

Al in Action: A Live Demonstration and Discussion of Legal Tech Tools Transforming Law Practice

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AI IN ACTION: A LIVE DEMONSTRATION AND DISCUSSION OF LEGAL TECH TOOLS TRANSFORMING LAW PRACTICE

Stephen Embry and Jeffery L. Sallee

I. INTRODUCTION

Artificial intelligence is no longer a futuristic concept – it's here, and it's changing the way lawyers work. In this interactive session, we'll go beyond theory and dive into live demonstrations of cutting-edge AI tools that are revolutionizing legal practice. From AI-powered chat assistants and contract review tools to e-discovery platforms and digital forensics advancements, attendees will see firsthand how these technologies can enhance efficiency, accuracy, and client service. Whether you're an AI skeptic or a tech-savvy lawyer, this session will equip you with practical insights on how AI can be integrated into your legal workflow.

II. LEARNING OBJECTIVES

A. Experience AI in Action

Witness live demonstrations of AI tools including ChatGPT and others.

B. Understand Practical Applications

Learn how AI can assist in deposition planning, legal research, contract management, practice management, and digital forensics with tools such as OtterAI, contract review platforms, e-discovery tools like Everlaw, and AI-powered image analysis solutions.

C. Explore Efficiency Gains

Discover how AI-powered tools streamline legal workflows, from document review to chatbot-driven client interactions.

D. Identify Ethical and Practical Considerations

Discuss the limitations, ethical concerns, and risk management strategies for implementing AI in legal practice.

E. Develop AI Integration Strategies

Gain actionable insights into selecting and deploying AI tools effectively within law firms and legal departments.

III. EXPERIENCE AI IN ACTION

A. Live Demonstration of ChatGPT

Although we plan to demonstrate creating custom GPTs in the session, for the background materials, I will provide an example from a ChatGPT custom GPT I use to do initial research on a potential customer from information security, regulatory, and current litigation perspectives. Recently, the CEO of Astronomer was caught in a Kiss Cam at a Coldplay concert. I thought it might be interesting to review the company using my process.

Query: Provide a report on Astronomer, Inc. which is headquartered in New York, NY:

<u>Response</u>: Here's the corporate risk report on **Astronomer, Inc.**, the commercial entity behind Apache Airflow orchestration:

1. Headquarters & Overview

- **Headquarters:** 50 West 23rd Street, Suite 1400, New York, NY 10010; officially relocated from Cincinnati in early 2024 (OpenGov Colorado).
- **Founded:** January 31, 2017 (Delaware entity), operational since ~2015 by co-founders Paola Peraza Calderon, Viraj Parekh, and Pete DeJoy (Wikipedia).
- **Employees & Valuation:** Approximately 350-370 employees; valued near \$740 M-\$1 billion after May 2025 Series D round (\$93 M raise) (<u>The Economic Times</u>).
- **Product:** Offers "Astro," a managed Apache Airflow DataOps platform for enterprise data pipelines (<u>Astronomer</u>).

2. Information Security Posture

- **Open-source posture:** Monitored by UpGuard continuously scanned across website, email, phishing, network, and brand/reputation vectors (<u>UpGuard</u>).
 - However, no publicly reported data breaches or incidents are listed.

• Security program:

- February 2025 Security Addendum outlines: SOC 2-modeled risk governance, quarterly access reviews, annual penetration tests, TLS 1.3 in transit, AES-256 at rest, strong MFA, sandbox separation, and customer notification within 24 hours for incidents (<u>UpGuard</u>, <u>Astronomer</u>).
- Highlights mature security hygiene and formal incident response processes.
- **Status:** Overall, Astronomer maintains a robust, documented security program and benefits from healthy third-party ratings; no historical breaches found.

3. Known Security Incidents

- No confirmed breaches or data leaks found in public or third-party sources.
- UpGuard lists security posture assessments but no incidents reported (<u>Dun & Bradstreet</u>, <u>UpGuard</u>).
- No significant vulnerabilities disclosed in news or breach databases.

4. Litigation & Legal Issues

- No major lawsuits or regulatory actions (e.g., data privacy or cyber-liability litigation) were found in reputable news outlets (AP, Reuters, CNN).
- The company's legal filings focus on security contracts and internal policies; no public legal disputes reported.

5. Recent Leadership & Governance Event

- In July 2025, CEO Andy Byron resigned following a viral "kiss-cam" incident at a Coldplay concert involving the CHRO (San Francisco Chronicle).
 - The entire episode widely covered in the press resulted in governance scrutiny, board action, and naming co-founder Pete DeJoy interim CEO (<u>San Francisco Chronicle</u>).
- While this is a reputational matter, **no legal actions** (claims, divorces, HR lawsuits) have been reported at this time.

Summary: Risk Profile	~	Summary	: Risk	Profile
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Category Status

HQ & Structure NYC-based, 350 FTE, private, ~\$1B valuation **Security Posture** Strong documented controls, no public incidents

Historical Breaches None found
Litigation Risk None found

Reputational EventCEO resignation after public incident

Recommendations

- 1. **Monitor reputational fallout** from the CEO incident internal culture, retention, brand perception.
- 2. **Verify third-party security assessments** (e.g. SOC 2 Type II), penetration-test reports if conducting vendor due diligence.
- 3. **Watch for emerging issues** during leadership transition and ongoing Series E fundraising.

If deeper due diligence is needed – like reviewing legal filings, SOC reports, SLAs, or customer agreements – let me know!

As you can see in the results, ChatGPT no longer relies entirely on the content used to train the underlying LLM. It can, if asked, search for relevant data on the Internet. The underlying instructions used to create this GPT were fairly simple:

This GPT is an information investigator specialized in providing company-specific reports. Upon receiving the name of a company, it asks the user to confirm the target company. Once confirmed, it delivers a structured report that includes: 1) the company's headquarters location, 2) an assessment of its information security posture using publicly available data, 3) a list of known information security incidents involving the company (including breaches, leaks,

or notable vulnerabilities), and 4) a list of serious litigation cases involving the company, citing major news sources such as Associated Press, Reuters, and CNN.

Chat GPT can also perform deep research. An acquaintance recently asked ChatGPT if it could translate a 2D image into a file that could be used by a 3D FDM printer to create a three-dimensional representation of the image. After a few days and many update requests, the system finally provided the equivalent of a preschooler's pipe cleaner representation of the image. Using Deep Research, the system explained the result was not possible based on the information provided in the original prompt. The report was a seven-page document that could be paraphrased as "If you really want me to do what you want me to do, then it is up to you to be very detailed in every aspect of your request. If you want me to tell you honestly if it is not possible, you must tell me that is an option." This was the opposite of the breakup meme "It's not you, it's me."

B. The advice for ChatGPT to reduce hallucinations for legal research included the following:



🔍 1. Legal Research (Case Law, Statutes, Doctrines)

Prompt:

"You are a legal research assistant. Find only U.S. federal or state case law relevant to [insert topic, e.g., 'duty of care in premises liability']. Do not fabricate cases or citations. If no case is found, say 'no known precedent.' Provide the case name, court, year, and a two-sentence summary. Cite your sources explicitly."



🧠 2. Statutory Interpretation or Code Review

Prompt:

"Interpret [insert statute section] strictly as written, based on current federal/ state law. Do not summarize from memory. Use plain language. If the section is ambiguous or context-dependent, say so. Do not invent case law."

3. Contract Clause Review

Prompt:

"Analyze the following contract clause for enforceability and risk under U.S. law. Do not make assumptions beyond the clause. Identify red flags, ambiguous terms, and potential litigation triggers. If the clause could vary by jurisdiction, flag that as well."

1 4. "Hallucination Check" for Legal Drafts

Prompt:

"Review the following legal summary. Highlight anything that may be unsupported, outdated, or unverifiable. Do not let confident tone override accuracy. If uncertain, mark as 'needs citation or confirmation.' Rate overall factual reliability as high, medium, or low."

💄 5. Summarize Legal Opinions

Prompt:

"Summarize the main holding, reasoning, and dissent (if applicable) in [case name]. Only include what the court actually stated – do not paraphrase beyond what's justified. Quote where helpful. Mention jurisdiction and date. If unsure of facts, say so."

iii 6. Jurisdiction-Specific Prompt

Prompt:

"Give an overview of how [legal issue, e.g., non-compete clauses] is treated in [state/jurisdiction]. Cite relevant statutes or recent case law. If no clear rule exists, say so and flag it as unsettled. Do not generalize from other states."

7. Litigation Risk Assessment Prompt

Prompt:

"Assess potential litigation risk in the following fact pattern under U.S. law. Use only known doctrines and precedents - do not invent legal standards. Identify plausible causes of action or defenses. Clearly separate factual analysis from legal speculation."

🎥 8. Ask for Confidence + Limitation Disclosure

Prompt:

"After answering, rate your confidence as:

- High (based on well-established law),
- Medium (ambiguous or disputed),
- ? Low (uncertain or lacking authority).

Also disclose any limitations or assumptions made."

BONUS: Prompt Modifier for "No Guessing" Rule

Add this to any legal prompt:

"Do not fabricate case names, statutes, or outcomes. If you are unsure, say 'I do not know' or 'cannot confirm based on current data.' Avoid answering just to match user expectations."

C. Deep Research

Use Deep Research when you need a fully developed background on a topic that you would normally give to a paralegal or junior attorney, ensuring that you are not placing confidential client data in the request. I used this research to give me a starting point when I began work on a regulatory compliance topic. I wanted to have the system start working on the topic while I started my more traditional research process. The report convinced me to consider my approach in a few areas and gave me a better understanding of the questions I needed to assess the existing and planned compliance activities.

D. Demonstration of Other AI Tools

We are working with a few vendors to create or obtain permission to share short video files that show how other Al products can assist in the practice of law.

IV. UNDERSTAND PRACTICAL APPLICATIONS

Al tools exist for about every substantive area of law and for all the supporting aspects of the practice of law.

A. Contract Management

- 1. Ironclad¹ uses AI to review contracts across the entire contract lifecycle. You can:
 - a. Draft, edit, and redline documents in MS Word or PDF formats.
 - b. Look for required and problematic clauses in the contracts.
 - c. Find suggested redlines on new contracts based on your completed contracts.
 - d. Scan contracts for searching, tagging, and overall workflow management.
 - e. Manage the signing process, if desired.
- 2. Litera's Kira² uses Al much like Ironclad, but it has some special features:
 - a. Larger library of clauses.
 - b. More than 40 substantive contract areas.
 - c. Enhanced classification and workflow processes.

¹ Ironclad's site is available at https://ironcladapp.com/.

² Litera's Kira site is available at Al Contract Review Software | Kira | Litera.

B. Summarize Audio/Visual Content

Otter.ai³ is an AI tool that can integrate with most commonly used office applications to:

- 1. Transcribe the audio.
- 2. Summarize the audio.
- 3. Capture slides.
- 4. Provide a chat-like AI interface to find content based on your prompts.

C. Electronic Discovery

EverLaw⁴ can assist with eDiscovery and trial preparation. Some of the features:

- 1. eDiscovery Use AI to identify key insights.
- 2. Early case assessment The Al can find the key documents for attorney review.
- 3. Trial preparation Use AI for comprehensive deposition and trial prep.
- 4. Special focus for plaintiff and boutique firms.

D. Law Firm Management

- 1. INTAPP⁵ is a law practice system with embedded AI capabilities. Some of the features:
 - a. Time and prebilling solutions.
 - b. Compliant timekeeping.
 - c. Compliant prebilling.
 - d. Risk and compliance solutions.
 - e. New business intake.

³ Otter.ai's site is available at https://otter.ai/.

⁴ EverLaw's site is available at https://www.everlaw.com/law-firms/.

⁵ INTAPP's site is available at https://www.intapp.com/legal/.

- f. Conflicts management.
- g. OCG compliance.
- h. Anti-money laundering.
- i. Ethical walls.
- j. Lateral hire onboarding.
- k. Partner attestation management.
- 2. EvenUp⁶ has a suite of applications that offer many capabilities focusing on personal injury:
 - a. Al Drafts[™] Use Al to draft Pl-specific briefs and working papers.
 - b. Express Demands™ Use AI to draft an entire demand package.
 - c. Demands[™] Use AI to draft demand letters likely to hit policy limits.
 - d. MedChrons™ Use AI to parse medical records to summarize key medical information.
 - e. Workflow Processes™ Use AI to ensure you meet your deadlines.
 - f. Case Companion™ Summarize and organize raw data for your cases.
 - g. Case Preparation™ Use AI to use adjuster negotiations to maximize your claim value.
 - h. Negotiation Preparation™ Prepare for a negotiation with claim adjusters.
 - i. Settlement Repository™ Use AI for settlement estimates, offers, and negotiations.
 - j. Executive Analytics™ Use AI to analyze your case for potentially overlooked items.

V. EXPLORE EFFICIENCY GAINS

Most artificial intelligence CLE presentations focus on the way attorneys can use AI to improve their ability to perform research and put that knowledge in a format that meets the needs of a particular audience. We discuss how to write a brief that will be hallucination free, use case law that is relevant, and most importantly, will not lead to sanctions or a bar

⁶ EvenUp's site is available at https://www.evenuplaw.com/

complaint. We discuss how AI can help us eliminate legalese and help craft our presentations to juries. We can use AI to generate content for a firm's web presence. AI can make it enticing but not cross ethical boundaries.

The discussions that are often missed in these CLE presentations are the way Al-powered tools can streamline legal workflows, from document review to chatbot-driven client interactions. The fear is that the effort to streamline will result in the elimination of jobs. We should think of ways Al can make us more efficient to improve our bottom lines.

A. Billing Processes

One key example of back-office improvements is the emergence of electronic automated billing platforms that take such things as billing guidelines and automate their application into the pre-bill process. The result is fewer write-offs for failure to comply with billing guidelines. When a Fortune 500 company implemented electronic billing in the mid-2000s, it became obvious that some law firms did not adhere to best practices, much less the corporate guidelines. E-billing vendors provided corporate clients with the ability to challenge improper billing. Al tools now provide even smaller law firms with the ability to address issues before the bill is even generated. Examples of billing issues that were easily identifiable almost 20 years ago are still problematic today:

- How many people can attend a deposition?
- What are the rates for copies/faxes/texts?
- Is there a preferred vendor, e.g., do not try to FedEx a package for UPS?
- Is there a maximum number of hours for a lawyer to work per day?
- Do you have a rate for "windshield" time travelling to/from a destination?

It is common for guidelines to be different for different clients and even for specific matters for the same client. The lawyer who negotiates the rates may not be the person who generates the client bill. The new AI-enabled billing systems are able to generate correct bills the first time, eliminating the back-and-forth process of billing disputes and increasing cash flow. After an audit preparing for the eBilling effort, a Fortune 500 company found a firm that had billing issues to such a degree that the parties mutually agreed to a deep discount until the billing overages were resolved.

Another efficiency with AI-centric law practice management is that bills can be generated with less effort as well as being created within guidelines. The systems can integrate into both desktop and mobile apps and prepare the bills as you go. Having an automated assistant generating the bills, and potentially sending them, can speed up payments.

B. Office Management and Firm Profitability

Most attorneys do not have MBAs and do not have formal training on office management. Having an AI tool that can track your business plan and firm financials for you can be invaluable. Many small firms and solo practitioners are not aware of the actual profit or loss until their annual meeting with their tax advisors, assuming they do not file their own taxes. With Al-enabled law practice solutions, you can evaluate your firm and even individuals more frequently.

VI. IDENTIFY ETHICAL AND PRACTICAL CONSIDERATIONS

A. Ethical Rules

Every AI presentation seems to cover the ethical aspects of using AI in the practice of law. Lawyers have a duty regarding technology. Found in Rule 1.1^7 (competence: Comment 8 to Model Rule 1.1 requires us to be cognizant of the risks and benefits of technology relevant to our practices), we must understand the capabilities and limitations of technology, including artificial intelligence. The most obvious risk related to using AI relates to Rule 1.6^8 (confidentiality). It is possible to use AI in a way that adversely affects the confidentiality you are required to protect.

Attorneys are still trying to grapple with billing and how AI affects our billing practices. Rule 1.5 (ethical billing) is implicated because we are prohibited from charging unreasonable fees. Technology can reduce costs and fees.

Although most attorneys realize the responsibility of supervising other legal professionals in their firm (Rule 5.1¹⁰), many firms still do not have AI or technology standards. Some attorneys do not realize that Rule 5.3¹¹ includes experts for things like eDiscovery and even the vendors who provide our technology, especially technology with embedded AI. Attorneys remain responsible for themselves and for those they supervise. One cannot adequately supervise what one does not understand.

⁷ SCR 3.130(1.1) found at https://govt.westlaw.com/kyrules/Document/NED31B960D18111EF 8763B4A255D0FA3B?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageIte m&contextData=(sc.Default)&bhcp=1.

8 SCR 3.130(1.6) found at https://govt.westlaw.com/kyrules/Document/NAECEEE80BB6911 EC871BBD85CE4BA4A0?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPage https://govt.westlaw.com/kyrules/Document/NAECEEE80BB6911 EC871BBD85CE4BA4A0?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPage https://govt.westlaw.com/kyrules/Document/NAECEEE80BB6911

⁹ SCR 3.130(1.5) found at https://govt.westlaw.com/kyrules/Document/N31BEFB50BB6A11E CB043DD63579CCC35?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageI tem&contextData=(sc.Default).

SCR 3.130(5.1) found at https://govt.westlaw.com/kyrules/Document/N30C40B70BB6811E C9B64FBDA1DB24F24?contextData=%28sc.Default%29&transitionType=Default.

¹¹ <u>SCR 3.130(5.3)</u> *found at* <u>https://govt.westlaw.com/kyrules/Document/N1EEE2840BB6811ECB2A4A9E619FF97D5?viewType=FullText&originationContext=documenttoc&transitionType=CategoryPageItem&contextData=(sc.Default).</u>

B. Al Can Make You Lazy

The one essential truth in using AI in the practice of law is simple—use AI as a tool and not a crutch. Attorneys who rely too much on AI are likely to lose some of the skills they need to effectively practice law. There have been several articles and studies that point out that excessive use of AI can cause a cognitive decline. These include the following:

- 1. MIT Study: https://arxiv.org/pdf/2506.08872v1. Scientific data shows Al does affect cognitive ability when doing tasks.
- 2. Cognitive decline: https://www.analyticsinsight.net/editorial/chatgpt-cognitive-laziness-are-we-losing-mental-edge. This article summarizes the MIT study.
- 3. We think we are lazy when using AI: https://www.psychologytoday.com/us/blog/the-digital-self/202503/the-lazy-genius-how-ai-boosts-us-and-bums-us-out. AI users believe using AI is a form of cheating and does make them lazy.
- 4. How to avoid being lazy with AI: https://www.forbes.com/sites/jodiecook/2025/01/29/5-ways-chatgpt-is-making-you-lazy-and-how-to-stay-sharp/. An article with some ideas on how to counteract the tendency of AI to make us lazy.
- 5. Al is a two-edged sword: https://pub.aimind.so/ai-making-us-lazy-the-death-of-human-creativity-and-critical-thinking-cac2d492afc1. Al can increase productivity, but you must "use Al as a partner, not a crutch."
- 6. Lazy, but is that OK?: https://www.itpro.com/technology/artificial-intelligence-ai/359557/is-ai-making-us-lazy. Using AI can make you lazy, but it also can free you from time-consuming tasks. You need to understand how and when to use the tools.

C. Actionable Advice for Using AI

There are a few key strategies to help you use AI systems ethically.

- 1. Always check your work. As long as AI hallucinates, attorneys must verify the case law exists, has not been overturned, is on point, and that any quotes are present in the original text.
- 2. Ensure the terms and conditions protect client confidentiality. Most free Al tools do not protect client confidentiality. Not only is it likely the information you use for the Al prompt will be used to train or update the Al system, your interactions with the Al tool to refine the response, as well as the final response itself may be used.

- 3. Do not convince yourself that AI is the ultimate answer. Even using the tools tailored for law firms, e.g., Nexis+12 and CoCounsel13, the fact that AI can be an effective tool does not provide the level of competence in the subject matter required by Model Rule 1.1. It is your law license at stake, not the AI system.
- 4. Provide transparency with your clients and the courts where you practice. If you are going to use AI, ensure your clients know. At a minimum, this should be part of your engagement letters. Check the court rules to know the impact of AI and if you need to provide any additional information to the court.

VII. DEVELOP AI INTEGRATION STRATEGIES

It will soon be impossible to avoid AI on computers and smart phones. It seems that every computer program, website, and application is announcing some way they integrate into one or more AI systems. Even if you wanted to try to avoid using AI as legal counsel, and if you were somehow able to use older technology that predates AI, today's reality will cause you to interact with others who are using AI. This will range from other attorneys who are using AI tools, to *pro* se opponents who use AI as their lawyer, to the increasing number of clients who are using AI in their workplaces. How can you advise a client on the legal implications of using AI if you are not keeping track of how to use AI in your own profession?

¹² For Nexis+, see https://www.lexisnexis.com/en-us/products/nexis-plus-ai.page, last visited on July 20, 2025.

¹³ For CoCounsel, see https://legal.thomsonreuters.com/en/legal/generative-ai, last visited on July 20, 2025.

FOR YOUR INFORMATION ...

The Kentucky Law Update: Continuing Legal Education for All Kentucky Lawyers

The Supreme Court of Kentucky established the Kentucky Law Update Program as an element of the minimum continuing legal education system adopted by Kentucky attorneys in 1984. The KLU program is now offered in a hybrid format. The 2025 Kentucky Law Update is presented as a one-day, inperson program at nine different locations across the state. The 2025 On-Demand Kentucky Law Update is available virtually on the Kentucky Bar Association website from September 1st until December 31st. These two programs combined offer every Kentucky attorney the opportunity to meet the 12 credit CLE requirement, including the 2 ethics credit requirement close to home and at no cost! Judges can also earn continuing judicial education credits through the Kentucky Law Update.

This program was designed as a service to all Kentucky attorneys regardless of experience level. It is supported by membership dues and is, therefore, every member's program. The program is a survey of current issues, court decisions, ethical opinions, legislative and rule changes, and other legal topics of general interest that Kentucky practitioners encounter daily. As such, the program serves both the general practitioner and those who limit their practice to specific areas of law. The Kentucky Law Update program is not intended to be an in-depth analysis of a particular topic. It is designed to alert the lawyers of Kentucky to changes in the law and rules of practice that impact the day-to-day practice of law.

About the Written Materials and Presentations

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KBA Elder Law Section

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KBA Law Practice Committee Legal Aid Society

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New Americans initiative
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CLE and Ethics Credit

The one-day, in-person 2025 Kentucky Law Update program is accredited for 6 CLE credits, including 2 ethics credits. The 2025 On-Demand Kentucky Law Update is accredited for 9.25 CLE credits, including 3 ethics credits. One credit is awarded for each 60 minutes of actual instruction, as noted on the agendas provided on the KBA website.

The Kentucky Bar Association's 2025 Kentucky Law Update programs are accredited CLE activities in numerous other jurisdictions. Credit categories and credit calculations vary from state to state. CLE reporting information for other states will be provided at the registration desk at the in-person programs. The out-of-state information for the on-demand sessions will be available on the program website.

Kentucky judges: don't forget you can claim CJE credit for attending this program.

REMEMBER: Reporting attendance credits is now done online. Visit the Kentucky Bar Association website for reporting information. The activity numbers for the in-person and on-demand programs are listed on the corresponding agendas and must be used to report credits through the Member CLE Portal.

Evaluations

The 2025 Kentucky Law Update is *your* program, and your input *is* valued and needed. Links to the program evaluations for the live, in-person programs will be provided to all registrants via email. A link for the on-demand evaluation will be located on the program webpage. Please take a few minutes to complete the evaluation. We appreciate your assistance in improving this program.

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