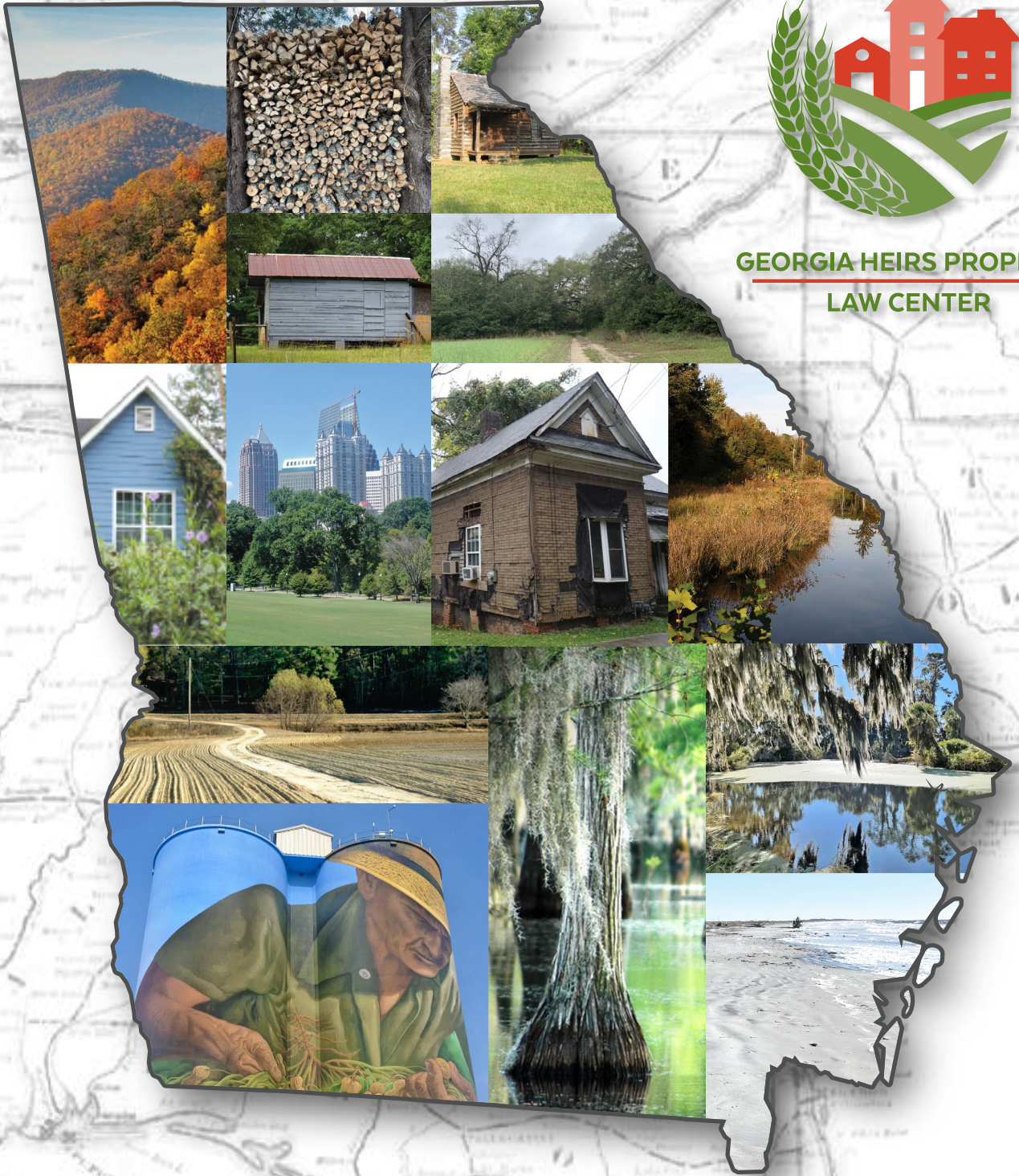




**GEORGIA HEIRS PROPERTY
LAW CENTER**



GROWING GEORGIA'S ECONOMY THROUGH PROPERTY RIGHTS

2022 ANNUAL REPORT

Dear Friends, Partners, and Colleagues,

The Georgia Heirs Property Law Center, Inc.'s (the "Center") impact is best demonstrated by the equity unlocked and protected for our clients: Georgia's families, nonprofits, and local governments. In FY2022, a client, whose title the Center had cleared, was able to sell her late mother's three empty lots for \$455,000.00 to a city to expand public greenspace. Clearing title for this client not only unlocked generational wealth for an entire family, but also created a public benefit that will serve this community's residents and economy for future generations. Although only about 20% of the Center's clients choose to sell their property once their title is clear, the quantitative return on investment for this client was huge.

For every \$1.00 the Center spent clearing this client's title, there was a \$91.00 return on investment for the client. Meanwhile, the public will continue to reap the benefits of this investment in the form of public greenspace for generations to come.

The Center resolves heirs property through title remediation; prevents heirs property through estate planning; and provides asset education to build generational wealth, economic value, and community stability. Since 2015 the Center has closed 541 legal matters; cleared 97 titles in 30 counties valued at over \$7 million; completed 200 estate plans; and reached 14,600+ individuals through educational and outreach programs across 114 counties.

Whether experienced through forced sale and eviction, family discord, a non-federally designated disaster, or the slow ravages of time, heirs property is a burden, not an asset. Representing \$34 billion dollars in tax appraised value in Georgia, heirs property undermines every aspect of Georgia's economy.

FY2022 focused on scaling-up the Center's services to meet the need. With place-based work from Atlanta to Plains to Thomasville; estate planning Signing Days from Houston to Crawford to Sapelo; and outreach partners from Team Agriculture Georgia to the Georgia Division of Aging Services to The Links, Inc. Brunswick Chapter, the Center reaches more people, clears more titles, and completes more estate plans year after year.

From the beginning, the Center recognized that Georgia needs a comprehensive approach to heirs property—remediation, prevention, and education. It is folks like you, through your pro bono hours, financial support, and partnerships, who enable the Center to scale-up. In FY2022, the Center's staff grew with the addition of a staff attorney and a social worker. Through a Pro Bono & Best Practices Program, the Center is leveraging its expertise to build a library of forms, training materials, and handbooks for Georgia's families, judges and attorneys, housing counselors, and community leaders. We are a small team that provides a huge return on investment for Georgia.

The potential for growing Georgia's economy through property rights is profound. 11-25% of homeowners/landowners in Georgia cannot access their equity or property-related services because of "tangled title." Resolving and preventing heirs property ends blight, builds tax digests, stabilizes neighborhoods, enables best farming and timber practices, and ensures that communities are resilient in the face of economic and environmental headwinds.

By investing in direct legal services, our funders and partners witness how unlocking equity for families pays dividends for the greater community. Securing property rights for low- and moderate-income families is fundamental to Georgia's just, equitable, and sustainable economic growth. Let's continue this work together!

With gratitude for your ongoing support and leadership,



Skipper G. StipeMaas, J.D.
Executive Director



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OUR MISSION

The Georgia Heirs Property Law Center increases generational wealth, economic value, and community stability by securing and preserving property rights of low- and moderate-income Georgians.

***GROWING GEORGIA'S ECONOMY
THROUGH PROPERTY RIGHTS***



MAKING AN IMPACT

A Return on Investment for Resilient Communities

OPPORTUNITY

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



Our average client is 67 years old,



has a household income of \$30,068 a year,



and has an interest in property with a tax appraised value of \$83,137.



STAT: HEIRS PROPERTY IS CREATED EVERY DAY

Heirs property is created when owners die with or without wills. Heirs property limits a family's ability to build generational wealth and hampers the efforts of nonprofits and municipalities to revitalize neighborhoods. According to the USDA Forest Service and UGA-Carl Vinson Researchers, 11% to 25% of parcels in every Georgia county are probable heirs property. This represents over **\$34 billion** of tax appraised land that is "locked equity," contributing to blight, unmanaged farmland, and generational poverty.

CLIENT STORY

Although only about 20% of the Center's clients choose to sell their property once their title is clear, the economic return on investment for these clients is often quite high. For example, for every \$1.00 the Center spent on clearing Ms. Thompson's title, there was a \$91.00 return on investment, and the return on investment for the public will continue to grow. Ms. Thompson was able to sell her late mother's three empty lots for \$455,000.00 to a city to expand public greenspace. Clearing title for this client not only unlocked generational wealth for an entire family, but also created a public benefit that will serve this community's residents, environment, and economy for future generations.

*Names have been changed to protect client confidentiality.



THE RETURN ON INVESTMENT FOR THE COMMUNITY

Through access to bedrock community stabilization legal services, the Center has collaborated with its staff, clients, and community partners to resolve heirs property through title clearing, prevent heirs property through estate planning, and provide asset education that helps low- and moderate-income Georgians build generational wealth. By securing and preserving property rights, the Center is able to increase economic value and community stability.

RETURN ON INVESTMENT*

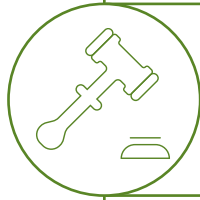
- Every \$1.00 invested in the Center's title clearing program unlocks an average of \$14.00 of equity.
- Every \$1.00 invested in the Center's estate planning services protects \$24.00 of equity.

*ROI for the Center's work is based on the Tax Appraised Values of properties.

IMPACT

BY THE NUMBERS

Summary of Work Accomplished from
May 7, 2015 through September 23, 2022



The Center has provided legal services for and closed **541** matters: **194** title clearing matters, **327** title searches/audits, and **200** estate planning matters.

Titles for **97** properties have been cleared in **30** counties valued at approximately **\$7.29 million**.



The Center, in collaboration with private attorneys and pro bono title companies, reviewed titles for **327** tracts of land in **53** counties, collectively valued at **\$22.43 million**.



The Center, solely or in collaboration with other partners, completed **360** community outreach programs, trainings, and stakeholder meetings, reaching approximately **14,600** individuals.



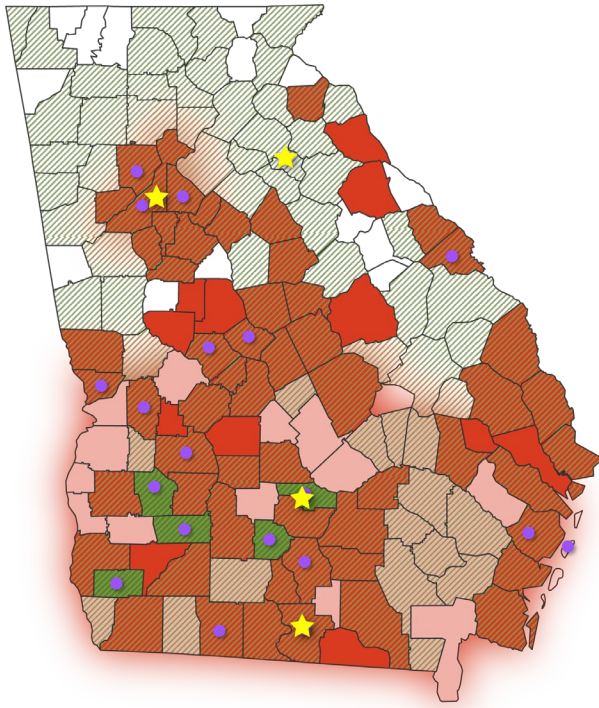
The Center, in collaboration with its partners, completed **36** webinars, reaching approximately **2,515** individuals from around the state and around the nation.



Heirs property refers to a home or land that passes from generation to generation resulting in ownership being divided between all living descendants in a family, none of whom are the legally designated owner. This unstable form of ownership limits a family's ability to build generational wealth and hampers the efforts of nonprofits and municipalities to revitalize neighborhoods, especially following natural disasters.

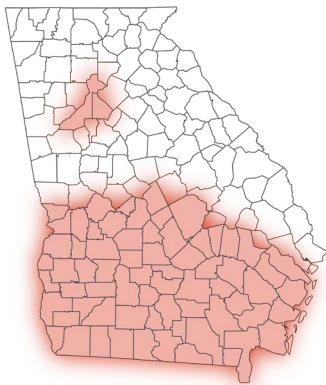
ON THE MAP

As of June 30, 2022

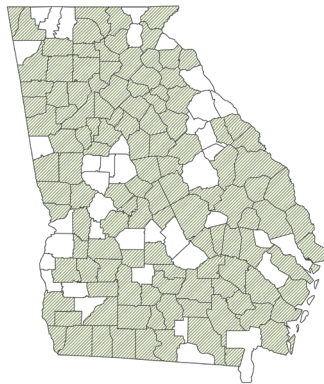


- Target Areas
- Outreach, Workshops & Webinars
- Landowner Academy
- Heirs Property Cases & Wills
- GHPLC Offices
- Signing Days & Clinics

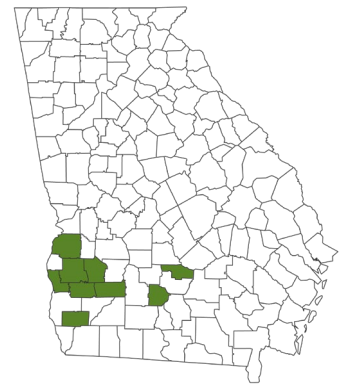
TARGET AREAS



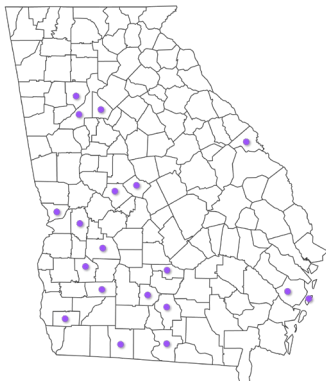
OUTREACH, WORKSHOPS & WEBINARS



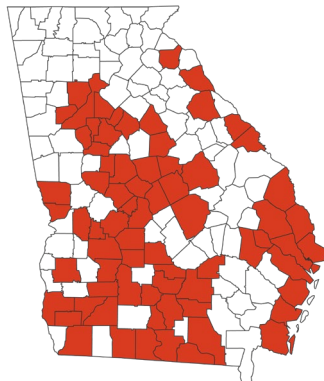
LANDOWNER ACADEMY



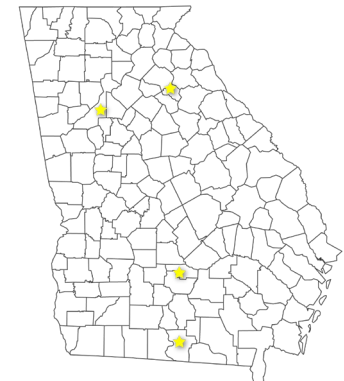
SIGNING DAYS & CLINICS



HEIRS PROPERTY CASES & WILLS



GHPLC OFFICES



CLIENT STORY

Land and family are two of the most complicated aspects of our lives. After the Center cleared Mrs. Jackson's title, she shared how difficult it was for her to begin the process because her name had been on the deed alongside of her husband for over 50 years. She feared that removing his name from the deed was like erasing him from her life. Even with these heavy emotions, Mrs. Jackson acted right away, and her clear title enabled her to participate in a home repair program.

*Names have been changed to protect client confidentiality.



Equity is at the heart of the Center's work. The Center provides a comprehensive approach to heirs property – remediation, prevention, and education.

Legal support for families, individuals, nonprofits, and municipalities through:

- Title search review;
- Title clearing; and
- Remediation of fractured title.

Land loss prevention services to help slow down land loss and secure property assets through:

- Legal counsel; and
- Development of estate plans.

Asset education through:

- Educating community members and stakeholders about heirs property and potential impact on owners and their communities; and
- Educating of landowners about ways to increase the value of their property and generational wealth.

CLIENT STORY

Family helping family is a common thread throughout the work of the Center. For example, the Center was able to obtain a clear title for Ms. Gomez when both of Ms. Gomez's siblings signed over their interest in their deceased mother's home to Ms. Gomez. Similarly, the Center's staff attorneys were able to clear and consolidate the title to Mrs. White's property when 14 family members, which included nieces, nephews, and a sister-in-law, conveyed their interest to Mrs. White. Because of this, she now has clear and consolidated title and can manage the home as an asset.

*Names have been changed to protect client confidentiality.

SCALING-UP SOLUTIONS THAT BUILD CAPACITY AND IMPACT

The Center's work is focused on advancing equity - both economic and social - in Georgia. Clear titles change lives, neighborhoods, communities, and the economy of Georgia. Outreach and education are key components to remediating, preventing, and ending heirs property.

Over the last two years, the Center has continued to develop innovative solutions to build capacity and create lasting impact in our communities. COVID-19 and rising inflation have underscored the need for housing stability, estate planning, and economic security in our state. Through a combination of in-person, virtual, and hybrid meetings and presentations, the Center has continued to expand its services and reach more residents and communities impacted by heirs property. The Center's continued innovation is creating a lasting impact on Georgia's economy and a clear return on investment for heirs property owners, communities, and our state.

DEVELOPING BEST PRACTICES RESOURCES

The Center leverages its connections with other nonprofits, the legal and financial sectors, as well as municipalities and government agencies to provide communities and residents with access to these informative resources. And the Center's website serves as an online hub for the community to access these vital resources.

The Georgia Market Bulletin, a publication of the Georgia Department of Agriculture, with a circulation of 35,000, continues to serve as an avenue to help raise awareness of heirs properties and the Center's resources, recently by promoting webinars and printing the Myths and Facts about Heirs Property.

The Center continues to expand its library of resources including best practices forms and handbooks. To date the Center has produced:

- Estate Plan Execution Instructions for Signing Days
- Georgia Estate Planning Handbook for Nonprofit Law Firms and Their Pro Bono Attorneys
- Georgia Estate Planning Handbook for Communities
- Myths and Facts about Heirs Property
- Disaster Planning and Heirs Property
- Heirs Determination Worksheet

SAPELO ISLAND WORKSHOP TOPICS

DISASTER MITIGATION HEIRS PROPERTY PREVENTION
ESTATE PLANNING OWNERSHIP INTERESTS

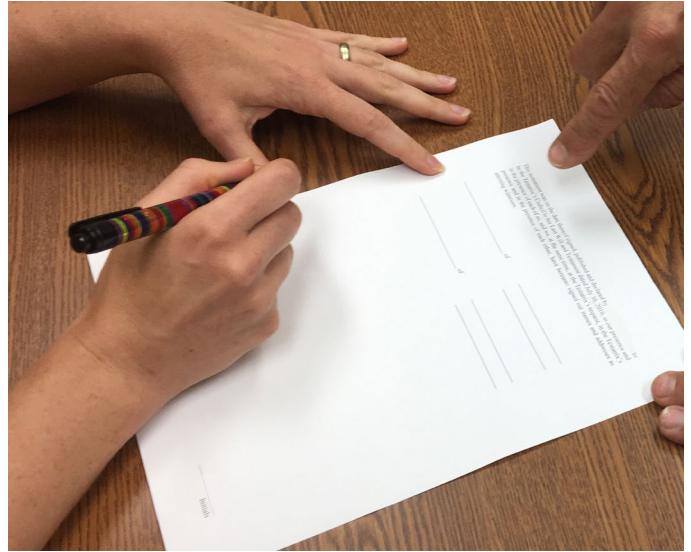
The Center continued its work on Sapelo Island and presented three workshops on heirs property for Sapelo Island descendants. These workshops culminated in a Signing Day on Sapelo Island for 11 Sapelo Descendants. The Center has now completed estate plans for 18 Sapelo Descendants.



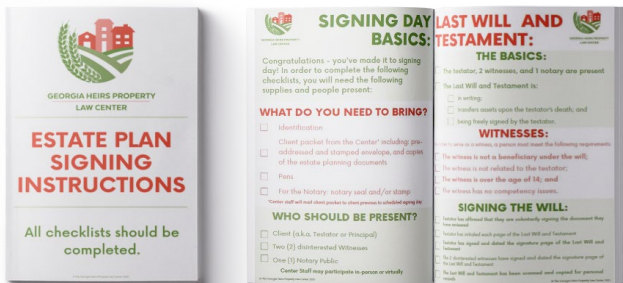
PRESERVING ASSETS THROUGH SIGNING DAYS

Last year the Center launched its Signing Days Program to meet the increasing demand that COVID-19 created for estate planning services in communities throughout Georgia. The Center developed training curriculum, provided technical assistance to organizational partners, and established a network of grassroots non-legal and legal pro bono volunteers. Center attorneys participated via video which brought the Signing Day event to the client while enabling attorneys to execute estate plans anywhere across the state without the time and expense of travel.

SIGNING DAYS ADDRESS THE INCREASED DEMAND FOR ESTATE PLANS BROUGHT ON BY COVID-19 AND BUILDS ON THE CENTER'S FY21 PUBLICATION OF THE GEORGIA ESTATE PLANNING HANDBOOK FOR COMMUNITIES.



Signing Days mean that more clients can be served and less property becomes heirs property throughout Georgia.



Signing Days Instruction Handbook

Volunteers are trained to serve as witnesses and provide notary services for Center clients executing estate plans. The Center has trained and held Signing Days with Thomasville's Public Library and GOLD (Georgia Outreach for Landowner Development) Committee members, Ft. Valley State University Cooperative Extension, Golden Triangle RC&D, Georgia Forestry Commission, USDA Farm Services Administration, and UGA Macon Bibb Cooperative Extension.

CLIENT STORY

The impact of these Signing Days is evident not only in the Center's increased capacity to respond to the need for estate plans, but also in the increased awareness created by training community-based volunteers throughout rural Georgia. One volunteer, after being trained on heirs property and estate planning realized that her parents, like everyone, would benefit from estate plans. The Center's legal staff and its pro bono volunteers drafted an estate plan for her parents and then - using different volunteers - executed her parents' estate plans via a virtual Signing Day. Signing Days is one of the many ways the Center continues to build its institutional programs and systems.

*Names have been changed to protect client confidentiality.

CLEARING TITLES BEFORE & AFTER NATURAL DISASTERS

COMMUNITY RESILIENCE AND RECOVERY

Heirs property is the story hidden under blue tarps after natural disasters and is the cause of intergenerational poverty in communities throughout Georgia. The Center clears titles in the areas hit hardest by natural disasters to unlock access to state and federal resources and expertise.



CLIENT STORY

Sometimes the Center's title clearing process can be as simple as signing an affidavit of surviving joint tenant, which does not require opening an estate in the probate court. This simple fix, facilitated by the Center, enabled Mrs. Panton to qualify for home repairs after a 2017 storm damaged her home in Albany, Georgia.

*Names have been changed to protect client confidentiality.

MITIGATION PLANNING

Heirs property and lack of estate planning hinders community resilience. Clarifying property ownership, safe keeping legal documents, and proper estate planning are critical disaster mitigation strategies.

By incorporating heirs property strategies (how to identify, address and prevent it) into mitigation planning, the Center is helping partner agencies and community leaders take steps that result in stronger and more equitable communities.

COMMUNITY LISTENING SESSIONS

The Center conducted listening sessions for the 2017 Mitigation Planning Program- Heirs Property Disaster Mitigation and Estate Planning, with service providers serving a 15-county target area. These listening sessions inform the Center's development of an heirs property mitigation plan to promote resilience and recovery at both the individual and the municipal level for communities in the 2017 Federally Designated Disaster Areas. Planning efforts engage community leaders and residents in the 2017 HRRP (Homeowner Repair and Reconstruction Program) cities of Albany (31701, 31705, 31707), Brunswick, and Kingsland. Input is being solicited from all 15 counties so that the resulting Disaster Mitigation Plan includes strategies and materials that are an effective resource for Berrien, Camden, Charlton, Chatham, Coffee, Cook, Crisp, Dougherty, Glynn, Liberty, McIntosh, Thomas, Turner, Wilcox, and Worth counties.

GEORGIA CLIMATE CONFERENCE



The Center presented “Disaster Resiliency and Heirs Property” at the Georgia Department of Natural Resources, Coastal Resources Division Georgia Climate Conference 2021: Minimizing Georgia’s Risk, Maximizing Georgia’s Future on Jekyll Island/Glynn County on August 12-13, 2021. The Center presented as part of a Law & Policy Session called “Resilience Issues for Vulnerable Communities,” moderated by Shana Jones.

TECHNICAL ASSISTANCE

“Community Resiliency Through Property Rights: Why Disaster Mitigation Planning Must Address Heirs Property,” brought together 26 UGA Cooperative Extension Agents representing the leadership of Regional Disaster Preparedness Teams for the state of Georgia for a 2-hour training/focus group on October 28, 2021.

CENTER PROVIDED RESOURCES

- **400** “Disaster Planning and Heirs Property” pamphlets
- **400** “Emergency Document Checklist” handouts
- **200** “Owning Heirs Property” trifolds
- **200** “Preventing Heirs Property Through Estate Planning” trifolds

MITIGATION AGENCIES:

- **Resource, Conservation & Development:** The Center staff presented an Heirs Property and Estate Planning Workshop to the directors of Georgia’s RC&Ds on June 6, 2022. Through this meeting, Golden Triangle is building the capacity of sister organizations to identify and address heirs property in their regions.
- **Federal Emergency Management Agency (FEMA):** The Center is working with FEMA to discuss the Center’s services and find ways to help families coming to FEMA Intake Centers find title clearing information.
- **Georgia Emergency Management Agency (GEMA):** The Georgia Disaster Housing Taskforce meetings include the Dept. of Comm. Affairs Housing Policy, Dept. of Public Health, Division of Aging Services, Dept. of Behavioral Health, and Developmental Disability, GA Voluntary Organizations Active in Disaster, Red Cross, Salvation Army, and GEMA planners.
- **Brunswick:** Building on HRRP connections, the Center has begun setting up focused conversations with community leaders in Brunswick, including webinars with The Links, Inc.





2017 & 2018 DISASTER RECOVERY HOMEOWNER REPAIR & RECONSTRUCTION PROGRAM

The Center, in partnership with the Georgia Department of Community Affairs and the communities of Brunswick, Kingsland, and Albany/Dougherty, provides title clearing services so that residents, whose homes were damaged during the 2017 Hurricane Irma and Albany tornadoes, are able to qualify for federal home repair programs.

- So far, the Center has closed and returned 38 title clearing matters to their HRRP Case Managers and is currently working on 29 more title clearing matters for DCA.

For 2018 Hurricane Michael, the Center is working with partners to design a management software interface that will make it more efficient for the Center to provide and receive information from case managers in Dougherty, Seminole, and Decatur Counties.

The Center expects to provide over 200 title audits and handle over 30 heirs property cases under this program.

CLIENT STORY

Natural disasters reveal the increased vulnerability of living in heirs property. Storms in 2017 rendered Mrs. Baker's home in Brunswick, GA uninhabitable. Mrs. Baker's husband passed intestate in 2013, and Mrs. Baker and her three daughters inherited the home. The Center's staff attorney obtained deeds of gifts from each daughter to Mrs. Baker, which made her the sole owner and qualified her for the Georgia Department of Community Affairs Disaster Recovery - Homeowner Repair and Reconstruction Program.

*Names have been changed to protect client confidentiality.

IDENTIFYING VULNERABLE COMMUNITIES

The Center, in collaboration with the NASA Develop Program, part of NASA's Applied Sciences Program, which addresses environmental and public policy issues through interdisciplinary research projects that apply the lens of NASA Earth observations to community concerns around the globe, is focusing on disaster mitigation planning efforts. The partnership will focus on the following information: a map highlighting socioeconomic data, elevation data for floods, information about blue tarps on roofs after Hurricane Irma, CAMA data about potential heirs property in 15 targeted counties, and potential ways to measure damaged groves, overgrown yards, and structural damage.



INCREASING ACCESS THROUGH WEBINARS

As the world continues to recover from COVID-19, webinars provide the Center with the opportunity to leverage technology to reach a wider audience across Georgia and the country.

The Center collaborated with partners across the state to create compelling and informative webinars. Highlights include:

The Center, in partnership with Ft. Valley State University's Cooperative Extension Agents, Golden Triangle, Georgia Forestry Commission, and UGA Cooperative Extension Macon, presented a webinar titled "Preserving Family Heritage: Last Wills & Testaments 2.0." **The 177 people registered were from 55 counties.**

In collaboration with the Georgia Initiative for Community Housing (GICH), the Center presented a webinar titled, "Community Resilience Through Property Rights: Addressing Heirs Property for Neighborhood Revitalization & Disaster Mitigation Planning." **There were 63 attendees spanning Georgia from Hall County to Dougherty County.**

The Center facilitated two workshops for the Brunswick Chapter of The Links, Incorporated. The first Zoom workshop titled "Estate Planning Basics Workshop: Preventing Heirs Property & Passing Wealth to the Next Generation" was held April 21, 2022. **15 community leaders** attended and expressed interest in becoming volunteers through the Center's Signing Day Program. The Center also hosted "Heirs Property and Disaster Recovery" on May 19, 2022, and 35 people attended.



The webinar "made me more aware of how complicated an heirs situation can get, and how important it is to resolve these issues before they get out of hand."

"The workshop has really ignited a fire that is encouraging most who attended, including myself, to 'Take Action'."



UNDERSTANDING HEIRS PROPERTY

- Introduction to Heirs Property
- Determining Heirs Property Interest/ Heirs Determination Workshop



PREVENTING HEIRS PROPERTY

- Preserving Family Heritage: Last Wills & Testaments
- Estate Planning Basics Workshop: Preventing Heirs Property & Passing Wealth to the Next Generation
- Protecting History & Building Generational Wealth: Preventing Heirs Property through Estate Planning
- Estate Planning for Forestland Owners: Field Forester Training



MITIGATING FOR RESILIENCE

- Community Resilience Through Property Rights: Addressing Heirs Property for Neighborhood Revitalization & Disaster Mitigation Planning
- Heirs Property and Disaster Recovery
- Heirs Property and Estate Planning in the Context of Disaster Mitigation
- Forest, Farm, and Homeowners: Addressing Heirs Property, Unlocking Wealth, and Mitigating Natural Disasters



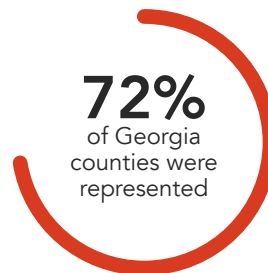
ASSET EDUCATION AND LAND MANAGEMENT BEST PRACTICES

The Center provides asset education, a form of financial literacy training that helps clients increase the equity in their home and land. Asset education is part of each of the Center's service areas: title clearing, estate planning, and outreach programs.

Through Outreach, the Center engages nonprofit and governmental partners to help attendees access home repair and land/timber management services they might not know about or have been ineligible for because of their heirs property status. For example:



On February 23, 2022, as part of (TAG) Team Agriculture Georgia's "A Roadmap to Success" for new and prospective farmers, the Center, along with representatives from Ft. Valley State University, UGA, TAG, USDA NRCS, FSA, BFR, Rural Development, and Risk Management, presented on heirs property programs and resources available from federal, state, and community-based organizations in Georgia. The Center presented information on heirs property and estate planning in the context of disaster mitigation. **There were 559 registrants from 114 counties** and attendees learned about programs and resources available from federal, state, and community-based organizations in Georgia.



The Center, with Georgia Forestry Commission, TAG, and USDA OPPE presented "Forest, Farm, and Homeowners: Addressing Heirs Property, Unlocking Wealth, and Mitigating Natural Disasters" via Zoom on June 16, 2022. **98 people registered from 39 Georgia counties and six other states.** The workshop covered a variety of topics geared toward new and beginning farmers and timberland owners. Workshop participants learned about forestry, heirs property, and how estate planning can be used to mitigate the effect of natural disasters.



SCALING-UP THROUGH PARTNERSHIP

Through strategic partnerships focused on legal services, land loss prevention, and asset education outreach, the Center advances economic justice at the micro (individual) and the macro (community) level. The Center empowers families and communities impacted by heirs property through a multi-sector approach. Partnership is at the center of the statewide and systems-based approach developed by the Center to address heirs property. Clients, nonprofits, and the public sector working together allows our state to address heirs property and to work together to build a healthy economy for all of Georgia. Unlocking equity for families pays dividends for the greater community.

The Center is unique in its mission to serve the entire state (rural and urban), its expertise in probate and litigation, its robust education/outreach program, its leadership and model for other states, and its work with local governments on natural disaster mitigation and recovery. As the Center scales-up, it can increase the number of clients served, generational wealth transferred, and equity unlocked. The Center's work is fundamental to just, equitable, and sustainable economic growth in Georgia. The Center is developing best practices as a national model to advance work in other states.

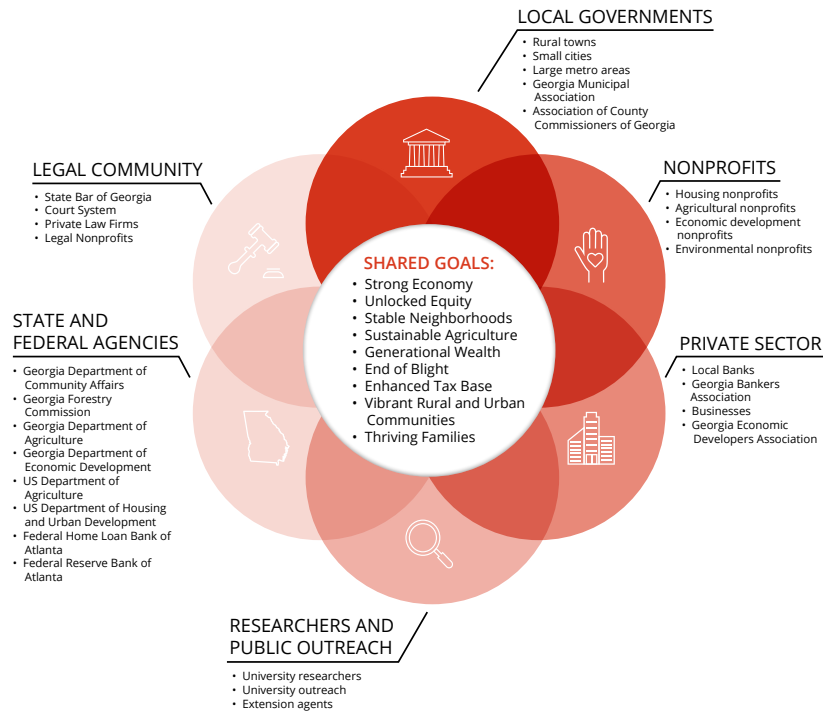
CLIENT STORY

The Center handles cases for clients that require multiple filings and recordings in multiple courts . Our pro bono attorneys are invaluable in navigating these complex cases. For example, to clear the title for Mrs. Martin, the Center's staff and pro bono volunteers opened an estate for a post-deceased son of Mrs. Martin's mother, filed a petition to probate a copy of a will in lieu of the original, prepared an affidavit of diligent search for the original will, searched for witnesses, prepared affidavits of diligent search for the witnesses, collected affidavits of signature from two close friends of the deceased, collected an affidavit of full force and effect for one of the heir's agents under power of attorney, and successfully probated the decedent's will. Mrs. Martin was appointed as executrix, deeds of assents were filed, quitclaims were executed from each heir and all of this resulted in a clear title for Mrs. Martin.

*Names have been changed to protect client confidentiality.

PARTNERSHIPS UNLOCK & PROTECT GENERATIONAL WEALTH

HEIRS PROPERTY IMPACTS COMMUNITIES



- Heirs property hinders efforts to increase affordable housing and family stability.
- Damaged homes that are heirs property often become abandoned and blighted property.
- Heirs property status makes it difficult for cities to identify owners, enforce code ordinances, and collect property taxes.
- Heirs property is a contributing factor to the decrease in owner-occupied homes and family-owned farms.
- Communities can lose funding for revitalization efforts if heirs property is pervasive.

BUILDING SUSTAINABLE COMMUNITIES

The Center is collaborating with the Carter Plains Foundation to clear titles to homes so they can participate in the Home Repair Program. President Jimmy Carter and First Lady Rosalynn Carter started the Carter Plains Foundation to eradicate substandard housing in Plains, Georgia. But, as most revitalization efforts find, heirs property poses an immediate roadblock to making investments in neighborhoods.

With a vested interest in revitalizing communities, the private sector plays a vital role in educating and advocating within the business community. The Center continues to collaborate with key stakeholder including Federal Home Loan Bank of Atlanta, Truist, and Wells Fargo to develop awareness and educational outreach programs on heirs property. On December 2, 2021, the Federal Home Loan Bank of Atlanta joined with Federal Home Loan Bank of Boston, Federal Home Loan Bank of Dallas, Federal Home Loan Bank of Pittsburgh, Federal Reserve Bank of Atlanta, Federal Reserve Bank of Richmond, and Asset Funders Network to host a unique event designed to connect funders and organizations working to prevent and solve the challenge of heirs property. The Center presented a proposal for scaling-up the Center's work through a dedicated Pro Bono and Best Practices and Forms Programs.



CREATING STATEWIDE CHANGE THROUGH LEGISLATION

With experience and expertise in this complex area of law, the Center works with community leaders to explain heirs property, streamline the processes to clear titles, and increase investment in remediation and prevention.

The Center's Staff continues to work with the Fiduciary Section of the State Bar of Georgia to explore and monitor possible legislative changes to improve the Center's services and impact in Georgia. The Center meets with elected officials to provide information they need to understand heirs property's impact in their community:



- The Center joined with state leaders for the House Natural Resources and Environment Committee's presentation, "Conservation and Land Management Resources for Private Landowners." Other speakers included USDA's Rodney Brooks (Beginning Farmer Regional Coordinator and USDA Liaison to U.S. House of Representatives) and GFC's J.T. Lumpkin (Prescribed Fire Center Coordinator and Lead for the Chattahoochee Fall Line Prescribed Fire Cooperative). The event was facilitated by UGA's Carl Vinson Institute of Government and had 30 attendees, including Chair Rep. Lynn Smith of Newnan; Rep. Richard Smith of Columbus; staff from the Governor's Policy Office; and The Nature Conservancy. GFC/Center Advisory Committee member, Tim Lowrimore, introduced the Center and its work.
- The Center presented at the Association of County Commissioners of Georgia's (ACCG) Lifelong Learning Academy session "Building Sustainable Communities" on February 4, 2022. The training was facilitated by UGA's Carl Vinson Institute of Government and included commissioners from 12 counties: Bleckley, Cobb, Cook, Fayette, Forsyth, Gilmer, Gwinnett, Henry, Lumpkin, Montgomery, Telfair, and Wheeler.

CLIENT STORY

The Center offers estate plans to all heirs property clients to prevent cleared titles from once again becoming heirs property upon their death. This creates generational wealth and often protects federal subsidies. For example, the Center's client, Mrs. Walker, was referred to the Center by the Glynn County 2017 HRRP Disaster Recovery program. Upon completing a title search, the Center's staff was able to come up with a legal strategy to clear the title to her property. Mrs. Walker is now the sole owner of her home and qualified to have her home repaired. ***After the Center's staff cleared her title, the Center's pro bono attorneys drafted an estate plan that preserves her property for future generations and protects the hard work and subsidies put into repairing her home through federal, state, and local programs.***



*Names have been changed to protect client confidentiality.



CONNECTING WITH ADVOCATES IN THE LEGAL COMMUNITY

The legal community provides a statewide network of advocates for the remediation and prevention of heirs property. The pro bono support of law firms, legal departments, and volunteers is an integral part of the Center's success across the state. FY22 highlights included:

- **Eversheds Sutherland Pro Bono Program:** The Center is working with pro bono attorneys on cases, as well as on a review of intellectual property protection for the Center's educational materials.
- **Truist Pro Bono Program:** The Center is working with Truist on a web based version of the Heirs Determination Worksheet. This could become a useful tool for family genealogists, the legal field, or nonprofits in other states.
- **The FHLBank of Atlanta CLE:** The Center staff provided a CLE for FHLBank's attorneys on October 10, 2021. The program titled "Unlocking Equity: Putting Professionalism into Practice by Helping Resolve Heirs Property" provided a professionalism credit.
- **Pro Bono Roundtable:** The Center participated in a Pro Bono Roundtable of Atlanta Stakeholder Meeting on March 16, 2022. This collaboration of Alston & Bird, Kilpatrick Townsend & Stockton, the State Bar of Georgia, Troutman Pepper, Atlanta Legal Aid Society, and Georgia Legal Services Program is focused on providing statewide civil legal assistance during a disaster. The Center provided input on heirs property and estate planning resources.
- **Fiduciary Law Section of the State Bar of Georgia:** The Center's partnership with the Fiduciary Law Section has made intentional estate planning more accessible to low-to-moderate income Georgians through direct services and educational outreach. The Fiduciary Section advances the work of the Center by supporting the development of judicial trainings and educational materials for Probate and Superior Courts.

Pictured: Board Member Nick Djuric, Shareholder with Djuric Spratt, and staff member Delene Porter



JUDICIAL TECHNICAL ASSISTANCE

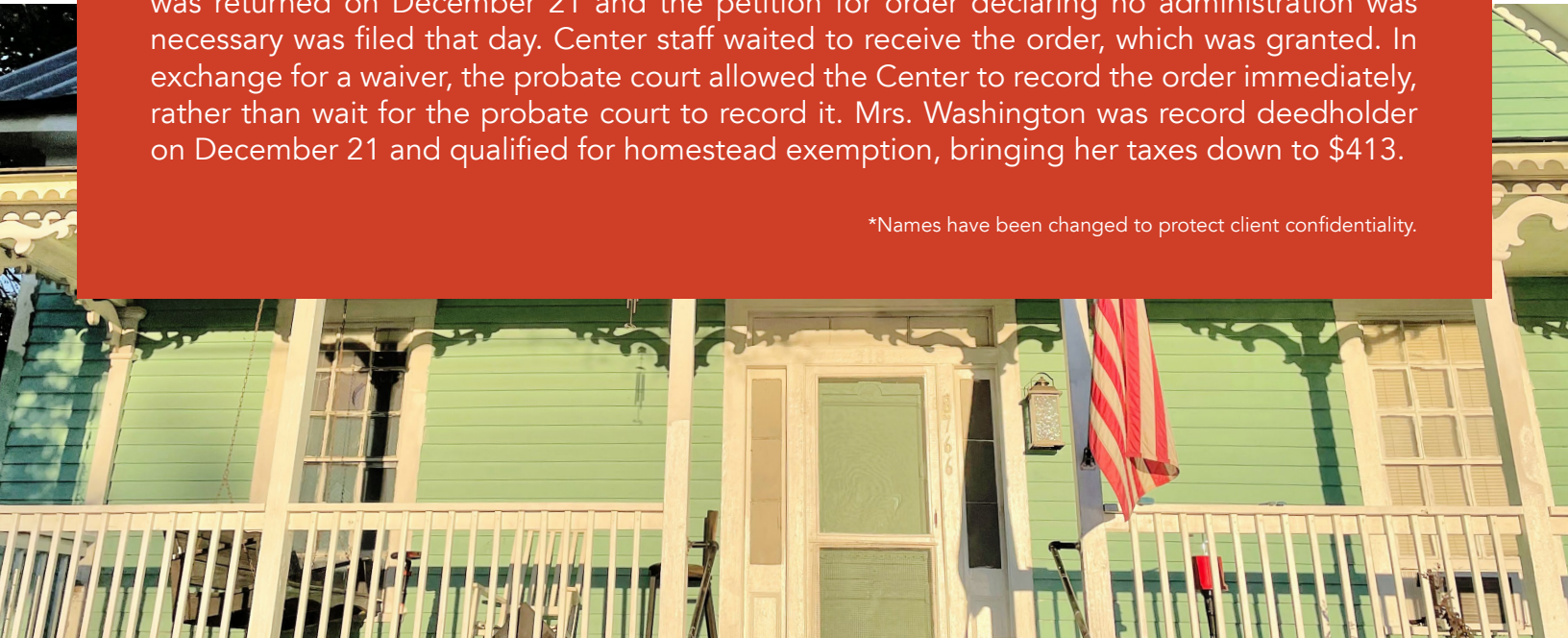
The Center continues to create educational materials and programs for Probate and Superior Courts:

- For Superior Court Judges, the Center is working with Troutman Pepper to create a bench card on applying the Uniform Partition of Heirs Property Act.
- In partnership with the Fulton County Probate Court, the Center is developing a video on heirs property and estate planning for the probate court to share with their partner/affinity groups, churches, senior centers, neighborhood clubs, and homeowners' associations (HOAs).
- For Probate Courts, the center has created "Owning Heirs Property" and "Preventing Heirs Property Through Estate Planning" brochures.

CLIENT STORY

As property taxes rise, qualifying for homestead exemption is imperative for the Center's older clients on fixed incomes. Mrs. Washington's taxes were rising sharply- from \$333 in 2017, to \$732 in 2018, to \$1,546 in 2021. Mrs. Washington came to the Center in November and needed clear title by December 31st in order to qualify for homestead exemption. We knew we had to act fast; luckily the client and her sisters were willing as well. The title search was returned on December 21 and the petition for order declaring no administration was necessary was filed that day. Center staff waited to receive the order, which was granted. In exchange for a waiver, the probate court allowed the Center to record the order immediately, rather than wait for the probate court to record it. Mrs. Washington was record deedholder on December 21 and qualified for homestead exemption, bringing her taxes down to \$413.

*Names have been changed to protect client confidentiality.



The Center continues to create partnerships with the legal community that extend throughout Georgia and the country.

Since the beginning of COVID-19, the Center has had an increased demand for title clearing services and for innovative ways to get title searches completed in rural Georgia.

Addressing heirs property advances both economic and social equity and the Center's work is *interdependent on the work of title examiners*. Each of the Center's cases begin with a title search.



The Center, in collaboration with private attorneys and pro bono title companies, reviewed titles for **327** tracts of land in **53** counties, collectively valued at **\$22.43 million**.

The Center's Board member Russ Henry, Partner at Coleman Talley LLP, played a critical role in developing a working relationship with American Land Title Association. This partnership will increase the Center's capacity to provide technical and legal services for Georgians to resolve heirs property.

Pictured: Board Member Russ Henry, Partner with Coleman Talley LLP, and staff Delene Porter



SPOTLIGHT ON VOLUNTEERS

Three pro bono volunteers took a deep dive into the Center's work in FY22.

- **Shannen Levin** - Having recently left a position as Associate Counsel of Title Litigation for Fidelity National Law Group, the in-house litigation department for Fidelity National Financial, Shannon contacted the Center about volunteer opportunities at the end of December. Ms. Levin is providing advice on the Center's litigation work and attending weekly case calls.
- **Jeff Simmons** supported the Center's estate planning work by drafting many of the estate plans executed at Signing Days this year.
- **Newsom Cummings** is a retired banking attorney who shares his years of expertise and insight on tough real estate issues during weekly case calls.

PARTNER ORGANIZATIONS

705 Marketing
Advocates for Better Communities, Inc.
Alston & Bird
American Bar Association
American Land Title Association
Association of 1890 Research Directors
Association of County Commissioners
Atlanta Bar Association Estate Planning & Probate Section
Atlanta Beltline
Atlanta Council of Young Lawyers
Atlanta Department of City Planning, Housing, & Community Development
Atlanta Legal Aid Society
Atlanta NPUs
Atlanta Volunteer Lawyers Foundation
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Brunswick Land Bank Authority
C.T. Martin Recreational Center
Carl Vinson Institute of Government
Carter Plains Foundation
Cascade Corridor, Atlanta
Center for Community Progress
City of Albany and Dougherty County
City of Atlanta Mayor's Office of Constituent Services
City of Atlanta Office of Housing and Community Development
City of Brunswick and Glynn County
City of Fitzgerald
City of Hartwell
City of Kingsland and Camden County
City of Thomasville
City of Valdosta
Coastal Regional Commission of Georgia
Collier Heights Neighborhood Association
Columbus Alumni Chapter of Delta Sigma Theta Sorority, Inc.
Columbus Community Reinvestment Office
Columbus Land Bank Authority
Columbus Tax Assessors Office
Community Outreach Training Center, Inc.

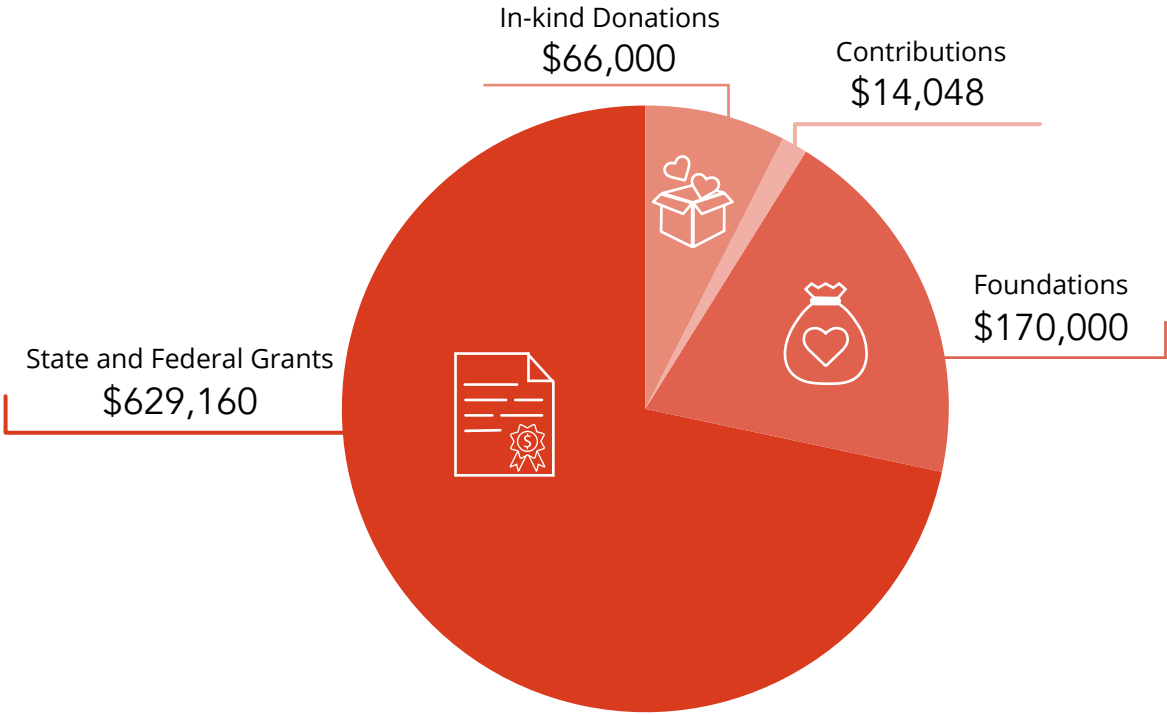
Dewey City Neighborhood Watch
DLA Piper
Dogwood Senior Center
Douglass High School Alumni Association
Emory Law School
Enviva Heirs Property Fund
Equal Justice Works
FAMU Cooperative Extension
Farmers and Consumers Market Bulletin
Federal Home Loan Bank of Atlanta
Federal Reserve Bank of Atlanta
Fort Valley State University
Georgia Advancing Communities Together, Inc.
Georgia Alabama Land Trust
Georgia Appleseed
Georgia Bankers Association
Georgia Council of Probate Court Judges
Georgia Council of Superior Court Judges
Georgia Council on Aging
Georgia Department of Agriculture
Georgia Department of Community Affairs
Georgia Department of Natural Resources
Georgia Division of Aging Services
Georgia Economic Developer's Association
Georgia Emergency Management Agency
Georgia Forestry Association
Georgia Forestry Commission
Georgia Initiative for Community Housing
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Georgia Legal Services Program
Georgia Municipal Association
Georgia Organics
Georgia State Law School
Georgia VOAD (Volunteer Organizations Aiding in Disaster)
Golden Triangle Resource Conservation & Development Council
Grant Park Recreational Center
Grant Specialists of Georgia
Grove Park Foundation and Neighborhood
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Sustainable Forestry Initiative
Synovus
Team Agriculture Georgia
The Community Foundation of South Georgia, Inc.
The Georgia Trust for Historic Preservation
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Thomasville Landmarks, Inc.
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USDA Forest Service Southern Research Station
USDA Natural Resources Conservation Service
USDA Rural Development
USDA SARE (Southern Agriculture Research and Education)
Ware County Public Library
Wells Fargo
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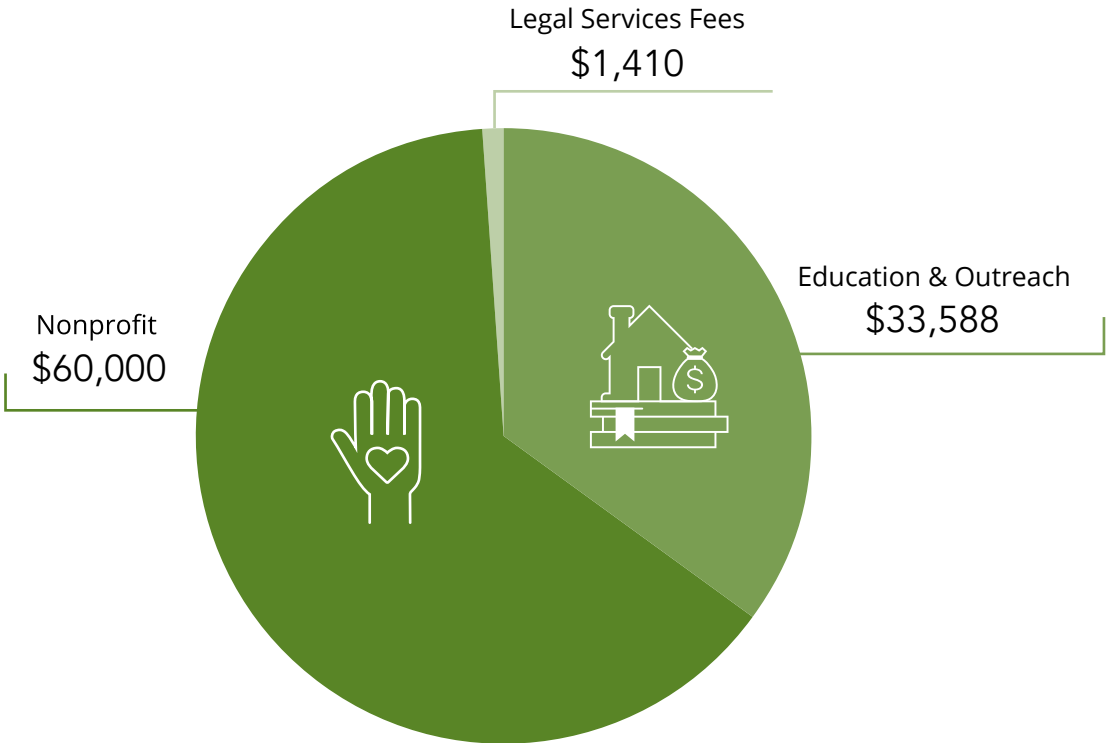
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As of June 30, 2022

Public Support

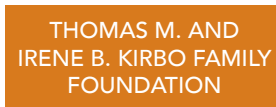
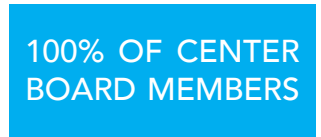


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As of June 30, 2022



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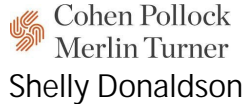
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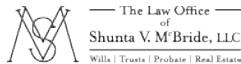
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Dept. of Community Affairs

GARY BLACK

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Commissioner of Georgia
Dept. of Agriculture

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Director of Georgia
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Georgia Heirs Property Law Center, Inc.

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APPLY FOR SERVICES



GEORGIA HEIRS PROPERTY
LAW CENTER

Georgia Heirs Property Law Center is a not-for-profit law firm that helps heirs property owners, nonprofits, and municipalities 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 or home improvement programs.

EMERGENCY DOCUMENT CHECKLIST

- Proof of Clear Title (i.e. a valid deed to the property and/or a rent-to-own agreement);
- A note containing the VIN number for your car and manufactured home, if applicable;
- Drivers License, passport, and/or other forms of identification;
- Mortgage Information;
- List of Digital Passwords;
- Birth Certificates;
- Banking Information;
- Debit, Credit Cards, and/or Cash;
- Medical Records with Medication List;
- List of Emergency Contact Information; and
- Original Estate Planning Documents (or copies with a note containing the location of the original)
 - Last Will and Testament
 - Financial Power of Attorney
 - Advance Directive for Health Care

GEORGIA HEIRS PROPERTY LAW CENTER

(706) 424.7557 • info@gaheirsproperty.org • www.gaheirsproperty.org

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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, these documents may be needed:

- Copies of any deeds for the property, including the deed where the family acquired the property and the last recorded deed (if different);
- An heirs determination packet, filled out to the best of your ability, beginning with the original owner, and showing the names of all living and deceased heirs and their spouses (if presently known), how they are related, and whether any are deceased. All biological and adopted children must be included regardless of whether born within a marriage or not;
- Death certificate for the original owner and any of his or her deceased heir(s);
- Obituary for the original owner and any of his or her deceased heir(s);
- Copies of wills or probate documents for the original owner and any of his or her 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;

Upon receiving all requested information and documents, the Center will review your matter and determine whether your case can be accepted on a "pending" basis. If you are accepted on a "pending basis," you will be required to provide the Center's income worksheet and complete a detailed heirs determination packet. Upon receipt of your income worksheet and heirs determination materials, the Center will make a determination regarding whether you are eligible for services and what legal fees, if any, you would be required to pay.

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 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 or home improvement programs.

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