on rolling slides during annual meeting programming
- The committee focused on the goal to “provide well-being facet options on a regular, rotating basis to normalize well-being in conversations” by:
 - Contributing resources to *Addendum*
 - Updating resource guides for law students and new admittees
 - Working with the ISBA and Krill Strategies to coordinate Indiana’s participation in the 2025 nationwide survey of lawyers’ health and well-being

CLE

- Working on developing CLEs based on mental health first aid training and combating the stigma associated with mental health issues and alcohol and drug addiction

Alternative Education Opportunities

- Social media posts for Well-Being in Law Week (May 5 -9, 2025)
- Resource guide for law students, which will be distributed at law school activity and career fairs
- Resource guide for new attorneys, which are included in the packets new lawyers receive at the spring and fall admission ceremonies
- Distribution of Institute for Well-Being in Law resources, including 31-Day Mental Health Challenge

Looking to the Future

- Continue to provide resources to support ISBA members in search of healthy, positive lifestyles.
- Strive to infuse the facets of well-being in ISBA offerings by partnering with and supporting other ISBA sections and committees.
- Utilize the results of the national lawyers' survey (both global and Indiana-specific results) to direct resources to the greatest areas of need and develop programming and content to that
- Provide long-form, written well-being content for *Res Gestae* and other ISBA outlets on a regular basis.

This report is respectfully submitted by:

Kristin Durianski, Chair
kristin.durianski@codilis.com
September 18, 2025



INDIANA STATE
BAR ASSOCIATION



Women in Law Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight of Accomplishments

- Celebrated the 23rd year of the Women's Bench & Bar Retreat at the Swan Lake Resort in Plymouth, Indiana on February 28 – March 2, 2025
- Over 61 lawyers and judges attended the retreat.
- Offered scholarships to young lawyers and to law students to attend conference so that they can network and gain connections throughout the state.



CLE

- Offered 9.0 CLE/ 1.0 Ethics credits to lawyers attending the 2025 Women's Bench & Bar Retreat.
- CLEs ranged from:
 - Appeal on Wheels Oral Argument with Appellate Judges Dana Kenworthy, Margret Robb, and Leanna Weissmann
 - Judiciary's Response to Substance Use Disorder with Chief Justice Rush
 - The Costs of Self-Neglect
 - 23 Things Every Indiana Lawyer Should Know with Hon. Steven David
 - Trial Proceedings with Hon., Margret Robb and Christina Miller
 - Problem Solving Courts Panel from Clark and Floyd County Judges



Social opportunities

- Sisters in Law Summer Social – August 2025
 - 64 Women Judges and Lawyers gathered at the home of Chief Justice Loretta Rush to celebrate another successful year in the practice of law.
 - Many long-time members as well as newly admitted lawyers joined together for a lovely evening of fun and fellowship
 - Thank you to the Chief Justice and her husband, Jim, for a lovely evening and we were so happy the weather cooperated as well!



Scholarships & Awards

- Six scholarships were awarded to law students and young women lawyers to attend the 2025 Women's Bench & Bar Retreat.
- The Women in Law Committee is so happy to offer opportunities to attend these important events with the assistance of the ISBA and other generous supporters!
- Thank you!!



Contributions

- Committee members donated their resources in December with the Women in Law “Golden Gifts” 2024
- Committee members purchased gifts to spread cheer for some very lovely seniors in our area who may be forgotten during the holiday season
- A special thank you to Tamara Weaver for coordinating this service project



Looking to the Future

- 24th Annual Women's Bench & Bar Retreat is going on the Road!!
 - Coven WBBR 2026: Breaking Barriers, Building Bridges, and Inspiring Change
 - March 1 – 4, 2026 in Savannah, Georgia
 - Make plans to attend!
 - Make your Hotel Reservations now – Registration to be open soon!
 - Join us for 9 hours of CLE with Indiana Judges and Lawyers
- We are always looking for new members – contact Leah Baker to join our committee!



This report is respectfully submitted by:

Hon. Judi L. Calhoun, Chair
Women in Law Committee

Written Publications Committee

Indiana State Bar Association
Report to the ISBA House of Delegates
October 9, 2025
Indianapolis, Indiana

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Highlight(s) of Accomplishment

- This year, the committee released their first symposium issue in several years, focused on the Rule of Law and how legal professionals can educate their communities. Feedback on the issue included:
 - “We just saw the Indiana State Bar’s special Rule of Law issue of Res Gestae. I haven’t been able to read all of it yet but from what I’ve seen it is exactly what we all need at this time. Thank you for putting it together and showing us all the way bars and lawyers can lead on this issue. I hope you receive positive feedback from your members.” *American Bar Association Center for Bar Leadership*
 - “The joint July/August 2025 Res Gestae’s reflections and reports on the Rule of Law is a pertinent reflection on a key universal driver of social progress. The vital views on the Rule of Law by various esteemed contributors should not therefore echo from few months ago without further laudatory.” *ISBA Member*

Highlight(s) of Accomplishment

- Additional feedback on Res Gestae:
 - “I just want to thank you and your team for publishing, in hard copy (double thanks) the Res Gestae magazine. I really value every issue. In particular, thank you for including Lawyers and Depression: 3 Possible Reasons Why a Lawyer May be Unhappy by Dr. M. Welsh in the March 2022 issue. I’ve been using it as “end-of-semester” class topic since it was published. As I prepare for my last class for this semester, I just re-read the article in its entirety and look forward to using it as a basis for class discussion with students who have been in legal externships this semester.”
Indiana Law School Faculty Member
- By the numbers:
 - Res Gestae is mailed to ~8,500 members each month. It is shared digitally with more than 10,000 members, legal professionals, and community leaders.
 - In 2024-25, emails promoting each digital issue average:
 - A 54.4% open rate (compared to a 46.5% average across all ISBA messaging)
 - 18,507 unique forwards

Alternative Education Opportunities

- Since September 2024, the committee has helped print 10 issues of *Res Gestae*, including:
 - 93 total articles
 - 5 scholarly articles
 - 18 submissions from Indiana legal professionals
 - 50 columns
- For a full listing of articles, [click here »](#)

Council Members/Committee Members

- Prosper Batinge
- Geoffrey Blazi
- George Brown, Jr.
- Karen Celestino-Horseman
- Colin Flora
- Joanna Grama
- Tyler Helmond
- Sara Hook
- Erin Huang
- Melissa Keyes
- David Murphy
- Greg Pachmayr
- Jeffrey Peabody
- William Ramsey
- Joel Schumm
- Normal Tabler
- Marianne Vorhees

Looking to the Future

- The committee's goals for 2025-26:
 - Increase engagement by scheduling 1-2 articles per year that invite reader response and include multiple perspectives
 - Increase law student involvement (by featuring student writers or adding law students to the committee)
 - Continue focusing on diversity in reviewers and authors
 - Continue inviting content experts to review practice-specific articles

This report is respectfully submitted by:

Melissa Keyes
Co-Chair

Hon. Marianne Vorhees
Co-Chair



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