



Presenter Biographies

Nonprofits and Taxes: What You Need to Know

Rachael Chamberlain is a partner in the Florence office of FBT Gibbons LLP. Rachael practices in the area of tax law, with an emphasis on state and local taxation and nonprofit taxation. Rachael assists clients with issues involving property tax, sales and use tax, and income tax, assisting in both tax planning and controversy work. She has represented clients throughout the audit and administrative appeals process and into the court system and has also assisted with various requests for rulings and guidance on tax issues from state taxing authorities. Rachael has also assisted clients with federal and state tax credits, economic incentive deals, and voluntary disclosure program applications. She currently serves as Chair of the Tax Section of the KBA.

I (Can't) Challenge You to a Duel: Kentucky Attorneys and the Ethical Implications of Dueling

Anna Girard Fletcher has been the Executive Director of the Energy & Mineral Law Foundation since 2018. Previously, she was an attorney with the Commonwealth of Kentucky Energy and Environment Cabinet practicing environmental protection and natural resources law, and law clerk to the Honorable Phillip J. Shepherd. In 2025, she was named Woman of the Year by the Fayette County Bar Women Lawyers Association. In addition, she is a Kentucky Colonel, a former national Chair of the Conference of Government Mining Attorneys and was chosen for the Kentucky Bar Association's inaugural leadership class in 2018. She currently serves on the board of the Fayette County Bar Association, is a former president of the Fayette County Women Lawyers Association and is a member of the Women's Energy Network. She is a graduate of the University of Kentucky Rosenberg College of Law where she served as Student Bar Association president and was a member of Phi Alpha Delta. Her writing has been featured in such publications as the National Law Journal, and she is a former editor of the Kentucky Journal of Equine, Agriculture, & Natural Resources Law, and current Editor-in-Chief of the Energy & Mineral Law Institute, the flagship publication of the Energy & Mineral Law Foundation. She resides in beautiful Lexington, Kentucky, with her husband and two children.

Unclaimed Property and Post Judgement Collection

Kentucky State Treasurer, Mark H. Metcalf was elected Kentucky's 42nd State Treasurer on November 8, 2023. He has practiced law for 39 years as a private practitioner, state and federal prosecutor, and as a US immigration judge in Miami, Florida prior to his election. He was previously elected to six terms as Garrard County Attorney and selected Kentucky's Outstanding County Attorney in 2013 for his work as a special prosecutor. He has twice represented Kentucky before the US Supreme Court as Special Assistant Attorney General. Additionally, Treasurer Metcalf served 29 years in the Kentucky Army National Guard and is a combat veteran of Iraq.

Sam P. Burchett, originally from Olive Hill, Kentucky, practiced law in Lexington for 39 years prior to being named as General Counsel for the Kentucky State Treasury. While in private practice, Sam represented corporations and individuals at all levels of Kentucky Courts. Prior to his legal career, Sam worked as a coal operator. That formative experience was instrumental in his success while representing coal companies of every size throughout Kentucky. Now at Treasury, Sam works as General Counsel advising Treasury staff and executives regarding a vast array of matters. Sam served as a dedicated member of the Kentucky Science and Technology Corporation board and executive committee for nearly three decades. Additionally, Sam is the proud father of five and husband to his beloved Linda.

Robert L. Gullette III, a native of Jessamine County, has practiced law in Kentucky since 2008. Immediately following his admission to the bar, Rob opened his office in Nicholasville. Rob's private practice focused primarily on civil litigation, family law and probate matters. In addition to his private practice, Rob served as the City Attorney for Wilmore, Kentucky for more than a decade. In 2024, Rob was hired by Treasurer Metcalf to serve as a Division Director in the State Treasury and as Deputy General Counsel under Sam Burchett. Rob shares three daughters with his wife, Erin.

When AI Listens: Confidentiality, Discovery, and Ethical Risks in the AI Era

Jeff Sallee is a member of Western & Southern's Information Security team, joining the company following his retirement from Procter & Gamble. He is an alumnus of the Defense Language Institute and earned three undergraduate degrees from Purdue University before receiving his J.D. from Chase College of Law. He currently serves as an instructor at the University of the Cumberlands. Jeff holds certifications as a Certified Information Systems Security Professional (CISSP) and a Certified Information Systems Auditor (CISA).

Kentucky Appellate Case Law and Rules Update

Joseph A. Wright is a partner at Thompson Miller & Simpson, PLC, where he focuses on complex civil litigation and appellate practice, representing healthcare providers, hospitals, and manufacturers. His work includes defending medical negligence and product liability claims and advising clients on regulatory and professional matters. He earned his undergraduate degree in Materials Engineering and his J.D. from the University of Kentucky, and previously clerked for Chief Justice John D. Minton, Jr. of the Kentucky Supreme Court. Joey is active in the legal community, including involvement with the Kentucky Bar Association and Louisville Bar Association, and serves on Kentucky's eCourts Project Management Committee.

Courting Trouble: When AI Crosses the Ethical Line

Ruth Baxter is the managing partner of Crawford & Baxter in Carrollton, Kentucky. She earned her B.A., *cum laude*, from Murray State University and her J.D. from the University of Kentucky J. David Rosenberg College of Law. She began her career as a law clerk for the U.S. Tax Court and later served as an Assistant Attorney General in the Consumer Protection and Special Prosecutions Division. Ms. Baxter is Director Emeritus of Lawyers Mutual of Kentucky after a 30-year term on its board and is a three-term member of the Kentucky Bar Association Ethics Committee, where she also serves on the Ethics Hotline for the 6th Judicial Circuit. A board-certified civil trial attorney with the National Board of Trial Advocacy for more than 20 years, she has been recognized as a "Super Lawyer" in Real Estate since 2008 and has held an AV Preeminent rating from Martindale-Hubbell for over 25 years.

Sheldon G. "Shelly" Gilman recently retired from the active practice of law but remains engaged in law-related matters, including assisting other lawyers, addressing professional conduct issues, and studying the impact of artificial intelligence. He earned his undergraduate degree from Ohio University and his law degree from Case Western Reserve University, and served four years in the U.S. Army Judge Advocate General's Corps. Mr. Gilman has been recognized in *The Best Lawyers in America* (Trusts and Estates and Employee Benefits Law), as 2016 Best Lawyer of the Year, and has also been listed in *Kentucky Super Lawyers* and *Who's Who in American Law, America, and the World*. A longtime leader in lawyer professional responsibility, he has served on the Kentucky Bar Association Ethics Committee and Ethics Hotline for more than 30 years, authoring over 800 Hotline Informal Opinions, and was a member of the Ethics 2000 Committee that recommended Kentucky's current Rules of Professional Conduct. In 2023, he received the KBA's Bruce K. Davis Bar Service Award for his service to the Ethics and Hotline Committees.