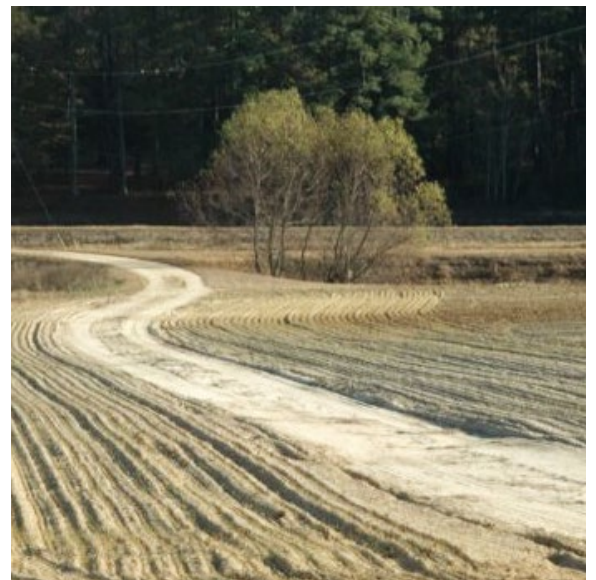
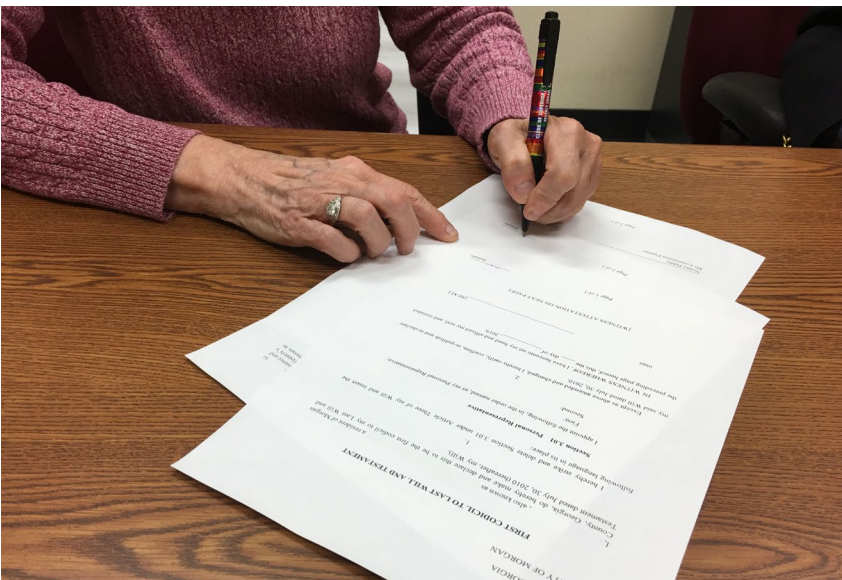


2019

Annual Report

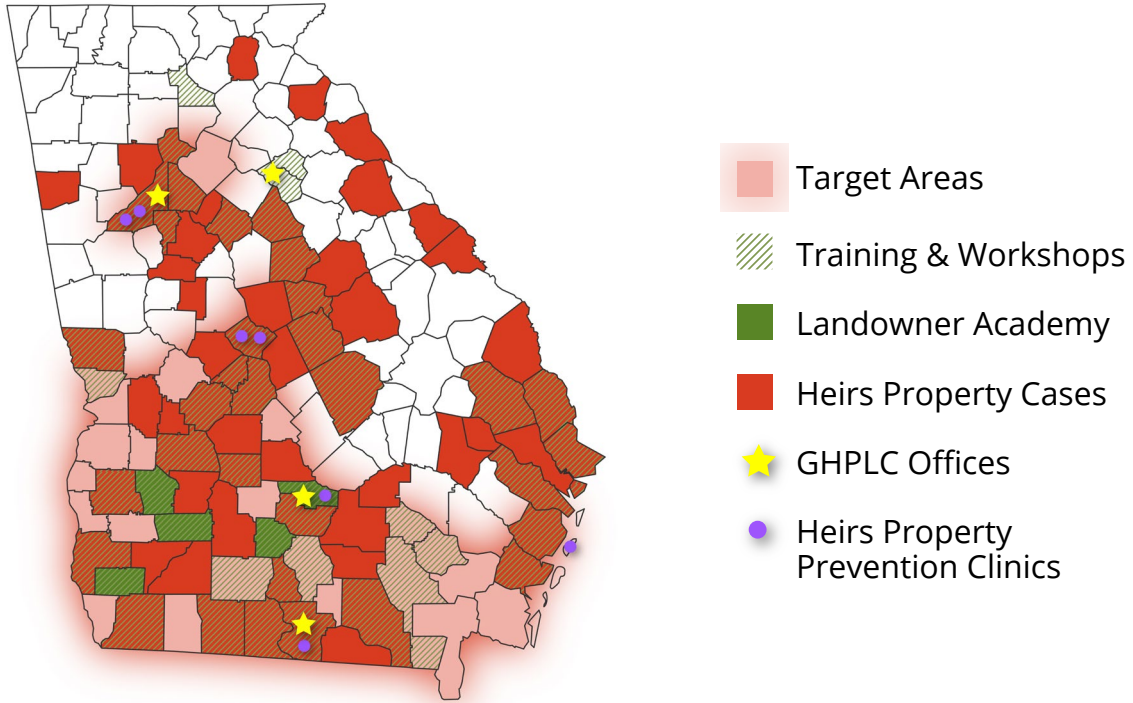


GEORGIA HEIRS PROPERTY
LAW CENTER

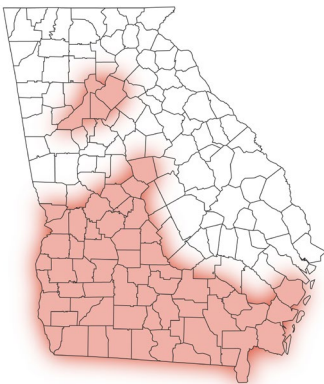
☎ 706.424.7557 ext 1
✉ info@gaheirsproperty.org
🏠 www.gaheirsproperty.org
📍 54 Ellis Street NE | Atlanta, GA 30303

ON THE MAP

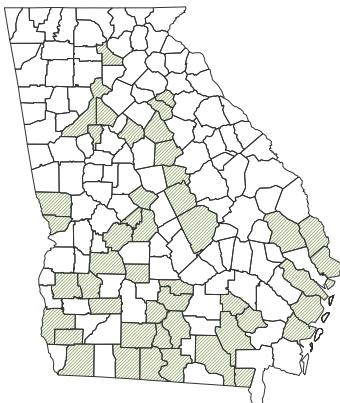
As of June 30, 2019



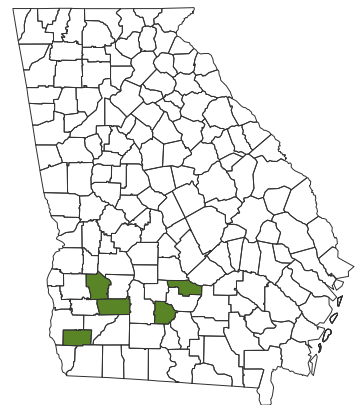
TARGET AREAS



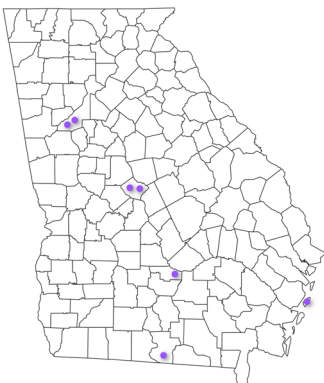
TRAINING & WORKSHOPS



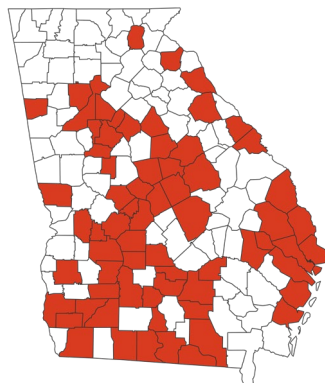
LANDOWNER ACADEMY



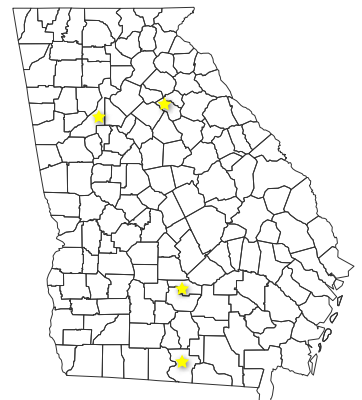
PREVENTION/WILLS CLINICS



HEIRS PROPERTY CASES



GHPLC OFFICES



CONTENT

2	ON THE MAP
4	LETTER FROM THE DIRECTOR
5	OPPORTUNITY
6	IMPACT
7	PREVENTION
10	OUTREACH AND EDUCATION
15	TITLE REMEDIATION
19	COLLABORATION
22	FINANCIALS
23	DONORS
24	BOARD OF DIRECTORS

Dear Friends, Partners, and Colleagues,

Thank you for making the Georgia Heirs Property Law Center's Fiscal Year 2019 yet another remarkable year! While the Center started off FY19 armed with the data that over \$34 billion dollars of Georgia property is heirs property, we wanted to find out exactly what that meant to individual Georgians and our communities. We met with as many of you as possible to have the hard conversations about the true impact heirs property has in Georgia. Traveling throughout our state was an honor and privilege. I even found myself sleeping in my childhood friend's camper in the middle of her family's cotton field, which is heirs property, in the days after Hurricane Michael. The Center staff heard the need and this is what we learned:

Simply put, heirs property stymies the state's economy in rural and urban, and in coastal and inner Georgia. Every person we met with, no matter the geographical location, class, race or stature, has an heirs property story. Every municipality is negatively impacted by heirs property. Every government program, whether local, state, or federal, is hindered by heirs property. Throughout our state, disaster recovery is stalled by heirs property.

Growing Georgia's Economy through Property Rights

Some local governments continue to mow lawns and demolish abandoned heirs property. All are carrying large liens on heirs property. Many governments have had to return or reallocate funds because of heirs property. Too often, well-intentioned rehab loan programs or other property improvement and disaster relief programs cannot be implemented because of heirs property. Finally, and perhaps most importantly, without intentional work, heirs property is created every day.

Heirs property is an obstacle to economic development and community stability throughout Georgia. The tangled titles of heirs property prevent towns and farms from prospering and inhibit economic development and recovery after natural disasters.

Equally, heirs property is an opportunity. The return on investment of clearing title is great. With clear title, homeowners qualify for nonprofit and government programs or can take out home equity loans from private banks to repair/upgrade their homes or send a kid to college. With clear title, property tax digests increase; families have safe, stable homes; and owners can sell their property at fair market value and qualify for programs. In general, less blight and fewer abandoned properties result when code enforcement and redevelopment efforts are not thwarted.

The Center's clients, some of whose stories we share in this report, speak to the return on investments from heirs property prevention, education, and title clearing. We, at the Center, are committed to using every tool we have to address heirs property for local governments, families, agriculture, silviculture, and natural disaster mitigation and recovery.

As we gear up for FY2020, we hope you will join us as our dedicated staff continues to grow Georgia's economy through property rights.

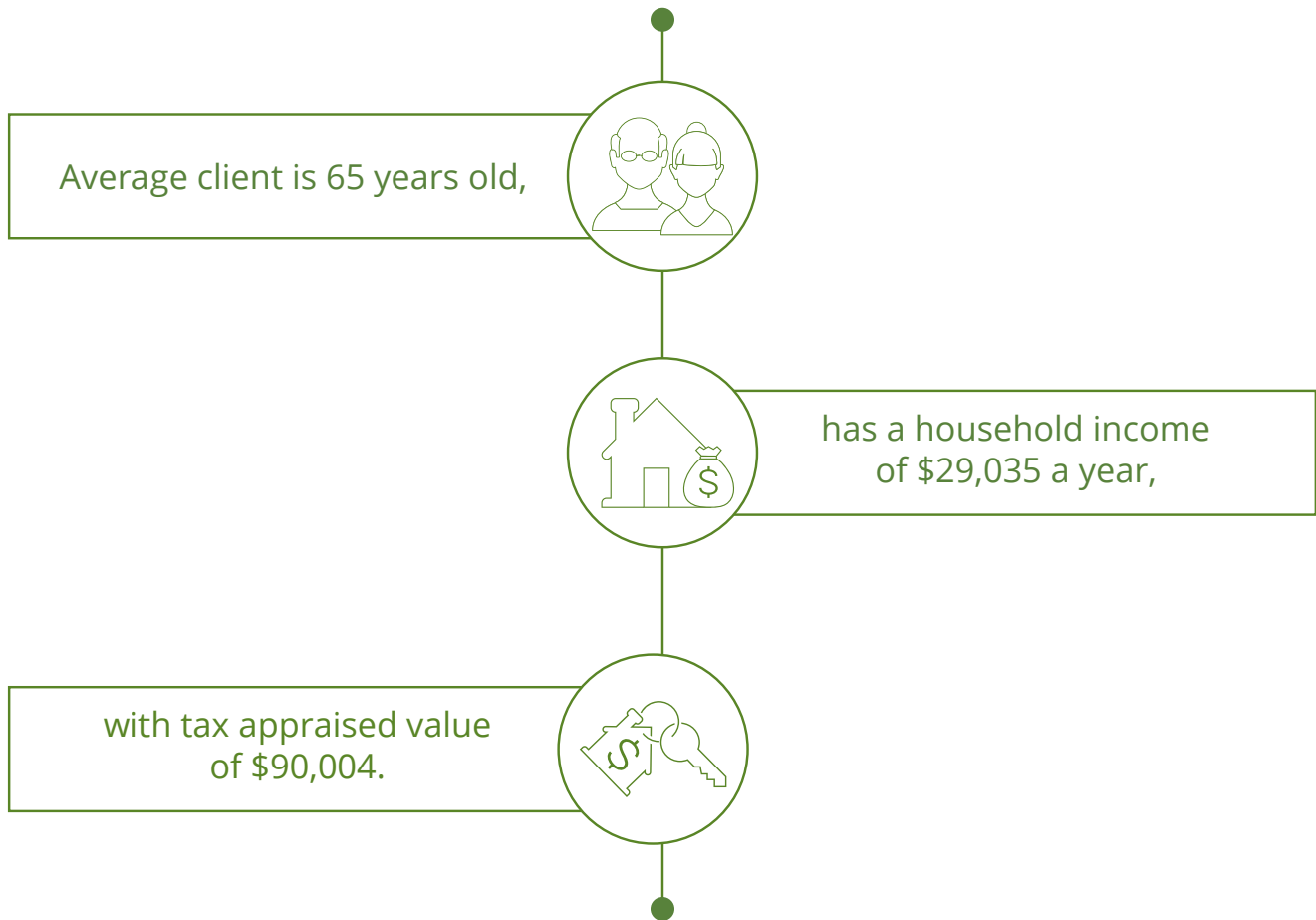
With warm regards,



Skipper G. StipeMaas
Executive Director

OPPORTUNITY

The Math: The total tax appraised value of probable heirs property undermining Georgia's economy is over \$34 billion.



WHO OWNS HEIRS PROPERTY, WHERE IT IS LOCATED AND HOW IT IMPACTS GEORGIA'S ECONOMY?

Myth:

My family is unique; we own land collectively.

Truth:

There is nothing unique about owning land collectively, and almost every family has heirs property or has a story about heirs property. Research conducted in 2017 found that 11% to 25% of the property in Georgia is probable heirs property.

IMPACT

BY THE NUMBERS

As of June 30, 2019





PREVENTION

PRESERVING FAMILY HOMES AND LAND

For each piece of heirs property, whether it is a home or a tract of land, there are multiple legal owners (usually descendants in a family), no single one of whom can make major decisions for the property without everyone's agreement. Heirs property, which can be created with or without a will, is equivalent to having a pile of money in a glass box; a family can see their asset but cannot access its equity.

Heirs property is an unstable form of property ownership that inherently affects the relationships of the family owners and limits the family's ability to access the tools that will help them leverage their real property and build generational wealth. Historically and continuing today, the tangled webs of heir property ownership result in tax lien and and other below market sales and land loss.

However, the legal tools in the hands of committed attorneys and intentional outreach by community organizations can resolve and prevent heirs property so that generational wealth building and community revitalization efforts can succeed.

The Center's Multi-Pronged Approach

The Center prevents heirs property by helping clients create estate plans with a focus on effective generational wealth transfer.

Preventing Tangled Titles - Estate Planning

Estate planning that contemplates heirs property prevention breaks the cycle of generational property loss. According to a 2016 Gallup poll, 56 percent of Americans do not have a will. The percentage is even higher in low-income communities that lack access to affordable estate planning attorneys.

The Center has completed 150 estate plans for clients. The Center with pro bono attorneys offers estate plans to all clients.

CAN A WILL CREATE HEIRS PROPERTY?

Myth:

You cannot create heirs property in a last will and testament. If I have a will that makes provision for my lands, I have not created heirs property.

Fact:

People can, and often do, inadvertently create heirs property through a last will and testament by leaving their real property to multiple family members. If you leave your property to your four children, you have created heirs property with four tenants-in-common.

CLIENT STORY

In addition to title clearing services, the Center's staff offers estate planning services; both as a means to build generational wealth and to prevent unintended heirs property in the next generation. For example, Mr. Connor* and his first wife Betty* owned a home as tenants-in-common. Betty passed away in 2011 without a will. The couple had three children, all of whom are still living. Mr. Connor contacted the Center for assistance in placing title to the property in his name so that all important documents, including the tax bill, were directed to him and he could handle his affairs accordingly.

Mr. Connor remarried twice since Betty's death, and the children were reluctant to give up their interests in the property for fear that their childhood home could be inherited by a stepmother. Mr. Connor agreed that he wanted his children, and not any spouse, to inherit the property. As a result, the Center helped Mr. Connor prepare an estate plan that leaves his interest in the property to the children. The Center also helped Mr. Connor get appointed as administrator and drafted an administrator's deed of assent devising his late wife's interest in the property to himself and his children.

**Clients' names have been changed to protect their privacy.*

HEIRS PROPERTY PREVENTION CLINICS

Collaborating with nonprofits, churches and pro bono attorney volunteers, our staff members conduct hands-on heirs property prevention clinics (aka wills clinics) where low-income clients receive property tax homestead exemptions and property tax valuation appeals.

In McIntosh County, the Center facilitated the first wills clinic in the history of the Sapelo Island's Hog Hammock community. Four pro bono attorneys from the Atlanta law firms of Djuric Spratt P.A. and Eversheds Sutherland provided complete estate plans for seven community residents. Of the clinic participants, three were dealing with heirs property issues. The Center was able to refer these three participants to pro bono attorneys, and two matters have been resolved.



In Fulton County, the Cascade Corridor Heirs Property Prevention Clinic provided eleven residents of Atlanta's Cascade Road corridor and surrounding neighborhoods with vital heirs property education and resources. Three pro bono attorneys from the Law Office of Shunta V. McBride, Troutman Sanders, and Eversheds Sutherland volunteered to draft wills. An additional participant was unable to attend, and a pro bono attorney agreed to work with him separately to complete his will.

Ben Hill County residents were the recipients of a Heirs Property Prevention Clinic, which resulted in wills for eight participants and protected \$476,420 in tax appraised homes and land from becoming heirs property. Information about the clinic, heirs property prevention, and estate planning was distributed to 45 attendees at two outreaches in advance of the clinic.

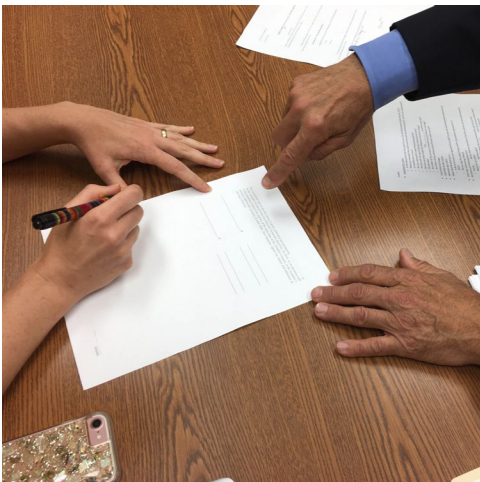
Residents of the **City of Valdosta** were offered a Heirs Property Prevention and Estate Planning Workshop in partnership with the City of Valdosta, which provided information about why heirs property is a problem, how to identify if you are an heirs property owner, how to prevent heirs property, the importance of estate planning, and the probate process. The Center also offered individual consultations at no charge to 10 heirs property owners. The staff also presented at Georgia Initiative for Community Housing Retreat and hosted a second Heirs Property Prevention and Estate Planning Workshop in partnership with the City of Valdosta.



In Macon-Bibb County, the Macon Heirs Property Prevention Clinic resulted in eleven participants completing their Last Will and Testaments, which protected over \$388,540 in tax appraised property from becoming heirs property. This Clinic was conducted in partnership with Georgia Legal Services Program-Macon office, the Pro Bono Project of the State Bar of Georgia, the Macon-Bibb Community Development Block Grant Program and Wells Fargo.

“Coleman Talley was pleased to host the Valdosta Wills clinic with the Georgia Heirs Property Center. Our firm has been a member of the Valdosta community since 1937 and we appreciate the opportunity to be of service to its citizens.”

RUSSELL D. HENRY
Partner
Coleman | Talley LLP



In **Grove Park (Atlanta)**, the Center offered an Heirs Property Prevention and Wills Clinic to 8 residents of Atlanta’s Grove Park neighborhood. The clinic was part of a two-day housing forum sponsored by the Grove Park Foundation. Staff made presentations about the importance of estate planning and the prevention of heirs property on each day of the forum. In addition, the Center created an Heirs Property Prevention and Wills Clinic in partnership with Atlanta Legal Aid Society for residents of the Cascade Road corridor and surrounding neighborhoods. The clinic was hosted by Paradise Missionary Baptist Church and included two workshops at area churches leading up to the clinic as well as marketing and awareness through the area neighborhood planning units (NPU) and city council members.



OUTREACH & EDUCATION

EMPOWERING PROPERTY OWNERS THROUGH INFORMATION AND OUTREACH

Heirs property is as destructive an issue in rural communities as it is in urban communities. Heirs property ownership issues affect every socio-economic segment and every geographic region of Georgia, and it is created every day. Heirs property, when boiled down to its bare essence, is about family and land, the two most complex aspects of all of our lives and fundamental components of our economic system.

Outreach and education are key components to remediating, preventing and ending heirs property. The Center, solely or in collaboration with other partners, has completed **271 community outreach** programs, trainings and stakeholder meetings in 41 counties and provided information and educational materials to over **8,900 individuals**:

- **144** in the metro Atlanta area; and
- **127** in Central and Southern Georgia

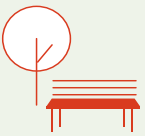


THE CENTER'S MULTI-PRONGED APPROACH

The Center focuses on several key areas within its outreach and education efforts:



- **Leadership Education:** Advances a deeper understanding of heirs property—its impact, its cures and its prevention—by providing education and planning to government agencies and employees, elected officials, attorneys and judges, and nonprofit and neighborhood leaders.



- **Neighborhood Outreach:** Reaches residents, senior centers, neighborhood associations to provide education on the general subject of heirs property; on title searches; on the Center's intake process; and on estate planning.



- **Landowner Academy:** Provides educational programs on and access to government, private sector, and nonprofit land management/home improvement and disaster relief programs. It also includes asset education that helps real property owners steward and enhance the value of their home or land.

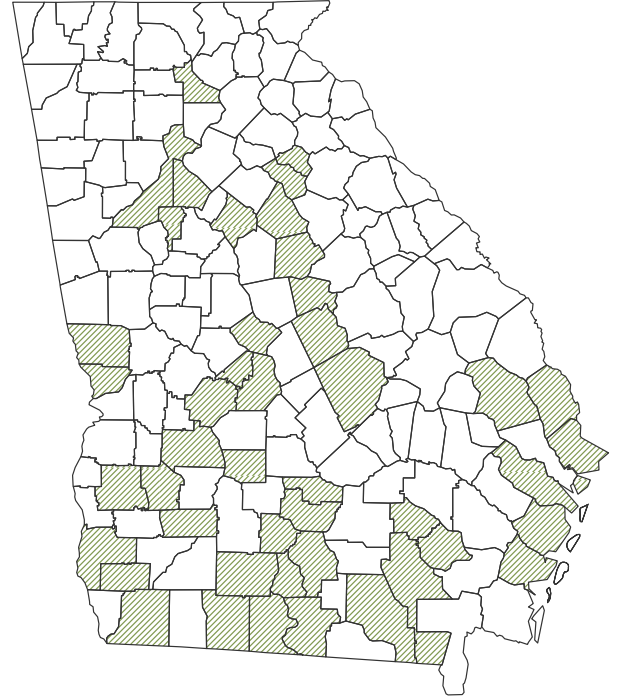
LOCAL GOVERNMENTS

Leadership Education

For local governments, heirs property means undervaluation and stagnation of significant resources in title-tangled land in which no one person has the legal authority to manage the property in such a way that benefits the family, let alone the tax base.

As word of the Center's services spreads, demand increases throughout Georgia. The Center's cases are divided evenly in rural south Georgia and Atlanta, and include some cases along the coast. The Center works with local governments to provide training workshops for local leaders and low income homeowners on heirs property prevention services.

Each year, the Center speaks at the Georgia Initiative For Community Housing Conference. GICH is a three-year program sponsored by the GA Dept of Community Affairs and GA Power to help local governments develop a comprehensive housing strategy and connect them with best practices and partners who can help them achieve their goals. This year, the Center presented at GICH's opening session to current and alumni communities. Follow up contacts from this presentation led the Center to Thomasville.



Trainings and Workshops

THOMASVILLE

Building on the Center's presentation to Thomasville's Georgia Initiative For Community Housing Team, the Center met with officials from Thomasville and Thomas County (Inspections and Planning, Tax Commission, and City Manager) to discuss heirs property issues revealed by Hurricane Matthew, as well as those arising through the city's neighborhood revitalization efforts. The City of Thomasville estimates that up to 20% of the properties in the city are heirs property and attributes the major cause of blight and dilapidated housing to heirs property. Because no one single individual owns the house, no one person wants to be responsible to maintain it. As a result, the City, private funders and local nonprofits have invited the Center to conduct a workshop for neighborhood leaders with an eye toward providing place-based services in 2020.

COLUMBUS

At the invitation of the Columbus Land Bank, the Center conducted an educational workshop for Columbus-Muskogee stakeholders, city officials and non-profits on heirs property issues, including an overview of how heirs property is created; how title can be cleared; and how heirs property can be prevented. An estimated \$1.23 billion in tax appraised probable heirs properties exists in Columbus, creating a hindrance to generational wealth building and drag on the tax base. As a result, the City has invited the Center to conduct workshops targeting two neighborhoods to support blight remediation and revitalization efforts.

NEIGHBORHOOD OUTREACH

VALDOSTA

In November 2018, the Center's staff conducted an "Heirs Property Prevention and Estate Planning Workshop" in partnership with the City of Valdosta. Information was presented about why heirs property is a problem, how to identify if you are an heirs property owner, how to prevent heirs property, the importance of estate planning, and the probate process. The Center also offered individual consultations at no charge to 10 heirs property owners. The Center also presented at the Georgia Initiative for Community Housing Retreat in February 2019, and hosted its second Heirs Property Prevention and Estate Planning Workshop in partnership with the City of Valdosta the same month.

ATLANTA

The Center continues to build relationships with the City of Atlanta. The Center met with new City of Atlanta Chief Housing Officer, District 9 commissioner, and city staff to discuss a citywide outreach campaign as well as support for residents through the Code Diversion Program. In addition, the Center was retained by HouseProud Atlanta to facilitate title searches for applicants for the Invest Atlanta Heritage Owner-Occupied Rehab Program. Applicants must have clear title to participate, and the searches are funded by Invest Atlanta. The Center, in coordination with a title abstractor, completed 30 title searches for applicants seeking to qualify for the program. Staff also met with Atlanta Housing Authority - Choice Neighborhoods Rehab Program to discuss title issues their homeowners are facing.

MACON

In Macon-Bibb County, the Center cultivated partnerships with organizations to help with outreach and to target residents most in need. During the year, the Center's staff worked with representatives from the Elaine H Lucas Senior Center, Historic Tindall Heights Neighborhood Association, Macon-Bibb Police Department, and the Fuller Center for Housing, as well as two churches in the Tindall Heights area- Greater Little Rock Baptist Church and Greater Rising Start Full Gospel Tabernacle- and the Buck Melton Community Center to reach Macon-Bibb residents.

CLIENT STORY

Oftentimes, it is simply a lack of knowledge that creates and perpetuates heirs property. The Center has found that one of the most powerful tools to prevent and resolve heirs property is educational outreach. For instance, during an outreach presentation, Mrs. Johnson* argued with our staff attorney who had informed attendees that, under a will, title to a home or land is not transferred until the will has been properly administered with the county probate court and the property has been deeded out of the estate. After the program, Mr. Lynn,* who is now a Center client, revealed that he had been holding on to his wife's original will since she passed away in 1980, believing that the will alone was proof that he owned their home and her interest in family timberland. For almost 30 years, this inaccurate information and lack of access to legal counsel led Mr. Lynn mistakenly to believe he owned clear titles. As a result of the Center's outreach, Mr. Lynn has since administered his wife's estate with the county probate court, and the Center is working with him to place title to the family property in his name.

**Clients' names have been changed to protect their privacy.*

LANDOWNER ACADEMY

As part of its outreach and asset education program, the Center developed the Georgia Landowner Academy in collaboration with Fort Valley State University Cooperative Extension Program, Georgia Forestry Commission, Sustainable Forestry Initiative, and the Golden Triangle Resource Conservation and Development Council. This series of workshops targets rural Georgians who own at least 10 acres of land, helps landowners develop land/timber management plans, create conservation plans, complete conservation easements, apply and qualify for USDA programs, take advantage of disaster relief programs through the Federal Emergency Management Agency (FEMA), and develop working relationships with each of our partners and their offices throughout Georgia. Participants in the Georgia Landowner Academy also receive assistance in completing an estate plan.

“The knowledge I have gained through the academy has enabled me to know what I need to research and what questions I need to ask in order to be a successful landowner.”

— BENNY PORTER,
Academy Participant,
Dougherty County



Georgia Landowner Academy Class



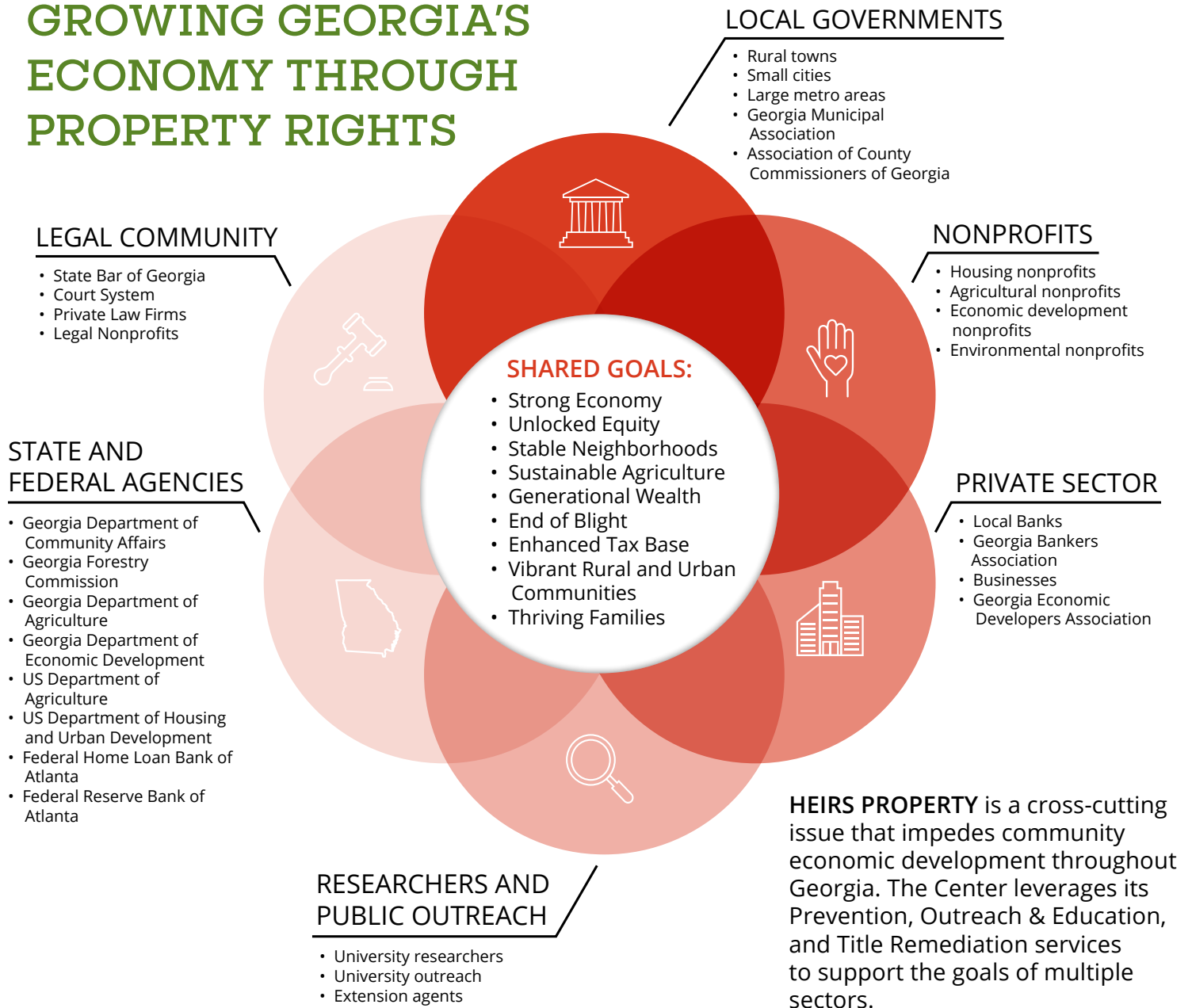
Georgia Landowner Academy Graduation

OCONEE-AREA FOREST OWNER ACADEMY



The Center co-presented a two-day workshop - the Oconee-Area Forest Owner Academy - in collaboration with the Georgia Forestry Commission and the USDA Forest Services at 4HCamp Rock Eagle in Eatonton. The Oconee-Area Forest Owner Academy focused on individuals who own forest, timber or wooded land in the Oconee National Forest Area, with the specific target areas of Jones, Jasper and Putnam Counties. The academy offered sessions about heirs property and individual follow-ups with each participant to ensure that the information is being used efficiently and understand how participants are able to use information provided outside of the classroom. The Center offered each participant a free estate plan.

GROWING GEORGIA'S ECONOMY THROUGH PROPERTY RIGHTS



DOES PAYING PROPERTY TAXES MEAN I OWN THE LAND?

Myths:

The myths around property taxes are numerous. Here are a few:

1. I have a greater ownership interest than others because I pay the property taxes.
2. If I pay the property taxes, I own the property outright.
3. If my family members don't pay the property taxes, then the property belongs to me, and I can do whatever I want with it.
4. If someone pays all the back taxes, they own the property.
5. You aren't responsible for the back taxes on the property if the deed holder passed away. Those are their debts.

Fact:

Paying current or back property taxes does not increase your legal ownership of any real property, including heirs property.



TITLE REMEDICATION

Heirs property limits a family's ability to make home improvements, manage farm/timberland, and build generational wealth because the family cannot qualify for financing, grant, or repair programs. Heirs property not only limits a family's ability to build wealth – it also thwarts the efforts of local governments to revitalize their neighborhoods.

29 matters with properties in **7** counties valued at approximately **\$2.1 million** were resolved through title clearing, deeds or corrective instruments, probate, formation of LLCs and removal of liens.

The Center's Multi-Pronged Approach

Remediates “tangled title” utilizing a full range of diagnostic and curative tools, including working with clients to determine goals for their property and developing a family tree of heirs; facilitating title searches and surveys; and clearing titles through negotiated agreements, probate and litigation.

CLIENT STORY

Confusion about ownership and how property is transferred upon the owner's death can prevent heirs property owners from realizing the full benefits of ownership. Ms. Carter* was referred to the Center after she was cited by a city for housing code violations for her deceased mother's home. Prior to receiving notice of the code violations, Ms. Carter had been unaware that her brother, who had been appointed by the county probate court as administrator of her mother's estate, had recorded a deed purportedly conveying the home to her and that she had “owned” the property for over 2 years. Her brother did not have the benefit of legal counsel and thus failed to convey marketable title to Ms. Carter.

The Center worked with Ms. Carter to properly administer her mother's estate and gain marketable title to the home. Although Ms. Carter was able to correct the code violations, she did not have funds to make substantial repairs to the home. However, she did start mowing the grass and making some small repairs. People noticed changes to the property after being empty for over 2 years, and Ms. Carter started receiving letters from investors with extremely low cash offers for the property. Ms. Carter thought a \$10,000 offer was reasonable given the property's tax assessed value of \$7,200, but our staff advised Ms. Carter that the property would sell for much more if listed with a knowledgeable real estate agent. The Center provided Ms. Carter with a list of reputable brokers and agencies to consider contacting about her options. Using these resources, Ms. Carter ultimately sold the house for \$50,000 and worked with the Center to develop an estate plan to pass some of the proceeds on to her children and grandchildren. During a follow up call, Ms. Carter expressed her gratitude to the Center: “The Center was wonderful—they helped me clean up the title and turn an abandoned house into a treasure.”

**Clients' names have been changed to protect their privacy.*

WHY CLEAR HEIRS PROPERTY?

Myth:

It's not important to clear title because heirs property is a form of protection and keeps the property from being sold.

Fact:

Marketable title is necessary to protect and manage property especially since heirs property can and is sold and may be more vulnerable to forced sales. Any one heir or interest owner in the property can force a sale. Non-family members or family members who are not co-owners but purchase a co-tenant's interest can also force a sale.

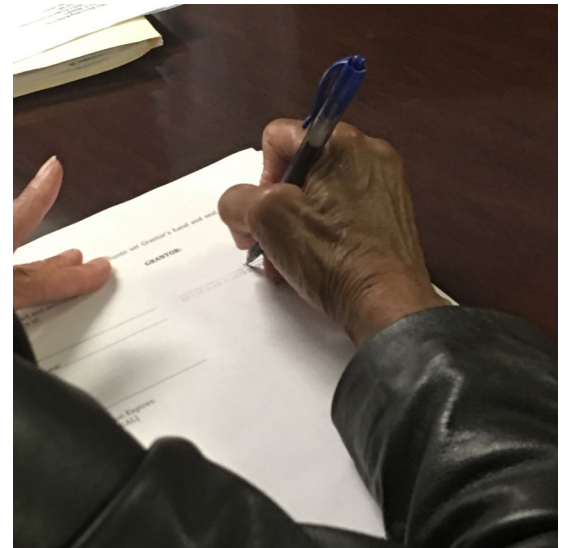
TITLE REMEDIATION AFTER NATURAL DISASTERS

Families often discover that they own heirs property when they apply for Disaster Recovery programs following a hurricane or other natural disasters. The Center is working with the Georgia Department of Community Affairs (DCA) to provide legal services to heirs property owners recovering from 2017's Hurricane Irma and 2017's tornados in Albany. This is the first time the State of Georgia has received Federal Housing and Urban Development (HUD) funds for natural disaster recovery. The targeted areas for this work are the cities of Brunswick, Kingsland and Albany, with additional services available to 15 federally designated CDBG-DR counties: Berrien, Camden, Charlton, Chatham, Coffee, Cook, Crisp, Dougherty, Glynn, Liberty, McIntosh, Thomas, Turner, Wilcox and Worth. At DCA's invitation, the Center made a presentation to government officials from HUD, DCA, Brunswick, Kingsland and Albany in March 2019 in Tifton GA. As a follow up, the City of Brunswick's Economic & Community Development Director invited the Center to present to the Brunswick Land Bank Authority in May 2019.



CLIENT STORY

Mr. Howard* lived with his 92-year-old mother in her Atlanta home until it was crushed by a tree during a tropical storm. Mr. Howard's two siblings had both passed away within the previous year, so he and his mother moved in with another relative until they could rebuild and return to the neighborhood they had loved for over 40 years. Before any progress could be made, however, Mr. Howard's mother passed away. Mr. Howard, a niece and two nephews became co-owners of his mother's home. Because Mr. Howard was not able to show formal ownership, he could not even complete the demolition of the home or negotiate with the insurance company. When Mr. Howard could not find a private attorney willing to help him untangle the complex probate and property title, he became a client of the Center. Mr. Howard, with the Center's help, is now serving as executor of his mother's estate, working with his niece and nephews to resolve title, and moving forward with the rebuilding process. The Center's attorneys also drafted an estate plan for Mr. Howard to ensure that the home can be securely passed on to the next generation.



TITLE AUDITS

The Center is often asked to assess the condition of title in a neighborhood or area designated as blighted. The Center can determine the “state of titles” for land and/or homes on a first come, first served basis or can work with partners and leaders to focus audits on properties in a target area. This service includes a search of real estate and tax records, judgments and liens to determine the record owner of the property and whether there are any unpaid taxes, liens, encumbrances, or other issues that would prevent the owner from participating in the nonprofit or municipal program. The Center can provide a report to the nonprofit or municipality summarizing its findings or review another vendor’s report to identify potential issues. If such issues are identified by the Center, we can identify steps that the owner would need to take to clear title and qualify for the programs and an estimate of the time needed to resolve those issues.

The Center, in collaboration with pro bono private attorneys and title companies, has reviewed titles for 203 tracts of land involving properties in 43 counties collectively valued at \$14.1 million.

CLIENT STORIES

Ms. Raines*, who is the guardian of her three grandchildren, including one who has cancer, was living in a property originally owned by her deceased mother and deceased stepfather as tenants-in-common. When Ms. Raines’s mother passed away in 2011, her stepfather and six children inherited. Subsequently Ms. Raines’ stepfather passed away in 2016. With the Center’s assistance, Ms. Raines was appointed as executor of both her mother and stepfather’s estates, and was able to secure quit claim deeds from each of her siblings, which effectively cleared the title. Ms. Raines is now sole owner of the property, and as a result, has secure housing for herself and her three grandchildren.



**Clients’ names have been changed to protect their privacy.*

EXPANDING CENTER RESOURCES THROUGH PRO BONO ATTORNEYS

The Center's partnerships with pro bono attorneys is critical to developing the best solutions for its clients. The Center can provide pro bono volunteers with legal education on best practices in estate planning that prevents the creation of heirs property.



ESTATE PLANNING FORMS PROJECT

Recognizing the need for quality estate forms for use by nonprofits and practitioners throughout Georgia, the Center partners with the Fiduciary Law Section of the State Bar of Georgia and Atlanta Legal Aid to develop estate planning forms and education materials that will be available for free to nonprofits and their volunteers throughout Georgia. These forms will be housed at and maintained by the Center, and will include an updated estate planning questionnaire, annotated last will and testament, statutory power of attorney, and advance directive for healthcare.

MEDIATION COURSE

With the support of law firms Troutman Sanders, Eversheds Sutherland, Bondurant, Mixon & Elmore and King & Spaulding, the Center held a civil mediation course for staff with UGA Fanning faculty member and attorney Raye Rawls. The course was tailored to the Center's needs and provided attorneys with 28 regular, three Ethics, one Professionalism, and 28 Trial CLE hours. The course incorporated heirs property examples, role playing, and techniques for facilitating family conversations both in and outside of formal mediation settings. The Center also worked with Troutman Sanders to develop and launch ongoing training for non-attorney staff training which was held and conducted by the State Bar of Georgia.

PRO BONO VOLUNTEER OUTREACH: Center staff met with attorneys from Bondurant Mixon & Elmore, Alston & Bird, Baker Donelson, and DLA Piper. Staff also have a meeting scheduled with Kilpatrick Townsend. As a result of these meetings, staff developed a list of pro bono opportunities with corresponding time commitments that is being distributed to law firms and is available on the Center's website. In addition, the Center's staff submitted a one-page sheet of pro bono opportunities to be included a booklet made available to the Atlanta Pro Bono Roundtable, which consists of pro bono leads at law firms and in-house legal departments who gather two or three times each year.

CLIENT STORY

30 years ago, Ms. Wilson* moved into the property where she currently lives to care for her elderly father. A few years later when Ms. Wilson's father passed away, she believed she was the sole owner of the property since she was her father's sole heir. Ms. Wilson maintained the property and paid the property taxes, but when she recently tried to qualify for homestead exemption and obtain homeowner's insurance, she discovered that she had no ownership interest in the property since the legal title had passed down her stepmother's side. With the assistance of a pro bono volunteer attorney, the Center filed a quiet title action, asserting adverse possession. Not only was the quiet title successful, it also reunited family members to share stories about their deceased love ones. Ms. Wilson now has clear title to the property with a tax assessed value of \$322,000.00. Since she is in her 80s, she has decided that the home is too much for her to maintain and plans to sell. The Center is working with Ms. Wilson to assure she works with a reputable relator to get the best price possible. The Center is also working on Ms. Wilson's estate plan so that she can take care of herself and pass wealth to the next generation.



Ms. Wilson and Pro Bono Attorney John Sharpe, Eversheds Sutherland

**Clients' names have been changed to protect their privacy.*



COLLABORATION

PARTNERSHIPS DRIVING RESULTS

Educating public officials, attorneys, nonprofit and government employees, community and neighborhood leaders, and stakeholders is a critical aspect of tackling heirs property in Georgia. The Center is working with diverse partners like the U.S. Department of Housing and Urban Development, the Junior League of Atlanta, Inc., Pro Bono Partnership of Atlanta, Atlanta Legal Aid Society, and the Georgia Department of Community Affairs to help affordable housing nonprofits and housing counselors integrate title remediation and estate and resiliency planning into their services.

THE GENERATIONAL POVERTY LAW PROJECT



Terri Hendley, Pro Bono Partner
and Jazz Watts, Center Staff

The Generational Poverty Law Project is a partnership among Pro Bono Partnership of Atlanta, Atlanta Legal Aid Society and Georgia Heirs Property Law Center, and funded by The Junior League of Atlanta. The Project selected neighborhoods (Cascade Heights, Dixie Hills, East Point, Oakland City, Penelope Neighbors, West End Park and Westview) with high rates of homeownership and multigenerational families for targeted, pro bono legal services to identify, protect and build clients' limited assets and financial resources. The partners provide residents and the nonprofits serving them with outreach, educational resources and online PBPA trainings on homeownership, estate planning, home loss prevention and heirs property.

CLIENT STORY

The Building Generational Wealth webcast series is offered by the Generational Poverty Law Project, a partnership of Pro Bono Partnership of Atlanta, Atlanta Legal Aid Society and Georgia Heirs Property Law Center, and funded by The Junior League of Atlanta. One of the core tenets of the JLA grants is to conduct outreach and distribute new materials to Atlanta area nonprofits serving families living in poverty and conduct live workshops and webinars to give nonprofits information and tools to help families remain housing-stable and transform underserved communities. In coordination with Atlanta Legal Aid and Pro Bono Partnership of Atlanta, the partnership has conducted three webinars. Webinar topics this year included: *The Probate Process and Deceased Relatives' Debts* and *Kinship Care – Who Will Save the Children?*

PRO BONO VOLUNTEERS & ORGANIZATIONS

As of June 30, 2019

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**Legal Aid
Atlanta**

Dina French

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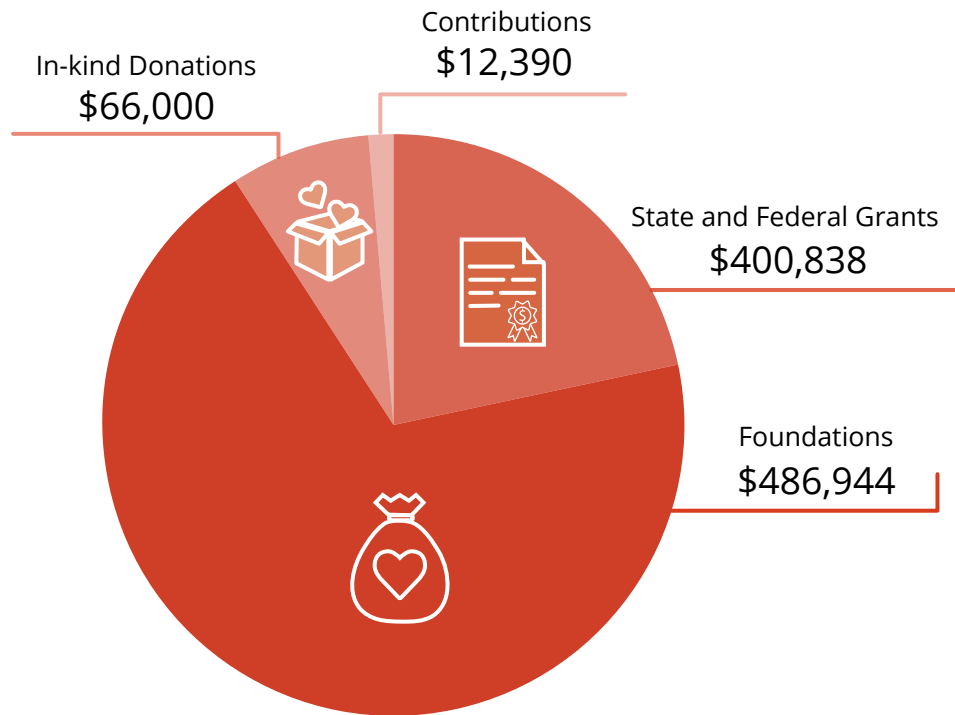
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Advocates for Better Communities, Inc.
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Annie E. Casey Foundation
Association of County Commissioners
Atlanta Bar Association Estate Planning and Probate Section
Atlanta Bar Association Public Interest Section
Atlanta Beltline
Atlanta Habitat for Humanity
Atlanta Legal Aid Society
Atlanta NPUs
Atlanta Volunteer Lawyers Foundation
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Georgia Appleseed
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Georgia Council on Aging
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Georgia Department of Natural Resources
Georgia Forestry Association
Georgia Forestry Commission
Georgia Initiative for Community Housing
Georgia Legal Services Program
Georgia Municipal Association
Georgia State Law School
Golden Triangle Resource Conservation & Development Council
Greater Little Rock Baptist Church
Greater Rising Start Full Gospel Tabernacle
Grove Park Foundation and Neighborhood
Habitat for Humanity Columbus
Historic Macon Foundation
Historic Tindall Heights Neighborhood Association
HouseProud Atlanta
Junior League of Atlanta
Leadership Macon
Ludacris Foundation
Macon Habitat for Humanities
Macon-Bibb Police Department
Mechanicsville Civic Association
Metro Fair Housing
Neighborworks Columbus
Okefenokee Regional Library System
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Pew Charitable Trusts
Pro Bono Partnership of Atlanta
Pro Bono Roundtable of Atlanta
Rebuilding Macon
ROSA, Inc.
State Bar of Georgia
State Bar of Georgia Fiduciary Law Section
State Bar of Georgia Probate Law Section
Sustainable Forestry Initiative
The Community Foundation of South Georgia, Inc.
Thomasville Habitat for Humanity
Thomasville Land Bank
Thomasville Landmarks, Inc.
UGA Cooperative Extension Services
UGA Warnell School of Forestry
United States Department of Agriculture Forest Service
USDA National Agricultural Statistical Service
USDA Natural Resources Conservation Service
USDA SARE (Southern Agriculture Research and Education)

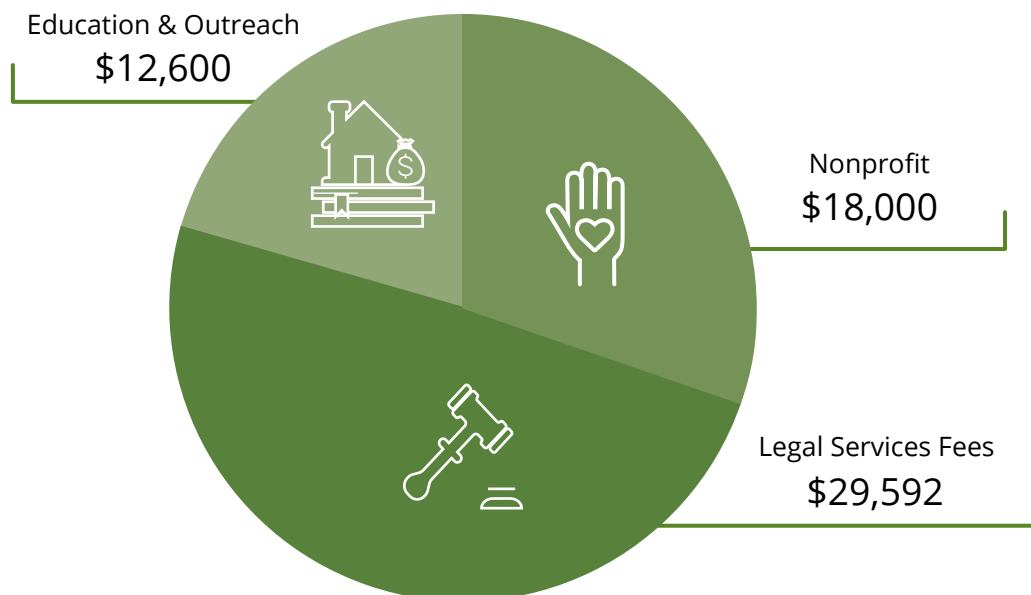
FINANCIALS

As of June 30, 2019

PUBLIC SUPPORT

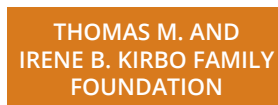


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July 1, 2018 - June 30, 2019



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as of June 30, 2019

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-
Executive Director, Georgia Heirs
Property Law Center, Inc.

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as of June 30, 2019

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JIM DAVIS

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Staff Attorney

TERESA G. MOORE

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Equal Justice Works GA Housing
Corps Advocate



GEORGIA HEIRS PROPERTY
LAW CENTER

Georgia Heirs Property Law Center is a not-for-profit law firm that helps heirs property owners, nonprofits and local governments remediate fractured title, increase equity and transfer wealth to the next generation through title clearing, wills creation, estate planning and facilitating access to government, private sector, and nonprofit land management and home improvement programs.

APPLYING FOR LEGAL ASSISTANCE WITH HEIRS PROPERTY ISSUES

Who Does the Center Serve?

The Center works throughout Georgia but, due to limited resources, cannot accept every case. The Center gives priority to potential clients with properties located in Atlanta and South Georgia. The Center's services are either free or discounted depending on a client's qualifications.

How Do I Apply for Assistance?

To apply for assistance, contact the Center at (706) 424-7557, Ext. 1 for a free initial telephone interview. To fully evaluate your case for representation and best serve you, please plan to provide the following documents:

- A rough draft family tree, beginning with the person on the last deed for the property, and showing the names of all heirs and their spouses (if presently known), how they are related, and whether they are living or deceased;
- Copies of any deeds for the property;
- Copies of wills or probate documents for the original owner and deceased heirs;
- Copies of written agreements among family members or with third parties regarding the property;
- Copies of any legal notices relating to the property, such as tax sale, foreclosure, pending or threatened lawsuits, and code violation notices;
- Copies of recent tax bills and other tax records for the property;
- Copies of other documents relating to the property or your heirs property issue; and
- A completed income worksheet for your household.

Following the telephone interview, you may be asked to provide additional information. Upon receiving all requested information and documents, the Center will review your matter and make an initial determination regarding whether to move forward with you as a "Pending Applicant" and what legal fees, if any, you would be required to pay if your case is formally accepted. Pending Applicants are required to complete an Heirs Determination packet and may be asked to find additional documents. Once the Center receives your completed information, we will make a final determination regarding your case.

Please bear in mind throughout the process that the Center has not yet agreed to represent you and has not established an attorney-client relationship with you. You will only become a client if the Center formally accepts your matter and you sign an engagement agreement.

GEORGIA HEIRS PROPERTY LAW CENTER
(706) 424-7557 • INFO@GAHEIRSPROPERTY.ORG • WWW.GAHEIRSPROPERTY.ORG



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Building Generational Wealth and Strengthening Communities by Securing and Preserving Property Rights.

WHAT WE DO



LEGAL SUPPORT

Georgia Heirs Property Law Center provides legal support for families, individuals, nonprofits and municipalities. Title-clearing services include title audits, family meetings, probate, quiet title actions, and legal tools like management agreements; powers of attorneys; consolidation of title into single ownership, LLC, or trust.



LAND LOSS PREVENTION

Georgia Heirs Property Law Center develops estate plans and prepares last wills and testaments for individuals to foster generational wealth transfer and prevent land loss. Services may include advanced directive for healthcare, financial power of attorney, and establishing a trust or LLC. In addition, the Center provides educational materials for nonprofits through its Estate Planning Forms Project.



ASSET EDUCATION

Georgia Heirs Property Law Center provides financial education on home and land ownership to grow assets for the next generation. The Center engages nonprofit and governmental partners to help clients develop land/timber management plans, qualify for USDA programs, and access home repair, Disaster Recovery and Resilience programs.

WHO WE ARE



Center attorneys, support staff, and a network of pro bono volunteers and grassroots organizational partners



Statewide work with geographic outreach in Atlanta and South Georgia



Serving families, individuals, nonprofits, and municipalities with legal support, prevention, and asset education services.



Offices in Atlanta, Athens, Fitzgerald, and Valdosta.

Heirs Property is the hidden story behind blight and generational poverty in Georgia.

Heirs property refers to a home or land that passes from generation to generation without a legally designated owner resulting in ownership divided among all living descendants in a family. This unstable form of ownership limits a family's ability to build generational wealth and hampers the efforts of nonprofits and cities to revitalize neighborhoods.

CONTACT US

-  www.gaheirsproperty.org
-  info@gaheirsproperty.org
-  706-424-7557