



STATE BAR
OF MONTANA

REPORT TO THE MONTANA SUPREME COURT

July 2023

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I. Executive Summary.

The State Bar of Montana (State Bar) offers this special report to the Montana Supreme Court on the dues structure of the State Bar and is pleased to report to the Court that the State Bar maintained a strong fiscal plan through the COVID-19 pandemic and remains financially sound. Based upon current projections (including modest 1% growth and 3% expense increases), for the next five fiscal years (including current FY24), the State Bar's general fund will remain structurally stable, with the bar ending FY29 with an estimated net operating profit of over \$150,000 and twenty-five (25) months of reserves. As a result, the Executive Committee and the Board do not see a current need for a member dues increase for operations and believe that the State Bar will continue to be able to make strategic investments from reserves.

With the increase in the Mandatory Continuing Legal Education assessment in 2022, (a need identified in the July 2020 Special Report), the MCLE compliance budget is more sound, but may require spending into MCLE reserves based upon current staffing; however that eventuality may be offset by efficiencies gained from the ongoing MCLE software conversion.

One area identified in need of additional financial attention at this time is the operations of the Office of Disciplinary Counsel (ODC), which has not had an increase in its assessment since 2007. As a result, although ODC is carefully

managing its budget, it is presently spending into its reserves for annual operations. It would maintain nine (9) months of reserves by FY27 but would fall to just two (2) months of reserves by FY29. The Court likely will need to address this shortfall in the coming years, and likely prior to the State Bar's next special report in 2026. Any proposed increase in the disciplinary assessment would come to the Court via ODC and the Chief Disciplinary Counsel, however the Board wishes to call that to the attention of the Court.

II. Court Requirements and Strategic Plan.

In furtherance of the Court's inherent and constitutional powers to regulate the legal profession, and pursuant to its Unification Order of 1974 and subsequent orders, the State Bar manages and facilitates various Court created programs and administratively supports various Court Commissions to maintain the independent regulation of the profession. Those include:

- Commission on Character and Fitness (direct support)
- Board of Bar Examiners (direct support)
- Pro hac vice and Admission on Motion applications (direct support)
- Commission of Continuing Legal Education (direct support)
- Office of Disciplinary Counsel (ODC) (attached only for administrative needs, such as employee health and retirement benefits, but not management of disciplinary process, which is independent)
- Maintenance of all member records, including dues and MCLE (direct administration)
- Trust account oversight and compliance, including Interest on Lawyers Trust Account (IOLTA) program (direct administration)
- Fee arbitration program (direct administration)
- Lawyers' Fund for Client Protection (LFCP) (direct administration)

- State Bar Ethics Committee (direct administration)
- Lawyer Assistance Program (direct administration)
- State Bar Continuing Legal Education Institute (direct administration)
- Pro Bono Reporting and Equal Justice (direct support)
- Lawyer Referral and Information Service (direct administration)
- Publications (Deskbook & Directory, Montana Lawyer Magazine, etc. (direct administration)

The State Bar also adds support to various other court programs and State Bar committees and voluntary sections, including but not limited to:

- Access to Justice Commission
- Civil Jury Instructions Guidelines Commission
- Criminal Jury Instructions Commission
- Commission on Technology
- 16 State Bar Committees such as Technology and Professionalism Committees
- 21 State Bar practice-area sections, such as Business, Estates, Tax, Trust and Real Estate (BETTR), Bankruptcy, and Public Utilities Law, as well as a Paralegal Section.

All of the work in support of the Court commissions and programs above, as well as State Bar committees and sections, are supported by the members of the State Bar through mandatory and voluntary dues, Court assessments, and associated program revenue.

To fulfill these various responsibilities to protect the public and serve the profession and as established in the Unification Order, the State Bar operates under a leadership structure elected by its in-state active, active military, and judicial members, excepting from that members of the Montana Supreme Court who are not eligible to vote in bar elections. A Board of Trustees of sixteen (16), elected from

eight (8) areas (corresponding to the eight (8) areas by which the members of the Montana Commission on Practice are elected) and officers who are elected on a statewide basis: president, president-elect, secretary/treasurer, and past president.

The Board develops strategic plans, implemented by an executive committee and bar staff. The State Bar's current two-year strategic plan will expire May 2025. The 2021-23 strategic plan continued to emphasize optimization of State Bar operations. *See* Appendix, A-1. Those efforts have been successful, including a move by the ODC into the same building as the State Bar proper, allowing for the elimination of certain administrative redundancies. The State Bar is continuing to work to convert the MCLE tracking software program to match the association management software it recently installed. The work to support the CLE Commission by converting to new software is being directly supported by the State Bar Board of Trustees from the bar's financial reserves.

III. Member Dues, Court Assessments and Fees.

The State Bar annually invoices and collects dues (currently \$300 for active members), as well as all separate fees and assessments ordered by this Court, as well as the attorney license tax (currently totaling \$215.) *See* Standard Dues Invoice, Appendix A-2. As of this writing, the State Bar does not recommend any adjustment to the current member dues and assessments, with the exception, potentially, of the disciplinary assessment as discussed herein; however, that is a decision for the Chief

Disciplinary Counsel to pursue, or not.

IV. Revenue

A. Dues Revenue.

The State Bar's primary revenue source is member dues, both mandatory and voluntary. As of June 2023, 4,074 active members paid mandatory dues (which does not include active military members who only pay court assessments allocated and restricted to ODC, MCLE and LFCP). *See* June 2023 Membership Report, Appendix A-3. Total active dues collected in FY23 were \$1.44 million. Additionally, 1,390 members, comprised of the classes of inactive and senior members, pay voluntary dues to the State Bar. *Id.* In FY23, voluntary dues paid to the State Bar amounted to \$243,000.

For recently concluded FY23, approximately 71.6% of all general State Bar revenue was comprised of member dues of various types¹ on total State Bar general revenue of \$2.0 million, not including investment gains. The remaining general revenue was generated from non-dues sources including CLE revenue, publication sales, various affinity agreement royalty payments, and similar non-dues sources. Administrative fees and those generated by Admissions on Motion (AOM) are also

¹ This dues revenue figure does not include the Montana attorney license tax collected and transferred to the Clerk of the Montana Supreme Court, or that from court assessments such as the CLE Transcript Filing Fee, the Disciplinary Counsel assessment, and the Lawyers' Fund for Client Protection membership assessment.

included in the above gross general revenue figure.

As noted in the 2020 report, dues revenue is directly impacted by the overall membership composition of the State Bar. When the State Bar last reported to the Court in June of 2017, there were 3,837 active members (3,102 in-state), and 6,657 total members across all categories of membership. *See* Historic Membership Reports, Appendix A-4. In June 2020, we reported 3,940 active members (3,104 in-state) and 7,203 total members across all categories of membership. In June of 2023, the bar had 4,074 active members (3,153 in-state) and 7,794 total members across all types.² *See* Appendix A-3.

As with the increase between 2017 and 2020, the majority of the increase in active members in 2023 is, again, derived mainly from an increase of 85 out-of-state active members. However, unlike our last report, where there were only two (2) more active in-state attorneys in June 2020 than there were in June 2017, in June of 2023, there are now forty-nine (49) more active in-state members than in June 2020, a significant increase. The Fourth Judicial District experienced the largest increase in active members, thirty-four (34) more than in 2020, followed by the Eighteenth Judicial District, which had fifteen (15) more active practice attorneys in June 2023 than it did in June 2020. This is perhaps not surprising given the overall ongoing

² There was a significant increase in the number of suspended members between June 2020 and June 2023 reflecting the non-payment of dues suspension cycle for 2023.

growth in the Missoula and Bozeman regions. On the other hand, the Thirteenth Judicial District was down seventeen (17) active practice attorneys from 2020. *See generally* Appendix A-3 and A-4.

While active members grew 3.4% between 2020 and 2023, there was a slight decrease in inactive members over the same period, moving from 1,014 inactive members in June 2020 to 998 in June 2023, a decrease of approximately 1.6%. The continued “graying” of the profession we noted in our 2020 report also continued. In June 2023 there were 366 senior members, up from 308 in 2020, an increase of 18.8%. The number of retired members also jumped significantly to 1,117 retired members as of June 2023, an increase of 33% over the 840 retired members in June 2020. *Id.* Some of the increase in the two latter categories is likely related to the decrease in inactive members as they move to senior or retired.

While these shifting demographics are cause for some concern, as senior members pay lower dues and retired members no longer pay any dues, the pool of active and inactive members who pay the majority dues revenue remains relatively stable. Thus, as we have done for a number of years and reported in 2020, we continue to predict all revenue, the majority of which is mandatory and voluntary dues revenue, increasing modestly at approximately 1% per annum, which is reflected in the long-range general budget forecast. *See* Budget Forecasts, Appendix A-5.

B. Non-dues Revenue.

As noted, the State Bar also receives revenue from non-dues sources related to the education and training of our members through things such as continuing legal education programs, publications like the Lawyers' Deskbook and other law practice-oriented publications. The marketplace made some major shifts over the past three years due to the COVID-19 pandemic, but the State Bar is finding that the new use of video to deliver synchronous live interactive CLE programming has allowed for significantly increased attendance and, in many cases, a corresponding increase in revenue. For example, the audience size for the popular Bench-Bar CLE has nearly doubled in size over pre-pandemic attendance due to the addition of an online audience.

The State Bar also continues to explore new revenue sources, including to increase attorney participation in the Lawyer Referral Information Service, which has moved to a new, online product called "Licensed Lawyer." We are looking to grow participation on the platform, which formally debuted this year and charges an annual membership fee to attorneys. The goal is not only to potentially increase non-dues revenue, but to use some of that revenue to better advertise the service online in targeted ways that assist members of the public searching for attorneys. An important requirement of attorneys participating in the Licensed Lawyer program is that they maintain malpractice insurance.

V. Expenses.

While the pandemic posed many challenges, including for the legal profession, it did provide the opportunity for the State Bar to continue to restructure operations to reduce expenses.

During the height of the pandemic when event costs, travel and other items were significantly reduced (and as other organizations also experienced), the State Bar was able to significantly increase its investment reserves, strengthening the overall financial health of the organization. In the 2017 Special Report, the State Bar projected that with the suggested higher proposed dues increase the organization would begin experiencing a deficit in FY23. When we reported to the Court in 2020, we indicated that, based upon our budget models, we did not forecast a budget deficit to occur until FY26. The current forecast model does not show the State Bar in a deficit position until after 2029. *See* Budget Forecasts, Appendix A-5.

VI. General Fund Cash Reserve and Investments.

In our 2020 report, we also projected that investment reserves at the close of FY23 would be \$1,468,590. Due to the aforementioned reduction in expenses in the past three years, including a significant drop during the height of the pandemic, the State Bar actually finished FY23 with general investment reserves of \$3,052,082, more than double the reserves projected in our last report and now maintains a total of 19 months of investment reserves. The Lawyers Fund for Client Protection

maintains investments of \$1,308,394.

This fiscal improvement provides several advantages to the State Bar and its members moving forward. First, as noted in the most recent long-range budget forecasts attached, general bar operations are currently forecast to be financially very healthy as far out as FY29, with an anticipated continued net operating profit and twenty-five (25) months of reserves. The State Bar predicts the need for a general dues increase is highly unlikely in the next five years.

There is also another important aspect of the buttressed reserve position. The Board of Trustees is now able to spend reserves, and/or the interest thereon, for important projects. For example, the MCLE program and bar operations supporting it are to operate without a financial burden to the general State Bar budget and are instead to be supported by the MCLE Transcript Filing Fee and other program fees alone. However, because of the significant reserve position, the Trustees were able to approve spending of \$75,000 from State Bar general reserves directed toward the conversion of the MCLE reporting software in an effort to improve overall bar efficiency and, it is hoped, improve the MCLE reporting process for the membership. Again, this was a direct result of the improved financial position of the organization, and likely will not be the last time that important capital investments and improvements will now be possible.

VII. Bar Sections and Programs.

As noted in Section II above, the State Bar presently has twenty-one (21) practice area specific sections covering a wide variety of legal topics. These sections all aid in the continued professional education of members and development of the law, including through CLE programming. Each section is separately governed by elected members, and each has its own segregated funds. At present, the aggregate balance of section funds is \$398,729, primarily derived both from voluntary dues over time and income from various section CLE programs.

A specific program that merits attention in our 2023 report is the Lawyers' Fund for Client Protection (LFCP) program. The LFCP operates as a trust for the benefit of clients injured by the conduct of attorneys who fall within the program rules. The Fund was created by order of the Court and all active and active military members pay an annual membership assessment of \$20.

For an injured client to be eligible for payment from the Fund, an attorney against whom an LFCP claim is made, must: (1) have been disbarred, involuntarily suspended, or otherwise have voluntarily surrendered her or his law license; (2) have died or have been found to be mentally incompetent; (3) have been found guilty of a crime constituting "dishonest conduct" under the rules; or (4) have had a judgment or decree entered against her or him related to the

“dishonest conduct” claimed. *See* Rule 8(B)(1-4), Lawyers’ Fund for Client Protection Rules. As its rules also make clear, the program is a fund of grace, managed by the Lawyers Fund for Client Protection Board. The board investigates and processes claims and makes discretionary payments as it deems warranted.

In the past several years, LFCP claims have increased after a period of relative quiet. Between 2020 and 2023, thirty (30) claims were paid to injured clients amounting to \$212,060. Just three (3) claims were denied as falling outside of the program rules and requirements. There are presently seven (7) LFCP claims pending, three (3) of which involve one attorney.

It is important to note that the claims between 2020 and 2023 resulted from the actions of a very small number of lawyers, six (6) to be exact. Eighteen (18) of the claims in total involved just two (2) lawyers; one disbarred by order this Court, and another who passed away (a third deceased attorney accounted for another four (4) paid claims).

The LFCP continues to be an important program administered by the State Bar, providing a valuable service to assist injured members of the public.

VIII. Office of Disciplinary Counsel.

As noted in our 2020 report, the current annual Office of Disciplinary Counsel (ODC) assessment is \$125 for active members and *pro hac vice* applicants. That has not increased since 2007. The State Bar does not propose or review ODC's budget

or the Court's disciplinary assessment. ODC employees are State Bar employees solely for administrative purposes such as health insurance, retirement benefits, etc. Given the current operating deficit, it is highly likely that ODC will need to adjust the assessment that has not been adjusted in sixteen years.

IX. Supreme Court Commissions.

As noted in Section II, above, in order to support the independent regulation of the legal profession, the State Bar provides support staff and services to several Supreme Court Commissions under the terms of a Memorandum of Understanding which clarifies their respective roles and responsibilities, as well as budget obligations. Those commissions include the Commission on Character and Fitness, the Board of Bar Examiners, and the Commission on Continuing Legal Education. The work of these Commissions, including the State Bar staff and administrative support, is funded through a variety of mechanisms such as the MCLE Transcript Filing Fee paid by attorneys, fees generated through the admissions process, MCLE course sponsor fees and the like. The State Bar Board of Trustees maintains fiduciary responsibility and oversight over State Bar revenues collected to support the work of these Commissions, subject to audit by independent auditors contracted by the State Bar. Commission support budgets are adopted as part of the overall State Bar budget.

A. Board of Bar Examiners and Commission on Character and Fitness.

As noted in prior reports, there is not a “direct” attorney assessment for support operations of the Board of Bar Examiners and the Commission on Character and Fitness. Rather, those operations are funded by a combination of admissions revenue collected by the State Bar including revenue from application fees, admission on motion fees (AOM), and pro hac vice admission fees. As previously noted, a significant part of the growth in active members is coming from those residing outside of Montana. Many of those members come to the bar through the admission on motion process. In FY21, during the height of the pandemic, AOM revenue reached a three-year high of over \$130,000. Pro hac vice application revenue also reached a three-year high of over \$91,000. Though both are now lower than FY21, they continue to bring in combined revenue of nearly \$190,000 supporting the admissions process. Admission support operations do not have segregated reserves similar to the MCLE operations discussed below, however we do not anticipate any need to increase the various admissions fees prior to the next report in 2026.

B. Commission on Continuing Legal Education.

In 2021, the Montana Commission on Continuing Legal Education petitioned the Court to increase the MCLE Transcript Filing Fee, and the Court ordered the fee increased to \$45 (which was not the entire amount the Commission had requested).

See Appendix, A-2. The MCLE assessment, paid by active members (but not active military members, because active military members do not have a CLE reporting requirement), is used to fund State Bar operations in support of MCLE regulation and is managed under the fiduciary oversight of the Board of Trustees. Additional revenue is derived from sources such as late filing penalties and fees assessed to CLE sponsors.

When we last reported to the Court in 2020, MCLE support operations were not financially stable, and it had been a significant number of years since the last increase in the MCLE Transcript Filing Fee. That situation presented a significant challenge; however, two things have happened since then which have improved the situation. First, as noted above, the Court ordered an increase in the MCLE attorney assessment to \$45. Second, the State Bar not only completed its own major management software switch, but the Board of Trustees agreed to spend \$75,000 out of State Bar general reserves to fund a similar major software transition for MCLE operations, eliminating the existing and labor-intensive software and bringing MCLE compliance into the same overarching software program used by the State Bar for membership management, IOLTA compliance and the like. The hope is that this move, expected to be completed in the fall of 2023, will generate a better online experience for members during the dues and compliance period and will bring significantly more efficiencies to MCLE support operations.

Although budget predictions show MCLE operations dipping into dedicated reserves, actual operations in FY23 resulted in a net operating profit of nearly \$30,000, adding to reserves (and FY23 revenue did not include the increased assessment). See Budget Projections, Appendix A-5. We are cautiously optimistic that MCLE operations will be far more efficient in the coming years due to the software switch and will be buttressed by additional revenue from the Transcript Filing Fee increase. We do not see a need to reexamine the MCLE assessment prior to the State Bar's 2026 report.

X. Conclusion

The State Bar of Montana, which underpins Montana's self-regulating legal profession, remained financially sound through the global pandemic and is adjusting to the new post-pandemic world. The Board of Trustees, Officers and staff continue to manage the State Bar's finances to optimize its mission to protect the public and serve the profession. While ODC operations may require an adjustment in the disciplinary assessment due to the passage of time, we see no need for any further adjustments to the dues structure prior to the State Bar's 2026 special report.

David Steele, President

Toni Tease, Chair of the Board of Trustees

Alanah Griffith, Secretary/Treasurer *John Mudd, Executive Director*

STATE BAR OF MONTANA

2 Year Strategic Plan
(June 2021 - May 2023)

1. As a voice for lawyers and the profession, in furtherance of its own Constitution, expand the State Bar of Montana's role in aiding the public in understanding the rule of law as a crucial underpinning of a free society, the role of the Constitution, separation of powers principles and the importance of a fair and independent judiciary.
 - A. Coalition-Building
 - a. Among law-related bar associations
 - b. Among other professional, trade, business or public interest associations
 - B. Media Outreach
 - C. Broad Public Education Campaign
 - D. Legislative Education and Outreach
 - E. Expansion of Youth-Oriented Initiatives

2. To better lead the profession and serve the public interest in a more sustainable manner, evaluate and enact a comprehensive plan designed to streamline or enhance efficiencies within core Bar functions.
 - A. Improve the Member Experience
 - B. Regulatory Efficiencies
 - a. Commissions & Boards
 - i. Board of Bar Examiners / Character & Fitness
 - ii. Continuing Legal Education
 - b. Bar Programs
 - i. Fee Arbitration
 - ii. Fund for Client Protection
 - c. Montana Justice Foundation / IOLTA Compliance
 - d. Office of Disciplinary Counsel
 - e. Other
 - C. Office Space Efficiencies
 - D. Petition Supreme Court on Recommendations, where Applicable

Dues Invoice 2023-2024

State Bar of Montana

33 S. Last Chance Gulch, Suite 1B
P.O. Box 577
Helena, MT 59624

Invoice #	Payee #	Invoice Date	Notice Date	Due Date	Balance Due
36163	1000000128 (I)	4/1/2023	1/26/2023	4/1/2023	\$515.00

Bill to:
John Doe
State Bar of Montana
PO Box 577
Helena, MT 59624
United States

Ship to:
John Doe
State Bar of Montana
PO Box 577
Helena, MT 59624
United States

Item Description	QTY	Rate	Total
Active Attorney	1	\$300.00	\$300.00
Discipline Counsel Assessment	1	\$125.00	\$125.00
LFCP Membership	1	\$20.00	\$20.00
MCLE Transcript Filing Fee	1	\$45.00	\$45.00
State of Montana License Tax	1	\$25.00	\$25.00

Note	Total Invoice	\$515.00
	Payments	\$0.00
	Balance Due	\$515.00

Please detach and return

Invoice #	Payee #	Invoice Date	Terms	Notice Date	Due Date	Balance Due
36163	1000000128 (I)	4/1/2023	Pay By Due Date	1/26/2023	4/1/2023	\$515.00

Credit card payments will have a 3% surcharge applied.

John Doe
State Bar of Montana
PO Box 577
Helena, MT 59624
United States

Payment: Check AMEX MC VISA DISC

Check/Credit Card Number		Exp (mm/yy)	CVV
Amt. Paid	Pmt. Date		
		Signature (credit card only)	

Membership Totals Report

6/21/2023

Membership Types: Active, Inactive, Inactive/Disability, Emeritus, Judicial, ActiveMilitary, SUSuspended, Resigned/Retired, Senior, Paralegal

Membership Type	"A"	"I"	"ID"	"E"	"J"	"AM"	"SU"	"R"	"S"	"P"	TOTAL
Montana	3153	359	15	24	221	6	275	483	242	143	4921
Out-Of-State	921	639	1	2	26	22	502	634	124	2	2873
TOTAL	4074	998	16	26	247	28	777	1117	366	145	7794

Gender	Male	Female	Other	Total
Montana	2286	1472	2	3760
Out-Of-State	1105	601	0	1706
TOTAL	3391	2073	2	5466

District includes Active, Active Military, Inactive, Senior Members

District	"A"	"I"	Total
1	565	88	653
2	66	16	82
3	24	9	33
4	704	135	839
5	47	23	70
6	41	14	55
7	22	9	31
8	210	32	242
9	29	6	35
10	18	6	24
11	255	54	309
12	26	4	30
13	523	83	606
14	5	2	7
15	12	3	15
16	28	4	32
17	18	2	20
18	381	69	450
19	17	1	18
20	70	12	82
21	58	16	74
22	40	13	53

Section Counts

Animal Law Section	18	Bankruptcy Law Section	61
BETTR Law Section	231	Construction Law Section	40
Criminal Law Section	69	Dispute Resolution Law Section	47
Family Law Section	105	Federal Practice Law Section	41
Healthcare Law Section	43	Indian Law Section	87
Intellectual Property Law Section	38	Natural Resources Law Section	94
New Lawyers Section	98	Nonprofit Law Section	36
Paralegal Section	151	Public Law Section	46
Public Utilities Law Section	25	School Law Section	13
Veterans Law Section	14	Water Law Section	86
Women's Law Section	87		

STATE BAR OF MONTANA MEMBERSHIP INFORMATION REPORT

June 4, 2020

By: *Jill Diveley*

MEMBERSHIP TYPE	"A"	"I"	"ID"	"E"	"J"	"AM"	"SU"	"R"	"S"	"P"	TOTAL
Montana	3104	364	13	21	213	3	215	351	196	156	4636
Out-of-State	836	650	1	2	25	26	424	489	112	2	2567
TOTAL	3940	1014	14	23	238	29	639	840	308	158	7203

Membership Types: Active, Inactive, IDisability, Emeritus, Judicial, ActiveMilitary, SUsuspended, Resigned/Retired, Senior, Paralegal

(GENDER & DISTRICT includes Active, ActiveMilitary, Inactive & Senior members)

GENDER	"M"	"F"	Unknown	TOTAL
Montana	2322	1344	1	3667
Out-of-State	1051	573	0	1624
TOTAL	3373	1917	1	5291

(DISTRICT includes Active/ActiveMilitary, Inactive/Senior members)

DISTRICT	"A"	"I"	TOTAL
1	560	88	648
2	61	17	78
3	30	7	37
4	670	121	791
5	40	17	57
6	38	11	49
7	26	4	30
8	211	33	244
9	31	6	37
10	22	4	26
11	248	47	295
12	26	5	31
13	540	83	623
14	4	1	5
15	15	0	15
16	24	2	26
17	16	2	18
18	366	68	434
19	17	3	20
20	70	11	81
21	53	17	70
22	39	13	52

SECTION COUNTS

ANIMAL LAW	22	NAT. RESOURCE/ENVIRON.	122
BANKRUPTCY LAW	99	NEW LAWYERS	126
BETTR LAW	205	NONPROFIT LAW	33
CONSTRUCTION LAW	61	PARALEGAL	160
CRIMINAL LAW	89	PUBLIC LAW	78
FAMILY LAW	156	SCHOOL LAW	18
FEDERAL PRACTICE	72	VETERANS' LAW	28
HEALTH CARE LAW	93	WATER LAW	105
INDIAN LAW	81	WOMEN'S LAW	118
INTELLECTUAL PROPERTY	43		

MEMBERSHIP INFORMATION REPORT

June 8, 2017

By: *Jill Diveley*

MEMBERSHIP TYPE	"A"	"I"	"ID"	"E"	"J"	"AM"	"SU"	"R"	"S"	"P"	TOTAL
Montana	3102	367	12	7	200	4	180	243	139	164	4418
Out-of-State	735	652	1	2	20	24	357	357	89	2	2239
TOTAL	3837	1019	13	9	220	28	537	600	228	166	6657

Membership Types: Active, Inactive, IDisability, Emeritus, Judicial, ActiveMilitary, SUsuspended, Resigned/Retired, Senior, Paralegal

(GENDER & DISTRICT includes Active, ActiveMilitary, Inactive & Senior members)

GENDER	"M"	"F"	TOTAL
Montana	2341	1271	3612
Out-of-State	978	522	1500
TOTAL	3319	1793	5112

(DISTRICT includes Active/ActiveMilitary, Inactive/Senior members)

DISTRICT	"A"	"I"	TOTAL
1	553	88	641
2	80	10	90
3	25	8	33
4	638	104	742
5	43	12	55
6	42	8	50
7	32	3	35
8	209	39	248
9	33	6	39
10	21	3	24
11	248	39	287
12	32	5	37
13	520	77	597
14	6	2	8
15	16	0	16
16	24	3	27
17	18	0	18
18	364	61	425
19	18	3	21
20	84	9	93
21	60	15	75
22	40	11	51

SECTION COUNTS

BANKRUPTCY	96	NAT. RESOURCE/ENVIRON.	121
BETTR LAW	158	NEW LAWYERS	123
CONSTRUCTION LAW	52	NONPROFIT LAW	30
CRIMINAL LAW	70	PARALEGAL	169
FAMILY LAW	162	PUBLIC LAW	60
FEDERAL PRACTICE	69	SCHOOL LAW	23
HEALTH CARE LAW	63	VETERANS' LAW	29
INDIAN LAW	76	WOMEN'S LAW	92
INTELLECTUAL PROPERTY	40		

**State Bar of Montana
General Fund Forecast based on Approved Budgets
March 31, 2023**

	Final FY23	Approved FY24	Projected FY25	Projected FY26	Projected FY27	Projected FY28	Projected FY29
Revenue	2,264,693	2,249,250	2,271,743	2,294,460	2,317,405	2,340,579	2,363,985
Expenses	1,884,439	1,908,611	1,965,869	2,024,845	2,085,590	2,148,158	2,212,603
Investments	3,052,082	3,392,722	3,698,596	3,968,211	4,200,026	4,392,447	4,543,828
No. Months Reserve	19	21	23	24	24	25	25

Class: SBM, ADM, CLE Institute, LAP (does not include LFCP)
 Revenue increases 1%, Expenses increase 3%
 FY20 report included Haswell Fund. I have not included.]
 FY20 Report did not remove Section funds Removed section fund balance of 401671.33

**State Bar of Montana
Mandatory CLE Forecast based on Approved Budgets
March 31, 2023**

	Final FY23	Approved FY24	Projected FY25	Projected FY26	Projected FY27	Projected FY28	Projected FY29
Revenue	280,495	341,665	345,082	348,532	352,018	355,538	359,093
Expenses	251,042	352,837	363,422	374,325	385,555	397,121	409,035
Investments	198,961	187,789	169,449	143,656	110,119	68,536	18,594
No. Months Reserve	10	6	6	5	3	2	1

Revenue increases 1%, Expenses increase 3%

**State Bar of Montana
Office of Disciplinary Council Forecast based on Approved Budgets
March 31, 2023**

	Final FY23	Approved FY24	Projected FY25	Projected FY26	Projected FY27	Projected FY28	Projected FY29
Revenue	565,300	541,000	546,410	551,874	557,393	562,967	568,596
Expenses	621,081	698,199	719,145	740,719	762,941	785,829	809,404
Investments	1,305,490	1,148,291	975,556	786,711	581,163	358,301	117,493
No. Months Reserve	25	20	16	13	9	5	2

Revenue increases 1%, Expenses increase 3%