

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND



50th Annual Report

July 1, 2024 through June 30, 2025

Our Mission

The Attorney Grievance Commission of Maryland is dedicated to protecting the public and maintaining the integrity of the legal profession. The Commission, through the Office of Bar Counsel, seeks to encourage and promote the ethical practice of law and the highest standards of professionalism by members of the Bar. In carrying out their functions of evaluating complaints and enforcing ethical standards for lawyers, the Commission and Bar Counsel strive for fairness and equity.

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50th Annual Report (Fiscal Year 2025)
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At the conclusion of fiscal year 2024, Linda H. Lamone, Esquire retired as both member and Chair of the Attorney Grievance Commission. Ms. Lamone was first appointed to the Commission in 1995 by the Supreme Court of Maryland. She was subsequently appointed Vice Chair of the Commission in 2001 and then Chair of the Commission in 2009. The Commission recognizes Ms. Lamone's almost 30 years of dedication, professionalism, and outstanding service, as well as her many contributions to the organization.

On June 3, 2024, the Supreme Court of Maryland appointed Dolores O. Ridgell, Esquire as both member and Chair of the Commission, effective July 1, 2024, to fill the vacancy left by Ms. Lamone's retirement. On January 29, 2025, the Supreme Court of Maryland appointed Peter Cotter, Esquire to fill the position vacated by Philip T. Cronan, Esquire after his appointment to the Talbot County Circuit Court.

There were several personnel changes in the Office of Bar Counsel during fiscal year 2025. Law Clerk Paulette N. Fogle departed the office. The Office of Bar Counsel welcomed Assistant Bar Counsels W. Hunter Daley, Aline Montes, and Kyle O'Grady.

The number of active attorneys in Maryland increased slightly from 43,074 to 43,273. This year, the Office of Bar Counsel opened 1,760 files, up from 1,696 in fiscal year 2024. Bar Counsel docketed 210 matters for further investigation. Cases docketed for investigation included complaints received, reinstatement petitions, and attorney trust account overdraft notifications.

The number of sanctioned attorneys, 40, increased from FY 2024 when 37 received sanctions. The number of sanctioned attorneys is significantly lower than the ten-year average for all sanctions: approximately 69 per year. Disbarments, numbering 12, were lower than the ten-year average of 21, while suspensions, 15, were lower than the ten-year average of 22. Reprimands, 13, were also lower than the ten-year average of 26.

The largest percentage of complaints docketed involves attorneys located in Prince George's County (19%). Prince George's County is followed by out of state attorneys (17%), Montgomery County (15%), Baltimore City (15%), and Baltimore County (12%). The practice area at issue with the most docketed complaints was family law (12%). Eleven percent of complaints were docketed to investigate attorney trust account issues. The largest category of conduct complained about included some combination of competence, diligence, and communication failures, representing 29% of all docketed complaints, followed by issues involving safekeeping of property (17%).

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
DISCIPLINARY SUMMARIES
Fiscal Year 2025

ANDERS, Joel William – Commission Reprimand on August 30, 2024, for failing to safekeep funds in an attorney trust account and disbursing funds from an attorney trust account when the disbursement created a negative balance with respect to an individual client matter or all client matters in the aggregate. The Respondent failed to deposit his client’s unearned retainer payments into an attorney trust account and failed to maintain the required trust account ledgers and monthly reconciliations.

BAUM, Matthew Adam – Temporary Suspension on February 21, 2025, effective immediately, pending further Order from the Supreme Court of Maryland.

COCHRAN, Gill Andrew – Commission Reprimand on January 17, 2025, for failing to abide by the scope of the representation, failing to represent his client diligently, failing to adequately communicate with his client, failing to take steps to protect his client’s interest upon termination of the representation, and engaging in conduct that is prejudicial to the administration of justice. The Respondent was retained to represent a client in a criminal matter and failed to appropriately withdraw from the case. After the client terminated the representation and hired new counsel, the Respondent accepted the State’s plea offer in the case without communicating with the client.

COHEN, Nancy Ann – Commission Reprimand on June 30, 2025, for failing to represent her client diligently, failing to adequately communicate with her client, and failing to reasonably expedite litigation. The Respondent failed to draft and submit a settlement agreement in a worker’s compensation case for over two years.

DAVIS, Mary Elizabeth – Suspension for thirty days on July 9, 2024, effective *nunc pro tunc* to July 29, 2023, stayed under the conditions imposed by the Supreme Court of Maryland, in a reciprocal action from the District of Columbia for representing a client involving a conflict of interest and engaging in conduct that is prejudicial to the administration of justice. The Respondent failed to obtain her client’s informed consent regarding a conflict of interest.

DAVIS, Philip Allen – Suspension by Consent for 150 days on January 27, 2025, effective immediately, for committing a criminal act that reflects adversely on his honesty, trustworthiness, or fitness as an attorney; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. The Respondent pled guilty to one count of stalking.

ELAN, Evan Stuart – Disbarment by Consent on November 25, 2024, effective immediately, in a reciprocal action from Virginia and the District of Columbia, for failing to represent his clients competently and diligently, failing to adequately communicate with his clients, failing to take steps to protect his clients’ interests upon termination of the representation, and engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation. The Respondent abandoned representation of multiple clients.

FARRAR, Perneita Montrece – Commission Reprimand on April 24, 2025, for failing to recognize a conflict of interest as a government employee and engaging in conduct that is prejudicial to the

administration of justice. While employed by the Baltimore County Office of Law and assigned to represent the Baltimore County Department of Corrections, the Respondent provided an incarcerated individual with information relating to claims against the detention center. Each time she visited the incarcerated individual at the detention center, the Respondent used her Maryland State Bar card and was permitted a professional legal visit, even though she was not representing him in his criminal matter.

FRANKLIN, Jamel R. – Disbarment by Consent on December 23, 2024, effective immediately, for committing a criminal act that reflects adversely on his honesty, trustworthiness, or fitness as an attorney; and engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation. The Respondent pled guilty to one count of perjury in violation of Maryland Code, Criminal Law § 9-101; and one count of theft over \$100,000.00 in violation of Maryland Code, Criminal Law § 7-104.

GALLAGHER, Michele Yvonne – Indefinite Suspension by Consent on September 23, 2024, effective immediately, with reinstatement conditioned on the satisfactory report of a healthcare professional, for committing a criminal act that reflects adversely on her honesty, trustworthiness, or fitness as an attorney; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. The Respondent entered an Alford Plea to one count of conspiracy to commit second degree assault.

GLENN, IV, Robert Edwin – Disbarment by Consent on July 29, 2024, effective immediately, in a reciprocal action from West Virginia, Virginia, and the District of Columbia, for engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation. Over the course of eight years, the Respondent improperly received over \$35,000.00 from his former law firm as reimbursement for expenses incurred while representing a client. The Respondent used the funds for personal expenses unrelated to client matters.

GORMLEY, Brian R. – Reprimand by Consent on December 19, 2024, for representing clients involving a conflict of interest and failing to uphold his responsibilities as a partner in a law firm. Without the informed consent of each potentially affected client, the Respondent represented clients in a matter where the position to be taken by the clients was adverse to a position taken or to be taken by another client in the same matter, even though the second client was represented by different counsel. The Respondent, as a partner in his law firm, failed to make reasonable efforts to ensure his firm had in effect measures giving reasonable assurance that the conduct of the lawyers in the firm conformed to the Rules of Professional Conduct, specifically by failing to ensure conflicts were screened when opening new cases.

GUNDLACH, Phillip L. – Commission Reprimand on July 8, 2024, for failing to adequately communicate with his client, failing to take steps to protect his client's interest upon termination of the representation, and failing to maintain candor to the tribunal. The Respondent represented a client in a divorce matter and sent correspondence to his client via mail to his home address and via email despite learning his client had become incarcerated. The client, therefore, was not aware of the Respondent's motion to withdraw his representation. The client received a default judgment as a result of his failure to appear at a court date that occurred while he was incarcerated.

HARDY, II, James Roger – Suspension by Consent for 120 days on July 25, 2024, effective *nunc pro tunc* to October 25, 2022, in a reciprocal action from Connecticut, for violating the State of

Connecticut Rules of Professional Conduct. The Respondent failed to represent his clients diligently; failed to adequately communicate with his clients; collected unreasonable fees; failed to return unearned fees upon the termination of representation; failed to reasonably expedite litigation; engaged in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaged in conduct that is prejudicial to the administration of justice. The Respondent also attempted to settle a grievance claim with a former client without advising the client in writing of the desirability of seeking the advice of independent legal counsel and providing a reasonable opportunity to seek same. On July 25, 2024, the Supreme Court of Maryland ordered the Respondent's reinstatement, effective *nunc pro tunc* to February 23, 2023.

HAUFRECT, Mark Stephen – Commission Reprimand on January 29, 2025, for failing to represent his clients competently and diligently and failing to properly supervise non-attorney assistants. The Respondent was a founder of a nonprofit immigration legal services organization. During the course of representing the nonprofit organization's clients, the Respondent failed to appropriately supervise the organization's non-attorney staff and failed to provide competent and diligent representation to these clients.

IBEBUCHI, Ferdinand Uchechukwu – Commission Reprimand on June 18, 2025, for failing to represent his clients competently and diligently, failing to adequately communicate with his clients, collecting unreasonable fees, and failing to take steps to protect his clients' interests upon termination of the representation. The Respondent engaged in professional misconduct while representing clients in six individual matters. The Respondent missed or was late for scheduled telephone meetings with a client and asked the client for help editing his draft of her complaint. Another client's appeal was dismissed twice for the Respondent's failure to file any brief on her behalf. The Respondent failed to file any opposition to a motion to dismiss another client's appeal, which resulted in the dismissal of the appeal. The Respondent then failed to take action to assist that client with reinstating the appeal.

IGWE, Chukwuemeka Uchenna – Reprimand on January 27, 2025, in a reciprocal action from Pennsylvania for violating the Pennsylvania Rules of Professional Conduct in failing to adequately communicate with his client, collecting unreasonable fees, and engaging in conduct that is prejudicial to the administration of justice. In representing a client in connection with a Special Needs Trust, the Respondent charged an excessive fee, performed minimal work, and failed to adequately explain the matter to the client.

JOHNS, Kosmas Nicholas – Commission Reprimand on April 2, 2025, for failing to represent his clients competently and diligently and engaging in conduct that is prejudicial to the administration of justice. The Respondent repeatedly failed to comply with disclosure of compensation requirements in bankruptcy cases in which he was involved as the debtor's attorney.

JOHNSON, Bruce Allen, Jr. – Disbarred on January 27, 2025, effective immediately, in a reciprocal action from the District of Columbia, for failing to safekeep funds in an attorney trust account. In its Opinion, the District of Columbia Court of Appeals concluded that the Respondent had engaged in the reckless misappropriation of funds.

KIM, Weon Geun – Commission Reprimand on May 21, 2025, in a reciprocal action from the Virginia State Bar Disciplinary Board, for failing to safekeep funds in an attorney trust account and commingling funds. The Respondent left personal funds in his trust account, deposited

unearned fees into his operating account, and kept clients' checks for unearned fees in a desk drawer rather than depositing them into his trust account. There was, however, no evidence of misappropriation.

KOH, Francis Huisuk – Suspension by Consent for six months on August 27, 2024, effective *nunc pro tunc* to May 17, 2024, in a reciprocal action from Virginia, for failing to represent his clients competently and diligently; failing to properly supervise a non-attorney assistant; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. The Respondent failed to provide competent and diligent representation in representing foreign domiciled trademark applicants before the United States Patent and Trademark Office.

KURLAND, Sari Karson – Disbarment by Consent on May 21, 2025, effective immediately, for failing to maintain candor to a tribunal; knowingly disobeying obligations under the rules of a tribunal; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. Bar Counsel filed a Petition for Temporary Restraining Order and Preliminary Injunction against the Respondent that alleged that the Respondent had misappropriated client funds and had violated several of the Maryland Attorneys' Rules of Professional Conduct. The court granted the Motion for Temporary Restraining Order by consent as to the entry of a preliminary injunction. Bar Counsel filed four separate petitions for contempt, charging that the Respondent had violated the terms of the consent preliminary injunction. The Respondent consented to a finding of contempt of the injunction. Bar Counsel subsequently filed two additional contempt petitions relating to additional conduct violative of the injunction, and the Respondent consented to the entry of a second finding of contempt.

LANTON, Ferriar Hussein – Temporary Suspension on March 21, 2025, effective immediately, pending the resolution of the criminal charges against the Respondent in the District of Columbia.

MAHONE, Daniel Quinn – Commission Reprimand on April 2, 2025, for failing to represent his client competently and diligently and failing to adequately communicate with his client. The Respondent failed to promptly and timely pursue his client's civil action in court with correctly named parties or within sufficient time to make necessary amendments. The court denied the Respondent's motion to amend and granted the proper defendant's motion to dismiss, citing the incorrect party listed as the defendant and the tolling of the statute of limitations prior to notice upon the proper defendant.

MAHONEY, John P. – Suspension by Consent for sixty days on September 25, 2024, effective *nunc pro tunc* to July 13, 2024, with all but thirty days stayed in favor of one year of probation with the terms imposed by the District of Columbia Court of Appeals, in a reciprocal action from the District of Columbia, for failing to adequately communicate with his clients, failing to take steps to protect his clients' interests upon termination of the representation, and failing to properly supervise attorneys. In six client matters, the Respondent failed to take reasonable steps to ensure two subordinate attorneys complied with their ethical duties to clients and failed to take reasonable remedial action to avoid or mitigate the consequences of the subordinates' conduct. In four of the matters, the Respondent personally failed to respond to his clients' reasonable requests for information, and in three of the matters, the Respondent personally failed to protect his clients' interests as the representation was ending.

MARSHALL, Brian Keith – Indefinite Suspension by Consent on January 27, 2025, effective immediately, for failing to represent his client competently and diligently, failing to adequately communicate with his client, failing to withdraw from representing his client when discharged, failing to take steps to protect his client’s interest upon termination of the representation, knowingly making false statements to Bar Counsel, and knowingly failing to respond to Bar Counsel. The Respondent failed to respond to his client’s reasonable requests for information about her worker’s compensation case and, after she discharged him, he took no substantial steps to withdraw from her case.

MAYERS, Sheila Bridget Thurmond – Temporary Suspension on September 23, 2024, in a reciprocal action from the District of Columbia and Virginia, pending further Order from the Supreme Court of Maryland.

O’NEILL, Brian David – Disbarred on September 24, 2024, effective immediately, in a reciprocal action from the District of Columbia, for committing a criminal act that reflects adversely on his honesty, trustworthiness, or fitness as an attorney; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. In the U.S. District Court for the Southern District of New York, the Respondent pled guilty to two counts of wire fraud.

PISNER, Gary – Disbarred on March 5, 2025, effective immediately, for failing to represent his client competently, failing to safekeep unearned funds in a trust account, filing frivolous pleadings, knowingly disobeying obligations under the rules of a tribunal, and engaging in conduct that is prejudicial to the administration of justice. The Respondent’s misconduct arose from his representation of himself in various matters relating to a revocable trust. The Respondent engaged in the intentional misappropriation of trust assets, failed to comply with court orders, and engaged in a persistent pattern of vexatious and frivolous litigation, causing harm to others, and burdening the judicial system.

SNYDER, Stephen Lawrence – Temporary Suspension on January 27, 2025, subject to further Order of the Supreme Court of Maryland, following the Respondent’s conviction in the United States District Court for the District of Maryland of one count of attempted extortion and seven counts of violating the Travel Act.

SOUTHERLAND, Janel Asheley – Suspension by Consent for thirty days on January 27, 2025, stayed in favor of one year of probation with the terms contained in the Probation Agreement, for failing to safekeep funds in an attorney trust account; and failing to comply with attorney trust account record-keeping, monthly reconciliation, and prohibited transaction requirements. The Respondent overdrawed her attorney trust account and made nine cash withdrawals. Additionally, the Respondent failed to reconcile her trust account and failed to maintain copies of cancelled checks, ledgers, and receipts relating to transactions in her trust account.

STEWART, Craig W. – Disbarment by Consent on February 3, 2025, effective immediately, for failing to represent his client diligently; failing to adequately communicate with his client; engaging in the unauthorized practice of law; and engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation. On April 8, 2021, the Respondent had been indefinitely suspended by consent for routinely failing to deposit and maintain unearned fees in his attorney trust account

and instead depositing those fees into his operating account. The Respondent knowingly engaged in the practice of law while his license to practice law was suspended.

STROUD, Barron LeGrant, Jr. – Temporary Suspension on February 21, 2025, effective immediately, pending further Order from the Supreme Court of Maryland, following referrals from the Child Support Administration regarding the Respondent's child support arrearages.

TINGWEI, Susan Engonwei – Disbarment by Consent on June 27, 2025, effective immediately, for committing a criminal act that reflects adversely on her honesty, trustworthiness, or fitness as an attorney; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. The Respondent pled guilty to one count of health care fraud in violation of 18 U.S.C. § 1347.

WALDECK, Robert P. – Disbarred on July 25, 2024, effective immediately, in a reciprocal action from the District of Columbia, for failing to represent his clients diligently; failing to adequately communicate with his clients; failing to safekeep funds in an attorney trust account; failing to take steps to protect his clients' interests upon termination of the representation; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. While representing five different clients in employment matters, the Respondent intentionally misappropriated trust funds, commingled client funds with funds in his operating account, recklessly failed to determine the amount held in trust for each client, delayed settlement negotiations, failed to meet litigation deadlines, and abandoned his clients.

WALKER, Doris – Commission Reprimand on February 28, 2025, for failing to represent her client diligently, failing to adequately communicate with her client, charging unreasonable fees, failing to take steps to protect her client's interest upon termination of the representation, failing to reasonably expedite litigation, and engaging in conduct that is prejudicial to the administration of justice. In a personal injury matter, the Respondent failed to provide a draft settlement offer to her client for review and failed to provide any settlement offer to the insurer, despite the Respondent's assurances that she would do so. Upon termination of the representation, the Respondent refused to provide her client with a copy of her case file and demanded a \$2,500.00 payment for its release. The client never received an invoice justifying the requested \$2,500.00 and never received a copy of the case file. In addition, the Respondent failed to cooperate with Bar Counsel during the investigation process.

WERSANT, Paul Gerard – Temporary Suspension on February 21, 2025, effective immediately, pending further Order from the Supreme Court of Maryland, based on a reciprocal action from the United States District Court for the Middle District of Florida, Orlando Division, and pending the resolution of criminal charges against the Respondent in the Superior Court of Forsyth County, Georgia.

WHITTED, Stephen E. – Indefinite Suspension on August 1, 2024, effective immediately, for filing frivolous pleadings; engaging in conduct involving dishonesty, fraud, deceit, or misrepresentation; and engaging in conduct that is prejudicial to the administration of justice. The Respondent repeatedly filed retaliatory, meritless claims against his ex-wife, her new husband, her attorneys, and judges who ruled against him; filed meritless appeals; repeated failed arguments; and ignored court rulings.

WOJAHN, Patrick Lewis – Disbarment by Consent on March 21, 2025, effective immediately, for committing criminal acts that reflect adversely on his honesty, trustworthiness, or fitness as an attorney; and engaging in conduct that is prejudicial to the administration of justice. The Respondent pled guilty to 140 counts of possession and distribution of child pornography.

YEATMAN, Francis Edward – Disbarred on November 22, 2024, for failing to represent his clients competently and diligently, failing to adequately communicate with his clients, knowingly failing to respond to Bar Counsel, and engaging in conduct that is prejudicial to the administration of justice. The Respondent failed to communicate with, and effectively abandoned, his clients in two separate estate matters. In addition, in connection with Bar Counsel’s investigation, the Respondent failed to respond to requests for information by Bar Counsel.

TARGETED MAIL SOLICITATIONS

The Business Occupations and Professions Article of the Annotated Code of Maryland §10-605.2 requires an attorney to file with Bar Counsel copies of letters of solicitation sent to prospective clients under certain circumstances. In FY 2025, there were 409 targeted mail submissions, down from 483 submissions in FY 2024. Of the submissions to Bar Counsel this year, no submissions required revisions to remedy violations of the Maryland Attorneys' Rules of Professional Conduct.

ATTORNEY TRUST ACCOUNT OVERDRAFTS

Maryland Rule 19-411 permits approved financial institutions to maintain attorney trust accounts. Those approved institutions must agree to promptly report overdrafts on attorney trust accounts to Bar Counsel. Upon receipt of the bank's report, Bar Counsel seeks an explanation from the attorney. This year, there were fifty-five (55) overdraft notifications, down from sixty-two (62) in FY 2024. Eighteen (18) were transferred to docketed status for further investigation, up from fourteen (14) in FY 2024.

CONSERVATORSHIPS

When an attorney is deceased, disbarred, suspended, or incapacitated, and there is no responsible attorney to take possession of the client files of that attorney, it may become necessary for Bar Counsel to petition the local Circuit Court to establish a conservatorship. If no attorney is available in the community to take on the task, an attorney on Bar Counsel's staff is nominated to serve as conservator. Upon approval by the Circuit Court in the county where the attorney maintained an office for the practice of law, an appointment of a conservator is ordered, the files of the attorney are marshaled, and, with the aid of attorneys on Bar Counsel's staff, notices are sent to clients to determine the appropriate disposition of active files. Pursuant to court order, the destruction of unclaimed client files is permitted.

In FY 2025, seven (7) new conservatorships were established, private lawyers were appointed as conservators in five (5) cases and members of Bar Counsel's staff were appointed as the conservator in two (2) cases. Seven (7) conservatorships were closed during the fiscal year. There are thirty-seven (37) pending conservatorship cases at the end of FY 2025, including the conservatorships which were opened, and remain open, this fiscal year. Bar Counsel staff members are appointed as conservators in fourteen (14) of the cases, and third parties are appointed as conservators in the remaining twenty-three (23) cases.

Opened	DATE	Third Party or AGC
1. Donnelly, Vernon C.	04/09/2025	AGC
2. Gold, Sally B.	05/23/2025	3 rd Party
3. Hamilton, Linda M.	03/24/2025	AGC
4. Moore, Dominique Stanford	08/02/2024	3 rd Party
5. Raden, Jeffrey D.	01/31/2025	3 rd Party
6. Spencer, Ellen Gale	09/12/2024	3 rd Party
7. Yeatman, Francis E. & F. Douglas	05/13/2025	3 rd Party

Closed	DATE	Third Party or AGC
1. Moore, Ronisha	05/05/2023	3 rd Party
2. Swafford, Scott M.	08/12/2024	3 rd Party
3. Fezell, Howard J.	03/27/2025	AGC
4. Hoppe, Jon A.	04/28/2025	AGC
5. King, Robert W.	06/04/2025	3 rd Party
6. Spencer, Ellen G.	06/10/2025	3 rd Party
7. Drummond, Christopher F.	06/20/2025	3 rd Party

CONSERVATORSHIPS

Pending:	DATE OPENED	Third Party or AGC
1. Arneja, Harnam Singh	07/25/2022	3 rd Party
2. Bell, John T.	02/21/2019	AGC
3. Blum, Bruce D.	03/14/2024	AGC
4. Boulay, Corrie A.	01/11/2024	3 rd Party
5. Briskin, Robert K.	03/09/2016	AGC
6. Callahan, Thomas R.	10/06/2021	3 rd Party
7. Clarke, Timothy E.	01/25/2021	AGC
8. Donnelly, Vernon C.	04/09/2025	AGC
9. Francomano, John R.	11/21/2022	3 rd Party
10. Gann, William	03/31/2023	3 rd Party
11. Gold, Sally B.	05/23/2025	3 rd Party
12. Haley-Pierson, Monica	12/16/2020	AGC
13. Hamilton, Linda M.	03/24/2025	AGC
14. Hickman, Thomas E.	03/11/2024	3 rd Party
15. Johnson, Breon L.	08/05/2019	3 rd Party
16. Katz, Steven	01/26/2024	3 rd Party
17. Koch, James	01/11/2023	AGC
18. Kurland, Sari K.	02/13/2024	3 rd Party
19. LeRoux, Stephen A.	05/29/2024	3 rd Party
20. McGill, Robert R.	03/24/2023	3 rd Party
21. Miller, Albert Matthew	03/19/2021	3 rd Party
22. Miller, Richard S.	10/01/2021	3 rd Party
23. Moore, Dominique S.	08/02/2024	3 rd Party
24. Moorehead Hughes, Dianne	11/04/2022	AGC
25. Opoku-Asare, Jennifer	04/25/2022	3 rd Party
26. Osborne, Matthew Hayes	10/09/2020	AGC
27. Peitersen, Marc N.	07/23/2019	3 rd Party
28. Raden, Jeffrey D.	01/31/2025	3 rd Party
29. Resnick, Jonathan & Perry	04/22/2021	AGC
30. Roberts, Rachael L.	04/14/2023	AGC
31. Rouse, Joseph H.	03/14/2022	AGC
32. Shrybman, James A.	03/05/2021	3 rd Party
33. Spiegel, John	03/05/2021	3 rd Party
34. Tachie-Menson, Patrick	09/26/2022	3 rd Party
35. Van Sweringen, Raymond A.	01/09/2017	AGC
36. Wright, David C.	02/15/2022	3 rd Party
37. Yeatman, Francis E. & F. Douglas	05/13/2025	3 rd Party

PEER REVIEW COMMITTEE

This fiscal year 297 lawyers and 59 non-lawyers volunteered their time to participate in the peer review process. There were seventeen (17) matters submitted for peer review, up from five (5) last year. Six (6) of the seventeen (17) peer review matters involved more than one complaint against a respondent attorney. Ten (10) peer review meetings were completed. Three (3) peer review proceedings were terminated for non-cooperation by the respondent attorney, two (2) were terminated by Bar Counsel, and one (1) was terminated (waived) by the respondent attorney. There were two (2) peer review panels pending at the end of the fiscal year.* In total, thirty-three (33) complaints were subject to peer review. Of the ten (10) completed peer review panel meetings, the panel recommended public charges in five (5) matters, a reprimand in four (4) matters, and dismissal of the complaint with a letter of cautionary advice in one (1) matter.

The Commission makes the final decision after receiving a recommendation from a peer review panel. This fiscal year the Commission overturned two (2) panel recommendations.

Baltimore County had the greatest number of peer review panels followed by Baltimore City and Montgomery County, while eighteen (18) counties had none during this fiscal year.

PANEL BREAKDOWN BY COUNTY	FY 2025
Anne Arundel County	2
Baltimore City	3
Baltimore County	6
Howard County	1
Montgomery County	3
Out of State	1
Prince George's County	1
TOTAL:	17

Note: The following counties had 0 panels in their jurisdiction in FY 2025:

Allegany, Calvert, Caroline, Carroll, Cecil, Charles, Dorchester, Frederick, Garrett, Harford, Kent, Queen Anne's, Somerset, St. Mary's, Talbot, Washington, Wicomico, and Worcester.

* Some panels with multiple BC Dockets had different panel determinations, resulting in 18 panel determinations from 17 panels.

CONDITIONAL DIVERSION AGREEMENTS

When appropriate under Maryland Rule 19-716, when it is determined that misconduct by an attorney can be remediated, and the attorney and Bar Counsel agree, then a Conditional Diversion Agreement may be executed with the approval of the Commission. The agreement may have a variety of conditions, tailored to the needs of the attorney, recognizing any harm done to the complainant. Those conditions may include one or more of the following: an apology to a complainant, attendance at educational seminars, obtaining legal malpractice insurance, the appointment of a practice monitor for a specified period, hiring an accountant to instruct on proper bookkeeping practices, and/or psychiatric and psychological treatment, among other conditions.

Such agreements usually conclude the disciplinary process. Ordinarily, the attorney has not been the subject of prior complaints. This fiscal year, the Commission approved five (5) conditional diversion agreements. Six (6) conditional diversion agreements were closed. Nine (9) were pending at the end of the fiscal year.

CONDITIONS TO OR UPON REINSTATEMENT

In an order of suspension for an indefinite or fixed period, or in an order reinstating an attorney, the Supreme Court of Maryland may require, as a condition precedent to reinstatement or as a condition of probation after reinstatement, one or more of the requirements set forth in Maryland Rule 19-752. The Court may require a variety of conditions, including but not limited to the following: engaging a practice monitor for a specified period; limiting the nature or extent of the attorney's future practice of law; participating in a program tailored to individual circumstances that provides the attorney with office management assistance, treatment for substance abuse, or psychological counseling; demonstrating, by a report of a health care professional or other evidence, that the attorney is competent to resume the practice of law; issuing an apology; or taking any other corrective action the Court deems appropriate.

This fiscal year, three (3) reinstatements with conditions were ordered. Three (3) reinstatements with conditions were closed, and none were revoked. Five (5) were pending at the end of the fiscal year.

PROBATION

Under Maryland Rule 19-740, upon a request by Bar Counsel or an attorney, or on its own initiative and for good cause, the Supreme Court of Maryland may stay execution of a suspension and place an attorney on probation upon terms and conditions the Court finds appropriate, which may include any terms or conditions permitted in a Conditional Diversion Agreement.

This fiscal year, two (2) attorneys were placed on probation. Five (5) probation matters were closed. One (1) probation matter was unsuccessfully completed. Three (3) were pending at the end of the fiscal year.

ACTIVITIES OF PROFESSIONAL STAFF

Bar Counsel Thomas M. DeGonia II continued to actively engage in outreach and educational activities during FY 2025. Mr. DeGonia met with or presented to the Bar Associations of Baltimore City and Anne Arundel, Baltimore, Calvert, Carroll, Charles, Frederick, Montgomery, St. Mary's, and Washington Counties. Together with the Maryland State Bar Association (MSBA), Mr. DeGonia presented or served as a panelist for various continuing legal education programs including the Solo and Small Firm Symposium, the Advanced Real Property Institute, Advanced Estate Planning, Hot Topics in Elder Law, and the MSBA Legal Summit and Annual Meeting. Through educational programs, he built on relationships with the Maryland Hispanic Bar Association, the J. Franklyn Bourne Bar Association, and the Asian Pacific American Bar Association of Maryland. Nearly every presentation given by Mr. DeGonia this year highlighted recent changes to Maryland Attorneys' Rule of Professional Conduct 19-301.15, involving the safekeeping of client property. Mr. DeGonia addressed students at the American University Washington College of Law, the University of Baltimore School of Law, and the University of Maryland School of Law on multiple occasions. Additionally, this year, Mr. DeGonia met with both the Maryland Criminal Defense Attorneys' Association and the Maryland State's Attorneys' Association, and he continued to meet with private firms to provide ethics training. Mr. DeGonia also continued to work with the Standing Committee on Rules of Practice and Procedure and its subcommittees.

Deputy Bar Counsel Jessica Hall continued to be an at-large member of the Executive Committee of the Women's Bar Association of Maryland, where she chairs the Long-Term Planning Committee. She continues to co-chair the Montgomery County Women's Bar Association High School Mentorship Program for its fourth year. Ms. Hall remained actively involved in the charitable activities of the Montgomery County Women's Bar Association. Ms. Hall also belongs to the American Bar Association, the Maryland State Bar Association, and the Bar Association of Montgomery County, and she is a member of the Montgomery County Chapter of Inns of Court. This year, Ms. Hall presented programs on a variety of topics. On September 26, 2024, she co-presented "Professionalism and Civility" for the Maryland State Bar Association. On March 11, 2025, she co-presented "Breaking up is not hard to do: How to break up with clients" for Montgomery County Inns of Court, and on April 23, 2025, she co-presented a program for the New Practitioner's Section of the Bar Association of Montgomery County, entitled "Common Pitfalls for New Practitioners."

Deputy Bar Counsel C. Shea McSpaden is a member of the American Bar Association, the Maryland State Bar Association, and the Baltimore County Bar Association. Ms. McSpaden and Assistant Bar Counsel Lana Hitchens co-presented a program entitled "Attorney Ethics and Magistrates" for the Judicial College of Maryland's 2024 Magistrate's Conference. Ms. McSpaden also attended the 2025 Mid-Year Meeting of the National Organization of Bar Counsel and the Maryland State Bar Association Legal Summit and Annual Meeting.

Assistant Bar Counsel Leonard H. Addison IV was a guest lecturer for the Legal Ethics class at American University Washington College of Law.

Assistant Bar Counsel W. Hunter Daley joined the Office of Bar Counsel on September 16, 2024. In the 2024-2025 bar year, Mr. Daley was inducted as a member of the "Bar Leaders" of the Bar Foundation of Montgomery County. He also served as a member of the Bar Foundation of

Montgomery County Diversity Committee and the Bar Association of Montgomery County Leadership Academy Committee.

Assistant Bar Counsel Cortenous Herbert participated in the Bar Association of Montgomery County's Law Day and attended the J. Franklyn Bourne Bar Association Scholarship Banquet.

Assistant Bar Counsel Lana Hitchens, along with Deputy Bar Counsel C. Shea McSpaden, presented a program entitled "Attorney Ethics & Magistrates" at the Judicial College of Maryland's 2024 Magistrates' Conference. Ms. Hitchens also attended the 2025 Mid-Year Meeting of the National Organization of Bar Counsel.

Assistant Bar Counsel Aline I. Montes served on the Board of Directors for the Maryland Hispanic Bar Association (MHBA) where she chaired the Membership Committee. She also sat on the 2025 Gala planning committee for the annual MHBA Gala. Additionally, Ms. Montes joined the Maryland State Bar Association as a new attorney.

Assistant Bar Counsel Caitlin M. Phillips conducted a training on conflicts of interest for Maryland Legal Aid, along with Lisa Fishelman of the Office of Disciplinary Counsel for the D.C. Bar. Ms. Phillips also completed the Leadership Academy through the Bar Association of Montgomery County.

Assistant Bar Counsel Peter J. Terech spoke to students as part of the Anne Arundel County Bar Association's Law Day at Magothy River Middle School, located in Arnold, Maryland. During the Law Day program, Mr. Terech spoke to students about what it means to be an attorney, explained the historic foundation and origins of judicial review, and demonstrated the application of judicial review and the legal system to current news, events, and related topics of interest.

Executive Counsel and Director Marianne J. Lee continued to serve on the National Council of Lawyer Disciplinary Boards (NCLDB) Planning Committee for its Annual Meeting and attended conferences for both the NCLDB and the National Office of Bar Counsel (NOBC). During 2024-2025, she was a member of the James Macgill Inns of Court, Howard County Bar Association, and Maryland State Bar Association (MSBA) and attended meetings of various bar association events. Ms. Lee served as a panelist on the Professionalism & Integrity Panel at the University of Baltimore School of Law. She served as a mock trial judge for the MYLaw, Maryland Youth & the Law, High School Mock Trial Competition. She moderated a program for the American Bar Association 50th National Conference on Professional Responsibility and presented a program titled "Introduction to the Attorney Grievance Commission Practice and Procedure" with Bar Counsel Thomas M. DeGonia II and Commission Chair Dolores Ridgell at the MSBA Legal Summit and Annual Meeting.

THE COMMISSION

(as of June 30, 2025)

Dolores O. Ridgell, Esq., Chair
Jeffrey P. Ayres, Esq., Vice-Chair
Barry P. Gossett, Public Member, Treasurer
Donna E. McBride, Esq.
William M. Shipp, Esq.
Kerry D. Staton, Esq.
Dennis Whitley, III, Esq.
David Coaxum, Esq.
Deborah Warner-Dennis, Esq.
Peter R. Cotter, Esq.
Timothy Phelps, Public Member
LaNae S. Croxton, Public Member

Executive Counsel & Director

Marianne J. Lee

Administrative Assistant to Executive Counsel & Director

Lisa Cottely

THE OFFICE OF BAR COUNSEL

(as of June 30, 2025)

Bar Counsel

Thomas M. DeGonia II

Deputy Bar Counsel

Jessica M. Hall

C. Shea McSpaden

Assistant Bar Counsel

Leonard H. Addison IV

Lauren Batucan

Garrett E. Byron

W. Hunter Daley

Katherine T. Getty

Moses Gobezie

Cortenous Herbert

Lana Hitchens

Aline Montes

Kyle O'Grady

Caitlin M. Phillips

Peter J. Terech

Law Clerk

(vacant)

Investigators

Jason P. Bogue, Lead Investigator

Daniel J. Weishaar

Darin T. Bush

Bill Lynn

Andrew Logan

Deana M. McMahon

Operations Manager

Susan G. Townshend

Administrative Assistants

Debora A. Goodrick

Nancy M. LaRocque

Erica Maldonado

Kelsey E. Rowe

Receptionist

Courtney Dantos

File Clerk

Geneva Yearwood

TEN (10) YEAR COMPARISON CHART

July 1, 2015 through June 30, 2025

	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Ten Year Totals
Active Maryland Attorneys	38,814	39,890	40,300	40,393	41,177	41,611	42,050	43,289	43,074	43,273	n/a
New Cases Received	1,835	2,061	1,802	1,657	1,599	1,433	1,589	1,614	1,696	1,760	17,046

Cases Docketed	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Ten Year Totals
Complaints	339	243	212	232	253	155	257	135	110	173	2,109
Reinstatement Petitions	13	14	17	18	10	16	20	14	25	16	163
Trust Account Overdraft	5	14	21	20	17	21	23	16	14	18	169
Resignation	0	1	2	4	4	4	3	0	3	2	23
Child Support	n/a	n/a	2	4	1	0	0	0	0	1	8
TOTALS	357	272	254	278	285	196	303	165	152	210	2,472

	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	Ten Year Totals
Docketed Cases Concluded	347	394	276	265	293	316	363	329	174	232	2,989

TEN (10) YEAR COMPARISON CHART

July 1, 2015 through June 30, 2025

Disposition by Number of Attorneys	2015- 2016	2016- 2017	2017- 2018	2018- 2019	2019- 2020	2020- 2021	2021- 2022	2022- 2023	2023- 2024	2024- 2025	Ten Year Totals
Disbarred	16	14	14	14	11	10	14	4	2	5	104
Disbarred by Consent	13	19	12	12	17	11	5	9	4	7	109
Suspension	18	31	20	20	16	30	25	14	17	9	200
Interim Suspension	2	3	3	1	0	2	2	3	0	6	22
Public Reprimand by Court	3	4	4	5	6	5	2	3	6	2	40
Public Reprimand by Commission	26	22	12	25	26	23	31	34	8	11	218
Inactive Status	1	4	5	2	5	4	3	3	2	2	31
Dismissed by Court	8	4	4	3	8	6	6	2	1	0	42
Petitions for Reinstatement Granted	7	8	8	8	3	7	13	5	14	8	81
Petitions for Reinstatement Denied	4	7	7	7	6	8	3	0	4	1	47
Petitions for Reinstatement Dismissed	0	0	0	0	0	0	0	2	3	6	11
Petitions for Reinstatement Withdrawn	2	1	4	3	1	0	1	2	2	1	17
Petitions for Reinstatement Revoked	0	0	0	0	0	0	1	0	0	0	1
Resignations Filed	0	1	1	3	5	4	1	0	3	2	20
Permanent Retired Status*	1	0	0	0	2	3	0	0	1	6	13
TOTALS	101	118	94	103	106	113	107	81	67	66	956

*Effective July 1, 2016, the Supreme Court of Maryland added Permanent Retired Status as a possible resolution of a disciplinary matter in certain situations. Permanent Retired Status is not a disciplinary sanction. *See* Maryland Rule 19-717.1.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

REASONS FOR DISCIPLINARY ACTION: (Excludes reinstatement, resignation, inactive status, dismissal by the court, or monitoring. Disciplinary action may have resulted from several rule violations, <u>only the primary rule violated is indicated below.</u>)	FY 2024	FY 2025
Competence, Diligence, Communication, Failure to Abide by Client's Decisions	8	10
Conflict of Interest	2	2
Conflict of Interest – Current Clients	1	0
Conflict of Interest – Government Officers and Employees	0	1
Declining or Terminating Representation	0	2
Disclosure of Confidential Client Information	1	0
Failure to Maintain Complete Records, Account for Client or Third-Party Funds, Failure to Maintain Trust Account or Safeguard Funds, Commingling	6	3
Failure to Respond to or Making a False Statement to Admissions or Disciplinary Authority	2	0
Fairness to Opposing Party and Attorney	0	1
False Statement Concerning Integrity/Qualifications of a Judge	1	0
Meritorious Claims and Contentions	1	0
Misappropriation of Client Funds, Estate Funds, Fiduciary Funds or Law Firm Funds	2	3
Misconduct	1	0
Misconduct – Conduct Prejudicial to the Administration of Justice	3	2
Misconduct – Criminal Action or Conviction	3	10
Misconduct – Dishonesty, Fraud, Deceit, or Misrepresentation	3	2
Professional Independence of an Attorney	1	0
Responsibilities of Partners and Supervisory Attorneys	0	1
Responsibilities Regarding Non-Attorney Assistants	0	1
Unauthorized Practice of Law	2	1
Unreasonable Fee	0	1
TOTAL:	37	40

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

NEW CASES RECEIVED	FY 2024	FY 2025
Complaint	1,595	1,670
Attorney Trust Account Overdraft Notice	62	55
Child Support	0	4
Reinstatement Petition Received	25	16
Resignation	3	2
Rule 19-741 Compliance Files	11	13
TOTAL:	1,696	1,760

NEW DOCKETED CASES	FY 2024	FY 2025
Complaint	110	173
Attorney Trust Account Overdraft Notice	14	18
Child Support	0	1
Reinstatement Petitions Docketed	25	16
Resignation	3	2
TOTAL:	152	210

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

DOCKETED CASES BY LAW PRACTICE CATEGORY	FY 2024	FY 2025
Attorney Trust Account	17	23
Bankruptcy	3	3
Civil Litigation	11	20
Contract	2	3
Criminal	2	14
Criminal – Prosecution	0	4
Criminal – Defense	16	6
Debt Collection/Landlord-Tenant	4	4
Employment Law	3	12
Family Law	22	26
Guardianship/CINA	1	3
Immigration	5	7
Injury to Persons, Property/Workers' Compensation	16	23
Other Categories	10	12
Other – Criminal Conduct	4	11
Other – Personal Conduct	1	6
Probate	10	7
Real Estate	0	10
Reinstatement	25	16
TOTAL:	152	210

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

DOCKETED CASES BY LOCALE	FY 2024	FY 2025
Allegany County	3	3
Anne Arundel County	9	6
Baltimore City	18	31
Baltimore County	14	25
Calvert County	1	2
Caroline County	0	0
Carroll County	0	0
Cecil County	1	2
Charles County	2	1
Dorchester County	0	2
Frederick County	3	7
Garrett County	0	0
Harford County	2	9
Howard County	6	9
Kent County	0	0
Montgomery County	36	32
Prince George's County	21	39
Queen Anne's County	0	3
Somerset County	0	0
St Mary's County	1	0
Talbot County	1	0
Washington County	0	1
Wicomico County	3	1
Worcester County	0	1
Out of State	31	36
TOTAL:	152	210

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

DOCKETED CASES BY PRIMARY RULE: (Primary rule violated may change during the course of the case; only the primary rule alleged is indicated below.)	FY 2024	FY 2025
Competence (1.1)	13	17
Scope of representation/allocation of authority (1.2)	3	5
Diligence (1.3)	14	18
Communication (1.4)	10	26
Fees (1.5)	5	9
Confidentiality of Information (1.6)	0	2
Conflict of Interest: General Rule (1.7)	5	6
Duties to Former Clients (1.9)	0	1
Conflict of Interest: Government Officers and Employees (1.11)	1	0
Client with Diminished Capacity (1.14)	0	2
Safekeeping Property (1.15)	26	35
Declining or Terminating Representation (1.16)	6	5
Meritorious Claims and Contentions (3.1)	1	1
Candor Toward the Tribunal (3.3)	3	2
Fairness to Opposing Party and Attorney (3.4)	0	1
Impartiality and Decorum of the Tribunal (3.5)	1	1
Special Responsibilities of a Prosecutor (3.8)	0	2
Truthfulness in Statements to Others (4.1)	0	1
Communication with Person Represented by Counsel (4.2)	5	3
Dealing with Unrepresented Person (4.3)	0	2
Respect for Rights of Third Persons (4.4)	0	2
Responsibilities of Partners, Managers, and Supervisory Attorneys (5.1)	1	2
Unauthorized Practice of Law; Multijurisdictional Practice of Law (5.5)	5	4
Bar Admission and Disciplinary Matters (8.1)	9	13
Misconduct 8.4(a)	0	2
Misconduct - Commit a criminal act (8.4(b))	8	10
Misconduct - Dishonesty, fraud, deceit, misrepresentation (8.4(c))	3	7
Misconduct - Prejudicial to administration of justice (8.4(d))	2	9
Commingling (19-408)	2	0
Other (Reinstatement, Reciprocal, Inactive, etc.)	29	22
TOTAL:	152	210

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

DISPOSITION OF CASES	FY 2024	FY 2025
Administratively Closed	11	81
Disbarment by Court	2	6
Disbarment by Consent	4	14
Dismissed by Commission	36	33
Dismissed by Court	1	0
Dismissed with Letter of Admonition	25	18
Dismissed with Letter of Cautionary Advice	25	12
Inactive	5	4
Indefinite Suspension	5	1
Indefinite Suspension by Consent	8	2
Interim Suspension	0	6
Permanent Retired Status	1	10
Reinstatement – Denied	5	1
Reinstatement – Granted	12	5
Reinstatement – Granted with Terms	2	3
Reinstatement – Petition Dismissed	3	6
Reinstatement – Withdrawn	2	1
Reprimand by Commission	8	19
Reprimand by Court	7	2
Resignation – Granted	3	2
Suspension Stayed with Probation	1	0
Suspension 30 Days	1	0
Suspension 30 Days Stayed with Conditions	0	1
Suspension 30 Days Stayed with Probation	2	1
Suspension 60 Days, 30 Days Stayed, with Probation	0	1
Suspension 60 Days Stayed with Probation	3	0
Suspension 120 Days	0	1
Suspension 150 Days	0	1
Suspension 6 Months	0	1
Suspension 6 Months Stayed with Probation	1	0
Suspension 6 Months with Probation upon Reinstatement	1	0
TOTAL:	174	232

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATISTICAL REPORT
Fiscal Year 2025

DISCIPLINARY ACTION (by number of attorneys)	FY 2024	FY 2025
Disbarment	2	5
Disbarment by Consent	4	7
Dismissed by Court	1	0
Inactive	1	0
Inactive by Consent	1	2
Indefinite Suspension	4	2
Indefinite Suspension by Consent	4	1
Interim Suspension	0	6
Permanent Retired Status	1	6
Reinstatement – Denied	4	1
Reinstatement - Dismissed	3	6
Reinstatement – Granted	12	5
Reinstatement – Granted with Terms	2	3
Reinstatement – Withdrawn	2	1
Reprimand by Commission	8	11
Reprimand by Court	6	2
Resignation	3	2
Suspension	1	4
Suspension Stayed with Probation	7	2
Suspension with Probation upon Reinstatement	1	0
TOTAL:	67	66

ATTORNEY GRIEVANCE COMMISSION
OF MARYLAND
Annapolis, Maryland

AUDITED FINANCIAL STATEMENTS
June 30, 2025 and 2024

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INDEPENDENT AUDITOR'S REPORT

To the Commissioners
Attorney Grievance Commission of Maryland

Opinion

We have audited the financial statements of the Attorney Grievance Commission of Maryland (the Commission), which comprise the statements of financial position as of June 30, 2025 and 2024, and the related statements of budget, receipts, expenditures, and fund balances, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Commission as of June 30, 2025 and 2024, and the changes in its fund balances and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America (GAAS). Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Commission and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of these financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Commission's ability to continue as a going concern for one year after the date that the financial statements are issued.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

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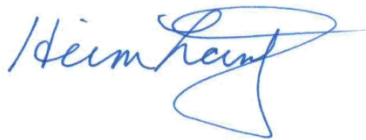
In performing an audit in accordance with GAAS, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Commission's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Commission's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control-related matters that we identified during the audit.

Report on Supplementary Information

Our audits were conducted for the purpose of forming an opinion on the financial statements as a whole. The supplemental information is presented for purposes of additional analysis and is not a required part of the financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the financial statements. The information has been subjected to the auditing procedures applied in the audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the financial statements as a whole.

A handwritten signature in blue ink, appearing to read "HeimLantz", with a stylized flourish at the end.

HeimLantz CPAs & Advisors, LLC
Annapolis, Maryland

September 12, 2025

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATEMENTS OF FINANCIAL POSITION
JUNE 30, 2025 and 2024

ASSETS		
	2025	2024
CURRENT ASSETS		
Cash and cash equivalents	\$ 373,440	\$ 679,317
Certificates of deposit - short-term	3,000,000	3,500,000
Accounts receivable - Client Protection Fund	99,994	97,211
Prepaid expenses	65,076	6,247
TOTAL CURRENT ASSETS	3,538,510	4,282,775
NON-CURRENT ASSETS		
Property and equipment, net	557	3,336
Right of use asset	1,749,445	223,483
Security deposits	20,020	20,020
TOTAL NON-CURRENT ASSETS	1,770,022	246,839
TOTAL ASSETS	\$ 5,308,532	\$ 4,529,614
LIABILITIES AND FUND BALANCES		
CURRENT LIABILITIES		
Accounts payable	\$ 75,006	\$ 70,345
Pension payable	356,584	158,895
Accrued compensated absences	180,933	164,002
Lease obligation - current portion	83,682	229,342
TOTAL CURRENT LIABILITIES	696,205	622,584
LONG-TERM LIABILITIES		
Lease obligation	1,665,763	-
Retiree health insurance credit plan	992,461	996,382
TOTAL LONG-TERM LIABILITIES	2,658,224	996,382
TOTAL LIABILITIES	3,354,429	1,618,966
FUND BALANCES		
Restricted fund balance	-	815,726
Unrestricted fund balance	1,954,103	2,094,922
TOTAL FUND BALANCES	1,954,103	2,910,648
TOTAL LIABILITIES AND FUND BALANCES	\$ 5,308,532	\$ 4,529,614

The accompanying notes are an integral part of the financial statements.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATEMENTS OF BUDGET, RECEIPTS, EXPENDITURES AND FUND BALANCES
FOR THE YEARS ENDED JUNE 30, 2025 and 2024

	<u>2025</u>			<u>2024</u>
	<u>Actual</u>	<u>Budget</u>	<u>Variance Positive (Negative)</u>	<u>Actual</u>
COMMISSION RECEIPTS				
Attorney assessments	\$ 4,725,619	\$ 4,730,880	\$ (5,261)	\$ 4,721,850
Investment income	182,455	175,000	7,455	241,141
Recovered court costs	38,480	45,000	(6,520)	27,896
TOTAL RECEIPTS	<u>4,946,554</u>	<u>4,950,880</u>	<u>(4,326)</u>	<u>4,990,887</u>
COMMISSION EXPENSES				
Personnel costs	4,115,609	4,181,813	(66,204)	3,272,698
Case management costs	111,528	232,000	(120,472)	88,707
Staff support	89,941	81,000	8,941	59,770
Outside services	115,647	119,600	(3,953)	102,108
Information technology support	241,534	219,000	22,534	232,319
Office expense	275,250	331,495	(56,245)	303,009
Court mandated costs	137,864	160,318	(22,454)	131,236
TOTAL EXPENDITURES	<u>5,087,373</u>	<u>5,325,226</u>	<u>(237,853)</u>	<u>4,189,847</u>
INCREASE (DECREASE) IN FUND BALANCES	<u>\$ (140,819)</u>	<u>\$ (374,346)</u>	<u>\$ 233,527</u>	<u>\$ 801,040</u>
FUND BALANCES, BEGINNING OF YEAR	2,910,648			3,823,130
RESTRICTED FUND BALANCE, PRIOR YEAR	(815,726)			(1,713,522)
RESTRICTED FUND BALANCE, CURRENT YEAR	-			815,726
UNRESTRICTED FUND BALANCE	<u>1,954,103</u>			<u>2,094,922</u>
FUND BALANCES, END OF YEAR	<u>\$ 1,954,103</u>			<u>\$ 2,910,648</u>

The accompanying notes are an integral part of the financial statements.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
STATEMENTS OF CASH FLOWS
FOR THE YEARS ENDED JUNE 30, 2025 and 2024

CASH FLOWS FROM OPERATING ACTIVITIES	2025	2024
Increase (decrease) in fund balances:	\$ (140,819)	\$ 801,040
Adjustments to reconcile increase (decrease) in unrestricted fund balances to cash provided by (used in) operating activities		
Depreciation	2,779	7,447
Net change in ROU asset and lease liability	(5,859)	(5,859)
(Increase) decrease in:		
Accounts receivable - Client Protection Fund	(2,783)	(2,116)
Prepaid expenses	(58,829)	11,028
Increase (decrease) in:		
Accounts payable	4,661	62,700
Pension payable	197,689	(224,689)
Accrued compensated absences	16,931	(58,498)
Retiree health insurance credit plan	(3,921)	141,529
NET CASH PROVIDED BY OPERATING ACTIVITIES	<u>9,849</u>	<u>732,582</u>
CASH FLOWS FROM INVESTING ACTIVITIES		
Net proceeds from investments held to maturity	500,000	750,000
NET CASH PROVIDED BY INVESTING ACTIVITIES	<u>500,000</u>	<u>750,000</u>
CASH FLOWS FROM FINANCING ACTIVITIES		
Court ordered transfer to the Client Protection Fund	(815,726)	(1,713,522)
NET CASH USED IN FINANCING ACTIVITIES	<u>(815,726)</u>	<u>(1,713,522)</u>
NET DECREASE IN CASH	<u>(305,877)</u>	<u>(230,940)</u>
CASH AT BEGINNING OF YEAR	<u>679,317</u>	<u>910,257</u>
CASH AT END OF YEAR	<u><u>\$ 373,440</u></u>	<u><u>\$ 679,317</u></u>

The accompanying notes are an integral part of the financial statements.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025 and 2024

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES AND PROCEDURES

Nature of the Commission

The Attorney Grievance Commission of Maryland (the Commission) was authorized and created by the Supreme Court of Maryland on February 10, 1975 to oversee the conduct of both Maryland lawyers and nonmembers of the Maryland Bar who engage in the practice of law in the State. The Commission investigates and, where indicated, prosecutes attorneys whose conduct violates the Maryland Attorneys' Rules of Professional Conduct as well as those engaged in the unauthorized practice of law.

Basis of Accounting

As an instrumentality of the Supreme Court of Maryland, the Commission maintains its accounting records on a basis consistent with generally accepted accounting principles. The Commission's funds are used to account for the proceeds of revenue sources that are restricted to expenditures for specific purposes.

Revenue and Revenue Recognition

Attorney assessments are the Commission's primary source of revenue. Assessments are received through payments made by individual attorneys to the Client Protection Fund of the Bar of Maryland (CPF) on a billing which includes assessments for CPF and the Commission. These annual assessments are required by the Maryland Judiciary for any individual admitted to practice before the Supreme Court of Maryland or issued a certificate of special authorization pursuant to Title 19, Chapter 200 of the Maryland Rules.

Since there is no requirement that an individual remain admitted to practice law in the State of Maryland, assessments are deemed to be revenue only when collected. When assessments are collected by the CPF, but not yet remitted to the Commission, they appear as a receivable on these financial statements. Based on prior experience, management feels that all amounts will be collected; therefore, there is no allowance for doubtful accounts included in these financial statements. The assessment collected by the Commission for each attorney in practice was \$110 for the years ended June 30, 2025 and June 30, 2024. The number of practicing attorneys as of June 30, 2025 and 2024 was 44,310 and 43,717, respectively.

Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

Income Tax Status

The Commission is an instrumentality of the Supreme Court of Maryland and as such is not subject to income taxes. Accordingly, no provision has been made. The Commission believes that it has appropriate support for any tax positions taken, and as such, does not have any uncertain tax positions that are material to the financial statements.

Cash and Cash Equivalents

Cash and cash equivalents represent cash held in checking and money market accounts with original maturities of less than ninety days.

Investments

The Commission invests solely in brokered, negotiable, certificates of deposit. Because the certificates of deposit are purchased in increments of \$250,000 or less, they are fully insured by the FDIC. Accordingly, there is virtually no risk of gain or loss if the investments are held to maturity.

Management intends to hold all certificates of deposit to maturity. In accordance with FASB ASC 825, *Financial Instruments – Overall*, these investments are carried at cost.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025 and 2024

Any certificates of deposit that mature within one year of the financial statement date are classified on the statement of financial position as “certificates of deposit - short-term” and those with maturity dates greater than one year after the financial statement date are classified “certificates of deposit – long-term”.

Property and Equipment

Acquisitions of equipment and furniture and all expenditures for repairs, maintenance, and betterments costing \$2,500 or greater that materially prolong the useful lives of assets are capitalized. Expenditures for maintenance and repairs are charged to expense as incurred. Equipment and furniture are stated at cost, less accumulated depreciation. Depreciation and amortization are computed using the straight-line method over estimated useful lives of three to thirty-nine years. Leasehold improvements are amortized on the straight-line method over the shorter of the lease term or estimated useful life of the asset.

Compensated Absences

The Commission accrues a liability for certain sick leave, and all annual leave which has been earned but not taken by the employees. Employees can earn a maximum of 25 days for annual leave per year. Annual leave can be accumulated up to 35 days. There is no requirement that annual leave be taken in the year earned. Upon termination, employees are paid for any accumulated annual leave. Employees hired prior to January 1, 1989 are reimbursed one third of accumulated sick leave, up to 60 days upon termination. Employees hired after 1988 are not reimbursed for accumulated sick leave. As of June 30, 2025, there are only two current employees hired prior to January 1, 1989.

Leases

The Commission leases office space and determines if an arrangement is a lease at inception. Operating leases are reported as a right of use asset and lease liability on the statements of financial position. A right of use asset represents the right to use an underlying asset for the lease term, and a lease liability represents the obligation to make lease payments arising from the lease.

Right of use assets and lease liabilities are recognized at commencement date based on the present value of lease payments over the lease term. As a practical expedient, the Commission uses the U.S. Bank Prime Loan Rate in determining the present value of lease payments. Lease terms may include options to extend or terminate the lease when it is reasonably certain that the Commission will exercise that option. Lease expense for lease payments is recognized on a straight-line basis over the lease term. The Commission’s lease agreements do not contain any material residual value guarantees or material restrictive covenants.

See Note 5 for additional information regarding the calculations of the lease liability and right of use asset.

NOTE 2 – PROPERTY AND EQUIPMENT

Property and equipment consisted of the following as of June 30:

	2025	2024
Computer equipment	\$ 68,643	\$ 113,883
Furniture and fixtures	88,202	88,202
Leasehold improvements	17,390	17,390
Software	118,796	118,796
Total property and equipment	293,031	338,271
Less accumulated depreciation	(292,474)	(334,935)
Property and equipment, net	\$ 557	\$ 3,336

Depreciation expense for the periods ending June 30, 2025 and 2024 was \$2,779 and \$7,447 respectively.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025 and 2024

NOTE 3 - PENSION PLAN

The Commission sponsors a trustee defined contribution pension plan covering substantially all employees meeting minimum age and service requirements. Contributions to the plan for the years ended June 30, 2025 and 2024 were \$356,584 and \$158,895 respectively. This amount is equal to 15% of the participant's compensation. For periods ending June 30, 2025 and 2024, the amount owed by the Commission to the plan was \$356,584 and \$158,895 respectively.

NOTE 4 – OTHER POSTEMPLOYMENT BENEFITS

On September 1, 2012 the Commission adopted an Other Post-Employment Benefit Plan (OPEB) to provide health insurance reimbursement benefits to eligible retirees and their surviving spouses. The official name of the plan is “The Attorney Grievance Commission of Maryland Retiree Health Insurance Credit Plan.” Eligible retirees include employees with at least ten years of service and have attained age fifty-five, or persons who have become disabled and are receiving benefits under the terms of the Social Security Act. Surviving spouses must have been covered under this plan at the time of the retiree’s death and enroll in the Plan on the first day of the month following the death of the covered retiree. Plan benefits will be paid directly by the Commission to the retiree at a rate of the lesser of \$5,250 annually or their actual health insurance premiums.

An actuarial valuation is performed to determine the outstanding “Net OPEB Liability” on an annual basis. This valuation is performed as of the final day of the prior year, and reflects what the Commission’s liability would be if all eligible employees terminated employment at that date. See below for key actuarial and balance information for the most recent valuation.

Key Actuarial Factors

Actuarial cost method	Entry age normal cost method
Discount rate	3.97%
Actuarial valuation date	June 30, 2024

The “2024 Net OPEB Liability” was calculated as \$1,045,446. See **Appendix A** for additional information regarding how this figure was calculated, as well as additional disclosures required under GASB 75 - *Accounting and Financial Reporting for Postemployment Benefits Other than Pension*.

During the year ended June 30, 2025, the Commission made payments of \$52,985 to current retirees, thereby reducing the OPEB liability to \$992,461, as of June 30, 2025. This balance is reflected on the statement of financial position as “retiree health insurance credit plan”.

NOTE 5 – LEASE COMMITMENT

The Commission leases office space in Annapolis, MD. The lease calls for monthly rental payments beginning on July 1, 2016. In addition to lease payments, the Commission is responsible for their portion of common area maintenance and property tax of approximately \$900 per month. The lease is an operating lease with an original end date of June 30, 2025.

On February 2, 2025 the Commission signed an amendment to extend the lease for 10 years and 2 months, with a new end date of August 31, 2035.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025 and 2024

Future minimum rental payments required under the operating lease agreements are as follows:

Year ending June 30,		
2026	\$	214,890
2027		257,868
2028		257,868
2029		257,868
2030		257,868
Thereafter		1,332,318
	\$	2,578,680

Calculation of lease liability and right of use asset

As described in Note 1, right of use assets and lease liabilities are recognized at commencement date based on the present value of lease payments over the lease term. The Commission used a discount rate of 7.5% to calculate the present value of the lease liability. The corresponding right of use asset is calculated to be equal and offsetting to the lease liability, and then adjusted for any other pre-existing lease balances (e.g. deferred lease liabilities, pre-paid rent, etc). Specific calculations are as follows:

Future minimum cash flows	\$ 2,578,680
Unamortized discount, to arrive at present value	(829,235)
Lease liability	\$ 1,749,445
Deferred lease liability	-
Right of use asset	\$ 1,749,445

The weighted average lease term and discount rate as of June 30, 2025 are 10.2 years and 7.5%, respectively.

NOTE 6 – BONDS

The Commission has a \$6,000,000 blanket crime protection insurance policy in effect for employee dishonesty.

NOTE 7 - RELATED PARTY TRANSACTIONS

Revenue

The Commission has significant transactions with the Client Protection Fund of the Bar of Maryland (CPF), an instrumentality of the State of Maryland. All attorney assessments are collected by CPF and the Commission's portion is transferred monthly by check. At year end, CPF owed the Commission attorney assessments in the amount of \$440 and \$1,980 at June 30, 2025 and 2024, respectively.

Reimbursable Expenses

The Commission provided office space, salary and benefits to three CPF employees. CPF reimburses the Commission for these expenses on a quarterly basis. During the years ending June 30, 2025 and 2024, the Commission was paid \$390,174 and \$379,198, respectively, by CPF for fees incurred for salaries, benefits and lease expenses. At June 30, 2025 and 2024, CPF owed reimbursements to the Commission in the amount of \$99,554 and \$95,231, respectively.

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
NOTES TO FINANCIAL STATEMENTS
JUNE 30, 2025 and 2024

NOTE 8 – CONTINGENCIES

Prior to the 2014 fiscal year, the Supreme Court of Maryland, at its discretion, was permitted to order a transfer of funds from the Commission to court related agencies. On March 13, 2014 an Administrative Order was issued by the Supreme Court of Maryland, requiring the Commission to maintain a fund balance of 75% of the prior year's fiscal expenditures. Any excess fund balance would be due to the Client Protection Fund of the Bar of Maryland (CPF), as of 30 days following the issuance of annual audited financial statements.

On March 3, 2023 an Administrative Order was issued by the Supreme Court of Maryland, to change the formula used to calculate the excess fund balance. Under the revised formula, the Supreme Court of Maryland requires that the Commission maintains an annual carryover balance totaling at least 25% but no more than 50% of its prior fiscal year expenditures. Under the current order, there are three potential scenarios for the fund balance each year:

#	<i>Percent of prior year's fiscal expenditures</i>	<i>Type of transfer required</i>
1	Under 25%	CPF to transfer deficit amount to the Commission
2	Over 50%	The Commission to transfer excess amount to CPF
3	Between 25% and 50%	No transfers required

Transfers to/from CPF, if required, are due as of 30 days following the issuance of annual audited financial statements. In addition, the aggregate amount of all transfers received from CPF may never exceed the aggregate amount of all transfers paid to CPF. For this purpose, the aggregate amount of all transfers paid to CPF includes payments made before and after March 2, 2023 – the date of the current Administrative Order.

Per this Order, at June 30, 2025 and 2024, the Commission was (due)/owed \$0 and \$815,726 to CPF, respectively. These amounts are reported as "Restricted Fund Balance" on the Statements of Financial Position.

The calculation for current year fund balance excess/(deficit) is as follows:

Beginning fund balance	\$	2,910,648
Plus net income/(loss):		(140,819)
Less balance paid for prior year:		(815,726)
Ending fund balance	\$	1,954,103
Total FY 2025 expenditures	\$	5,087,373
50% of Total expenditures		2,543,686
25% of Total expenditures		1,271,843
Fund balance excess/(deficit), June 30, 2025	\$	-

NOTE 9 – MANAGEMENT'S SUBSEQUENT REVIEW

The Commission has evaluated subsequent events through September 12, 2025, the date which the financial statements were available to be issued, and no events were noted that would materially impact the financial statements.

Appendix A

Additional Required Disclosures

Note to reader:

The following schedules are required disclosures related to the OPEB Liability (ex. change in liability, and changes to actuarial expectations and assumptions.) A table of contents for this appendix can be found below.

Please refer to “**Note 4**” on Page 10 of these financial statements for a summary of key information related to the OPEB Liability, including the ending liability balance and key actuarial factors.

<u>Required disclosures</u>	<u>Page</u>
Change in Net OPEB Liability <i>Reports changes from beginning to ending balance</i>	14
OPEB Expense <i>Reports current period OPEB expense build-up</i>	15
Sensitivity to Total and Net OPEB Liability <i>Provides illustrative calculations of liability if future actual costs are 1% higher or lower than expected</i>	16
Deferred Inflows/Outflows of Resources Related to OPEB <i>Summary of adjustments to future expense estimates – see pages 17-19 for detailed reports</i>	17
Schedule of Differences between Projected and Actual Earnings on OPEB Plan Investments <i>No differences between projected and actual earnings</i>	18
Schedule of Differences between Expected and Actual Experience <i>Reports the application of expected-vs-actual adjustments by year</i>	19
Schedule of Changes of Assumptions <i>Reports the application of assumption adjustments by year</i>	20
Schedule of Changes in the Total Liability and Related Ratios <i>Reports liability and payment information by year</i>	21

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Change in Net OPEB Liability

	Total OPEB Liability (a)	Plan Fiduciary Net Position (b)	Net OPEB Liability (a) - (b)
Balance as of June 30, 2023 for FYE 2024	\$1,047,628	\$0	\$1,047,628
Changes for the Year			
Service Cost	33,753		33,753
Interest	39,210		39,210
Changes of Benefit Terms	0		0
Experience Losses/(Gains)	(12,247)		(12,247)
Trust Contribution - Employer		51,383	(51,383)
Net Investment Income		0	0
Changes in Assumptions	(11,515)		(11,515)
Benefit Payments (net of retiree contributions)	(51,383)	(51,383)	0
Administrative Expense		0	0
Net Changes	(2,182)	0	(2,182)
Balance as of June 30, 2024 for FYE 2025	\$1,045,446	\$0	\$1,045,446
Funded status		0.00%	

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

OPEB Expense

1. Service Cost	\$	33,753
2. Interest		39,210
3. Projected Earnings on OPEB Trust		0
4. OPEB Administrative Expense		0
5. Changes in Benefit Terms		0
6. Differences Between Expected and Actual Earnings		
In Current Fiscal Year Recognized in Current Year		0
From Past Years Recognized in Current Year		0
Total		0
7. Differences Between Expected and Actual Experience		
In Current Fiscal Year Recognized in Current Year		(1,531)
From Past Years Recognized in Current Year		(13,994)
Total		(15,525)
8. Changes in Assumptions		
In Current Fiscal Year Recognized in Current Year		(1,439)
From Past Years Recognized in Current Year		(18,763)
Total		(20,202)
9. Total OPEB Expense	\$	37,236

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Sensitivity of Total and Net OPEB Liability

The following table presents Attorney Grievance Commission's Total and Net OPEB liability. We also present the Total and Net OPEB liability if it is calculated using a discount rate that is 1 percentage point lower or 1 percentage point higher.

Discount Rate	1% Decrease 2.97%	Baseline 3.97%	1% Increase 4.97%
Total OPEB Liability	\$1,158,461	\$1,045,446	\$949,016
Net OPEB Liability/(Asset)	\$1,158,461	\$1,045,446	\$949,016

The following table presents Attorney Grievance Commission's Total and Net OPEB liability. We also present the Total and Net OPEB liability if it is calculated using a health care cost trend rate that is 1 percentage point lower or 1 percentage point higher.

Ultimate Trend	1% Decrease 2.94%	Baseline 3.94%	1% Increase 4.94%
Total OPEB Liability	\$935,356	\$1,045,446	\$1,177,587
Net OPEB Liability/(Asset)	\$935,356	\$1,045,446	\$1,177,587

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Deferred Inflows/Outflows of Resources Related to OPEB

For the fiscal year ended June 30, 2025, Attorney Grievance Commission recognized an OPEB expense of \$37,236. At June 30, 2025, Attorney Grievance Commission reported deferred outflows of resources and deferred inflows of resources related to the OPEB plan from the following sources:

	Deferred Outflows of Resources	Deferred Inflows of Resources
Differences between expected and actual experience	\$ -	\$ 74,445
Changes of assumptions	93,202	220,494
Net difference between projected and actual earnings on OPEB plan investments	-	-
Employer contribution subsequent to measurement date	TBD	
Total	\$ 93,202	\$ 294,939

An amount to be determined will be reported as deferred outflows of resources related to OPEB resulting from employer contributions subsequent to measurement date will be recognized as a reduction of the net OPEB liability in the year ended June 30, 2026

Other amounts reported as deferred outflows of resources and deferred inflows of resources related to the OPEB plan will be recognized in the expense as follows:

Fiscal Year Ended June 30	Measurement Date	Earnings (Inflow)/Outflow
2026	6/30/2025	\$ (35,727)
2027	6/30/2026	(35,729)
2028	6/30/2027	(30,925)
2029	6/30/2028	(27,209)
2030	6/30/2029	(30,054)
Thereafter	6/30/2030 and after	(42,093)

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Schedule of Differences between Projected and Actual Earnings on OPEB Plan Investments

In conformity with paragraph 86b of Statement 75, the effects of differences between projected and actual earnings on OPEB plan investments are recognized in collective OPEB expense using a systematic and rational method over a closed five-year period, beginning in the current reporting period. The following table illustrates the application of this requirement.

Increase (Decrease) in OPEB Expense Arising from the Recognition of Differences between Projected and Actual Earnings on OPEB Plan Investments												
Year	Differences between Projected and Actual Earnings on OPEB Plan Investments	Recognition Period (Years)	Prior	2021	2022	2023	2024	2025	2026	2027	2028	2029
Prior	\$ -	5	\$ -	-	-	-	-	-	-	-	-	-
2021	-	5	\$ -	\$ -	-	-	-	-	-	-	-	-
2022	-	5	-	\$ -	-	-	-	-	-	-	-	-
2023	-	5	-	-	\$ -	-	-	-	-	-	-	-
2024	-	5	-	-	-	\$ -	-	-	-	-	-	-
2025	-	5	-	-	-	-	\$ -	-	-	-	-	-
Net increase (decrease) in OPEB expense			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

Deferred Outflows of Resources and Deferred Inflows of Resources Arising from Differences between Projected and Actual Earnings on OPEB Plan Investments

				Balances at June 30, 2024	
Year	Investment Earnings Less than Projected (a)	Investment Earnings Greater Than Projected (b)	Amounts Recognized in OPEB Expense Through June 30, 2024 (c)	Deferred Outflows of Resources (a) - (c)	Deferred Inflows of Resources (b) - (c)
Prior	\$ -	\$ -	\$ -	\$ -	\$ -
2021	-	-	-	-	-
2022	-	-	-	-	-
2023	-	-	-	-	-
2024	-	-	-	-	-
2025	-	-	-	-	-
				\$ -	\$ -

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Schedule of Differences between Expected and Actual Experience

In conformity with paragraph 86a of Statement 75, the effects of differences between expected and actual experience are recognized in collective OPEB expense, beginning in the current reporting period, using a systematic and rational method over a closed period equal to the average of the remaining service lives of all employees that are provided with OPEB through the OPEB plan (active and inactive employees), determined as of the beginning of the measurement period. The following table illustrates the application of this requirement.

Increase (Decrease) in OPEB Expense Arising from the Recognition of Differences between Expected and Actual Experience																
Year	Differences between Expected and Actual Experience	Recognition Period (Years)	Prior	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Thereafter	
Prior	\$ (32,870)	10	\$ (3,287)	(3,287)	(3,287)	(3,287)	(3,287)	(3,287)	(3,287)	(3,287)	(3,287)	(3,287)	-	-	-	
2020	(25,525)	10		\$ (2,553)	(2,553)	(2,553)	(2,553)	(2,553)	(2,553)	(2,553)	(2,553)	(2,553)	(2,548)			
2021	(4,067)	10			\$ (407)	(407)	(407)	(407)	(407)	(407)	(407)	(407)	(407)	(404)	-	
2022	(43,574)	9				\$ (4,842)	(4,842)	(4,842)	(4,842)	(4,842)	(4,842)	(4,842)	(4,842)	(4,838)	-	
2023	(8,241)	9					\$ (916)	(916)	(916)	(916)	(916)	(916)	(916)	(916)	(913)	
2024	(15,908)	8						\$ (1,989)	(1,989)	(1,989)	(1,989)	(1,989)	(1,989)	(1,989)	(1,985)	
2025	(12,247)	8							\$ (1,531)	(1,531)	(1,531)	(1,531)	(1,531)	(1,531)	(3,061)	
Net Increase (decrease) in OPEB expense			\$ (3,287)	\$ (5,840)	\$ (6,247)	\$ (11,089)	\$ (12,005)	\$ (13,994)	\$ (15,525)	\$ (15,525)	\$ (15,525)	\$ (15,525)	\$ (12,233)	\$ (9,678)	\$ (5,959)	

Deferred Outflows of Resources and Deferred Inflows of Resources Arising from Differences between Expected and Actual Experience

Year	Experience Losses		Experience Gains	Amounts Recognized in OPEB Expense Through June 30, 2024		Balances at June 30, 2024	
						Deferred Outflows of Resources	Deferred Inflows of Resources
	(a)	(b)		(c)		(a) - (c)	(b) - (c)
Prior	\$ -	\$ -	32,870	\$ -	23,009	\$ -	\$ 9,861
2020	-	-	25,525	-	15,318	-	10,207
2021	-	-	4,067	-	2,035	-	2,032
2022	-	-	43,574	-	19,368	-	24,206
2023	-	-	8,241	-	2,748	-	5,493
2024	-	-	15,908	-	3,978	-	11,930
2025	-	-	12,247	-	1,531	-	10,716
						\$ -	\$ 74,445

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Schedule of Changes of Assumptions

In conformity with paragraph 86a of Statement 75, the effects of changes of assumptions should be recognized in OPEB expense, beginning in the current reporting period, using a systematic and rational method over a closed period equal to the average of the remaining service lives of all employees that are provided with OPEB through the OPEB plan (active and inactive employees), determined as of the beginning of the measurement period. The following table illustrates the application of this requirement.

Increase (Decrease) in OPEB Expense Arising from the Effects of Changes of Assumptions															
Year	Changes of Assumptions	Recognition Period (Years)	Prior	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	Thereafter
Prior	\$ (52,302)	10	(10,032)	(5,230)	(5,230)	(5,230)	(5,230)	(5,230)	(5,230)	(5,230)	\$ (5,232)	(428)	-	-	-
2020	53,976	10		\$ 5,398	5,398	5,398	5,398	5,398	5,398	5,398	5,398	5,398	5,394		
2021	85,418	10			\$ 8,542	8,542	8,542	8,542	8,542	8,542	8,542	8,542	8,542	8,540	-
2022	52,034	9				\$ 5,782	5,782	5,782	5,782	5,782	5,782	5,782	5,782	5,778	-
2023	(216,585)	9					\$ (24,065)	(24,065)	(24,065)	(24,065)	(24,065)	(24,065)	(24,065)	(24,065)	(24,065)
2024	(73,518)	8						\$ (9,190)	(9,190)	(9,190)	(9,190)	(9,190)	(9,190)	(9,190)	(9,188)
2025	(11,515)	8							\$ (1,439)	(1,439)	(1,439)	(1,439)	(1,439)	(1,439)	(2,881)
Net increase (decrease) in OPEB expense			\$ (10,032)	\$ 168	\$ 8,710	\$ 14,492	\$ (9,573)	\$ (18,763)	\$ (20,202)	\$ (20,202)	\$ (20,204)	\$ (15,400)	\$ (14,976)	\$ (20,376)	\$ (36,134)

Deferred Outflows of Resources and Deferred Inflows of Resources Arising from Changes of Assumptions

Year	Increases in the Total OPEB Liability (a)	Decreases in the Total OPEB Liability (b)	Amounts Recognized in OPEB Expense Through June 30, 2024 (c)	Balances at June 30, 2024	
				Deferred Outflows of Resources (a) - (c)	Deferred Inflows of Resources (b) - (c)
Prior	-	52,302	41,412	-	10,890
2020	53,976	-	32,388	21,588	-
2021	85,418	-	42,710	42,708	-
2022	52,034	-	23,128	28,906	-
2023	-	216,585	72,195	-	144,390
2024	-	73,518	18,380	-	55,138
2025	-	11,515	1,439	-	10,076
				\$ 93,202	\$ 220,494

ATTORNEY GRIEVANCE COMMISSION OF MARYLAND
APPENDIX A: ADDITIONAL REQUIRED DISCLOSURES UNDER GASB 75
JUNE 30, 2025

Schedule of Changes in the Total Liability and Related Ratios

Changes in Employer's Net OPEB Liability and Related Ratios
Last 10 Fiscal Years
Information for FYE 2016 and earlier is not available

Disclosure for Fiscal Year Ending:	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016
Measurement Date:	6/30/2024	6/30/2023	6/30/2022	6/30/2021	6/30/2020	6/30/2019	6/30/2018	6/30/2017	6/30/2016	6/30/2015
Total OPEB Liability										
Service Cost	\$ 33,753	\$ 25,690	\$ 37,646	\$ 43,009	\$ 35,343	\$ 39,485	\$ 39,422	\$ 42,932	\$ -	\$ -
Interest Cost	39,210	32,261	20,733	25,577	29,333	31,845	31,258	25,234	-	-
Changes in Benefit Terms	-	224,230	-	-	-	-	-	-	-	-
Differences Between Expected and Actual Experience	(12,247)	(15,908)	(8,241)	(43,574)	(4,067)	(25,525)	(32,870)	-	-	-
Changes of Assumptions	(11,515)	(73,518)	(216,585)	52,034	85,418	53,976	(4,280)	(48,022)	-	-
Benefit Payments	(51,383)	(43,076)	(39,139)	(39,139)	(39,214)	(38,682)	(28,927)	(24,441)	-	-
Net Change in Total OPEB Liability	(2,182)	149,699	(205,586)	37,907	106,813	61,099	4,603	(4,297)	-	-
Total OPEB Liability - Beginning of Year	1,047,628	897,929	1,103,515	1,065,608	958,795	897,696	893,093	897,390	-	-
Total OPEB Liability - End of Year	1,045,446	1,047,628	897,929	1,103,515	1,065,608	958,795	897,696	893,093	-	-

Plan Fiduciary Net Position
Last 10 Fiscal Years
Information for FYE 2016 and earlier is not available

Disclosure for Fiscal Year Ending:	2025	2024	2023	2022	2021	2020	2019	2018	2017	2016
Measurement Date:	6/30/2024	6/30/2023	6/30/2022	6/30/2021	6/30/2020	6/30/2019	6/30/2018	6/30/2017	6/30/2016	6/30/2015
Contributions - Employer	\$ 51,383	\$ 43,076	\$ 39,139	\$ 39,139	\$ 39,214	\$ 38,682	\$ 28,927	\$ 24,441	\$ -	\$ -
Net Investment Income	-	-	-	-	-	-	-	-	-	-
Benefit Payments (net of retiree contributions)	(51,383)	(43,076)	(39,139)	(39,139)	(39,214)	(38,682)	(28,927)	(24,441)	-	-
Administrative Expense	-	-	-	-	-	-	-	-	-	-
Net Change in Fiduciary Net Position	-	-	-	-	-	-	-	-	-	-
Fiduciary Net Position - Beginning of Year	-	-	-	-	-	-	-	-	-	-
Fiduciary Net Position - End of Year	-	-	-	-	-	-	-	-	-	-
Net OPEB Liability	1,045,446	1,047,628	897,929	1,103,515	1,065,608	958,795	897,696	893,093	-	-
Fiduciary Net Position as a % of Total OPEB Liability	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	-	-
Covered-Employee Payroll ¹	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Net OPEB Liability as a Percentage of Covered Employee Payroll ¹	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Expected Average Remaining Service Years of All Participants	8	8	9	9	10	10	10	10	-	-

Notes to Schedule:
Benefit changes: None.

Changes of assumptions: The discount rate was changed as follows:
The discount rate changes year-to-year: 3.97% 3.86% 3.69% 1.92% 2.45% 3.13% 3.62% 3.58% N/A N/A

^{1/} Because this OPEB plan does not depend on salary, we do not have salary information.