

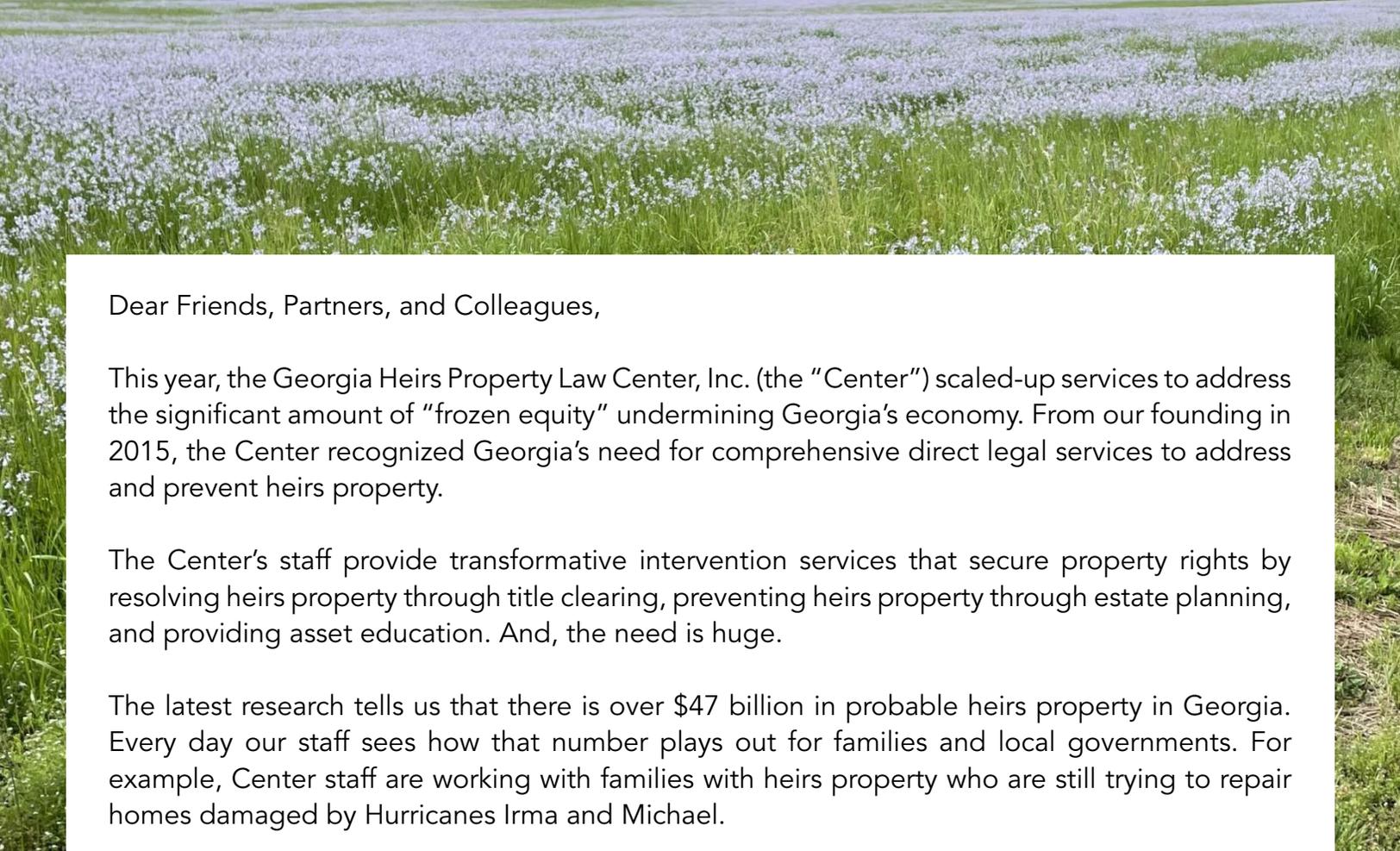
2023

ANNUAL REPORT

www.gaheirsproperty.org



**GEORGIA HEIRS PROPERTY
LAW CENTER**



Dear Friends, Partners, and Colleagues,

This year, the Georgia Heirs Property Law Center, Inc. (the "Center") scaled-up services to address the significant amount of "frozen equity" undermining Georgia's economy. From our founding in 2015, the Center recognized Georgia's need for comprehensive direct legal services to address and prevent heirs property.

The Center's staff provide transformative intervention services that secure property rights by resolving heirs property through title clearing, preventing heirs property through estate planning, and providing asset education. And, the need is huge.

The latest research tells us that there is over \$47 billion in probable heirs property in Georgia. Every day our staff sees how that number plays out for families and local governments. For example, Center staff are working with families with heirs property who are still trying to repair homes damaged by Hurricanes Irma and Michael.

Together, through your financial and pro bono support of the Center's work, we are changing lives because 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 or natural disasters.

Heirs Property is the prime example of the cost of inaction. If it goes unaddressed, every single one of us loses. It's time to roll our sleeves up and get to work by investing in direct legal services that advance equity for Georgians.

This is just and sustainable economic growth, and together we can create real change for all of us! Please join us in our mission to prevent and resolve heirs property.

With hope for economic equity for all,



Skipper G. StipeMaas, J.D.

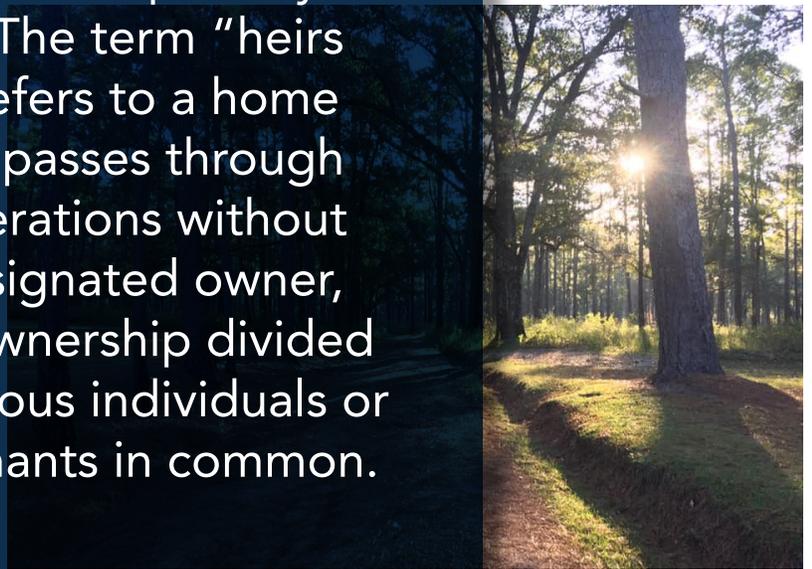
Executive Director

Every \$1 invested in the Center's title clearing program results in an estimated \$14 of unlocked equity.

Every \$1 invested in the Center's land loss prevention services results in an estimated \$24 in protected equity.



Heirs property is the hidden story behind blight, farm loss, natural disaster devastation, and generational poverty in Georgia. The term "heirs property" refers to a home or land that passes through several generations without a legally designated owner, resulting in ownership divided among numerous individuals or entities as tenants in common.





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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*

TRANSFORMING LIVES IN GEORGIA

THE MATH: The total tax-appraised value of probable heirs property undermining Georgia's economy is over \$47 billion.

Heirs property affects all levels of Georgia's economy. To quantify this, the Center partnered with NASA DEVELOP to identify the tax-appraised value of probable heirs property across Georgia's **159 counties**. The total is over \$47 billion in "frozen equity" undermining Georgia's economy.



Our average client is 66 years old,



has a household income of \$34,031 a year,

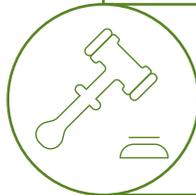


and has an interest in property with a tax-appraised value of \$84,728.

IMPACT

BY THE NUMBERS

As of June 30, 2023



The Center has provided legal services for and closed **603 matters** - **211** title clearing matters, **396** title searches/audits, and **213** estate planning matters.

Titles for **111** properties have been cleared in **32** counties valued at approximately **\$8.5 million**.



The Center reviewed titles for **396** tracts of land involving properties in **55** counties collectively valued at **\$28.3 million**.

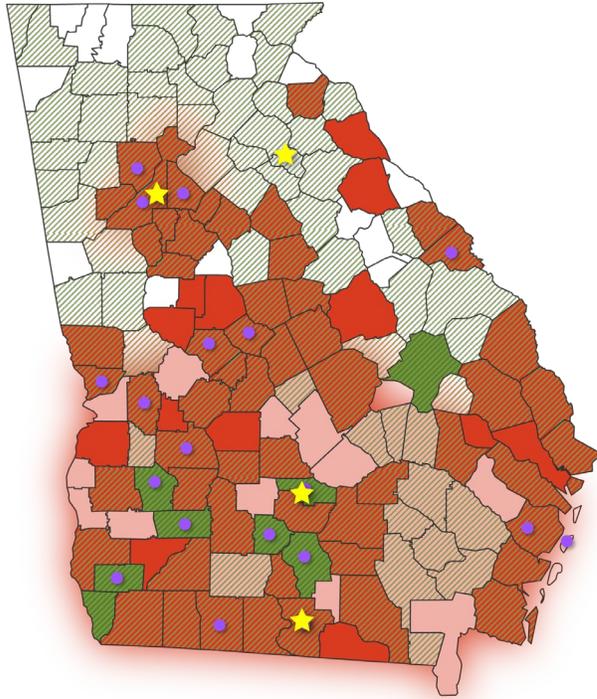
The Center completed **376** community outreach programs, trainings, and stakeholder meetings, reaching approximately **15,321** individuals.



The Center completed **40** webinars, reaching approximately **2,743** individuals from around the state and around the nation.

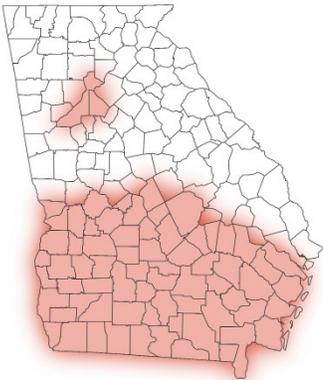
ON THE MAP

As of June 30, 2023



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

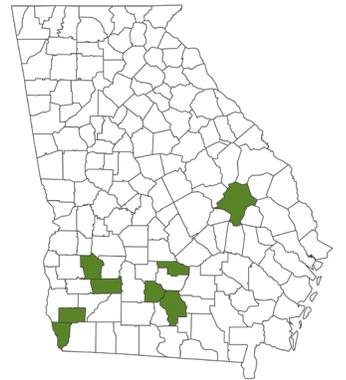
TARGET AREAS



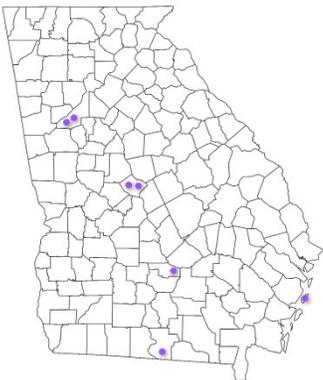
OUTREACH, WORKSHOPS & WEBINARS



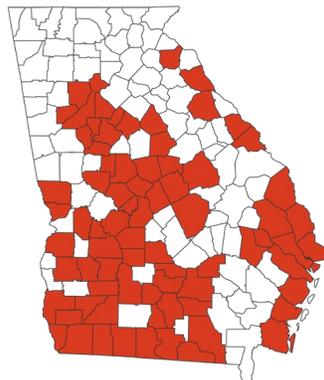
LANDOWNER ACADEMY



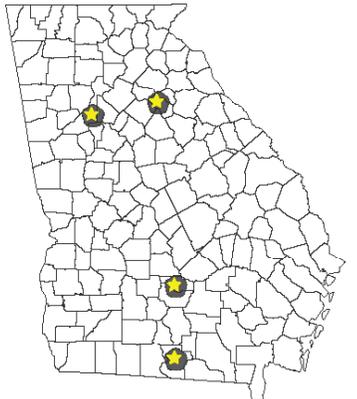
ESTATE PLANS & WILLS CLINICS

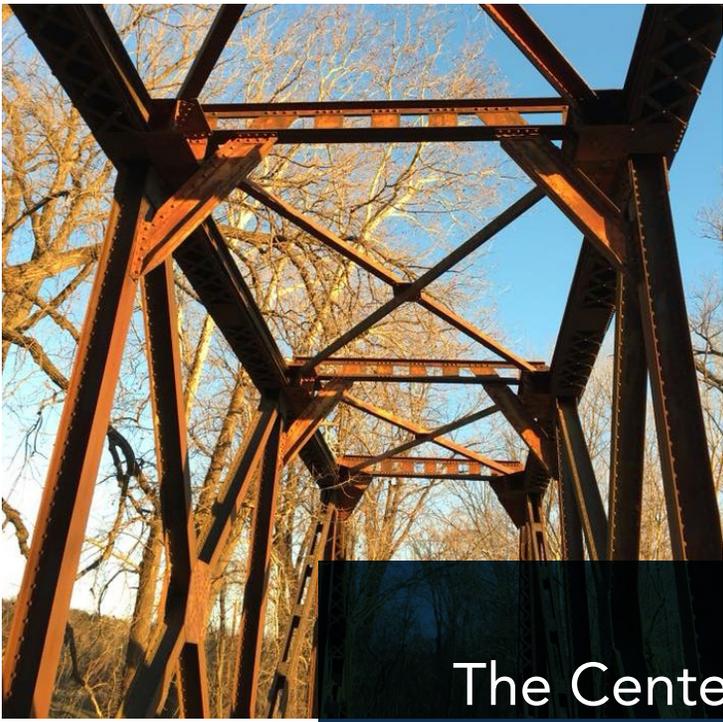


HEIRS PROPERTY CASES



GHPLC OFFICES





The Center is equipped to stabilize home and land ownership with legal expertise in probate and litigation, robust education/outreach programs, public leadership, and best practices that serve as a model for other states.

RECLAIMING ASSETS & CULTIVATING WEALTH

The Center, a not-for-profit law firm, increases generational wealth, economic value, and community stability by securing and preserving property rights of low- and moderate income Georgians. The Center helps heirs, property owners, nonprofits, and municipalities remediate fractured title, increase equity, and transfer wealth to the next generation.

The Center's services include title clearing, wills creation, estate planning, education, and facilitating access to government, private sector, and nonprofit land management/home improvement programs.



DISASTER RESILIENCE

The catastrophic aftermath of disasters such as hurricanes, tornadoes, and floods brings into sharp focus the profound importance of securing property rights. The Center's work is making it possible for Georgians to utilize federal disaster recovery funds allocated for communities impacted by severe natural disasters.

REBUILDING REQUIRES CLEAR TITLE

The Disaster Recovery Homeowner Rehab and Reconstruction Program (HRRP) is considered part of a community's long-term recovery, and it takes time to marshal the resources to rebuild homes. In order for homeowners to qualify for HRRP, they must show clear title to their home.

For people without clear title, rebuilding is almost impossible since they cannot access repair programs or other financing mechanisms. The Center clears titles for qualifying residents so they can participate in HRRP, which stabilizes workforce housing and improves the tax base for local communities.

A clear title is not just a legal document; it is a lifeline for individuals and families seeking to rebuild their homes and livelihoods.

HURRICANE IRMA & TORNADOES	HURRICANE MICHAEL	HURRICANE IDALIA
PROGRAM ALMOST COMPLETE	PROGRAM JUST STARTED	NO FEDERAL PROGRAM ALLOCATION YET
The Center received 75 referrals from Case Managers in Brunswick, Kingsland, and Albany/Dougherty County.	The Center has received 146 referrals (and the application is still open) from Case Managers overseeing 17 counties in Southwest and South Georgia.	A Presidential Disaster Declaration has already been made for Cook, Glynn, and Lowndes counties, with more to be added.
The Center determined that 63% of cases referred were heirs property.	The Center determined that 32% of cases referred so far are heirs property.	The Center's research determined that there is over \$1.8 billion in probable heirs property in the region impacted by Idalia.
For these cases, the Center has cleared 14 titles, and is actively providing services for 6 additional properties so they can receive repairs to their homes.	The Center has cleared one title and the rest are in various stages of the intake process.	Unless titles can be cleared, families will be unable to access any federal funds when allocated.

CLIENT STORY

Mr. Edward* was raised on his family's homeplace first by his parents and then, when they passed, by his older siblings. He has lived on the property in rural Georgia most of his life. Because of heirs property, he had been unable to qualify for any assistance programs since the natural disaster of Hurricane Irma. The Center cleared his title and qualified him to participate in disaster recovery home repairs.

*Name has been changed to protect client confidentiality.



*If you've ever wondered why there are still blue tarps on roofs 5 years after a hurricane, the answer is **HEIRS PROPERTY.***



THE SCALE OF THE PROBLEM

The Center, in partnership with the NASA DEVELOP Program (under NASA's Applied Sciences Program), used geospatial mapping tools to identify areas vulnerable to natural disasters due to heirs property.

NASA DEVELOP's most recent results estimated the tax-appraised value of probable heirs property in 11 of the rural counties impacted by Hurricane Irma as \$1.845 billion dollars. When extrapolated to the state, heirs property represents over \$47 billion in "frozen equity," preventing Georgia families from building generational wealth and municipalities from engaging in economic development and neighborhood revitalization.



*Heirs property affects all levels of Georgia's economy. In partnership with the NASA DEVELOP Program, the Center estimated the tax-appraised value of probable heirs property across the state's **159 COUNTIES** at **OVER \$47 BILLION** in "frozen equity" that undermines Georgia's economy.*

MITIGATING HEIRS PROPERTY STRENGTHENS RESILIENCE

The Center is leading efforts on behalf of the Georgia Department of Community Affairs ("DCA") to integrate heirs property remediation and prevention into disaster mitigation planning efforts in South Georgia communities.

Specifically, the Center is developing an Heirs Property Disaster Mitigation Plan that can be implemented for low- to moderate- income areas in the coastal cities of Brunswick and Kingsland and across fifteen counties: Berrien, Camden, Charlton, Chatham, Coffee, Cook, Crisp, Dougherty, Glynn, Liberty, McIntosh, Thomas, Turner, Wilcox, and Worth counties.



This project includes 1) a data collection phase for estate planning and heirs property prevalence in local infrastructure and 2) a plan development phase for assimilating the data into a community plan.

The forthcoming Heirs Property Disaster Mitigation Plan will advance resilience and recovery at both the individual and the municipal level for South Georgia communities that are vulnerable to natural disasters.

CLIENT STORY

Mobile home owners in Georgia are especially vulnerable to storm damage. Clouded title creates an additional obstacle for mobile home owners as it prevents them from receiving disaster relief and making repairs. With the help of the Center, clear title and habitable homes are possible. Ms. Anderson* and her son lived in a mobile home that was severely damaged by Hurricane Irma in 2017. Repairs were unaffordable, and while Ms. Anderson qualified for the HRRP Program, the clouded title on her mobile home kept her from getting the assistance she needed. The Center was able to consolidate the title into Ms. Anderson's name. Now she is qualified to receive a new mobile home!

*Name has been changed to protect client confidentiality.

PARTNERSHIPS FOR RESILIENCE

The Center partners with the Georgia Emergency Management Agency (“GEMA”) to provide outreach to emergency professionals and volunteer organizations across South Georgia. The Center’s information has been shared with GEMA’s External Affairs unit, and Center staff participate in GEMA’s Disaster Housing Task Force and Long Term Recovery & Mitigation team.

In addition, Center staff developed a presentation titled “Community Resiliency Through Property Rights: Addressing Heirs Property for Disaster Mitigation Planning” for educating local emergency responders and Homeland Security staff. These concerted efforts reflect the Center’s focus on building disaster resilience and ensuring that property rights remain an integral part of disaster mitigation planning.



Hybrid Signing Day at the Perry Branch Library and via Zoom

PREVENTING HEIRS PROPERTY

Preventing the creation of heirs property is a key component of the Center’s heirs property mitigation planning efforts. The Center is working to increase access to proper estate planning for low-income families through outreach programs and signing days and by providing estate plans to clients whose titles have been cleared by the Center.

Through the Center’s work across South Georgia, staff have learned that disasters hit the most vulnerable the hardest. When heirs property is not remediated and prevented, housing in rural areas becomes blighted over time as families lose the ability to access assistance and loans to maintain and improve their property.

HOUSING STABILITY

The Center provides crucial workforce housing legal services by resolving heirs property through title clearing, preventing heirs property through estate planning, and accessing potential income through asset education. In addition to the Center's partnership with DCA's Disaster Recovery HRRP Program, the Center's place-based approach fosters dynamic partnerships with local governments and nonprofits to advance equity in rural and urban areas across Georgia.



PLAINS, GA



President Jimmy Carter and First Lady Rosalynn Carter established the Carter Plains Foundation to eradicate substandard housing in Plains, Georgia. The new nonprofit began working on homes and immediately encountered title and estate planning issues.

The Center is currently working on clearing ten property titles so families can participate in the Carter Plains Foundation's home repair program. In addition, the Center will provide estate plans for these families. This dual approach stabilizes homes today and paves the way for intergenerational wealth transfer by preventing heirs property from taking root.

CLIENT STORY

Mr. Mason* lived in his wife's family home in Glynn County until her death in 2003. When she died, the property passed to Mr. Mason and his daughter, Katrina*. The Center took the case to clarify for the record that Mr. Mason and Katrina are the sole owners of the property and prepared an Affidavit of Descent for Mrs. Mason. The affidavit was successfully recorded in the Glynn County Records, and the Center is working with Mr. Mason and Katrina to put title in their names as joint tenants with rights of survivorship, ensuring that heirs property is prevented in the event one of them passes away.

*Name has been changed to protect client confidentiality.

THOMASVILLE, GA

Within the City of Thomasville, the Center's impact in the Dewey City Historic District extends beyond title clearing. With the support of the Williams Family Foundation, the Center has been educating residents about property rights and heirs property prevention. This has produced a surge of requests for estate planning, and the Center continues its work with the Thomas County Public Library to meet this demand.



The Center provided 100 copies of its *Georgia Estate Planning Handbook for Communities* to the Thomas County Public Library and is on call to assist the Thomasville community.

- The Center completed 8 Estate Plans for Thomasville residents protecting \$715,289 in tax-appraised value from becoming heirs property.
- The Center cleared 6 titles unlocking equity totaling \$306,384 in tax-appraised value.
- The Center is working to complete 2 estate plans and clear 7 titles which will unlock equity totaling \$467,248 in tax-appraised value.

ATLANTA, GA

With urban property values and development pressure high, the Center partners with nonprofits to increase housing stability and generational wealth in metro Atlanta. Securing long-term land security is a critical component of the land trust model, and the Atlanta Land Trust (ALT) is committed to helping their clients utilize their home for long-term generational wealth building.

"It's been a fun and interesting journey. Personally, I've learned a lot about my family and our heirs property."

- A Center Client



"I want to thank you so much because this is a load off my chest."

- A Center Client

Center staff provided an Heirs Property & Estate Planning Workshop for ALT's homeowners and followed up with estate planning services. The Center collaborated with pro bono attorneys from Truist, Parker, Hudson, Rainer & Dobbs LLP, and Bradley Arant Boult Cummings LLP to prepare estate plans and to host a Signing Day event at which clients finalized their estate plans.

The Center has now provided legal services for and closed 603 matters, completed 213 estate plans, and facilitated outreaches in 119 counties for over 15,321 individuals. With 125 potential clients on the waiting list, the Center currently has 163 open matters involving properties in 30 counties with a total tax-appraised value of \$10.4 million. The Center is in the process of transitioning to a new legal case management system with an additional lead tracking system that will facilitate new client intake and waiting list management.

GEORGIA INITIATIVE FOR COMMUNITY HOUSING (GICH)

Community leaders know heirs property is a barrier to meeting their workforce housing needs. Hearing from the Center has become a highlight of the Georgia Initiative for Community Housing's annual gathering of communities in Cartersville, GA. The over sixty participants included elected officials, nonprofit staff, realtors, lenders, and community leaders from across the state.



Through place-based partnerships, the Center's work is protecting property rights and building resilient communities for generations to come.



FOREST & FARM EQUITY



Heirs property is “frozen equity,” an insidious barrier to owning and operating agricultural land. Without clear title, it is difficult for heirs to achieve the fullest economic rewards and environmental potential of forests and farms. Heirs property owners cannot obtain federal benefits and financing, and the land is vulnerable to partition sales by third parties.

Land ownership is an essential requirement for successful farming because it immediately establishes equity, provides a financial asset that can be leveraged for liquidity, and naturally appreciates over time. Heirs property resolution unlocks resources for underserved producers with low savings and low cash flow, allowing them to purchase, gain, and retain land.

With the support and leadership of the Center’s Advisory Committee members from the Georgia Forestry Commission and Georgia Department of Agriculture, the Center organizes collaborative initiatives, conducts workshops, and delivers legal services to a variety of constituents in the agricultural sector. This work strives to resolve long-standing land ownership issues and to bolster agricultural communities facing economic pressure and environmental risks.

PARTNER HIGHLIGHT: TEAM AGRICULTURE GEORGIA



Team Agriculture Georgia (TAG) represents a coalition of USDA agencies, state departments, and community organizations united in their efforts to offer educational resources aimed at strengthening the resilience of the state’s emerging, small-scale, and underserved farmers. Through the collaboration between the Center and Team Agriculture Georgia (TAG), the Center has reached over 100,000 stakeholders.

OUTREACH & TRAININGS

- **Agricultural Wealth Transfer, Land Management, and Disaster Mitigation - June 15, 2023**

124 registrants participated in a virtual workshop targeting socially disadvantaged farmers in South Georgia, which included presentations by representatives from the Center, Team Agriculture Georgia (TAG), Georgia Forestry Commission, Golden Triangle RC&D, USDA Farm Service Agency, USDA Natural Resources Conservation Service, and Transition to Organic Partnership Program. The workshop educated attendees on heirs property and its effects on agriculture and forestry in Georgia, addressing heirs property before a natural disaster, preventing heirs property via estate planning, applying for USDA financial assistance, and tapping into organic agriculture.



OVER 200 PARTICIPANTS AT THE AG ISSUES SUMMIT

OUTREACH & TRAININGS - CONT'D

- **Saving Rural America - January 18, 2023 | Zoom** – Center staff participated in Black Sustainability, Inc.'s Saving Rural America virtual workshop by presenting “Strengthening Georgias Ag Communities Through Property Rights” to 33 farmers and ranchers.
- **Georgia House & Senate Joint Agriculture Committee Chairmen Ag Issues Summit - August 30, 2022 | Georgia National Fairgrounds & Agricenter** – During an event chaired by Sen. Larry Walker and Rep. Robert Dickey, the Center presented “Heirs Property: Preserving Generational Property Assets” to over 200 participants.
- **Longleaf & Landowner Academy - January 26, 2023 | Swainsboro, GA** – Hosted by the Longleaf Alliance based in Andalusia, Alabama, the Academy is tailored for historically underserved landowners and land managers interested in longleaf pine restoration and management. The Center presented to 30 Black landowners and staff from the US Forest Service, NRCS, and USDA FSA and was asked to develop a follow-up workshop on estate planning in FY24.
- **Climate, Families, and Beyond Agricultural Workshops - January 12, 2023 & February 7, 2023 | Berrien County, GA & Seminole County, GA** – In partnership with Golden Triangle RC&D, the Center staff conducted outreach to over 65 agricultural community members. Following the presentation, some alarmed participants observed that their existing estate plans were inadvertently converting valuable farmland to heirs property.



PARTNER HIGHLIGHT: GOLDEN TRIANGLE RC&D



The Center has a strong history of collaboration with Golden Triangle Resource Conservation District Area (RC&D) whose mission is to sustain the natural resource base, increase social and economic opportunities, and improve quality of life in Baker, Calhoun, Clay, Decatur, Dougherty, Early, Grady, Miller, Mitchell, Randolph, Seminole, and Terrell Counties.

DIRECT LEGAL SERVICES & TECHNICAL ASSISTANCE

USDA OPPE 2501 - Empowering Farmers and Ranchers

The USDA's Office of Partnerships and Public Engagement awarded the Center a three-year grant to assist socially disadvantaged and low-resource farmers and ranchers. The Center is partnering with Team Agriculture Georgia, Golden Triangle RC&D, and the Georgia Forestry Commission to conduct workshops and facilitate mutual referrals for services.

- Workshops reaching 256 individuals were held targeting socially disadvantaged farmers, ranchers, timberland owners, and new and beginning farmers in FY23.
- The Center has conducted 32 intake interviews with heirs of farm and timber properties in FY23.
- Golden Triangle has successfully completed 20 conservation plans for farmers.
- Through Team Agriculture Georgia's (TAG) website and newsletter, the Center has reached over 100,000 stakeholders.
- In partnership with Georgia Forestry Commission, the Center has completed title searches and audits and/or is clearing title for 1,114.5 acres.



CLIENT STORY

The Center is always searching for creative and effective ways to help families preserve wealth for the next generation. Mr. Jones'* parents owned 12 acres in Decatur County, Georgia, upon their deaths. Mr. Jones and his wife now live on the property, with ownership of the property fractionated between Mr. Jones and his nieces and nephews. Desiring to clear the title but keep the property collectively owned by the family, Mr. Jones reached out to the Center. The Center is working with the family to create an LLC or trust to manage the property collectively.

*Name has been changed to protect client confidentiality.

Legal Services Sneak Peek for FY24

The Center has joined forces with Florida Agricultural and Mechanical University - Brooksville Agricultural Environmental Research Station (FAMU-BAERS) to support Black farmers in South Georgia with heirs property.

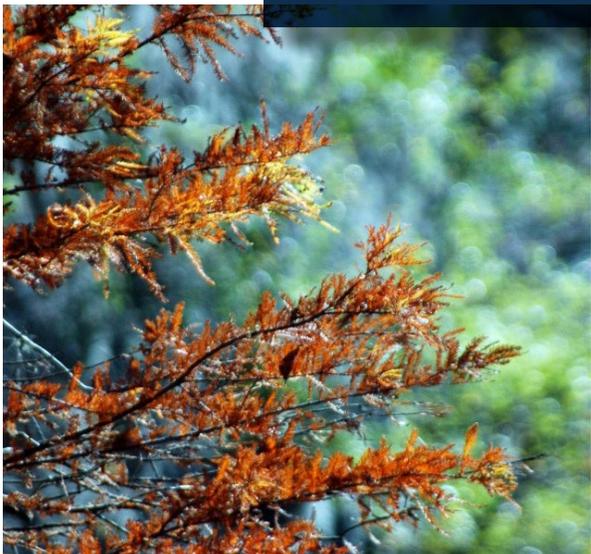
USDA-RD (Rural Development) - Strengthening Communities

The Center completed the two-year USDA Rural Community Development Initiative. Through workshops and consultations, the Center strengthened the capacity of Golden Triangle RC&D and Community Outreach Training Center (COTC) to assist residents in 15 rural counties with title clearing and estate planning. Golden Triangle and COTC received direct technical assistance from the Center to develop the capacity to help county residents be prepared to work on title clearing and estate planning – an important new function/capacity that local authorities did not possess.



Heirs property
undermines Georgia's
economy one family, one
neighborhood, and one
community at a time.

HEIRS PROPERTY
IS THE PROBLEM,
CLEAR TITLE IS THE
SOLUTION

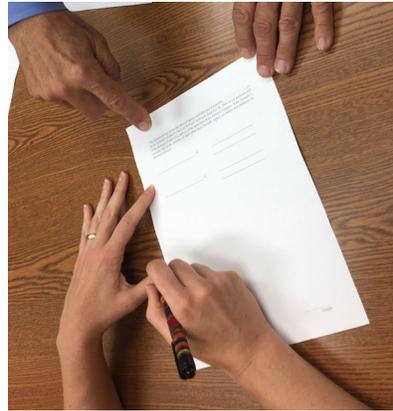
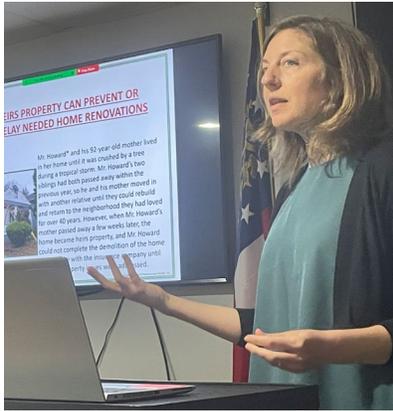


BUILDING CAPACITY

IN PURSUIT OF ECONOMIC JUSTICE THROUGH PROPERTY RIGHTS

Property ownership is the bedrock for building generational wealth. A home or land appreciates in value over time, providing a stable foundation for families as well as a building block for strong communities.

The Center uses asset education, title remediation, and estate planning as the three intervention points to systemically promote equity through property rights.



The Center is committed to building capacity across the disparate but interrelated sectors most affected by heirs property: families, attorneys/courts, local governments, banks, and nonprofits.



The Center enhances its capacity and amplifies its impact by:

1. Collaborating with state-level leadership
2. Developing best practices and providing legal training
3. Leveraging pro bono support
4. Engaging the financial sector
5. Forging partnerships
6. Sharing solutions

The Center's multi-sector approach to heirs property ensures that intervention outcomes are sustainable.

1 COLLABORATING WITH STATE LEADERSHIP

Our Advisory Committee is a group of influential partners who play a pivotal role in unlocking generational wealth and fostering equity throughout the state. Each member of this committee contributes to the Center's mission by promoting our programs to communities in need, making introductions to potential partners, and helping us identify sustainable sources of funding.

ADVISORY COMMITTEE

- CHRISTOPHER NUNN,
Commissioner of the Georgia
Department of Community Affairs
- TIM LOWRIMORE,
Director of the Georgia Forestry
Commission
- TYLER HARPER,
Commissioner of the Georgia
Department of Agriculture



Georgia Department of Community Affairs (DCA): Driving Community Development



DCA is at the forefront of affordable housing and community development efforts across the state. The Center's direct legal services play a key role in clearing titles, enabling low-income Georgians to participate in DCA's Disaster Recovery Homeowner Rehab and Reconstruction Programs (HRRP) to tackle

blight, enhance affordable housing, and bolster local tax bases after natural disasters. To promote resilience and recovery at both the individual and municipal levels, the Center is developing an heirs property mitigation plan for DCA and south Georgia communities vulnerable to natural disasters.

Georgia Forestry Commission (GFC): Protecting and Conserving Georgia's Forests

GFC enhances the health of the state's forest resources and is particularly interested in helping underserved forestland owners leverage best management practices that are both economically and environmentally sustainable. Heirs property is a major hindrance for land management programs, so the GFC's field foresters refer timberland owners who have heirs property to the Center. The Center likewise refers clients who have woods on their land to GFC.



Georgia Department of Agriculture (GDA): Nurturing Farm Families



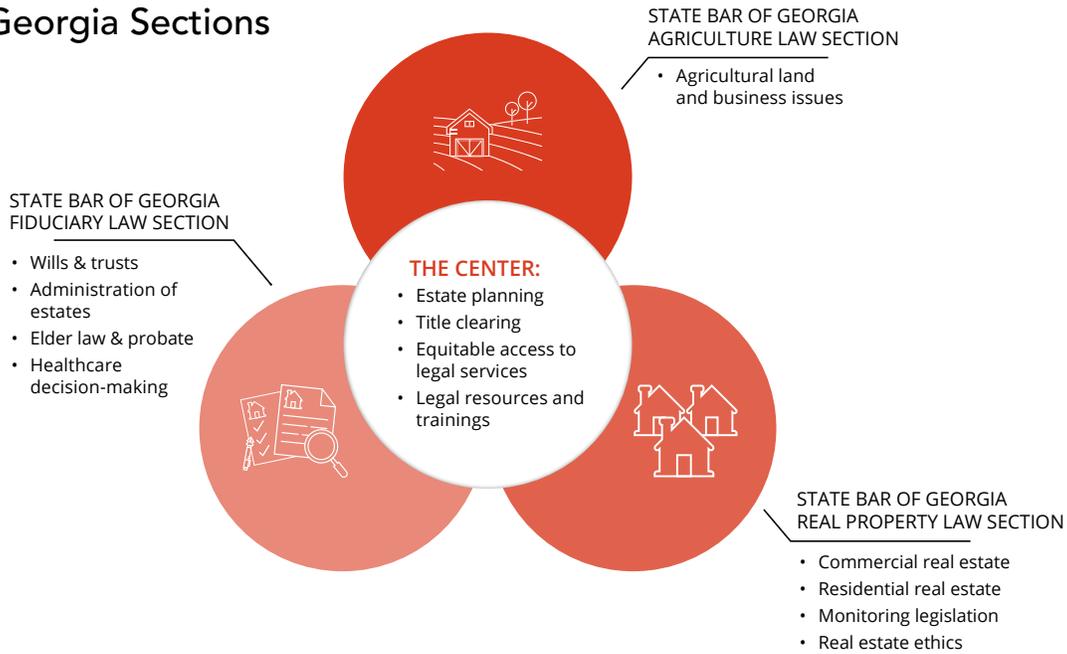
From the start, GDA saw how heirs property resolution and prevention are key to the sustainability of family farms and the stability of Georgia's farm families. To address the economic and emotional impact of heirs property on these families, the Center prioritizes outreach efforts and direct legal services in agricultural communities and partners with extension services to reach socially disadvantaged, beginning, and low-income farmers. Through initiatives like *Farmers & Consumers Market Bulletin* articles and *Myths and Facts*, the Center reaches an audience of 35,000 subscribers.



2 DEVELOPING BEST PRACTICES AND PROVIDING LEGAL TRAINING

The Center actively develops training materials, legal manuals, and best practices for property title remediation, estate planning, and asset education. Meanwhile, the Georgia legal community continues to drive progress toward the shared goal of securing property rights and advancing economic justice.

State Bar of Georgia Sections



Fiduciary Law Section: Forms Library

In partnership with the Fiduciary Law Section, the Center continues to expand its “Forms Library,” comprising sample forms, training curriculum, and case protocols based on the Center’s successful legal strategies. These resources enable the Center to train volunteer attorneys efficiently, enhancing their effectiveness in this intricate area of the law.

Real Property Law Section: Continuing Legal Education (CLE)

The Center was awarded a scholarship from the Real Property Law Section Pro Bono Initiatives Committee, enabling the Legal Programs Director to attend the Real Property Institute in May 2023. This marked the Center’s inaugural participation in an Institute event, paving the way for future engagements between the Real Property Law Section and the Center.

Agriculture Law Section: Training

The Center’s Legal Programs Director and Center Board Member Russell Henry (Coleman Talley LLP, Valdosta) trained 20 attorneys on Georgia’s Uniform Partition of Heirs Property Act (UPHPA) at an Agriculture Law CLE program at Middle Georgia State University in Macon. The Center provides needed insight into how to apply the UPHPA, adopted by Georgia’s legislature in 2012, to best support the rights of heirs property owners.

Coleman | Talley



Superior Court Judges Annual Meeting: Sneak Peek FY24 Training

The Center staff worked with Board Members Judge Robert Chasteen and Russell Henry as well as former Chief Justice Harold Melton and Wheaton Webb (Troutman Pepper) to design a training for superior court judges on the UPHPA at The Council of Superior Court Judges of Georgia (CSCJ) meeting in August 2023 on Jekyll Island, GA. This presentation will cover the UPHPA’s introduction, its historical context, differentiation from other partition methods, heirs property identification, the typical UPHPA case trajectory, key court actions, and an examination of limited case law.

3 LEVERAGING PRO BONO SUPPORT

The Center works with pro bono attorneys in several capacities.

- **Subject Matter Expertise:** Eversheds Sutherland provides pro bono legal expertise ranging from intellectual property and IRS liens to HIPAA.
- **Drafting and Sharing of Forms**
- **General Support:** Shannen Levin and Newsom Cummings attend case review meetings as long-term volunteers.
- **Co-counsel**
- **Estate Planning:** Pro bono attorneys support the Center's Signing Day program by drafting estate plans and participating in Signing Day, at which the estate plan is executed.

Truist Bank, Parker Hudson, and Bradley Arant Boult Cummings helped the Center complete two Signing Day events in 2023. Parker Hudson hosted the inaugural Signing Day where volunteers served as witnesses and notaries, facilitating the completion of five estate plans.



The Center's staff organized a lunch-and-learn Continuing Legal Education (CLE) session as well as three follow-up training webinars to train twenty-eight volunteers (26 attorneys and 2 staff members) to draft estate plans that prevent heirs property.

The second in-person Signing Day took place at the Truist office in downtown Atlanta, where 11 estate plans were successfully completed. Many of these clients are actively working with the Center to resolve heirs property issues within their families. During the Signing Day event, insightful conversations shed light on the motivations driving clients to secure their own estate plans.

Many were inspired by witnessing the careful planning undertaken by older family members and understood the potential challenges that heirs property issues could pose if family cooperation were lacking. One client shared their experience:

"You go into a copy store and the wills you can get there are simple. The wills that the Center does are much more complex and thorough. I feel good about what I've done."

The Center and the legal community have harnessed their expertise and resources to champion property rights and enact lasting change, and thus, together, foster equitable economic development in Georgia, ensuring that property rights are accessible to all. This alliance shapes a future where knowledge and justice go hand in hand, creating a stronger and more prosperous Georgia for all its residents.



4 ENGAGING THE FINANCIAL SECTOR

Clear titles create clients: lenders have a vested interest in resolving heirs property because each cleared title is a potential customer. With clear title, a property owner can open a line of credit, apply for a mortgage, and use the property as collateral to start a business or send a child to college. Property owners can also sell the property, which may increase the likelihood of new mortgages for lenders. The Center's banking partners support the work in many ways.

Federal Home Loan Bank of Atlanta: Leading Investment in Heirs Property

Beginning in 2020 with the hosting of an heirs property forum on the Center's work, the Federal Home Loan Bank of Atlanta (FHLBank of Atlanta) has raised the profile of heirs property among the banking and philanthropic community. Through a new grant, FHLBank of Atlanta provided the Center with resources to explore collaboration opportunities with neighborhood-based organizations in Atlanta. Approximately one-third of the Center's current cases are in Atlanta. Partnering with grass-roots groups on referrals increases the Center's efficiency and aligns with the FHLBank's commitment to neighborhood stabilization in Atlanta.



Wells Fargo: Accelerating Direct Legal Services



The Center received support as part of Wells Fargo Foundation's two-year heirs property initiative to facilitate educational seminars with community-based nonprofits and provide direct legal services to heirs property owners. This work exemplifies the financial industry's commitment to empowering communities through property rights advocacy.

Truist: Advancing Estate Planning

In addition to pro bono involvement, Truist leveraged its Community Reinvestment Act (CRA) funds to support the Center's asset education curriculum development, enabling the Center to conduct four workshops and host two Signing Days. Truist's strong support reflects their focus on promoting equitable access to property rights and economic development.



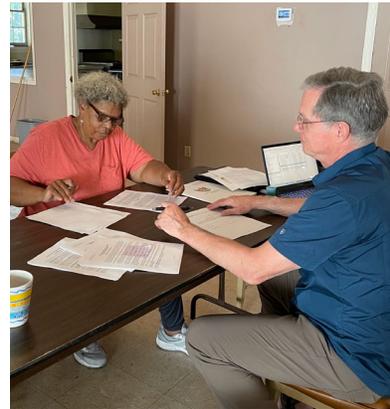
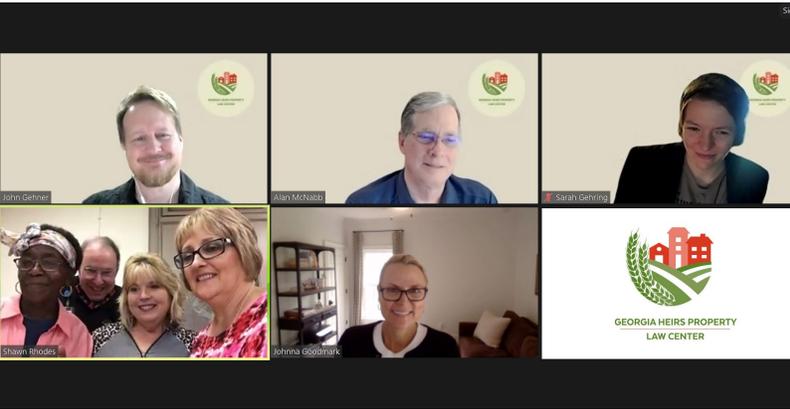
Synovus: Investing in Financial Literacy



The Center's asset education is a form of financial literacy, helping home- and landowners utilize their real property as an asset that can grow in value. Synovus supports the development of Center curriculum and outreaches.

5 FORGING PARTNERSHIPS

The Center is committed to sharing knowledge with nonprofits, governmental agencies, and community-based organizations:



Empowering Georgia's Housing Counselors

The Center presented "Everything Housing Counselors Want to Know about Heirs Property Consequences and Prevention" to Georgia's 53 HUD-approved housing counseling agencies. The Center also created a video for housing counselors to share with first-time homebuyers preparing for homeownership. Protecting a home from becoming heirs property is a key part of financial literacy.

Supporting Agencies that Support Seniors

The Center conducted a focus group/training for the directors of Georgia's Area Agencies on Aging (AAAs) and Elderly Legal Assistance Program (ELAP) providers. Many seniors find out they live in heirs property when they apply for homestead exemption or when they attempt to qualify for a home repair program. The average Center client is in their 60s; empowering seniors to address heirs property is critical.

Building Capacity in Southwest Georgia

Center staff facilitated a disaster mitigation planning discussion with the Southwest Georgia Regional Commission's Housing Task Force. The task force includes affordable housing agencies and government officials in an area particularly vulnerable due to its density of heirs property and frequency of natural disasters.

Engaging Real Estate Property Professionals

Real Estate Professionals know heirs property is an issue. Center staff are working with leaders of the Georgia Association of Realtors (GAR), the National Association of Realtors (NAR), the American Land Title Association (ALTA), and the Southeast Land Title Association (SLTA) to provide educational programming for their members. These associations advocate for funding for direct legal services to build sustainable solutions for low-income families.



6 SHARING SOLUTIONS

Through the dedicated practice of heirs property law, the Center has built a wealth of legal skills, tools, and resources. Its success in clearing property titles, executing estate plans, and supporting property owners sets it apart and charts a pathway for others.

As the only law center of its kind positioned to meet the challenges of heirs property, the Center is building a comprehensive library of best practices, legal forms, and educational handbooks to help communities understand, remediate, and prevent heirs property.



In addition to Outreach Workshops, the Center shares information on its website. Since launching the Publications Page on the website in 2017, the Center has had **61,959 INDIVIDUALS VISIT**.

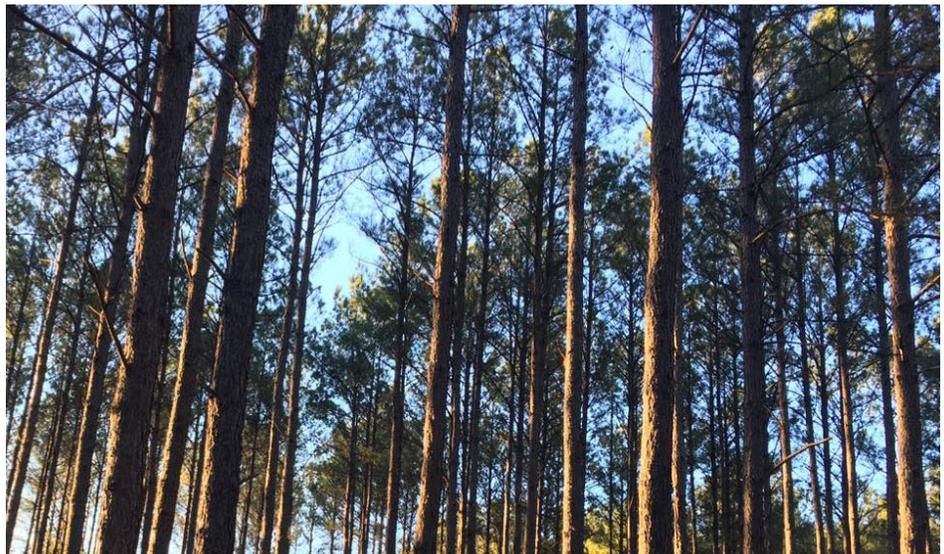
The Center's publications include:

- Estate Plan Execution Instructions for Signing Days
- Myths and Facts About Heirs Property
- Georgia Estate Planning Handbook for Nonprofit Law Firms and Their Pro Bono Attorneys
- Georgia Estate Planning Handbook for Communities
- Disaster Planning and Property Title Issues
- Emergency Document Checklist





Owning a home or land with clear title creates generational wealth, economic stability, and political power for Georgia residents and the regions in which they live.



PARTNER ORGANIZATIONS

705 Marketing

Advocates for Better Communities, Inc.

Alston & Bird

American Bar Association

American Land Title Association

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 Land Trust

Atlanta Legal Aid Society

Atlanta NPUs

Atlanta Volunteer Lawyers Foundation

Baker Donelson

Bar Foundation of Georgia

Ben Hill Family Connection

Berrien County Board of Education

Berrien County Family Connection

Black Sustainability, Inc.

Bonderant Mixon & Elmore, LLP

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 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

Coleman Talley, LLP

Collier Heights Neighborhood Association

Columbus Alumni Chapter of Delta Sigma Theta Society, Inc.

Columbus Community Reinvestment Office

Columbus Land Bank Authority

Columbus Tax Assessors Office

Community Outreach Training Center, Inc.

Community Sustainability Enterprise

Dewey City Neighborhood Watch

Division of Aging Services

DLA Piper

Dogwood Senior Center

Douglass High School Alumni Association

Emory Law School

Equal Justice Works

Farmers and Consumers Market Bulletin

Federal Home Loan Bank of Atlanta

Federal Reserve Bank of Atlanta

Florida A&M University - Brooksville Agricultural Environmental Research Station

Fort Valley State University

Georgia Advancing Communities Together, Inc.

Georgia Alabama Land Trust

Georgia Appleseed

Georgia Association of Floodplain Managers

Georgia Bankers Association

Georgia Council of Probate Court Judges

Georgia Council on Aging

Georgia Department of Agriculture

Georgia Department of Community Affairs

Georgia Department of Natural Resources

Georgia Economic Developer's Association

Georgia Emergency Management Agency

Georgia Forestry Association

Georgia Forestry Commission

Georgia Initiative for Community Housing

Georgia Latino Law Foundation

Georgia Legal Services Program

Georgia Municipal Association

Georgia Organics

Georgia Public Libraries

Georgia State Law School

Golden Triangle Resource Conservation & Development Council

Grant Park Recreational Center

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Gwinnett Bar Association

HouseProud Atlanta

Houston County Public Library System

JPMorgan Chase

Junior League of Atlanta

Liberty County JC Vision

Longleaf Alliance

Longleaf for All

Macon-Bibb County

Mechanicsville Civic Association

Metro Fair Housing

NASA DEVELOP

National Fish & Wildlife Foundation

National Wildlife Federation

Neighborworks Columbus

New Horizon Senior Center

Oakland City Community Organization

Old Adamsville Center

Pro Bono Partnership of Atlanta

Pro Bono Roundtable of Atlanta

Sapelo Island Cultural Revitalization Society

SE Neighborhood Senior Center

Seminole County Agriculture Center

Showers of Blessings Ministries

South Carolina Center for Heirs Property Preservation

South State Bank

Southwest Georgia Regional Commission

State Bar of Georgia Fiduciary Law Section

State Bar of Georgia Real Property Law Section

Sustainable Forestry Initiative

Synovus

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The Links, Incorporated

The Nature Conservancy

Thomas County Public Library

Thomasville Habitat for Humanity

Thomasville Land Bank

Thomasville Landmarks, Inc.

Thomasville NAACP

Troutman Pepper

Truist

UGA Cooperative Extension Services

UGA School of Law

UGA School of Social Work

UGA Warnell School of Forestry

University of Florida School of Law

USDA Farm Services

USDA Forest Service Southern Research Station

USDA Natural Resources Conservation Service

USDA Office of Partnerships and Public Engagement

USDA Rural Development

USDA SARE (Southern Agriculture Research and Education)

Walton Gwinnett Habitat for Humanity

Ware County Public Library

Wells Fargo

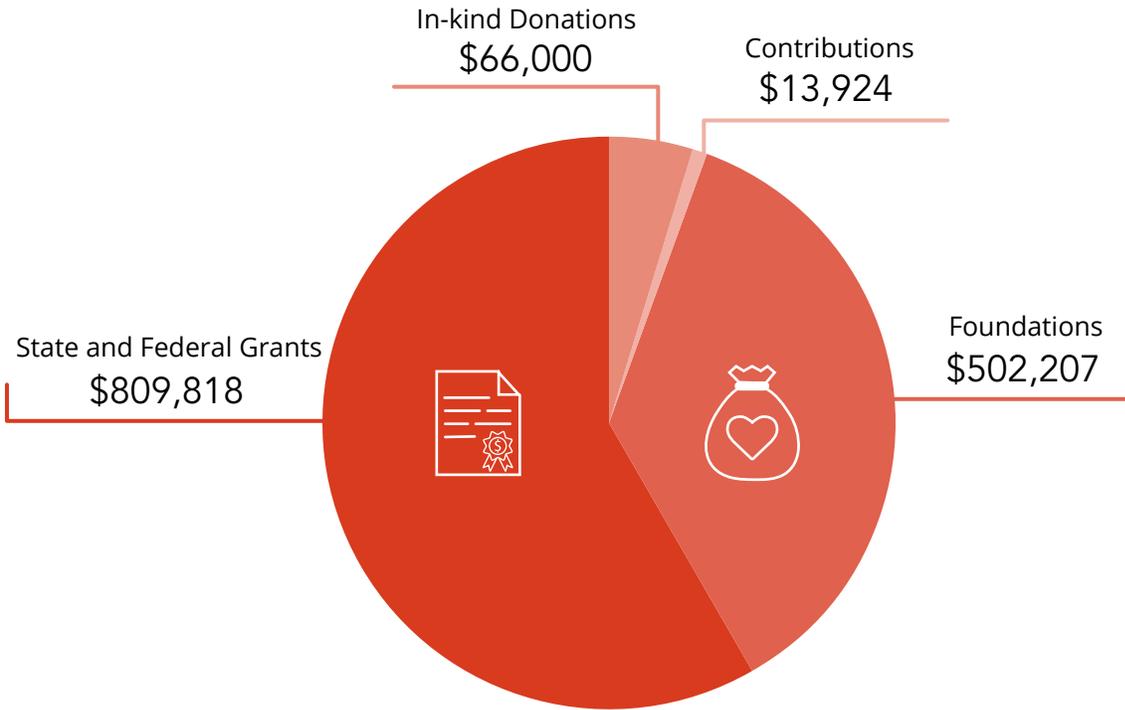
Wilcox County Probate Court

Williams Family Foundation

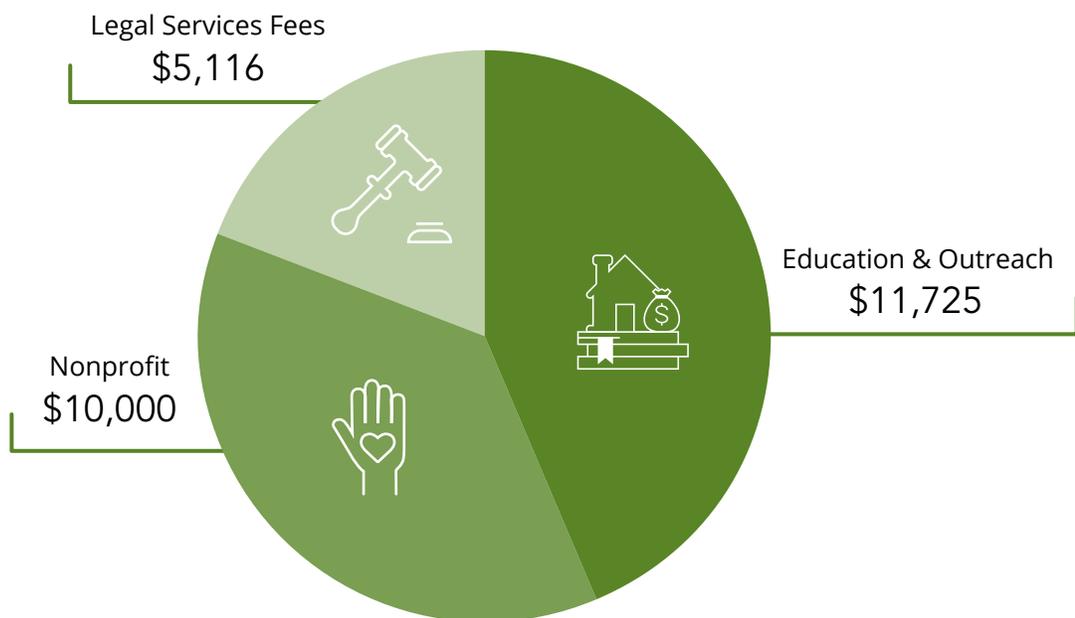
FINANCIALS

As of June 30, 2023

PUBLIC SUPPORT

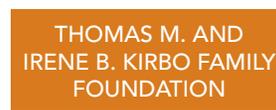


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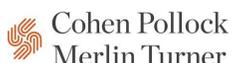
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as of June 30, 2023

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as of June 30, 2023

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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

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