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Promote justice, professional excellence and respect for the law; improve public access to the judicial system; provide law-related services to the community; and serve our members.*



Professional Excellence

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**Louisville Honors
Civil Rights Pioneer
Alberta Jones with Statue**

Dedication Ceremony
Hall of Justice Plaza
Friday, May 15th at 1 p.m.

Join us on May 15th as Louisville honors civil rights icon Alberta Jones. Jones (1930-1965) was the first African American woman to pass the Kentucky bar and was Jefferson County's first female prosecutor. Her life was tragically cut short in 1965.

Thanks to the dedicated efforts of LBA member and Jefferson County Attorney Mike O'Connell, a statue honoring Jones and her impact on our community will stand in the plaza outside the Hall of Justice at 401 S. Sixth Street.



Law Day and the Responsibility We Share

Each year, May begins with Law Day—a national reminder of the role lawyers play in upholding the rule of law and serving their communities. While Law Day is observed on a single day, its message extends throughout the year. It calls on each of us to reflect on how we continue to grow as professionals and serve effectively.

For members of the Louisville Bar Association, that responsibility is both professional and practical. One of the most important ways we meet it is through continuing legal education. As we approach the end of Kentucky's CLE reporting period in June, May is an ideal time to complete requirements while engaging with timely and meaningful programming.

The LBA has an exceptional lineup of CLE programs this month across a wide range of practice areas:

We begin on May 8 with “Rapid Erosion of Humanitarian Protections under U.S. Immigration Law,” where local experts examine recent shifts in immigration policy and their real-world impact. On May 12, “Scott Peterson’s Second Act: Could New Evidence Rewrite a Notorious Conviction?” offers a deep dive into one of the country’s most well-known criminal cases and the legal issues it continues to raise.

Mid-month programming includes “Closely Held Business Transfer and Exit Strategies” on May 15, providing practical guidance for advising business clients, and a May 19 double-header featuring “What Is a Reverse Mortgage—and Why Should Attorneys Understand Them?” followed by “Keep the ‘Law’ in Lawyer: The Importance of Knowing and Following the Law,” a candid and engaging look at professional responsibility.

We also continue to explore emerging issues in technology and ethics. On May 20, “The Final Transaction: Hands-On AI Training for the Transactional Lawyer” offers practical tools for modern practice. On May 22, “ChatGPT, Siri and Alexa Are Out to Get You” provides an entertaining and insightful ethics-focused discussion on technology risks, followed later in the month by “Barely Competent = Fully Disbarred” and “The Perfect Pop Song and Attorney Ethics,” both designed to reinforce the importance of maintaining high professional standards.

Additional programming includes “My Ex Hacked Me! Stalking in Family Law Cases” on May 28, addressing emerging issues in family law, as well as ongoing opportunities to

engage through the LBA’s Diversity & Inclusion Committee and the Health & Wellness Committee meetings.

Together, these programs reflect the LBA’s commitment to providing education that is not only relevant, but practical, engaging and responsive to the evolving needs of our members. Continuing education is more than a requirement, it is part of our broader responsibility to provide competent, thoughtful and effective representation.

As always, I welcome your thoughts about LBA programming and how we can continue to support our members. And if you are looking for ways to get more involved—whether through a section, a committee or attending events—this is an excellent time to do so.

Finally, I would be remiss not to highlight an important and meaningful moment for our legal community. On **Friday, May 15, at 1 p.m.**, a dedication ceremony will be held at the Hall of Justice plaza for the new statue honoring Alberta Odell Jones. Ms. Jones broke barriers as one of the first Black women admitted to the Kentucky bar and the first woman appointed to the Louisville City Attorney’s Office, and her legacy of courage, service and commitment to justice continues to resonate today. The placement of her likeness at the center of our justice system is both a recognition of her contributions and a powerful reminder of the progress made—and the work that remains. I hope many of you will join in this occasion as we honor her enduring impact on our profession and our community.

Thank you for your continued commitment to the profession and to the Louisville community.

**Things happen and sometimes speakers need to change the dates of the seminars, so please visit the calendar on the LBA’s website, www.loubar.org, for newly added seminars and/or confirmation of dates. We hope you will join us for these exciting programs.*



Samuel W. Wardle
LBA President



“

The strength of our profession lies not just in what we know, but in how we continue to learn, engage and show up for our community.

YOU'RE INVITED



LBA Annual Reception

Honoring Summer Associates and New Admittees

The Louisville Bar Association is thrilled to host a special reception welcoming those recently admitted to the bar and all summer associates at area law firms! Join us for a fun night of snacks, drinks and plenty of networking with attorneys, judges and other legal professionals.

Admission for summer associates and newly-admitted attorneys is free; guest tickets are \$15.

Did you know that newly-admitted attorneys receive their first year of LBA membership free? Contact Marisa Motley at mmotley@loubar.org to learn more.

- Wednesday, July 15
- 5:30 - 7:00 pm
- Bar Center, 600 W. Main St., Ste. 110



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Learning to Navigate New Waters—In Life and in Probate

Judge Karen Faulkner

“Death is beautiful when seen to be a law, and not an accident. It is as common as life.”

– Henry David Thoreau

I have reached that season of life where my “adult” loved ones have come to or are nearing the end of their lives. I am not the child of the ‘80s anymore, but a working mom of growing kids who has lost both her parents in recent years. I am now swimming in those waters without them, but with my own school of fish to lead. I am also a judge and the only lawyer in my immediate family, which means that I was nominated as Executrix in three wills of late. I know many members of our local bar can relate to this phenomenon, and those who practice in areas outside of probate may feel like a fish out of water walking into Jefferson District Court, Probate Division. I promise you, you are a fish out of water; but the current District Court probate judges are working hard to make the probate division accessible for all, including the non-practicing probate lawyer and the pro se individual navigating the new waters of life and court.

All probate cases are subject to the mandatory e-filing rules dictated by the Supreme Court, which significantly changed probate in Jefferson County and required creative solutions to this new rule given our volume. Probate Court has recently reorganized its schedule so that cases with counsel

are scheduled for 1 p.m. on either Monday or Thursday, and Wednesday at 1:30 p.m. for pro se litigants. These days are for new petitions only and are scheduled by the clerk. Our partnership with the Jefferson Circuit Court Clerk allowed us to change mid-stream and remove obstructions affecting our flow. The two sitting probate judges, Judge Yvette De La Guardia and I, rotate our weekly schedule to efficiently process the river of cases. On our opposing weeks, our schedule consists of necessary hearings to push forward to finality.

On Tuesday, a new motion hour handles all motions to be addressed by the court. This is scheduled at 1 p.m. for attorneys and 2 p.m. for pro se individuals. The motion filing deadline is the preceding Thursday at noon. The goal of motion hour is to ensure that attorneys have access to the courts on a weekly basis and can have their issues resolved timely, allowing the river to move to its next destination and create a path to settlement, our metaphorical ocean. Pre-rulings are issued in advance by email, and motions that are without objection are often listed as “to be signed” where no party is required to appear unless an objection is heard. We have seen a lot of success with motion hour and are constantly working to improve this process.

Another addition to Probate Court is our Rapid Appointment Docket, commonly known as the RAD docket, held Wednesday morning at 9 a.m. And yes, if you follow the rules of this docket, we do, in fact, think you are rad. This

docket is for non-contested estates with self-proving wills, allowing for the “rapid” appointments. Attorneys will need to pick up the RAD affidavit from the clerk and will have to ensure all aspects of their case meet RAD requirements by affidavit. This allows our rad attorneys to get a quicker appointment date and quicker processing time, and bonus points for being easy. But we have a plan for our pufferfish cases—the ones that may even start beautifully easy, but blow up and produce spikes; dedicated times for those spikes to be addressed by the court in a hearing. Unfortunately, in life and in death, the seasons are not always smooth, and neither are the estates that accompany them. With the new changes in the District Court Probate Division, we have helped to provide a smoother ride to ensure the waters are not too rough.

Judge Karen Faulkner presides in Division Eight of Jefferson District Court. ■



For more information on Jefferson District Probate Division, visit:

www.jeffersondistrictcourt.com/probate-court-information/

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Challenging Delaware: Texas' Rise in Company Formations

Drew Teague



While Delaware has been the go-to for more than a century, other states are making pushes to take over as a strong state for company formations.

For more than 120 years, Delaware was the premiere state for corporate laws. Long a tax haven for business with favorable laws, its grip on serving as the go-to state for company creation is slipping. There is a new contender in the ring, and that's Texas.

Delaware's Rise

In the 1890s, New Jersey began enacting laws to let businesses just do business as they pleased. These laws allowed companies to own stock, form for any purpose and set the duration of the company. Delaware took notice. New Jersey was raising a significant amount of money from the corporate filing fees, and franchise taxes it was collecting raised enough to pay off the state debt and abolish property taxes, as detailed by *The New York Times*. Delaware, another small state, copied New Jersey, but with an important change.

Delaware enacted its General Corporation Law in 1899 (the "1899 Law"), which began its rise as the go-to state for company creation. The key difference from New Jersey? It charged lower fees.

The 1899 Law allowed anyone to form a

company within the state, so long as they paid a fee and filed the company's articles of incorporation. It also helped lower taxes for companies on their capital without requiring the company to have their headquarters in the state. At the time, New Jersey was challenging Delaware in its corporate laws, but in the 1910s, a split arose.

Delaware began to hit its stride in 1913. By 1920, New Jersey had repealed its 1890s corporate reforms, and Delaware was there to take over in the corporate space.

Why does it matter where a company is formed? Its state law governs the company's governance, and that is the state law applied by courts. Over the past century, Delaware's Court of Chancery (the "Chancery Court") has developed case law for corporate governance and per its website, it "is widely recognized as the nation's preeminent form for determination of disputes involving the internal affairs of thousands upon thousands of Delaware corporations and other business entities through which a vast amount of the world's commercial affairs is conducted." The Chancery Court has one Chancellor and six Vice Chancellors, appointed for 12-year

terms. There are no juries involved in matters before the Chancery Court.

As of January 2025, Delaware was home to more than 2,000,000 companies, including more than two-thirds of Fortune 500 companies. The state's strong tax-friendly structure and the Chancery Court's expertise has created a strong company-friendly environment.

Lenders Prefer Delaware

Given this history, the laws and the Chancery Court, Delaware is the preferred state of formation in Commercial Mortgage-Backed Securities, commonly known as CMBS, loans. Most lenders who provide CMBS loans require their borrowers to be a Delaware limited liability company, which provides certainty for the investors. Other non-CMBS lenders or balance-sheet lenders generally require it as well, but can be more flexible depending on the loan amount or if the borrower will include a Delaware limited liability company as the non-Delaware borrower's sole member, which would provide many of the same protections.

(Continued on next page)



May 2026

Diversity and Inclusion Committee Corner

May is one of the richest months on the diversity calendar - a meaningful opportunity to reflect on who we serve and how we show up.

Awareness months give us a common starting point and a shared language for equity work that matters year-round.

Questions or ideas? Contact the DEI Committee through Lisa Murray at lmurray@loubar.org

AAPI Heritage Month

AAPI Heritage Month

AAPI attorneys remain underrepresented in firm leadership and the judiciary. Amplify AAPI colleagues' work, seek out AAPI-authored legal scholarship and examine your recruitment pipeline with fresh eyes.

◆ Tip: Move from mentorship to active sponsorship — advocate for a colleague's advancement by name.

Mental Health Awareness

Mental Health Awareness Month

Attorneys face some of the highest rates of depression and anxiety of any profession. The Health & Wellness Committee encourages open, honest conversation, because wellbeing is a professional priority, not a sidebar.

◆ Tip: Name KYLAP out loud at your next team meeting — not just buried in a benefits packet.

Jewish American Heritage

Jewish American Heritage Month

Jewish American attorneys and jurists have played historic roles in civil rights, labor law and constitutional law. Recognition and calendar awareness are simple, meaningful acts of inclusion.

◆ Tip: Check for religious observance conflicts before scheduling depositions or firm events.

Military Appreciation Month

Military Appreciation Month

Veteran attorneys bring discipline and a distinct perspective to the profession. Non-traditional career paths — including military service — are credentials, not red flags on a resume.

◆ Tip: Review how your firm evaluates candidates with unconventional career timelines.

◆ THIS MONTH, TRY THIS ◆

Sponsor, not just mentor, a colleague from an underrepresented background.

Audit your calendar for religious and cultural conflicts before finalizing events.

Name KYLAP in a team meeting — leaders who talk about it change the culture around them.

Reconsider what a non-traditional career path actually signals about a candidate.

BY THE NUMBERS

5% Only 5% of U.S. attorneys identify as Asian American, though AAPI Americans make up nearly 6% of the population. Representation in law starts with intentional action.

Source: ABA Profile of the Legal Profession

Lenders, especially in the commercial real estate space, require their borrowers (or their borrower's sole members) to be an SPE, or Special Purpose Entity/Single Purpose Entity, which requires it to only engage in the business of owning and operating the property that secures their loan. An SPE also has separateness requirements, to ensure the entity is independent and to avoid having its assets be substantively consolidated with the assets of an affiliate in connection with that affiliate's bankruptcy. Delaware has ample case law on these topics, which makes the lenders more comfortable knowing the outcome should things go awry with the loan.

These requirements are often included in the borrower's operating agreement but can also be included in the loan agreement or mortgage entered into between the lender and borrower. Lenders also require various legal opinions from their borrowers including certain corporate opinions from the state of formation, opinions regarding the Delaware LLC statute, an Authority to File Voluntary Bankruptcy Petition opinion and, depending on the loan amount, a Substantive Non-Consolidation opinion, all of which concern Delaware law.

With the strong backing of case law and essentially knowing outcomes, the lenders are most comfortable having Delaware law apply for a borrower's state of formation.

"DExit" Begins

While Delaware has been the go-to for more than a century, other states are making a push to take over as a strong state for company formations.

Nevada is among the states that have tried, and some companies, including TripAdvisor and Dropbox moved their incorporations to Nevada in 2023 and 2025, respectively.

However, Texas has started to gain the most traction. Two of Elon Musk's companies, SpaceX and Tesla, have moved to from Delaware to Texas after Musk claimed the Chancery Court was unpredictable after ruling against his corporate compensation plan in 2021. Musk and others felt that the Chancery Court substituted its judgment for the business judgment of the directors/stockholders of the companies. Coinbase also moved to a Texas incorporation in 2025, per its filings with the SEC.

Texas established a rival to the Chancery Court by creating the Texas Business Court (the "Business Court") on September 1, 2024. Per the Business Court's website, it is "a statewide, specialized trial court created to resolve certain complex business disputes." The Business Court will eventually have two judges appointed to 11 divisions; however, only five of those divisions currently have judges appointed by the governor, while the other six divisions remain without judges until at least July 1, 2026.

The governor appoints judges who have some subject matter expertise, including at least 10 years' experience in the aggregate in complex civil business litigation, transactional law and/or serving as a civil judge in Texas. Such appointees are to be confirmed by the Texas Senate.

Two glaring differences between Delaware and Texas exist: (i) Delaware's judges receive 12-year terms, while Texas' judges only have two-year terms with the possibility of reappointment, and (ii) Delaware has a century more case law and precedent to help provide certainty in the corporate landscape.

The large precedent helps the Chancery Court move quickly and adjudicate things efficiently, with judges who have developed deeper expertise in that specific section of the law over their extended tenure on the court. The Business Court's limited jurisdiction will limit the number of cases heard and may help cases get to resolution quicker. But its lack of precedent and certainty on how it will rule due to the potential regular turnover of judges every two years raise issues of lack of continuity and expertise development in the limited scope of the court.

Delaware Fights Back

Delaware saw the tides begin to change, starting a push to reform their laws in order to keep companies formed in the state and encourage new companies to look to Delaware as their state of formation. This includes changes to Section 144 and 220 of the 1899 Law, which, among other things, (i) allows company boards of directors to clear conflicts with controlling stockholders or interest directors by following the procedures laid out in the law, (ii) aims to reduce litigation by shareholders and clarify directors' independence and (iii) restricts shareholder access to the company's books to "core" documents.

Will Texas Overtake Delaware?

Given the youth of the Business Court and the lack of strong settled case law on Texas' corporate laws, Texas likely has work to do to overtake Delaware as the powerhouse of entity formation. Texas continues its legislative push to establish a business-friendly atmosphere, including codifying the Business Judgment Rule. Many entities may continue to make the jump and move their entity formations to Texas. However, it may take lenders a while to see Texas as Delaware's equal, with consistent, clear case law precedent to protect them (depending on how the Business Court rules and what precedent it creates).

Drew Teague is a real estate attorney licensed in Kentucky with a national practice, representing lenders in commercial real estate financing. He is a senior associate at FBT Gibbons and vice-chair of the LBA's Corporate Law Section. ■



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A Legacy of Action: Honoring Bart Greenwald

By Julia Leist

In 2014, Kenneth Winfield, a 49-year-old man experiencing homelessness, was found on the steps of St. John Center for Homeless Men during sub-zero temperatures in Louisville. Kenneth had been homeless for years and had recently sought help finding an apartment, fearing he might not survive another winter outside. Although he applied for supportive housing, he was not deemed “vulnerable enough” to qualify for the limited resources available. Shortly after being found outside the shelter, Kenneth died.

For many, Kenneth’s story was a heartbreaking tragedy. For Bart Greenwald, it became a call to action.

When Bart read about a man his own age dying on the steps of a shelter, he refused to let the story end there. He asked a simple but profound question: *What can I do to help?* That question came to define not only his response in that moment, but also a legacy of compassion, leadership and persistence that continues to shape our community.

In the months that followed, Bart began exploring how legal services could better reach individuals experiencing homelessness before crisis turned to tragedy. Around that time, he learned about Project H.E.L.P. (Homeless Experience Legal Protection), a national model championed by Jay C. Zaney. Bart believed Louisville deserved the same kind of outreach and advocacy. Acting on that belief, he partnered with Legal Aid Society to bring the program to life locally.

By 2015, Project H.E.L.P. Louisville launched at St. John Center for Homeless Men, where volunteer attorneys began providing free, on-site civil legal assistance. In those early days, Bart personally rallied members of the legal community, ensuring the program had the support it needed to grow and endure.

What began as a single clinic has since expanded to multiple shelters, reaching thousands of individuals who might otherwise never have access to legal help. Since its founding, Project H.E.L.P. has served more than 2,500 clients and resolved over 3,500 cases. Each result reflects Bart’s belief that justice should be accessible to all.

Bart also understood that lasting change requires investment in the future. Through the

Greenwald Family Endowment Fund at the Louisville Bar Foundation, he established ongoing support for law students to work with Project H.E.L.P. This created opportunities for the next generation of advocates to carry this work forward.

His commitment extended deeply into Legal Aid’s leadership. As a member of the Board of Directors beginning in 2016, and later as chair, Bart guided the organization with steadiness, vision and generosity. During the uncertainty of the COVID-19 pandemic, he stepped forward to lead the Justice for All Campaign, inspiring others to give boldly in a time of great need. For Bart, however, success was never defined by simply meeting a fundraising goal. He believed deeply that the work demanded more. There were always more people to reach and more justice to pursue.

He challenged Legal Aid Society to think bigger about its role, not just as a legal service provider, but as an essential part of the fabric of the entire community. He often referred to Legal Aid as “the best law firm in town” and, more powerfully, as “Louisville’s law firm.” This reflected his belief that the organization belonged to, and served, everyone. Under his leadership, that vision took hold and shaped how Legal Aid understands both its mission and its responsibility to the community.

Kenneth Winfield’s story was one of loss. Because of Bart Greenwald, it also became one of purpose.

Bart ensured that Kenneth would be remembered not only for the tragedy of his death, but also for the change his story inspired. Through Project H.E.L.P., through his leadership and through his unwavering belief in equal justice, Bart transformed a moment of heartbreak into a lasting force for good.

In remembering Bart Greenwald, we honor a life defined by action, compassion and an enduring commitment to others. His legacy lives on in every client served, every volunteer inspired and every step taken toward a more just community.

Julia Leist is the Director of Development and Communications at Legal Aid Society. ■

wellbeing BINGO

LBA BINGO Challenge | May 2026

 Take a 10-minute walk	 Drink 64 oz of water	 Schedule a break on your calendar	 Bring lunch instead of takeout	 Stand and stretch for FIVE minutes
 Write down 3 things you're grateful for	 No email for 30 minutes	 Check in with a colleague	 Review your monthly subscriptions	 Get 7+ hours of sleep
 Step outside for fresh air	 Practice deep breathing for 5 min	 LOUISVILLE BAR ASSOCIATION HEALTH & WELLNESS COMMITTEE	 Update your budget or expenses	 Listen to a non-legal podcast
 Compliment a colleague	 Take a full lunch break	 Move your body for 20 minutes	 Set a boundary	 Organize your workspace
 Unplug after work for one hour	 Plan a future day off	 Do something creative	 Check your retirement contributions	 Laugh - watch or read something funny



How to participate:

- Complete a row, column or a diagonal during the month of May
- Snap a photo or screenshot of each item
- Send all five items in an email to Lisa Murray at lmurray@loubar.org



Tiles, *good company* and no objections.

The LBA Health & Wellness Committee's Mahjong Open Play brought members together for an afternoon of tiles, laughter and genuine connection. Players of all skill levels gathered around a rotating spread of gorgeous sets, including a show-stopping Kentucky Derby edition, to learn from each other, swap strategies and just breathe for a while. Refreshments were plentiful. The vibe was even better.



More open play sessions coming!



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LBA ONE-HOUR CLE

Rapid Erosion of Humanitarian Protections Under U.S. Immigration Law

Friday, May 8

The past year has brought sweeping changes to U.S. immigration policy — and the legal landscape is still shifting. In this one-hour program, two Louisville-based immigration law experts will walk us through the evolution of humanitarian protections under U.S. immigration law, the wave of Executive Orders and agency memoranda redefining enforcement priorities, and what the current state of those protections means for immigrant and refugee communities.

From prosecutorial discretion to the limits of DHS authority, participants will come away with a clearer picture of where the law stands and where it may be headed.

The discussion will include:

- A quiz and a little history
- Changes to immigration policy over the past year
- Current state of humanitarian protections, with an emphasis on refugees
- Future impacts

Speakers: **Lisa DeJaco Crutcher** and **Rebecca Sim**, Catholic Charities of Louisville

Time: Noon - 1 p.m. — Program

Place: Zoom

Price: \$45 LBA Member | \$40.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo/Small Practice Section Members and Government/Non-Profit Sector Members | \$125 Non-member

Credits: 1.0 CLE Hour — Pending

DEBRIEFING THE LAW CLE SERIES PRESENTED BY JOEL OSTER

Scott Peterson's Second Act:

Could New Evidence Rewrite a Notorious Conviction?

Tuesday, May 12

More than two decades after Laci Peterson's disappearance, the case that captivated the country is far from settled. With the Los Angeles Innocence Project now actively involved and new evidence claims emerging as recently as early 2026, Scott Peterson's conviction is under fresh scrutiny, and the legal questions it raises are as relevant as ever.

The LBA's DeBriefing the Law CLE Series kicks off with litigator, national speaker and comedian Joel Oster, Esq. leading a three-hour deep dive into the full arc of the Peterson case. From building a prosecution on purely circumstantial evidence to mid-trial jury drama and a death sentence overturned by the California Supreme Court, this program draws real-world lessons for attorneys across practice areas — criminal defense, litigation, ethics and beyond.

This is program one of 11 in the DeBriefing the Law CLE Series, presented by Joel Oster.

Speaker: **Joel Oster, Esq.**, Comedian of Law

Time: 1 - 4 p.m. — Program

Place: Zoom

Price: \$135 LBA Member | \$270 Non-member

Credits: 3.0 CLE Hours — Pending

LBA HUMAN RIGHTS LAW SECTION ONE-HOUR

Safeguard American Voter Eligibility (SAVE) Act: What It Means for Kentucky

Wednesday, May 13

The Human Rights Law Section is hosting a one-hour program featuring Jefferson County Clerk David Yates on the Safeguard American Voter Eligibility (SAVE) Act and its implications for voters and election administration in Kentucky. Additional program details are forthcoming.

Watch your email and LBA social media for updates.

Speaker: **David Yates**, Jefferson County Clerk

Time: Noon - 1 p.m. — Program

Place: Zoom

Price: \$45 LBA Member | \$40.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo/Small Practice Section Members and Government/Non-Profit Sector Members | \$125 Non-member

Credits: 1.0 CLE Hour — Pending

SOLO AND SMALL PRACTICE SECTION MONTHLY CLE SERIES RETURNS

Closely Held Business Transfer and Exit Strategies

Friday, May 15

When a business owner is ready to exit, the decisions made in the years leading up to that moment can make or break the outcome — for the owner, their family and their key stakeholders. For attorneys advising closely held businesses, understanding the legal and financial mechanics of business transfers isn't just helpful, it's essential.

The LBA Solo and Small Practice Section's monthly CLE series continues with a practical, one-hour session on exit and transfer strategies for businesses of varying sizes — from structuring buy-sell agreements to navigating inside sales. You'll also get a timely look at the implications of *Connelly v. United States* and what that ruling means for your buy-sell planning conversations going forward.

Hosted by the Solo and Small Practice Section, this program is open to all LBA members regardless of firm size or practice area.

Speaker: **Thomas D. Wyatt**, JD, CFP®, AIF, CExP, Lifetime Financial Growth

Time: Noon - 1 p.m. — Program

Place: Zoom

Price: \$45 LBA Member | \$40.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo and Small Practice Section Members and Government/Non-Profit Sector Members | \$125 Non-member

Credits: 1.0 CLE Hour — Pending

LBA TWO-HOUR CLE

What Is a Reverse Mortgage — and Why Should Attorneys Understand Them?

Tuesday, May 19

Your older clients are sitting on significant home equity. Whether you practice elder law, estate planning, real estate, family law or bankruptcy, knowing how a reverse mortgage works — and when it could help or hurt — makes you a better advocate.

This two-hour seminar breaks down the FHA Home Equity Conversion Mortgage (HECM), comparing it with traditional mortgages, HELOCs and proprietary equity products. You'll leave with a practical working knowledge of how these loans are structured, what protections exist for borrowers and heirs, and where the legal landmines are — including ethical issues around competency, coercion, POA approval and protecting vulnerable clients.

Speakers: **Jennifer Fetter Fields**, Borders & Borders and **Julia Atherton Railey** (NMLS 645994), Longbridge Financial

Time: 11 a.m. - 1 p.m. — Program

Place: Zoom

Price: \$90 LBA Member | \$81.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo/Small Practice Section Members | \$45 Government/Non-Profit Sector Members | \$185 Non-member

Credits: 2.0 (including 0.25 ethics) CLE Hours — Pending

Cancellations: Must be received by LBA at least 24 hours in advance for a refund (minus \$10 processing fee). Substitutes allowed (except special events). Technology issues: User error does not qualify for a refund for LIVE webinars. Recordings are NOT included with registration. Separate fees apply for accessing past recordings through the LBA On-Demand Catalog. Please note: Live and on-demand CLE programs have different KBA accreditation requirements.

CLE CONTINUED ON NEXT PAGE

MESA ONE-HOUR

Keep the “Law” in Lawyer: The Importance of Knowing and Following the Law

Tuesday, May 19

While lawyers are trained to advocate for others, they often find themselves at the center of the controversy when their own personal conduct crosses the line from “eccentric” to criminal. In this one-hour program, legal humorist Sean Carter examines the general categories of criminality that most frequently ensnare members of the bar. From the seemingly trivial world of petty larceny and shoplifting to the complex web of administrative fraud and government-targeted scams, this session provides a sobering look at how the ethics rules apply to a lawyer’s life outside the courtroom. Using real-world examples of “lawpsided” behavior, the program explores why the disciplinary system often imposes harsher penalties than the criminal justice system and how a single lapse in judgment, whether on a city street corner or at a grocery store self-checkout, can permanently alter a lawyer’s career.

Speaker: **Sean Carter**, MESA CLE

Time: 1 - 2 p.m. — Program

Place: Zoom

Price per hour: \$55 LBA Member | \$50 Sustaining Member | \$25 Paralegal Members | \$125 Non-member

Credits: 1.0 CLE Ethics Hour — Pending

Please note that this is a partnered CLE program. Register through MESA CLE, and attendees must follow MESA CLE’s cancellation policy.

MESA THREE-HOUR

The Final Transaction: Hands-On AI Training for the Transactional Lawyer

Wednesday, May 20

The Final Transaction is a three-hour interactive mission for transactional attorneys ready to explore strange new tech... To seek out smarter workflows and faster closings... To boldly draft where no lawyer has drafted before! Join this hands-on voyage through the galaxy of AI tools that can turbocharge your due diligence, supercharge your negotiations and draft contracts at warp speed. You’ll get practical demonstrations, real-life applications and enough tips and tricks to make even the most skeptical lawyer say, “Make it so.” Engage your inner legal tech captain and prepare for a practice-transforming experience.

Speaker: **Sean Carter**, MESA CLE

Time: 1 - 4 p.m. — Program

Place: Zoom

Price per hour: \$55 LBA Member | \$50 Sustaining Member | \$25 Paralegal Members | \$125 Non-member

Credits: 3.0 CLE Hours — Pending

Please note that this is a partnered CLE program. Register through MESA CLE, and attendees must follow MESA CLE’s cancellation policy.



Thursday, September 24

2026 Carl A. Warns, Jr. & Edwin R. Render Labor & Employment Law Institute co-sponsored with the UL Brandeis School of Law Honorable Jane B. Stranch, United States Court of Appeals for the Sixth Circuit will be the keynote speaker.

Tuesday, December 1

2026 Kentucky Commercial Real Estate Conference co-sponsored with KY Chapter CCIM

DEBRIEFING THE LAW CLE SERIES PRESENTED BY JOEL OSTER

Trials of the Centuries: Notorious Stories and Famous Figures

Friday, May 22

From the trial of Jesus to the conviction of Amanda Knox, the cases that defined history didn’t just make headlines — they shaped the law. Some exposed the dangers of mob justice. Others revealed what happens when procedures collapse under the weight of public pressure. All of them have something to teach attorneys practicing today.

The DeBriefing the Law CLE Series continues with a full-day program from Joel Oster, Esq. that takes attorneys on a journey through the most significant, precedent-setting, culturally impacting trials of the last several millennia. The day covers six cases: the trials of Jesus and Galileo and their lasting impact on procedural safeguards and academic freedom; the Lincoln Conspiracy trial and the ethics of prosecuting for public reaction; the Lindbergh baby kidnapping and what Hauptmann’s case still teaches us about trial publicity; the Sam Sheppard trials and the Supreme Court’s landmark ruling in *Sheppard v. Maxwell*; Lenny Bruce’s obscenity prosecutions and the current state of First Amendment law; and the trial of Amanda Knox, examining confirmation bias, cross-cultural justice and the dangers of forced confessions.

This is program two of 11 in the DeBriefing the Law CLE Series, presented by Joel Oster.

Speaker: **Joel Oster, Esq.**, Comedian of Law

Time: 9:50 a.m. - 4:50 p.m. — Program

Place: Zoom

Price: \$270 LBA Member | \$540 Non-member

Credits: 6.0 (including 2.0 ethics) CLE Hours — Pending

MESA ONE-HOUR

Barely Competent = Fully Disbarred: Doing the Bare Minimum Leads to Maximum Exposure

Wednesday, May 26

In a profession obsessed with prestige, it’s easy to focus on the tailored suit and the mahogany desk while neglecting the actual engine of the practice. But as many a disciplined attorney has discovered, looking the part is only half the battle—and it’s the half that doesn’t keep you from losing your license. In this hilarious yet sobering webinar, legal humorist Sean Carter explores the mathematical certainty that “barely competent” behavior eventually equals “fully disbarred” results.

Using humor, Sean deconstructs Rule 1.1 into its four essential pillars: (1) knowledge, (2) skill, (3) thoroughness, and (4) preparation. Through a rapid-fire review of real-world disciplinary files, this program serves as a critical reminder that while the state bars set the minimum standard for entry, the disciplinary boards have a very different definition of “adequate.”

Speaker: **Sean Carter**, MESA CLE

Time: 1 - 2 p.m. — Program

Place: Zoom

Price per hour: \$55 LBA Member | \$50 Sustaining Member | \$25 Paralegal Members | \$125 Non-member

Credits: 1.0 CLE Ethics Hour — Pending

Please note that this is a partnered CLE program. Register through MESA CLE, and attendees must follow MESA CLE’s cancellation policy.

LBA ONE-HOUR CLE

My Ex Hacked Me! Stalking in Family Law Cases

Thursday, May 28

Nearly every family law attorney has taken that call — a client convinced their ex hacked their phone. Reality is usually more nuanced and knowing the difference matters.

This one-hour CLE cuts through the misconceptions around technology-based stalking in family law cases. You’ll learn why most stalking stems from shared accounts and devices rather than actual hacking, explore commonly overlooked avenues of digital surveillance and how to help clients shut them down, and walk away with practical guidance on the most cost-effective ways to engage an expert witness when you need to prove stalking occurred in court.

Speaker: **Patrick Siewert**, ArcherHall

Time: Noon - 1 p.m. — Program

Place: Zoom

Price: \$45 LBA Member | \$40.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo/Small Practice Section Members and Government/Non-Profit Sector Members | \$125 Non-member

Credits: 1.0 CLE Hour — Pending

DEBRIEFING THE LAW CLE SERIES PRESENTED BY JOEL OSTER

Trials of the Centuries: From Murder to Verdict

Friday, May 29

What does it take to convict someone of murder when the evidence isn't airtight? Four of the most gripping true crime cases in recent history answer that question — and each one reveals something different about the risks, ethics and limits of the criminal justice system.

The DeBriefing the Law CLE Series continues with a full-day program from Joel Oster, Esq., examining the trial strategies, investigative challenges and ethical flashpoints behind four high-profile murder prosecutions. The day opens with Scott Peterson — a case built entirely on circumstantial evidence, still unsettled as of 2026 with the Los Angeles Innocence Project actively involved. From there, Oster turns to Aaron Hernandez, whose conviction, suicide and the subsequent legal battle over the abatement ab initio doctrine rewrote Massachusetts law. The afternoon's ethics block tackles Casey Anthony — a cautionary tale about over-prosecution, the dangers of charging without sufficient evidence and what Model Rule 3.8 demands of prosecutors. The day closes with Jodi Arias, whose 18 days on the witness stand, dueling experts and two deadlocked penalty juries raise hard questions about self-defense claims, prosecutorial conduct and the cost of televising a trial.

This is program three of 11 in the DeBriefing the Law CLE Series, presented by Joel Oster.

Speaker: **Joel Oster, Esq.**, Comedian of Law

Time: 9:50 a.m. - 4:50 p.m. — Program
Place: Zoom
Price: \$270 LBA Member | \$540 Non-member
Credits: 6.0 (including 1.5 ethics) CLE Hours — Pending

MESA TWO-HOUR

Nice Lawyers Finish First

Friday, May 29

It's been said that nice guys finish last. And while that might be true in the rough and tumble arenas of politics, professional prize fighting and marriage, nothing could be further from the truth in the practice of law. Zealous representation doesn't require us to be zealots. In fact, the most effective representation requires just the opposite. Nice lawyers finish first ... And so do their clients!

Speaker: **Sean Carter**, MESA CLE

Time: Noon - 2 p.m. — Program
Place: Zoom
Price per hour: \$55 LBA Member | \$50 Sustaining Member | \$25 Paralegal Members | \$125 Non-member
Credits: 2.0 CLE Ethics Hours — Pending

Please note that this is a partnered CLE program. Register through MESA CLE, and attendees must follow MESA CLE's cancellation policy.

DEBRIEFING THE LAW CLE SERIES PRESENTED BY JOEL OSTER

Trials of the Centuries: Landmark Cases

Friday, June 5

The DeBriefing the Law CLE Series continues with a full-day program from Joel Oster, Esq., tracing six cases that fundamentally shaped the legal landscape attorneys work in today. The day spans millennia — from Socrates charged with corrupting the youth of Athens, to Clarence Darrow's masterwork closing argument that kept Leopold and Loeb off death row, to the Scopes Monkey Trial and its lasting lessons on the ethics of litigating cases that put you on the wrong side of public opinion. After a deep dive into the OJ Simpson trial and its legacy for DNA evidence and jury dynamics. The day closes with the Darwinian Awards — a one-of-a-kind ethics hour that hands out recognition to real attorneys who made decisions so spectacularly ill-advised they made legal history for all the wrong reasons.

Two hours of ethics credit is woven throughout, covering Model Rules on trial publicity, candor, competency, conflicts of interest and lawyer as a witness — with real disciplinary cases to illustrate each point.

This is program four of 11 in the DeBriefing the Law CLE Series, presented by Joel Oster.

Speaker: **Joel Oster, Esq.**, Comedian of Law

Time: 9:50 a.m. - 4:50 p.m. — Program
Place: Zoom
Price: \$270 LBA Member | \$540 Non-member
Credits: 6.0 (including 1.5 ethics) CLE Hours — Pending

LBA ONE-HOUR CLE

2026 Annual Kentucky Legislative Update

Tuesday, June 9

The Kentucky legislature has been busy, and what happened this session will affect your clients, your practice and your bottom line. Jason Reynolds, AOC Government Affairs Liaison, is back to break it all down in this annual must-attend briefing for Kentucky attorneys.

- Get up to speed on the bills that passed and what they mean for your day-to-day practice
- Understand what failed to advance this session and what may be back on the table next year
- Learn how new legislation could shift the landscape for your clients across practice areas
- Bring your questions and get straight answers on the legislation that matters most to your practice

This is the one CLE that keeps you from being the last person in the room to know what changed. Walk away with the context and clarity you need to advise clients with confidence.

Speaker: **Jason C. Reynolds**, Governmental Affairs Liaison, Administrative Office of the Courts

Time: Noon - 1 p.m. — Program
Place: Zoom
Price: \$45 LBA Member | \$40.50 Sustaining Member | \$15 Paralegal Members and Young Lawyers Section Members | \$25 Solo/Small Practice Section Members and Government/Non-Profit Sector Members | \$125 Non-member
Credits: 1.0 CLE Hour — Pending

CO-HOSTED BY THE LBA PROBATE AND ESTATE LAW SECTION AND THE KENTUCKY SOCIETY OF CPAS

2026 Annual Estate Planning Conference

Wednesday, June 10

This full-day conference brings together attorneys and CPAs for a premier learning experience built around what practitioners actually need. Expect timely legislative and regulatory updates, emerging trends and best practices in estate planning you can put to work with clients right away.

Co-hosted by the LBA Probate and Estate Law Section and the Kentucky Society of CPAs, this is one of the year's most valuable days of continuing education for estate planning professionals. Additional program details are forthcoming — watch your email and social media for speaker announcements and agenda updates.

Time: 8 a.m. - 4:30 p.m. — Program
Place: Hybrid (online or at the KY Society of CPAs Office)
Price: \$374
Credits: Pending

NATIONAL SPEAKER

FRIDAYS 11 A.M. - NOON
VIA ZOOM 1.0 CLE ETHICS CREDIT

STUART TEICHER ETHICS SERIES

MAY 22
ChatGPT, Siri and Alexa Are Out to Get You

MAY 29
The Perfect Pop Song and Attorney Ethics

JUNE 5
Eight Reasons Movie and TV Lawyers Would Be Disciplined

See page 18 for more!



Stuart Teicher, Esq., "The CLE Performer," covers the professional responsibility issues lawyers encounter every day through topics you never expected would land in a CLE classroom.

A Conversation with CJA Panel Attorney Bill Brammell

Interviewed by Evan Nixon

The Sixth Amendment of the Constitution guarantees every person accused of a crime the right to counsel. In federal court, the Criminal Justice Act (CJA) translates that guarantee into practice, establishing a system for appointing and compensating attorneys who represent defendants unable to afford a lawyer. In the Western District of

Kentucky, that roster of private attorneys serves as a critical complement to the Federal Public Defender's Office, stepping in when the FPD has a conflict, when multiple co-defendants require separate counsel or when the volume of cases exceeds what the office can absorb.

Bill Brammell has served on the CJA Panel for close to seven years. Brammell currently serves as

the CJA Panel Representative for the Western District of Kentucky. His path to the CJA Panel began

during his clerkship with Judge Gregory F. Van Tatenhove, where he watched seasoned panel attorneys navigate the complexities of federal criminal practice. Through his observations, Brammell came to believe that the CJA Panel is not only one of the most essential forms of public service, but also invaluable practical experience for any attorney.

I sat down with Mr. Brammell to discuss the program, the work and why he believes more attorneys should consider joining the panel.

The Path to the Panel

When asked what first drew him to CJA work, Brammell pointed to his clerkship experience. "I saw lots of criminal cases and panel attorneys during my clerkship," he said, "and I was inspired by the dedication to public service and the quality of the lawyers on the panel." Beyond the call of public service, Brammell identified a practical incentive that any litigator would recognize: "There is no better way to regularly practice in federal court than by being on the CJA Panel."

The Western District assigns CJA attorneys in each of its four divisions: Louisville, Bowling Green, Owensboro and Paducah. Attorneys are typically appointed to cases within the division where they reside and practice. The panel accepts applications each March and is always looking for more qualified candidates.

The Work

Cases are randomly assigned by the clerk's office, and ap-

pointed counsel is usually in place shortly before the initial appearance. "Not only is competent representation critical at every stage of the criminal process, but you also need to begin building that relationship with the client on day one," Brammell noted. Once appointed, the work is the same as any other criminal defense case: reviewing discovery, evaluating defenses and building theories of the case.

The types of cases that come through CJA appointments span the full breadth of the federal criminal docket. "You see the full gamut," Brammell said. "A lot of drug cases, but usually with the added wrinkles of firearms or immigration complications. We've seen an uptick in immigration-related cases recently." He observed that the composition of the docket tends to shift with the priorities of the United States Attorney's Office. "If they're going after more street-level offenses, there are typically more appointments. If the emphasis shifts to white-collar cases, there are typically fewer."

Typically, a panel member should expect between four and six cases per year Brammell noted.

No Second-Class Representation

When asked how CJA work compares to retained criminal defense representation, Brammell's answer was unequivocal: "There is no difference, and there shouldn't be. All cases and defendants are entitled to competent and professional representation, regardless of their ability to pay."

(Continued on next page)



2nd Class | Applications Open May 4

Practice-ready.
Starting now.



The Louisville Bar Association's New Lawyer Academy is a six-month, cohort-based program for LBA members in their first through third year of practice. It picks up where legal education leaves off, building on the foundation law school provides and adding the practical and personal skills that shape a successful, sustainable legal career.

By bridging the gap between law school and legal practice, the Academy sets new attorneys on the path to long-term career success.

Applications Open
Monday, May 4 - Friday, May 29, 2026.
Space is limited.

Questions:
lmurray@loubar.org

Apply at
www.loubar.org

(Continued from previous page)

Building trust with clients who did not choose their own attorney requires deliberate effort. Brammell described his approach: “I explain the role of the CJA, assure them they’ll receive the same level of attention and care, and then actually deliver on that. Keeping clients regularly updated on the progress of the case goes a long way towards ensuring a healthy attorney-client relationship.”

The importance of that commitment was illustrated by one case Brammell recalled in particular. A client had been indicted for armed robbery and faced a substantial sentence. “Through diligent review of the evidence and the record, we were able to demonstrate and convince the government that not only did they not have a case, but they may have had the wrong person entirely,” he said. “They ended up dismissing the case.” Without appointed counsel willing to dig into the details and put in the hard work, the outcome could have been profoundly different.

The Challenges of the Work

The work is not without its difficulties. “Maintaining regular communication with incarcerated clients can be challenging,” Brammell acknowledged, “but local jails have become more accommodating recently.” A more persistent challenge involves managing client expectations around sentencing. “The difference between the state and federal system can be particularly jarring for clients who may have been involved in the state system but not the federal system before,” he explained. “Managing those sentencing expectations can be difficult sometimes.”

On the subject of compensation, Brammell noted that CJA rates are set at the national level and adjusted on a semi-regular basis. “There has been a major push recently by the ABA and practitioners across the country to raise the rates,” he said, “but at the end of the day this is a public service first and foremost.” When panel attorneys need additional re-

sources such as investigators, expert witnesses or mitigation specialists, they can petition the court for authorization and funding, a process Brammell described as straightforward and routine.

Training, Mentorship and Professional Growth

The Western District invests in the development of its panel attorneys. There are semi-annual training sessions and panel members are invited to participate in trainings offered by the Eastern District as well. Panel attorneys can also attend national trainings and conferences at discounted rates, as well as enjoy discounted membership rates to national criminal defense attorney organizations.

Perhaps most notably, the CJA Mentorship Program has been a welcome development. Brammell described the program as a pipeline for developing the next generation of panel members. “The Mentorship Program lets less experienced attorneys work cases with experienced panel members, with the goal and expectation that they’ll then be eligible to become full panel members themselves.” He added that the collegial culture extends beyond the formal program: “Panel members are always willing to provide help and insight on cases.”

Serving on the panel has also shaped Brammell’s broader perspective as a lawyer. “Exposure to different people from different backgrounds who have been failed by the system and social safety nets has given me new insights and perspectives into my work as both a criminal and civil attorney,” he reflected. That experience has also given new meaning to his work on the Board of the Home of the Innocents, reinforcing the connection between courtroom advocacy and the wider community.

A Call to the Bar

For attorneys considering the CJA panel, Brammell’s message was direct: “You don’t need extensive federal criminal

experience to get involved. There is support available to assist people who want to be involved and make a difference. We always need more qualified attorneys. The right attitude is more important.”

Asked whether the panel offers a good opportunity for younger lawyers in particular, Brammell broadened the point. “There’s no better way for any lawyer, not just young lawyers, to get experience in federal court.”

If there is one thing Brammell would change about the CJA program, it would be the level of public awareness surrounding the enterprise. “Public criminal defense needs to be properly and consistently funded in order to preserve the integrity of the criminal justice system for all people,” he said. For lawyers prepared to serve that mission, the CJA Panel remains the place to begin.

For more information about the CJA program, the Mentorship Program or panel eligibility requirements, visit www.kywd.uscourts.gov/cja, contact the CJA Panel Committee at CJA_Committee@kywd.uscourts.gov or reach out to any panel member (including Bill Brammell, bill@wickerbrammell.com).

Bill Brammell defends individuals and entities who have been accused of violating the law, public servants who have been sued while doing their job and businesses who need his help. Beyond that, Bill has experience litigating an array of other matters — from personal injury and whistleblower lawsuits, to voting rights and campaign finance challenges.

Evan Nixon represents individuals, public officials and businesses in a wide range of legal matters, with focuses on constitutional challenges and federal criminal defense. His practice also spans voting rights, commercial litigation and administrative appeals. ■



KENTUCKY LAWYER REFERRAL SERVICE



KLRS WELCOMES NEW MEMBERS TO THE SERVICE.

Edward (Ted) Bartenstein, Bartenstein Law
Panels: Real Estate, Wills and Estates

Louis Senn, Rupp & Senn, PLLC
Panels: Domestic, Tort Law, Real Estate Law

Joshua Bolus, Bradford Law PLLC
Panels: Appellate, Wills and Estates

Brenton Stanley, Stanley Law PLLC
Panels: Tort Law, Product Liability

Michael Ryan, Ryan Injury Law LLC
Panels: State Workers' Compensation

Don't Miss Another Client!
Join the Kentucky Lawyer Referral Service Today

In the first quarter of 2026, KLRS has been forced to turn away more than 400 callers because we had too few attorneys available on certain panels to accept their cases.

Don't miss another potential client – help us make sure everyone gets a fair chance to pursue their claims!

PANELS MOST NEEDED:

Auto Consumer Law/Lemon Law
Guardianship/Conservatorship

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(502) 583-5314

MEETING ANNOUNCEMENTS

LBA Committee Meetings

Diversity and Inclusion Committee
Wed., May 13 | 4 p.m. via Zoom

Health and Wellness Committee
Thurs., May 21 | Noon via Zoom

If you are interested in joining any of these committees, please contact Lisa Murray, lmurray@loubar.org. ■

Women Lawyers Association

On May 14th, the Women Lawyers Association will host its Twilight Thursday at Churchill Downs! New and renewing members will receive a gift at this evening at the races. Bring your paralegal, a law student or your favorite track companion. Tickets are \$19, and gates open at 5 pm. Reserve your spot at wlajeffco.com. ■

Association of Legal Administrators

The monthly chapter meeting of the Kentucky Association of Legal Administrators will be held in person on Thursday, May 14, beginning at 11:45 am at FBT Gibbons LLP (400 W. Market St., Ste. 3200, Louisville, KY 40202.) Please RSVP by registering online at www.ky-ala.org. Any questions, please contact the Kentucky ALA Board at board@ky-ala.org. ■

MEMBERS *on the move*



Browning



Coleman



Marcus



O'Connell

Lawdragon has named Stites & Harbison attorney **Carol Dan Browning** to the 2026 Lawdragon 500 Leading Litigators in America. She is one of only two Kentucky attorneys honored in 2026. Browning is a Member (Partner) based in the firm's Louisville office. She is chair of the Pharmaceuticals & Medical Device Litigation Group and co-chair of the Torts & Insurance Practice Group. She is an accomplished trial attorney who has tried more than 35 cases to jury verdict in multiple jurisdictions. Browning's practice includes drug and medical device litigation, products liability and medical malpractice defense. She serves as national or state counsel for multiple drug, medical device and product manufacturers and is involved in multi-district litigation pending in various federal district courts and in coordinated litigation pending in state courts throughout Kentucky.

Vaughn Petitt Legal Group is pleased to announce the addition of **Kevin J. Coleman** as an associate attorney. Coleman studied law at the University of Louisville Brandeis School of Law. After graduating law school in 2014, Coleman started his legal career at the Louisville Metro Public Defender's Office and worked there for over seven years in the adult trial and capital trial divisions. After leaving the public defender's office in 2022, Coleman started his own law firm and was a solo practitioner for close to four years. Coleman has defended thousands of criminal cases at all levels of court in Kentucky, from traffic cases to death penalty cases, and has tried numerous cases to verdict. He is particularly skilled in the implementation of legal technology that enhances operational efficiency.

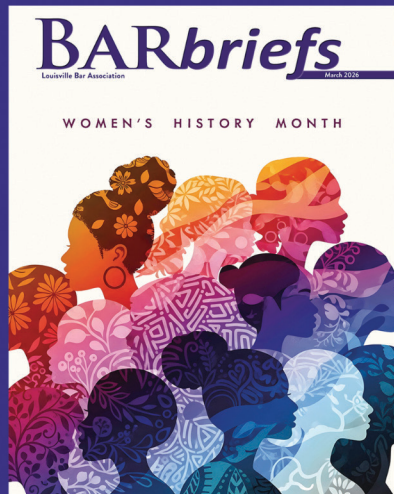
Dentons has named **Aaron Marcus** as managing partner of the firm's Louisville office, effective April

1. As managing partner, Marcus said he's looking to implement three main goals: helping lawyers continue to provide the best client service, acquiring talent and building relationships with the Louisville community. Marcus grew up in northwest Indiana before attending Howard University in Washington, D.C. His first career out of college was working as a consultant for a U.S. defense contracting firm based in Virginia. He said he later moved to Kentucky to work for the U.S. Army Human Resources Command in Fort Knox. Marcus currently sits on the boards for Fund for the Arts, Legal Aid Society and St. George's Scholar Institute. In 2022, he was named as a Louisville Business First 40 Under 40 honoree.

The House of Representatives of the Commonwealth of Kentucky recognized **Mike O'Connell** with a Citation of Appreciation during the 2026 Regular Session of the Kentucky General Assembly in celebration of "his retirement from the field of law, following more than 50 years of meritorious service as a skilled attorney." O'Connell received his J.D. from Notre Dame and began his career as an Assistant Jefferson County Attorney before becoming a Jefferson District Judge in 1980. He moved to Jefferson Circuit Court for three years before entering private practice as a partner in the firm Parker & O'Connell. In 2008, O'Connell was appointed to serve as Jefferson County Attorney and would go on to become the longest-serving Jefferson County Attorney in history as of August 2024. Over the course of his tenure as County Attorney, O'Connell's noteworthy achievements have been vast and in 2025 he received the Louisville Bar Association's highest honor, the Justice Martin E. Johnstone Special Recognition Award. ■

What have you been up to lately?

Did you know that Members on the Move announcements are a member perk and free of charge? Let us know what you've been up to! Send announcements to [Kim Kasey, kkasey@loubar.org](mailto:kkasey@loubar.org).



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IN MEMORIAM



Bart L. Greenwald passed away on Friday, March 27, at the age of 60.

Bart graduated, *cum laude*, from the UofL Brandeis School of Law in 1994 and was later honored by his alma mater as the 2020 Louis D. Brandeis School of Law Fellow. He often stated: "Not everyone should be a lawyer, but everyone should go to law school. It teaches you how to think."

He began his legal career at Frost Brown Todd, LLC, and practiced there for 21 years, becoming well-known for his expertise in commercial litigation. He left the firm in 2015 to become a founding partner at Duncan Galloway Greenwald, PLLC, where he remained for the next decade. His litigation expertise and talent for legal counsel were a natural foundation for advising clients in arbitration and mediation.

Bart was best known across Louisville for his commitment to community service. He began his civic efforts during his time at UofL by serving as a Court Appointed Special Advocates volunteer and was honored for his work by receiving the 1994 Humanitarian Award from the Women's Lawyers Association of Jefferson County. He served on the regional CASA Board of Directors for 10 years and as its president from 2002 to 2003, and committed time and service on the boards of countless other organizations.

Though he enjoyed his years practicing law, Bart saw his greatest professional accomplishment as the establishment of the Homeless Experience Legal Protection program through Louisville's Legal Aid Society. Bart worked alongside Legal Aid to establish a program offering free, on-site legal assistance to indigent and low-income clients. He also served on Legal Aid's Board of Directors. Bart's desire to mentor the next generation of legal minds was reflected in his establishment of the Greenwald Family Internship Endowment at the Louisville Bar Association, which he and his brother, Brent, founded to provide a scholarship for UofL law students to work at Legal Aid.

To read Bart's full obituary, visit <https://www.pearsonfuneralhome.com/obituaries/Bart-Greenwald?obId=47945999>.



The Louisville Bar Association would like to welcome our new and returning members.

KNOW SOMEONE INTERESTED IN JOINING?

Contact our Chief Outreach Officer, Marisa Motley, at mmotley@loubar.org for information!

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FREE FOR LBA MEMBERS

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Three one-hour ethics CLE programs. One national speaker with a talent for making the rules stick. Stuart Teicher, Esq. — “The CLE Performer” — covers the professional responsibility issues lawyers encounter every day, through topics you never expected would land in a CLE classroom.

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PART 1 OF 3

CHATGPT, SIRI AND ALEXA ARE OUT TO GET YOU

Stuart Teicher doesn't call them “virtual assistants.” He calls them “virtual career killers.” Join Teicher as he examines the real professional responsibility issues surrounding generative AI, voice-activated devices and related technologies — and gives you the practical knowledge to use these tools wisely and stay on the right side of the rules.

Rules 1.1 (Competence), 5.3 (Supervision of Nonlawyers) and 1.6 (Confidentiality)

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PART 2 OF 3

THE PERFECT POP SONG AND ATTORNEY ETHICS

The internet has declared three songs flawless. Teicher is going to reveal them — and make the case that the same elements that make a pop song perfect are the ones that make a lawyer exceptional. Competence, candor and clarity matter as much in the courtroom as they do on the radio.

Topics Include

- Strong client communication builds trust in the representation (Rule 1.4)
- Tailoring advice to the particular circumstances of each client (Rule 2.1)
- Strategic planning and structuring cases to best serve your client (Rule 1.1)
- How deviating from the ethical framework can lead to conflicts and improper conduct (Rules 1.7 and 8.4)

FRIDAY, JUNE 5 | 1.0 ETHICS CLE | VIA ZOOM

PART 3 OF 3

EIGHT REASONS MOVIE & TV LAWYERS WOULD BE DISCIPLINED

Attorneys in film break the rules constantly. The public may not notice — but you will. Join Teicher as he walks through eight ethics violations committed by lawyers in movies and on television, from the sometimes obvious to the surprisingly subtle.

Topics Include

- What counts as conduct prejudicial to the administration of justice (Rule 8.4(d))
- How fictional lawyers routinely disrupt tribunals in ways that would draw real sanctions (Rule 3.4(d))
- The obligation to report a colleague when you witness a violation (Rule 8.3(a))

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Wellbeing *Special Section*

Content courtesy of Lisa Murray, LBA Professional Development & Leadership Director, and staff liaison to the Health & Wellness Committee.

MAY IS

MENTAL
HEALTH

AWARENESS
MONTH

Wellbeing *Special Section*

Know What You're Feeling — It Might Be Your Most Underused Professional Skill

May is Mental Health Awareness Month and this year the LBA Health & Wellness Committee is turning attention to something that rarely comes up in legal circles: emotional awareness. Not emotional expression — just awareness. The ability to recognize what you're feeling, name it and understand what it might be signaling.

For people who spend their days managing other people's crises, arguing under deadline pressure and carrying the weight of high-stakes work, that's harder than it sounds. Suppressing or ignoring emotions doesn't make them disappear — it makes them surface elsewhere, often as burnout, physical symptoms or friction with colleagues and clients. Emotional awareness is a learnable skill. Here are six ways to start practicing it this month.

1. **Name it to tame it.** Before your next stressful call or difficult meeting, take 30 seconds to identify what you're *actually* feeling. Stressed? Frustrated? Anxious about a specific outcome? Simply labeling an emotion reduces its intensity and gives you room to respond deliberately rather than react on instinct.
2. **Notice where stress lives in your body.** Legal work is cognitively demanding and it's easy to lose touch with physical cues. Tight shoulders, a clenched jaw, shallow breathing — these are your nervous system's early warning signals. Catching them before they escalate gives you more options for how to respond.
3. **Keep a brief end-of-day log.** It doesn't need to be a journal. A few words about what triggered a strong reaction, what the emotion was and what you did with it can help you spot patterns over time. Knowing your triggers puts you ahead of them.
4. **Pause before you reply.** Whether it's a tense email from opposing counsel or a frustrated client, the space between stimulus and response is where emotional awareness does its work. Even a 60-second pause — or drafting a reply and sitting on it before you send — can change the entire tone of an exchange.
5. **Reframe "negative" emotions as information.** Feeling angry after a meeting doesn't mean you've lost your professionalism — it might mean a boundary was crossed worth addressing. Feeling anxious about a case doesn't mean you're not competent — it might mean you need more preparation or support. Emotions are data. Use them.
6. **Check in with yourself the way you check in with clients.** Lawyers are trained to ask probing questions and listen carefully — to everyone but themselves. Once or twice a day, ask yourself the same question you might ask a client in distress: How are you *actually* doing? And mean it. ■

FIVE THINGS TO DO IN THE FIRST TEN MINUTES OF YOUR DAY THAT AREN'T EMAIL

Pick one. Try it for a week. The inbox will still be there.

Most people in legal work start the day by opening their inbox. Ten intentional minutes before that happens can change how the whole day feels.

1 Sit still for two minutes before you touch anything.

No phone, no screen, no podcast. Just quiet. It sounds almost insultingly simple. It works.



2 Write down three things you actually need to accomplish today.

Not your full task list. Three things. Deciding what matters before other people start deciding for you is one of the most useful habits in a high-demand job.



3 Move your body.

A short walk, five minutes of stretching, a quick trip up the stairs. Morning movement activates the nervous system in a way that caffeine alone doesn't replicate.



4 Read something that has nothing to do with law.

A few pages, a long-form piece, a poem. The point isn't the content. It's the act of directing your own attention before the day takes it from you.



5 Check in with yourself before you check in on everything else.

Ask: How am I actually going into today? Tired? Carrying something? A 30-second honest answer gives you a chance to adjust before you're already in the thick of it.



*The inbox will still be there in 10 minutes.
Your footing for the day is harder to recover once you've lost it.*

The Billable Hour and the Burned-Out Brain

The legal profession has a mental health problem it has been slow to name. According to the American Bar Association, lawyers experience depression at rates nearly four times higher than the general employed population. Anxiety, substance use and suicide are all elevated in the profession. And at the center of much of it sits a deceptively simple concept: the billable hour.

The structure itself isn't the villain. Billing time is a practical way to measure and price legal work. The problem is what happens to the person doing the billing, particularly when the metric of a good day becomes hours produced rather than work done well, clients served or problems solved.

Time pressure is one of the most reliable predictors of burnout. When work expands to fill every recoverable hour, the nervous system never fully disengages. Recovery — genuine cognitive and emotional recovery — requires periods of low demand. Without them, the brain doesn't restore. It degrades. Decision-making suffers. Attention narrows. Irritability rises. The skills that make a lawyer effective erode quietly, often long before anyone notices or says anything.

There's a second layer that gets less attention: the relationship between billable hour pressure and help-seeking behavior. Attorneys who are struggling often don't reach out because stepping back, for therapy, a medical appointment or a mental health day, feels like it costs something measurable. Every hour not billed is visible on paper. Every hour spent on well-being is not. That asymmetry shapes behavior in ways that accumulate over time.

The billable hour isn't going away. But the assumptions underneath it is worth examining.

A few reframes worth trying:

1. **Treat recovery time as non-negotiable.** Lunch away from your desk, a walk between calls, a hard stop at a reasonable hour, these aren't indulgences. They're the maintenance that keeps the work sustainable.
2. **Separate your worth from your output.** A slow billing month doesn't mean you're failing. Difficult cases, demanding clients, compounding pressure — all of these affect pace. Hours are a measurement, not a verdict.
3. **Talk about it.** Billing pressure is one of the most universal stressors in private practice and it is almost never discussed openly. Finding even one trusted colleague you can be honest with changes the experience of carrying it. Or join the LBA's Health & Wellness Committee for a safe space to talk about this and other issues affecting attorneys.
4. **Know what help looks like.** The Kentucky Lawyer Assistance Program (KYLAP) provides free, confidential support to Kentucky lawyers and law students dealing with stress, burnout, mental health concerns and substance use. Reach them at kylap.org or (502) 226-9373. ■



Legal Support Staff Are Not Okay Either

When the legal profession talks about mental health — and it is finally starting to, more seriously than before — the conversation almost always centers around attorneys. That’s understandable. Lawyers face high-pressure work, significant ethical obligations and a professional culture that has historically treated struggle as a character flaw.

But it leaves out the people sitting in the same offices, answering the same calls and working on the same difficult case files: paralegals, legal assistants, receptionists, billing staff, investigators and office administrators. The people who keep law practices running.

Legal support staff absorb an enormous amount. They hear the distressed clients. They manage scheduling around crises. They read the documents, organize the files and prepare the materials in cases involving violence, abuse, financial devastation and loss. They do this work, often without the professional training, peer networks or compensation that attorneys receive, and they come back and do it again the next day.

Repeated exposure to traumatic content is a recognized occupational hazard with a name: secondary traumatic stress. It doesn’t require direct involvement in a traumatic event to take hold. Exposure through documentation, client contact or case material is enough. The symptoms look a lot like primary trauma: intrusive thoughts, emotional numbness, difficulty sleeping, cynicism and a growing sense of dread going into work.

The legal profession hasn’t built many structures to address this in support staff. There are no mandatory well-being requirements for paralegals. Many staff members don’t know whether they have access to EAP resources, or where to find them. And because well-being conversations in many legal workplaces still default to attorneys, staff often don’t feel permission to name what’s happening.

That needs to change. And it can start with small, concrete things.



If you’re in a leadership or supervisory role:

- Check in with your staff — not about deadlines, about them. A two-minute conversation that isn’t about work output signals that they’re seen as people, not functions.
- Make sure support staff know what mental health resources they can access. EAP programs and community mental health resources should be easy to find, not buried in an onboarding packet from three years ago. The LBA offers an Employee Assistance Program (EAP) for your firm through The Wayne Corporation. The EAP provides confidential support services, including counseling and resources, to help members manage personal and work-related challenges effectively. Visit <https://www.loubar.org/member-benefits/> to learn more.
- Watch for the quiet signs. Disengagement, increased errors, a shortened fuse, frequent illness, difficulty making decisions. These can all indicate someone running on empty. Address it early and directly.

If you’re a member of legal support staff:

- What you carry at work is real. The fact that it doesn’t come with a bar number doesn’t make it lighter.
- You are allowed to use whatever mental health resources your employer provides. You are allowed to name when something is hard. And you are allowed to draw a line on what you take home with you — mentally and physically — at the end of the day. ■

MENTAL HEALTH RESOURCES

Support for you, your colleagues and your clients.

NEED HELP NOW?

 **Call or text 988**
Suicide and Crisis Lifeline (24/7, free, confidential)

 **Text HOME to 741741**
Crisis Text Line (24/7 support)

LOUISVILLE & KENTUCKY

Seven Counties Services

24/7 Crisis Support
502-589-4113 (Adult)
502-589-8070 (Child)

Wellspring Crisis Stabilization

Short-term residential care
502-584-2870

FindHelpNowKY.org & Dial 211

Community resources and referrals

Louisville Metro Crisis & Deflection

Call 911 and request “deflection”
Non-emergency: 502-574-7111 (option 5)

University of Louisville Hospital

Emergency psychiatry
502-562-3100

University of Louisville Hospital

Emergency psychiatry
502-562-3100

FOR THE LEGAL COMMUNITY

Kentucky Lawyer Assistance Program (KYLAP)

502-564-3795 | kylap.org

ABA Commission on Lawyer Assistance

www.americanbar.org/groups/lawyer_assistance

Wayne Corp Employee Assistance Program

info@waynecorp.com | 502-451-8262 | www.waynecorp.com

NATIONAL RESOURCES

NAMI Helpline

800-950-6264 | Text NAMI to 741741

SAMHSA National Helpline

800-662-HELP (4357) | Text your zip code to 435748

SPECIALIZED SUPPORT

The Trevor Project (LGBTQ+)

866-488-7386 | Text START to 678678

RAINN (Sexual Assault)

800-656-HOPE (4679) | www.rainn.org

Human Trafficking Hotline

800-373-7888 | Text HELP to 233733

WHEN TO REACH OUT

- ✓ Feeling overwhelmed, anxious or burned out.
- ✓ Struggling with substance use.
- ✓ Supporting a colleague or client in crisis.
- ✓ Not in crisis, but need to talk.



*Reaching out is a strong first step.
Support is available –
confidential, professional and
ready when you are.*

Wellbeing *Special Section*

Compassion Fatigue Is Real and Here's How to Recognize It

Lawyers and legal professionals who work closely with people in crisis — for example, in family law, criminal defense, immigration, public interest work and victim advocacy — give something of themselves in every client interaction. That's not weakness. It's what makes them good at what they do. But it has a cost, and that cost has a name: compassion fatigue.

Compassion fatigue is the gradual erosion of empathy and emotional capacity that comes from sustained exposure to others' suffering. It's different from burnout, which stems primarily from workload and exhaustion. Compassion fatigue is specifically about the toll of caring, and it shows up in ways that are easy to dismiss or misread. Here's what to watch for.

1

You feel emotionally flat where you once felt engaged.

Cases or clients that once felt meaningful now feel like tasks to move through. You're not detached because you stopped caring. You're detached because you've been caring without replenishment.

2

You dread client contact. Not the difficult cases. All of them.

If picking up the phone or walking into a client meeting feels like bracing for impact, that's worth paying attention to.

3

You bring it home.

Intrusive thoughts about cases, difficulty being present with family, trouble sleeping because your mind won't leave work. These are signals your nervous system is saturated.

4

Your empathy has a short fuse.

Compassion fatigue often shows up as irritability, not sadness. If you're snapping at people or feeling quietly contemptuous of clients you would normally feel for, that's the fatigue talking.

5

You've stopped talking about your work, even when it would help.

Isolation is both a symptom and an accelerant. If you've stopped debriefing with trusted colleagues because it all feels like too much, that's precisely the moment to push back against the instinct to go quiet.

The Five-Minute Reset

Six quick recharge moves for a demanding profession.

01

Step outside.

Trade fluorescent lights for five minutes of daylight. Even a walk to the parking lot counts as a real reset.

02

Box breathe.

Inhale 4 counts. Hold 4. Exhale 4. Hold 4. Two rounds can shift your nervous system out of stress mode.

03

Hydrate and rest your eyes.

Fill your water bottle. Look 20 feet away for 20 seconds. Small habits, but they add up by end of day.

04

Desk stretch.

Roll your shoulders back. Stretch your neck side to side. Stand up and reach overhead. Your body keeps score.

05

Brain dump.

Write down the three things weighing on you most right now. Getting it on paper gets it out of your head.

06

Connect.

Say something genuine to a colleague, not work-related. Human connection is often the fastest antidote to stress.

Passionate about attorney wellbeing? The LBA Health & Wellness Committee welcomes new members.

Contact Lisa M. Murray at lmurray@loubar.org to get involved.