



Annual Report

2024

The OACTA Foundation

400 W Wilson Bridge Road, Suite 120, Worthington, OH 43085

Tel: 614.228.4727 | Fax: 614.221.1989

oacta@assnoffices.com | www.oacta.org

Table of Contents

Contents

Message From the 2025 OACTA Foundation President	1
Our Mission	2
Our History	3
2024 Financial Summary	4
2024 Board of Directors / Past Presidents	5
2024 Donor Support	6-7

**Message From the 2025 OACTA
Foundation President
*Paul W. McCartney***

Dear Friends and Supporters,

This year marks the 10th anniversary of the founding of The OACTA Foundation in 2015. Although our review is of the 2024 financials, we should be proud that we have reached this milestone. We could not have done it without you and our wonderful sponsors. The OACTA Foundation supports two worthy causes: The OACTA Hilary S. Taylor Law School Inclusion and Equity Scholarships and The National Foundation for Judicial Excellence ("NFJE").

The NFJE's mission is to "...support a strong, independent, responsive judiciary by providing officers of the courts with educational programs and other tools that enable them to perform at their highest level." This is led by the Annual Judicial Symposium for state level appellate judges to discuss collaboratively issues they may face in the coming year.

Our second cause, The OACTA Hilary S. Taylor Law School Inclusion and Equity Scholarships, has provided nearly \$60,000 in scholarships to 35 worthy recipients. The focus of the scholarships is those who come from backgrounds underrepresented in the legal profession including those from economically impoverished backgrounds and geographic disadvantaged communities.

The OACTA Foundation is financially responsible and strong. Our major source of revenue is OACTA's Annual Golf Outing (which will be celebrating its 10th anniversary in 2026). Through sponsorships (thank-you sponsors!), entry fees and donations, the Golf Outing has raised over \$140,000 for The OACTA Foundation since its inception in 2016.

The OACTA Foundation also receives charitable contributions directly from firms and individuals. These donations are tax deductible to the extent allowed by law and can be made on the OACTA website (www.oacta.org).

We welcome your support whether by sponsoring the golf outing, playing in the golf outing or making a direct donation to The OACTA Foundation. Together we are making a difference in our community throughout the Great State of Ohio.

Thank-you for your support.

Paul W. McCartney

Our Mission

Established in 2015, The OACTA Foundation was organized exclusively for charitable and educational purposes. The Foundation funds projects consistent with the mission of OACTA, such as the annual OACTA Hilary S. Taylor Law Student Inclusion and Equity scholarship program and the National Foundation for Judicial Excellence (NFJE). The OACTA Foundation is incorporated in Ohio as a 501(c)(3) nonprofit charitable organization under the Internal Revenue Service. Contributions made to The OACTA Foundation are tax deductible to the extent allowed by law. Please consider contributing to The OACTA Foundation. Go to www.oacta.org to make a contribution. Your support is appreciated!

OACTA Hilary S. Taylor Inclusion & Equity Scholarships

The OACTA Hilary S. Taylor Law Student Inclusion & Equity Scholarships are open to the following incoming second and third year law students who are enrolled in an Ohio law school or are a permanent Ohio residents including, but not limited to, Minority law students; LGBTQIA+ law students, regardless of race or ethnicity; female law students, regardless of race or ethnicity; law students with disabilities, regardless of race or ethnicity; law students from economically impoverished families/backgrounds, regardless of race or ethnicity, and law students from geographically disadvantaged communities, regardless of race or ethnicity. The criteria include academic achievements; service to the community and to the cause of inclusion and equity; and experience or interest in a civil defense practice.

Up to three (3) scholarships in the amount of \$2,500 each are awarded to successful applicants. Applicants are required to submit an application, law school transcript and a cover letter addressing the following: academic, personal and professional accomplishments, and why they should be selected as a recipient of the scholarship. Applicants must also submit at least one letter of recommendation but may submit a total of three. Applications must be submitted online with a cover letter. Transcripts and letters of recommendation may be mailed to the OACTA office. The completed applications and all other requested material must be received by the posted deadline.

OACTA Foundation Annual Golf Outing

Since 2009, OACTA has conducted an annual Golf Outing. Net proceeds from the Golf Outing have benefitted the OACTA Foundation since 2016. Since its founding, the Golf Outing has been held at Pinnacle Golf Club in Grove City, Ohio, in early September. OACTA members, friends and colleagues gather for golf and fun and all for good causes! Net proceeds from the annual Golf Outing support the Hilary S. Taylor Law Student Inclusion and Equity Scholarships and the NFJE. Since its formation, the annual Golf Outing has generated over \$146,400 (through 12/31/24). In 2024, over 70 golfers participated and over \$16,000 was raised for the OACTA Foundation.

Established in October, 2015, the OACTA Foundation is a 501(c)(3) charitable organization, dedicated to supporting OACTA projects, such as the OACTA Law Student Inclusion and Equity Scholarships and the National Foundation for Judicial Excellence (NFJE), and the broader educational and organizational goals of OACTA itself.

In 2016, OACTA hosted a 50th Anniversary Gala at the Ohio Statehouse in the Atrium and Rotunda. OACTA provided all the logistical and staff support for the event held in conjunction with the OACTA Annual Meeting in Columbus and the OACTA Foundation was the direct beneficiary of all net proceeds from the event. Sponsorships and contributions helped generate a net income to the OACTA Foundation in the amount of \$42,435.

2017 marked the first full year in which the entire OACTA Law Student Diversity Scholarship Program and the Annual OACTA Golf Outing were fully administered through the OACTA Foundation, with significant administrative support from OACTA. The personal donations and contributions of individuals are fully eligible for favorable tax deductions for each generous donor to the OACTA Foundation for these and all future OACTA Foundation programs and events.

In 2019, the scholarship program was re-named the Hilary S. Taylor Law Student Inclusion and Equity Scholarship, in honor of Mr. Taylor who provided leadership in OACTA's efforts to establish and implement the OACTA Diversity Scholarship. OACTA provided Mr. Taylor this recognition, in-person, at the November 2019 Annual Meeting. Since the OACTA Law Student Inclusion and Equity Scholarships were first awarded in 2011, OACTA and the Foundation have collectively awarded \$65,000 in scholarships to 35 students (as of 12/31/24). In addition to the Hilary S. Taylor Inclusion and Equity Scholarship Awards, OACTA has been a national leader among all defense bar organizations across the country both in its level of support and total years of support for the National Foundation for Judicial Excellence (NFJE). The NFJE is a unique program among national and state defense bar programs which seeks to train appellate court judges from around the country at an annual seminar held each year in Chicago. Before 2009, OACTA had made annual contributions to the NFJE from its general operating budget. The annual Golf Outing began in 2009 to fund these projects and since 2016, net proceeds fund the annual Golf Outing fund the OACTA Foundation.

Looking to the future, the goals of the Foundation include a commitment to continue OACTA's historic support for the NFJE, and the continued funding of Law Student Inclusion & Equity Scholarships, as well as increasing both the amount and number of scholarships, which can be awarded to deserving law students in the future. Last, but not least, the Foundation exists to serve as a vehicle to receive even more support from existing and future donors who support the above activities and the welfare and existence of OACTA itself.

- Foundation provides scholarships to law students of diverse backgrounds to further their education.
- Foundation provides annual financial support to the NFJE, which focuses specifically on education for the state appellate judiciary.
- Foundation will continue to support the mission of OACTA in these and future projects.

The OACTA Foundation is the only organization of its kind led by the Ohio Defense Bar.

As of 12/31/24, the total assets of the OACTA Foundation are \$73,166. In 2016, at the 50th Anniversary Gala Event, the OACTA Foundation raised over \$42,000 with the generous support of individual attorneys, law firms, corporations, and sponsors of OACTA. Expenses for 2024 accurately reflect the OACTA Foundation mission – educating future lawyers with diverse backgrounds and supporting the education of the judiciary. Since 2016 was a pivotal year near the inception of the creation of the OACTA Foundation, the main thrust was to create a “nest egg” to build on for future goals and financial stability of the OACTA Foundation. The OACTA Foundation Golf Outing is the annual fundraising event and the Hilary S. Taylor Law Student Inclusion and Equity Scholarship Program and NFJE contribution are the annual expenses. OACTA conducts an audit every-other year, alternating between a full audit and a financial audit review. When this is conducted, the OACTA Foundation is included in the process. OACTA continues to provide significant administrative and staff support for the Foundation programs.

DESCRIPTION	REVENUE	EXPENSES	NET SURPLUS
Golf	\$28,730	\$12,658	
General Contributions	\$3,240		
Inclusion & Equity Scholarships		\$7,500	
NFJE		\$3,000	
Investment / Banking & Credit Card Fees		\$1,075	
Accounting Fees		\$1,010	
Interest / Dividends	\$716		
TOTAL	\$32,686	\$25,243	\$7,443
Unrealized Investment Gain (Loss)			\$1,759

Pg. 5 Board of Directors/ Past Presidents

2024 OACTA Foundation Board of Directors

President (OACTA Immediate Past President)

David W. Orlandini

Collins, Roche, Utley & Garner, LLC
Dublin, OH

Secretary-Treasurer (OACTA Executive Director)

Debbie Nunner

Executive Director of OACTA
Westerville, Ohio

Directors

Paul W. McCartney

Bonezzi Switzer Polito & Hupp Co., LPA
Cincinnati, Ohio

Elizabeth T. Smith

Vorys Sater Seymour & Pease
Columbus, Ohio

Daniel A. Richards

Weston Hurd LLP
Cleveland, Ohio

Michael M. Neltner

Cincinnati Insurance Co.
Cincinnati, Ohio

The Members of the 2024 OACTA FOUNDATION consisted of the 2024 OACTA Board of Trustees.

OACTA Foundation Past Presidents

2023 – Benjamin C. Sassé

2022 – Natalie M.E. Wais

2021 – Jamey T. Pregon

2020 – James N. Kline

2019 – Jill K. Mercer

2018 – Brian D. Kerns

2017 – John J. Garvey, III

2016 – James L. Mann

Thank you to all of our individual and institutional donors who generously contributed to the OACTA Foundation in 2024.

Contributions of \$3,000 or more:

Tucker Ellis LLP

Weston Hurd LLP

Contributions of \$1,000 or more:

Cavitch, Familo & Durkin Co., LPA

Collins, Roche, Utley & Garner, LLC

John Garvey III

Garvey Shearer Nordstrom PSC

Contributions of \$500 or more:

Eastman & Smith

Lexitas Legal

Jill Mercer

Rimkus Consulting Group, Inc.

Elizabeth T. Smith

UB Greensfelder

Veritext

Contributions of \$250 or more:

Explico

Garvey, Garvey, Bellville & Garvey

Grange Insurance

Peter Hersha

James McCrystal

Milligan Pusateri Co., LPA

Reminger Co., LPA

Rudick Forensic Engineering

S-E-A

Subashi, Wildermuth & Justice

Sutter O'Connell

Young & Alexander Co., LPA

Contributions of \$100 or more:

Thomas Glassman

Brigid Heid

Melanie Irvin

Michael Neltner

Natalie M. E. Wais

Contributions of \$25 or more:

Brian Kerns

David Orlandini

Daniel Richards

Beth Sebaugh

Carolyn Taggart

Frantz Ward LLP