

STATE BAR *of* TEXAS

ANNUAL REPORT 2024-2025



I am pleased to present the 2024-2025 State Bar of Texas Annual Report and to reflect on a year marked by forward momentum, fresh ideas, and a deep commitment to Texas lawyers and the clients they serve.

The year's highlights include the release of our AI Toolkit, a pioneering resource designed to help attorneys navigate the fast-changing intersection of law and artificial intelligence. Created by the State Bar's Taskforce for Responsible AI in the Law, the toolkit equips lawyers with guidance on evaluating technology, maintaining data security, and remaining within ethical boundaries—all while leveraging AI to streamline legal work.



Another major achievement came in the area of succession planning. The State Bar of Texas received a national award for our Succession Planning Toolkit that includes helpful forms and checklists and our user-friendly online portal that allows lawyers to designate a custodian attorney. A project of the Law Practice Management Committee, this initiative is making it easier for attorneys across Texas—especially solo and small-firm practitioners—to plan for the future and protect their clients and practices.

Throughout the year, State Bar President Steve Benesh and the State Bar Board of Directors focused on initiatives to improve the practice of law and promote the administration of justice. After President Benesh identified the need, the Austin Bar Foundation launched a crisis assistance pilot program to help area attorneys who temporarily step away for mental health, substance use treatment, or an illness. Meanwhile, the State Bar Board of Directors established an Emerging Technology Committee to continue the State Bar's important work around law and innovation.

We also marked the 50th anniversaries of two landmark programs: the Client Security Fund, which has granted more than \$25 million to clients harmed by attorney misconduct, and the National Trial Competition, which brought top law school teams back to Houston, where the competition began in 1975.

The state of our bar remains strong because of our volunteers and professional staff, who work tirelessly to fulfill the State Bar's mission and statutory purposes. Together, we are shaping the future of our profession, and I look forward to what we will accomplish together in the years ahead.

Sincerely,

A handwritten signature in black ink, reading "Trey Apffel". The signature is stylized with a large, looped "T" and a cursive "Apffel".

Trey Apffel
Executive Director, State Bar of Texas



2024-2025 SUCCESSES & MILESTONES



As the newly sworn-in president of the State Bar of Texas, Steve Benesh hit the ground running. He announced goals to create a crisis assistance program for attorneys seeking treatment for mental health or substance use issues, or who need to step away from their practice

due to an illness. He offered to convene stakeholders to discuss common issues related to electronic case filings. And he pledged to continue the work of the bar's artificial intelligence task force while overseeing enhancements to the bar's website.

By the end of his term, he could point to progress on each goal. The Austin Bar Foundation announced the creation of a pilot program to assist lawyers in the greater Austin area who need to temporarily step away from practice, citing Benesh as an inspiration. He met with various stakeholders to discuss ways to improve the electronic filing process. The State Bar Board of Directors created a new standing committee on emerging technology to continue the work of the Task Force for Responsible AI in the Law, and a redesign of texasbar.com was well underway.

Also, over the past year, the State Bar of Texas celebrated the 50-year anniversaries of two significant programs: the Client Security Fund and the National Trial Competition.

The State Bar established the Client Security Fund in 1975 to protect the integrity of the legal profession by

providing grants to clients harmed by their lawyers' dishonest conduct.

Over the past five decades, hundreds of Texas attorneys and members of the public have volunteered their time to serve as members of the Client Security Fund Committee. Those committee members have approved more than \$25 million in grants to clients, helping to promote public confidence in the administration of justice.

Also in 1975, the Junior Bar of Texas—now known as the Texas Young Lawyers Association (TYLA)—partnered with the American College of Trial Lawyers (ACTL) to host the first National Trial Competition (NTC), and the partnership still exists today.



STATE BAR of TEXAS ★ 2024-2025 BOARD OF DIRECTORS

The NTC offers law students across the country the chance to refine their trial advocacy skills and inspire them to enter practice as trial attorneys.

The program has been a tremendous success. In 2025, more than 300 teams from over 160 law schools participated. Regional competitions were held across the country, and the 30 regional champions came to compete once again in the tournament's birthplace, Houston, where another national champion—a team from St. John's University School of Law—was crowned.

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 [THREADS.COM/@STATEBAROFTEXAS](https://threads.com/@statebaroftexas)

WHAT WE DO

SELF-GOVERNANCE

Texas lawyers practice law in a self-regulated profession with an independent grievance system. Since the inception of the State Bar of Texas, Texas lawyers have retained the right to approve proposed disciplinary rule changes in referenda elections and vote on members of the board of directors, which governs all manner of bar administration, programs, policies, and budget management. Learn more at texasbar.com/board.

PROTECTING THE PUBLIC

The State Bar of Texas furthers the state's interests in regulating the legal profession and improving the quality of legal services. The Texas attorney discipline system is administered by the Office of Chief Disciplinary Counsel (CDC) whose work is overseen by the Commission for Lawyer Discipline. CDC represents the commission in disciplinary litigation. The Client-Attorney Assistance Program processes written Requests for Assistance received from clients that have specific communication concerns with their Texas attorneys and answers the Grievance Helpline to provide information to the public about the grievance process and services of the State Bar of Texas. Also, the Client Security Fund assists clients whose lawyers improperly take funds belonging to the clients. Clients can apply to the fund after disciplinary proceedings are completed. Payouts are funded through an annual allocation from the bar, interest on the corpus, and any restitution received.

LAWYER REFERRAL SERVICE

The State Bar of Texas offers tools to help attorneys grow their practices. One is the Lawyer Referral and Information Service, which connects clients in need of legal representation with attorneys who may help. LRIS makes referrals in the Texas counties that do not have local referral programs.

LAW PRACTICE MANAGEMENT

The State Bar's Law Practice Resources Division created texasbarpractice.com to provide law practice management guidance on the different phases of a law practice, from starting to closing a practice, and emerging practice trends in addition to housing Texas Bar Books and Texas Bar Books Online resources. For emergency management and

client protection, the State Bar urges members to designate in advance one or more custodian attorneys. A custodian attorney assists with closing a practice in the event need arises. Lawyers can make advance designations by accessing the State Bar portal at texasbar.com/succession. The bar also offers the Texas Bar Career Center, an online portal for both employers and job seekers. Visit the Career Center to post open positions or search for law-related jobs.

COMMUNICATIONS

Each month, except a combined issue of July/August, members receive the *Texas Bar Journal*, which includes information and in-depth stories on current legal topics, disciplinary actions, legal technology, and more. It can also be viewed online at texasbar.com/tbj or via the digital edition at texasbar.com/digitaltbj. Members and the public can follow the bar on social media for timely announcements. The *State Bar of Texas Podcast* showcases interviews with experts on the latest legal trends and topics.

CONTINUING LEGAL EDUCATION

TexasBarCLE is one of the top providers of continuing legal education in the country and often sets the national standard for CLE content and delivery. Most programs are recorded and archived for online viewing, and many are available as online classes. Also, CLE articles are featured in the online library, including ethics-related articles.

EDUCATING THE PUBLIC

The State Bar, the Texas Young Lawyers Association, and the bar's Law-Related Education Department publish, in print and online, dozens of handbooks and pamphlets in both English and Spanish to educate the public on a variety of legal topics (see texasbar.com/resources, tyla.org/resources, and texaslre.org). Law-Related Education holds teacher workshops and publishes educational materials about the law and civics for teachers and K-12 students. To learn more, go to texaslre.org.

EDUCATING YOUNG LAWYERS

In addition to providing continuing legal education for all lawyers, the bar plays an important role in educating young lawyers, helping them build a strong foundation for law practices. Programs include: *After the Bar Exam*, which offers links to CLE online classes and access to other helpful

WHAT WE DO

resources for students who have graduated from law school and are awaiting the results of the bar exam, and the Texas Young Lawyers Association's podcast collection offering practical advice or tips on specific legal topics. Also, 40 State Bar sections offer free memberships for lawyers licensed two years or less, and 32 sections offer free memberships to law students. Sections often participate in mentoring programs for law students and sponsor CLE programs at Texas law schools, which students are allowed to attend for free. Finally, the State Bar of Texas Law Student Division provides an avenue for law students to connect to the bar before graduating—offering educational, networking, and scholarship opportunities.

ATTORNEY ETHICS HELPLINE

The Attorney Ethics Helpline at 800-532-3947 is a free benefit to attorney-members of the State Bar of Texas. Ethics attorneys provide nonbinding, nonconfidential guidance to Texas-licensed attorneys. Guidance is limited to questions involving the Texas Disciplinary Rules of Professional Conduct, Texas Rules of Disciplinary Procedure, and ethics opinions. Some caselaw and additional resources are also provided.

LEGAL SERVICES FOR ALL TEXANS

The State Bar of Texas is committed to ensuring that all Texans have access to justice regardless of income. The State Bar's Legal Access Department works to achieve this goal by providing resources such as malpractice insurance, Westlaw, CLE, and language access services to legal aid organizations and pro bono attorneys; striving to remove barriers to pro bono service; and partnering with legal aid organizations on disaster preparedness and response efforts. The Legal Access Department also assists the public by providing information to low-income Texans. For more information, go to texasbar.com/probono and probonotexas.org.

LOCAL BAR SERVICES

The Local Bar Services Department fosters and maintains relationships between the State Bar and local bar associations. Each year, the Local Bar Leaders Conference offers education and networking for local bar executives, young lawyer affiliates, and other volunteer leaders. Outreach to local bars helps to fulfill one of the purposes outlined in the State Bar Act.

MEMBER BENEFITS

The State Bar of Texas Member Benefits Program offers numerous resources to help attorneys with the everyday practice of law. Goods and services offered to assist lawyers include free legal research, free billing and trust accounting software, health insurance through the Texas Bar Private Insurance Exchange, and professional liability insurance through TLIE.

ADVERTISING REVIEW

The Advertising Review Department is responsible for reviewing attorney and law firm advertisements and solicitation communications as required by Part VII of the Texas Disciplinary Rules of Professional Conduct.

REGULATION

As part of its duty to regulate the legal profession, the State Bar of Texas works to ensure Texas attorneys remain in compliance with their membership and minimum continuing legal education requirements. The Minimum Continuing Legal Education Committee administers the MCLE program, formulates rules and regulations, evaluates accreditations of CLE activities, and encourages the development of high-quality programs.

TEXAS LAWYERS' ASSISTANCE PROGRAM

The Texas Lawyers' Assistance Program helps attorneys, law students, judges, and other legal professionals who are struggling with mental health or substance use concerns, chronic stress, or cognitive decline. TLAP handles consultations and offers numerous educational programs and resources, including a free CLE on depression and suicide prevention as well as an online support toolbox. Communications with TLAP are confidential by statute. For more information, go to tlaphelps.org.

TEXAS LAWYERS FOR TEXAS VETERANS

Texas Lawyers for Texas Veterans (TLTV), modeled after a program started by the Houston Bar Association in 2008, is a collaborative effort with local bar associations, legal aid organizations, and veterans service providers to host legal advice clinics throughout the state.

BY THE NUMBERS

The State Bar of Texas adopts a strategic plan every two years that includes goals and performance measures. The State Bar has identified three broad categories guiding these measures: (1) Serving the Public; (2) Serving Our Members; and (3) Serving Our Mission. The following are highlights of the results and outcomes for the 2024-2025 bar year. For a full list of results, go to texasbar.com/performance-measures-numbers.

SERVING THE PUBLIC

Number of people who received a referral through the Lawyer Referral and Information Service:

LRIS made **108,263** referrals in FY2025, assisting over **104,000** individuals.

Measure traffic and growth to State Bar of Texas consumer-facing websites and social media sites, including site visits and downloads to sites including information about the courts and the role of the judiciary:

35,443 pamphlets page hits; **2,872** media page hits; **23,544,257** total hits to the State Bar of Texas website; **6,797,943** website users (unique visitors); **75,480** page views to Texas Bar Blog; **89,024** engagements, **44,798** clicks, and **1,777,934** impressions to State Bar of Texas social media.

CAAP

34,370 contacts received via mail, email, and phone to CAAP program. CAAP conducted **769** dispute resolutions, with productive communication successfully reestablished in **87.4%** of the cases.

ATTORNEY DISCIPLINE (CDC)

Total complaints resolved: **329**; Total sanctions: **286**; Disbarments: **24**; Resignations: **8**; Suspensions: **78**; Public reprimands: **26**; Private reprimands: **73**; Grievance Referral Program: **77**.

ACCESS TO JUSTICE

Over **10,535** Texas attorneys made contributions in the amount of **\$1,580,354.91*** through the bar dues access to justice donation check-off option. *The reporting period for these ATJ numbers is from September 2023 to August 2024.

SERVING OUR MEMBERS

TEXAS BAR CLE

117,985 registrations obtained through **1,902** continuing legal education offerings.

TEXAS LAWYERS' ASSISTANCE PROGRAM

875 consultations, **56%** were related to mental health, **39%** to substance use, and **5%** to cognitive issues; TLAP's website—tlaphelps.org—garnered **8,494** users and **16,915** page views; TLAP made **110** educational outreach presentations, including at law schools.

MEMBER BENEFITS

Visits to State Bar of Texas Member Benefits homepage:

127,174.

Number of visits to succession planning materials on the State Bar of Texas website:

7,200 visits to the Succession Planning portal and **3,408** views of Closing a Practice materials.

SERVING OUR MISSION

Measure to confirm sufficient operating and capital reserves in keeping with best practices:

At May 31, 2025, the State Bar maintained **\$21,465,980** in reserves to support long-term financial stability. Of the total reserve, **\$13,480,619** is designated as minimum reserves, representing 3.1 months of operating expenditures. The remaining **\$7,985,361** is held in reserves for operational stability.

Measure the number of resources provided to practitioners in areas not supported by local bars, such as receiving free or reduced-cost CLE:

Nearly all TexasBarCLE programs are recorded and made available online (to view offline, programs can be ordered on a USB flash drive). The past 25 years of TexasBarCLE course articles are available online.

Track member engagement with State Bar email communications, including open rates, click-through rates, and opt-out rate:

1.6% average click-through rate, **37.2%** average open rate, **7,469** opt-outs.

INNOVATIVE LAWYER TOOLKITS

The State Bar of Texas continued to find inventive ways to serve lawyers in 2024-2025, including with a new artificial intelligence (AI) toolkit and an award-winning succession planning program.

‘FIRST OF ITS KIND’ AI TOOLKIT UNVEILED

The State Bar of Texas AI Toolkit is available at texasbarpractice.com, the bar’s online hub for law practice management resources. The State Bar of Texas Taskforce for Responsible AI in the Law developed the toolkit to help Texas attorneys keep abreast of developments in the use of artificial intelligence, said Steve Benesh, 2024-2025 State Bar president.

“This toolkit is the first of its kind in the country; no other state bar has created a similar resource,” Benesh said. “It is one of the ways that the State Bar of Texas is leading the nation in embracing AI advancements while upholding the highest ethical standards of the profession.”

The toolkit’s key features include:

- Ethical considerations for the use of AI in legal contexts.
- Guidance on evaluating AI tools and vendors.
- Tips for ensuring data privacy and compliance with regulatory standards.
- Practical examples of AI applications in legal workflows.
- Sample forms for client disclosures and checklists for evaluating AI tools.

The toolkit includes a link to Opinion 705 of the Professional Ethics Committee for the State Bar of Texas, which addresses ethical issues lawyers must consider when using AI tools.



texasbarpractice.com/artificial-intelligence-toolkit/

SUCCESSION PLANNING PROGRAM RECOGNIZED

The State Bar of Texas Law Practice Management Committee won the 2025 Solo and Small Firm Project Award from the American Bar Association Solo, Small Firm and General Practice Division. The award recognizes the State Bar of Texas’ work on succession planning, sudden cessation custodianships, and a succession planning toolkit.

While several states have provided information to lawyers on succession planning and others have implemented rule changes, Texas forged a new path. It combined succession planning information and rule creation with an online portal to quickly and easily designate one or more custodian attorneys who could wind down an attorney’s practice if the need arose. “As Past President Laura Gibson said upon implementation, there’s not an easier process anywhere in the country to designate a custodian,” Executive Director Trey Apffel said.



With the Succession Planning Toolkit, the committee sought to provide a user-friendly resource with information, checklists, and forms for identifying and implementing a succession plan that fits the needs of the lawyer, their family, and their clients. The committee also created an outreach plan to reach as many lawyers as possible—especially in rural areas—by partnering with local bar associations, State Bar sections, and other attorney groups for CLE programs.

STATE BAR OF TEXAS

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2024 - 2025

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