



**GEORGIA HEIRS PROPERTY
LAW CENTER**

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



LISTENING



EDUCATION



PARTNERSHIP



IMPACT

**FISCAL YEAR 2016 - FISCAL YEAR 2017
SUMMARY REPORT**

STAFF

as of January 2018



SKIPPER G. STIPEMAAS
Executive Director



DELENE W. PORTER
Chief Operating Officer



JOANN E. JOHNSTON
Legal Programs Director



VERONICA M. A. MCCLEENDON
Rural Staff Attorney



JIM DAVIS
Staff Attorney



JAZZ WATTS
Equal Justice Works GA
Housing Corps Advocate



GENTRY E. MANDER
Equal Justice Works GA
Housing Corps Fellow



ALEXANDRIA J. ARNOLD
Equal Justice Works GA
Housing Corps Fellow



TERESA G. MOORE
Equal Justice Works GA
Housing Corps Advocate

A MESSAGE

FROM OUR EXECUTIVE DIRECTOR

Dear Colleagues and Friends –

I'm thrilled to share the Center's first Annual Report with you. It reflects accomplishments by courageous heirs property owners, talented staff, committed volunteers, strong supporters and amazing partner organizations across Georgia and the Southeast.

As you may have noticed, I take this work personally. Decades before I became the Center's Executive Director, I became an heirs property owner. My father passed away, leaving my mother, five siblings and myself in charge of the farm on which we were dependent, but not prepared nor culturally encouraged to manage. I watched my widowed mother struggle against land loss, discrimination and the myriad negative implications of heirs property. My rural community lacked access to the types of lawyers and community advocates who could help us secure our land rights and generate wealth – let alone pass wealth to the next generation through estate planning. This lack of access propelled me to spend both my personal and professional life helping people and communities understand the legal and economic options available to them in relationship to land and homes, as well as develop the means to create stable, sustainable solutions for land management and affordable housing.

In order to develop and launch a non-profit law firm to serve Georgia, the Center set up listening sessions around the state in 2015 to find out how heirs property was directly affecting communities, municipalities, farmers, homeowners, conservationists and nonprofits. Many of the stories reminded me of conversations held on the porches and at the kitchen tables of my childhood, but this time the stories were gathered with the audacious task of building a vehicle to deliver solutions statewide. It worked! As a result, the Georgia Heirs Property Law Center and its mission was born.

Although I came to the table with my own history and knowledge of heirs property, these listening sessions revealed that heirs property is a universal story and THE hidden story behind generational poverty, blight and land degradation throughout Georgia. Equally, I was reminded of my fellow Georgians' capacity for leadership to address property rights as a means to create generational wealth, community revitalization and conservation in Georgia's urban and rural communities.

It is with a great deal of pride that I share with you this story, which is the new narrative about how heirs property can be prevented and transformed into assets for families and their communities. Today, the Center offers a wide variety of resources, tools and programs to increase generational wealth, social and environmental justice, and community stability. Your partnership and support makes these results possible. As you read this report, I hope you are as pleased by the Center's impact as I am.



Skipper G. StipeMaas

Executive Director

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LISTENING



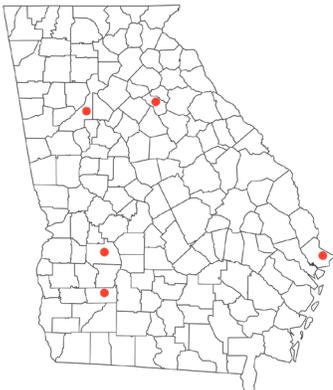
Heirs property hits Georgia's low-to-moderate income citizens the hardest. The pathway out of poverty for many of these families begins with property rights. However, heirs property focuses on two very complicated issues - land and family. With such a personal context to such a complex issue, it was vital for the Center to make a personal connection to heirs property owners, communities, municipalities and nonprofits.

“The true measure of any society can be found in how it treats its most vulnerable members”

- Mahatma Gandhi

Listening events were held throughout Georgia, including Albany, Americus-Sumter, Athens, Atlanta, Fort Valley, Dawson and Savannah.

The focus of these listening events was to understand the impact of heirs property on owners and their community and to explore opportunities for resolving and preventing heirs property. Several important takeaways from the listening events included:



Listening events were held throughout Georgia, including Albany, Americus-Sumter, Athens, Atlanta, Fort Valley, Dawson and Savannah.

- Heirs property is created every day but can be prevented through thoughtful estate planning;
- Clear title is necessary to manage and grow property as an asset;
- Legal tools are required to clean up title and prevent heirs property;
- There are many myths around heirs property that education can address; and
- Heirs property is everywhere and heirs property owners are not alone in their struggle.

These takeaways helped pave the way for the growth and development of the Center's services and outreach during the first three years.

CLIENT STORY

A family tree plays an important role in the resolution of heirs property. A Center client experienced this first-hand while untangling the title for a house her deceased father co-owned with her long-lost uncle. Her uncle moved to South America 40 plus years ago. The property had become dilapidated and the client had to frequently re-secure the house after repeated break ins. The client wanted to sell the property but did not believe it was possible because she was unable to locate her uncle. Using a skip trace database, the Center was able to quickly locate one of her uncle's children who was living in Florida. The client contacted her cousin and reached a resolution with the uncle to sell the property. The home is being renovated and is no longer blight in the community.

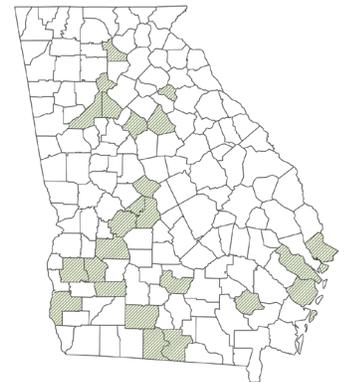
EDUCATION



Georgia Heirs Property Law Center is advancing a dialogue about heirs property in Georgia by providing resources, education and solutions to empower heirs property owners, municipalities, and nonprofits. As the prevalence of heirs property is better understood, Georgia's stakeholders are realizing the financial implications of this "locked capital" on heirs property owners, communities and the state. Tools for the remediation and prevention of heirs property are becoming an essential part of personal and community toolkits for wealth creation and revitalization.

The Center's dedication to education came to life in **53 community** outreach programs in **23 counties** in the first two years:

- 16 in the metro Atlanta area, including new homeowner classes at the Center for working families and a seminar at Ben Hill United Methodist Church; and
- 37 in Macon and rural Georgia, including the Macon-Bibb Blight Task Force, a Sapelo Island Heirs Property Workshop, a Georgia Association of Black Women Attorneys Community Law Clinic and National Community Development Week in Valdosta.



Education outreach programs were held throughout Georgia, including Atlanta, Macon, Sapelo Island and Valdosta.

In addition, the Center works closely with organizations to provide state-wide education. Examples include an Unlocking Heirs Property CLE through the Atlanta Bar Association and the Federal Reserve Bank of Atlanta's annual symposium on Heirs Property in the South: Fostering Stable Ownership to Prevent Land Loss and Abandonment.

Education Spotlights

HEIRS PROPERTY PREVENTION AND WILLS PROGRAM

The Center works systemically to prevent heirs property for future generations through education about estate planning and preparation of wills and estate plans. In May 2016, the Center, in partnership with Rebuild Macon, held an Heirs Property Prevention and Wills Clinic in Macon-Bibb County. The Center's Macon staff attorney and two volunteer lawyers produced wills for six low - and moderate - income individuals. Based on this pilot project's success, the Center implemented the Macon-Bibb Heirs Property Prevention and Wills Program for senior citizens in collaboration with the Macon office of Georgia Legal Services Program, Macon-Bibb Senior Center and UGA Extension Macon-Bibb Office. The effort consisted of a series of workshops on heirs property and estate planning held at the Macon-Bibb Senior Center followed by an Heirs Property Prevention and Wills Clinic in June 2017. At the clinic, six pro bono attorneys prepared last wills and testaments for fifteen senior citizens. Today, every Center client is offered estate planning services, and Heirs Property Prevention and Wills Clinics are being replicated statewide. The Center's work also helps educate new and inexperienced attorneys on best practices in estate planning.



EDUCATION

CLIENT STORY

A client came to the Center after learning from an Atlanta Code Enforcement officer that she was the record owner of her deceased mother's home in a Westside neighborhood. The home, which had a tax assessed value of \$7,200, was falling into disrepair and had been cited by the City of Atlanta for maintenance-related code violations. The client was informed that she had to pay for the necessary repairs or face fines. Although the client's household income was below the federal poverty line, she took steps to cure the maintenance violations and started a payment plan for past due property taxes and solid waste fees. She did not want to move into the home and did not have funds to make the larger needed improvements, so she asked the Center to help her position the property for sale. As the Center helped the client consolidate title and cure the code violations, she began receiving letters from investors with low cash offers to purchase the property. The Center strongly encouraged the client to discuss her options with at least one knowledgeable real estate professional before accepting any cash offer. Heeding the Center's advice, she listed the property with a realtor and began working with the Center on an estate plan, which included a last will and testament and advanced directive for healthcare. She told the Center that the passing of her mother showed her the need for, and importance of, proper estate planning.

The client recently sold the home for \$50,000, which was far above the cash offers she was receiving in her mailbox. She plans to invest some of the proceeds from the sale for the benefit of her own children and grandchildren. During a follow up call, the client expressed her gratitude to the Center: "The Center was wonderful - they helped me clean up the title and turn an old house into treasure."

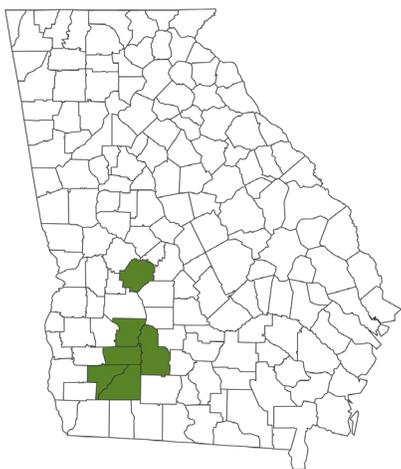
Education Spotlights, cont'd

ATLANTA CODE ENFORCEMENT

In April 2017 the Center was invited by Atlanta Code Enforcement to provide training about heirs property to Atlanta's 55 Code Enforcement officers. This education is a vital tool for addressing blight in urban areas of Georgia. Because heirs property owners cannot prove sole ownership of their houses, they are unable to leverage bank financing to make major repairs and do not qualify for many free home rehab programs. In some cases heirs property owners aren't even aware that they hold an ownership interest in a property. Code Enforcement officers must cite these homes as they fall into disrepair, but heirs property owners have their hands tied. Center staff shared our heirs property prevention and remediation strategies and the process for referrals. Within a few weeks of the presentation, Code Enforcement officers had already referred seven heirs property owners to the Center for legal assistance.



LANDOWNER ACADEMY



The Center developed the Georgia Landowner Academy for new and inexperienced rural landowners who own at least ten acres. Through this six session Academy, participants gain agricultural and natural resource management tools for sustainable land ownership, including information about business development, access to financing, and creation of an estate plan. The counties represented at the Spring 2017 (February – May 2017) Academy included Baker, Dougherty, Lee, Macon, Mitchell and Worth.

Through the Academy, participants received training on recordkeeping, managing farming and forestry operations, taxes and estate planning.

Participants also received information on heirs property and how owning heirs property can be a barrier to qualifying for programs to improve one's land.

“ The Academy has given me a better understanding of programs available for our farm, knowledge on realistic expectations and options to pass the farm down to the next generation. ”

- Lee County Participant

Participants received information on how to clear title to their property and were offered free wills prepared by one of the Center's staff attorneys.



The Center partners - Fort Valley State University, Golden Triangle Resource Conservation and Development Council, Southern Regional Extension Forestry, and the USDA's Natural Resources Conservation Service (NRCS) and Farm Service Agency (FSA) - contributed financially and programmatically to the Academy. With the financial support of NRCS, the Center and other organizers of the Georgia Landowner Academy have formed the GOLD (Georgia Outreach for Landowner Development) collaborative, which will be responsible for planning and executing future programs for landowners in rural Georgia.

“ The Georgia Heirs Property session was very helpful in preparing Wills and what needs to be considered to avoid heirs property. Being able to talk with an attorney was very helpful. ”

- Sumter County Participant



PARTNERSHIPS

The Center unlocks generational wealth and increases community stability through legal, prevention and education services surrounding heirs property in collaboration with heirs property owners, municipalities, nonprofits and other Georgia stakeholders. The Center's state-wide collaborative approach links heirs property issues and resources between rural and urban Georgia. During the last three years, these partnerships have allowed the Center to develop the most effective plan for information gathering and dissemination about the Center's programs and for connecting clients with cleared titles to economic development and financial literacy resources as well as business, estate and succession planning resources.

Georgia Outreach for Landowner Development

Outreach Education and Resources for Landowners in Georgia



Junior League of Atlanta Centennial Grant

As part of The Junior League of Atlanta's (JLA) Centennial Celebration, Atlanta Legal Aid Society, Georgia Heirs Property Law Center and Pro Bono Partnership of Atlanta received a \$380,000 grant to launch the Generational Poverty Law Project. The JLA Centennial Grants represent the opportunity for transformational change in Atlanta that will lead to a lasting and positive impact on the lives of families and children living in generational poverty.

The grant will allow the partners to expand outreach to metro-Atlanta nonprofits and collaborate to protect homes and families in the Atlanta area. In establishing the Generational Poverty Law Project, the partners hope to use their work in Atlanta to create a national model for providing holistic legal services to multi-generational families. This collaborative approach will help ensure that metro-Atlanta clients of all three organizations receive the legal help and social services support that make a significant difference.

PRO BONO VOLUNTEERS & ORGANIZATIONS



Fiscal Year 2016 - Fiscal Year 2017



Verna Smith, Esq.



Katie Barton
Diane Prucino

BEARDSLEY, P.C.
Pearson Beardsley

CALLOWAY
TITLE AND ESCROW, LLC
Amanda Calloway

PAUL
HASTINGS

Theresa Clark
Marianna Faircloth
Antoine Gary
Darcy White

EVERSHEDS
SUTHERLAND

John Flemming
David Cone
Michael Mannino
William Rothschild
Patrick Spook



Amy Dever



Nikola Djuric
Elizabeth Faist

WILLIAM H DODSON II LLC
William Dodson

JILL ELLIOTT, LLC
Jill Elliott

MARTIN
SNOW, LLP
ATTORNEYS AT LAW
Amy Fletcher

Nelson Mullins
Nelson Mullins Riley & Scarborough LLP



William Horkan
Kim Stroup



Michael Lee



Robyn Miller



Kristen Quinton
David Walker



SMITH, HAWKINS, HOLLINGSWORTH & REEVES, LLP

John Reeves



Karen Robertson



Alan Rosselot



Leslie Secret

LEECH TISHMAN
LEECH TISHMAN FUSCALDO & LAMPL

James Tarlton



Michael Wall



Clayton Walts



Martin Wilson



J. Zimmerman

THE VINCENT MCBRIDE
LAW FIRM

Shunta McBride

Bert King

Sundeep Kothari



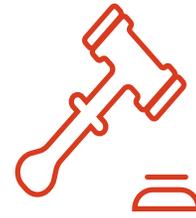
Mathew Couvillion



HALL BOOTH SMITH, P.C.
ATTORNEYS AT LAW

BY THE NUMBERS

Fiscal Year 2016 - Fiscal Year 2017



The Center provided legal representation and closed **66** matters.



The Center worked on **37** open title clearing and estate planning matters involving properties in 22 counties collectively valued at

\$3.66 million.



The Center provided consultations to an additional **27** applicants who were ultimately not engaged as clients.



The Center, solely or in collaboration with other partners, completed **53** community outreach programs in **23** counties.



The Center, in collaboration with private attorneys and pro bono title companies, reviewed titles for **82** tracts of land.



The Center worked on **12** pending title clearing matters where clients were completing family trees and/or obtaining title searches for properties.

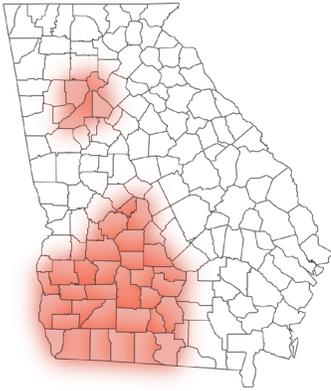


The Center's growth has continued in FY2018.

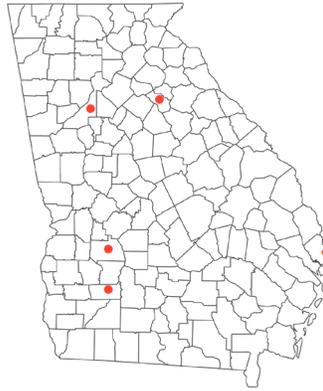
ON THE MAP

Fiscal Year 2016 - Fiscal Year 2017

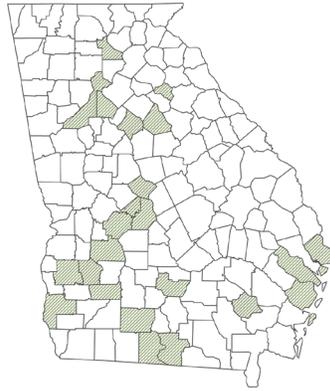
TARGET AREAS



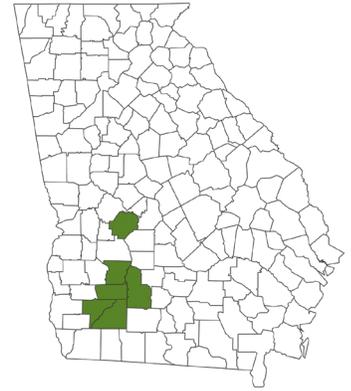
LISTENING EVENTS



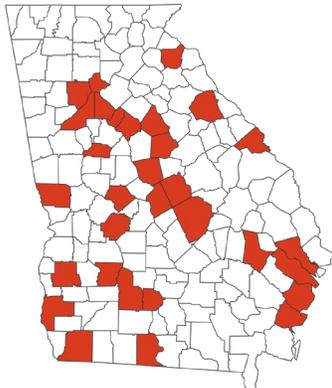
TRAINING & WORKSHOPS



LANDOWNERS ACADEMY



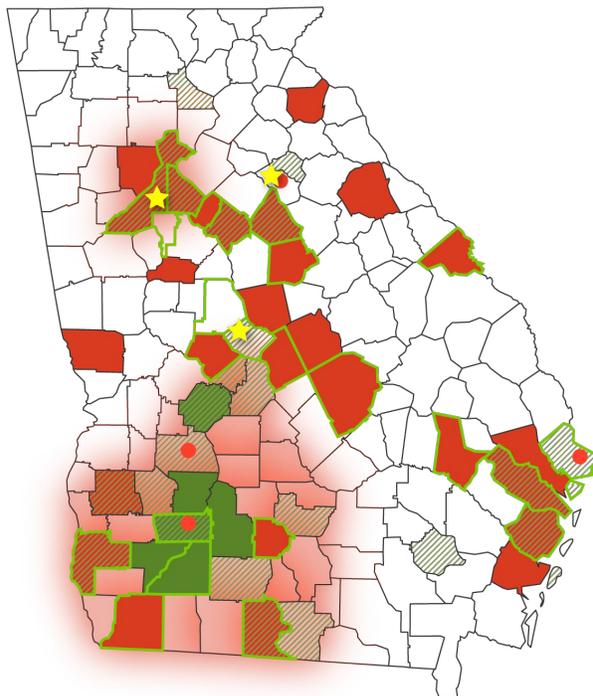
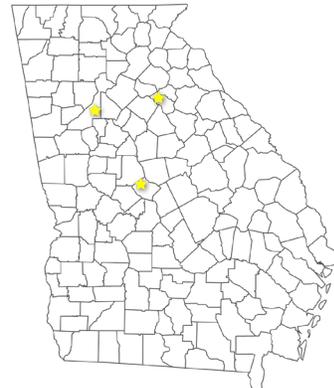
HEIRS PROPERTY LOCATIONS



CLIENTS' RESIDENCY



GHPLC OFFICES



- Target Areas
- Listening Events
- Training & Workshops
- Landowner Academy
- Heirs Property Locations
- Clients' Residency
- GHPLC Center

BOARD OF DIRECTORS



Fiscal Year 2016 - Fiscal Year 2017

as of June 30, 2017

PEARSON BEARDSLEY, ESQ.

-

Principal, Beardsley, P.C.

SCOTT M. BRYANT, ESQ.

-

Attorney, Hutchison PLLC

STACY FUNDERBURKE, ESQ.

-

Southeast Region Assistant, Regional
Counsel and Associate,
The Conservation Fund

PATRISE PERKINS-HOOKER, ESQ.

-

Fulton County Attorney, Fulton County
Attorney's Office

LESLIE FULLER SECREST, ESQ.

-

Retired Real Estate Attorney

SKIPPER G. STIPEMAAS, ESQ.

-

Executive Director, Georgia Heirs
Property Law Center, Inc.

SHARON HILL, ESQ.

-

Executive Director, Georgia Appleseed
Center for Law & Justice

HON. WILLIAM J. SELF, II

-

Anderson Walker & Reichert, LLP

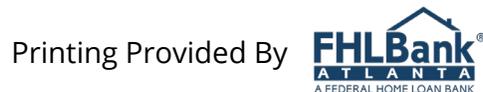
FUNDERS



2015-2016



2016-2017

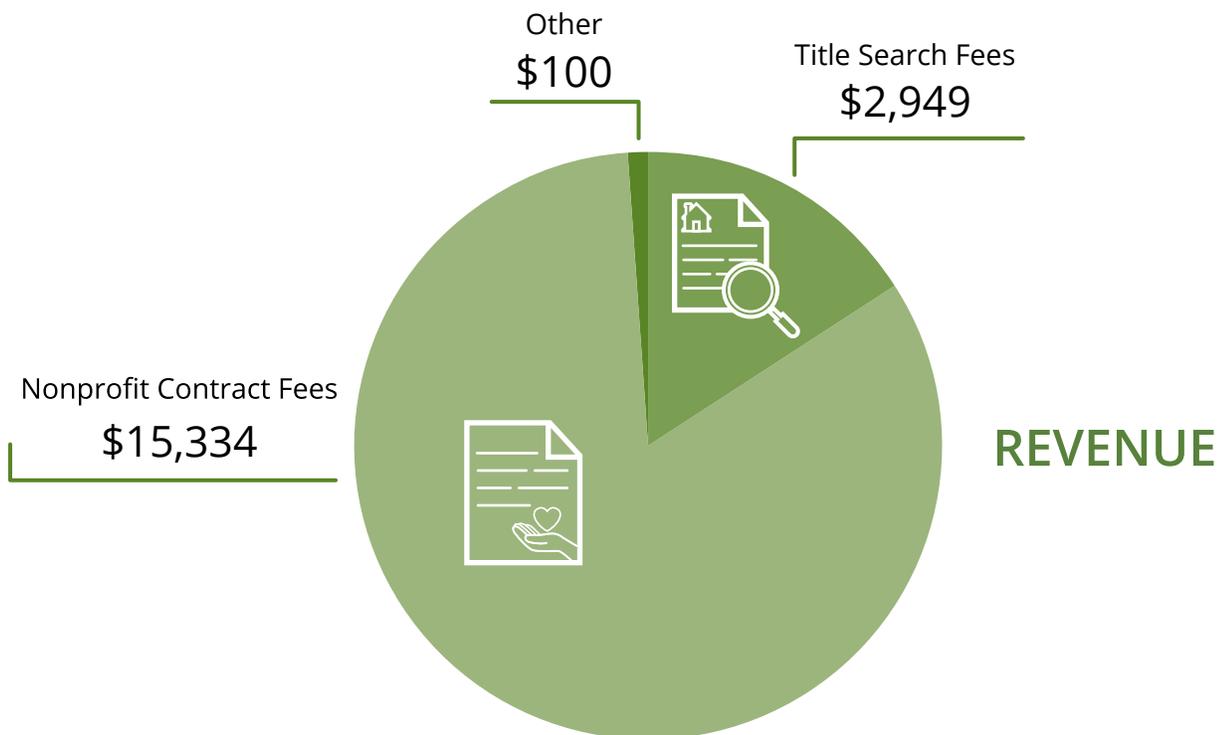
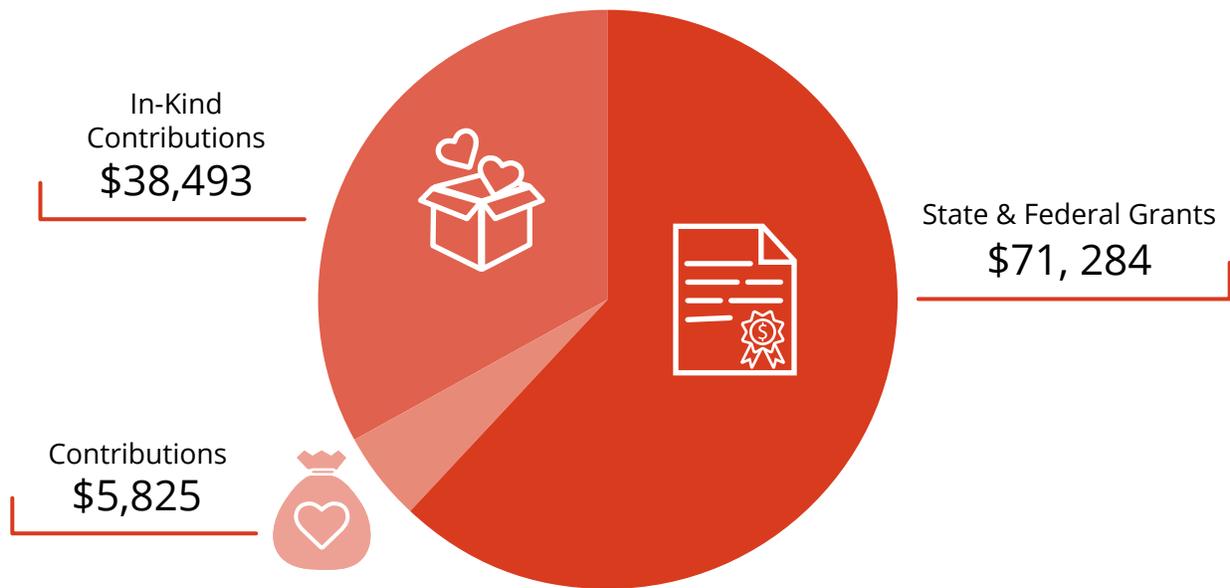


FINANCIALS

January 1, 2017 - June 30, 2017



PUBLIC SUPPORT

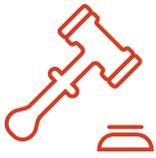




Georgia Heirs Property Law Center is a not-for-profit law firm that helps heirs property owners, nonprofits, and municipalities remediate fractured title, increase equity and transfer wealth to the next generation through title clearing, wills creation, estate planning and facilitating access to government, private sector, and nonprofit land management/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. Legal services for heirs property include title audits, title clearing and remediation of fractured titles.



LAND LOSS PREVENTION

In an effort to slow down land loss and secure property assets, Georgia Heirs Property Law Center offers legal and mediation counsel, develops estate plans, prepares last wills and testaments, and engages in financial planning.



ASSET EDUCATION

Georgia Heirs Property Law Center provides financial training and asset education on home and land ownership as a means to grow assets for the next generation. The Center also engages nonprofit and governmental partners to help clients develop land/timber management plans, create conservation easements, qualify for USDA Farm and Home programs, leverage home rehab and restoration programs, and develop working relationships with each of our partners.

WHO WE ARE



4 attorneys, 1 social worker, 2 community advocates, a network of pro bono volunteers and grassroots organizational partners



Statewide work with geographic outreach in Atlanta and Southwest Georgia



Serve low and moderate income families with properties in 31 Georgia counties with a collective value of more than \$4.87 million



Offices in Atlanta, Athens, Fitzgerald and Macon

Heirs Property is the untold 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