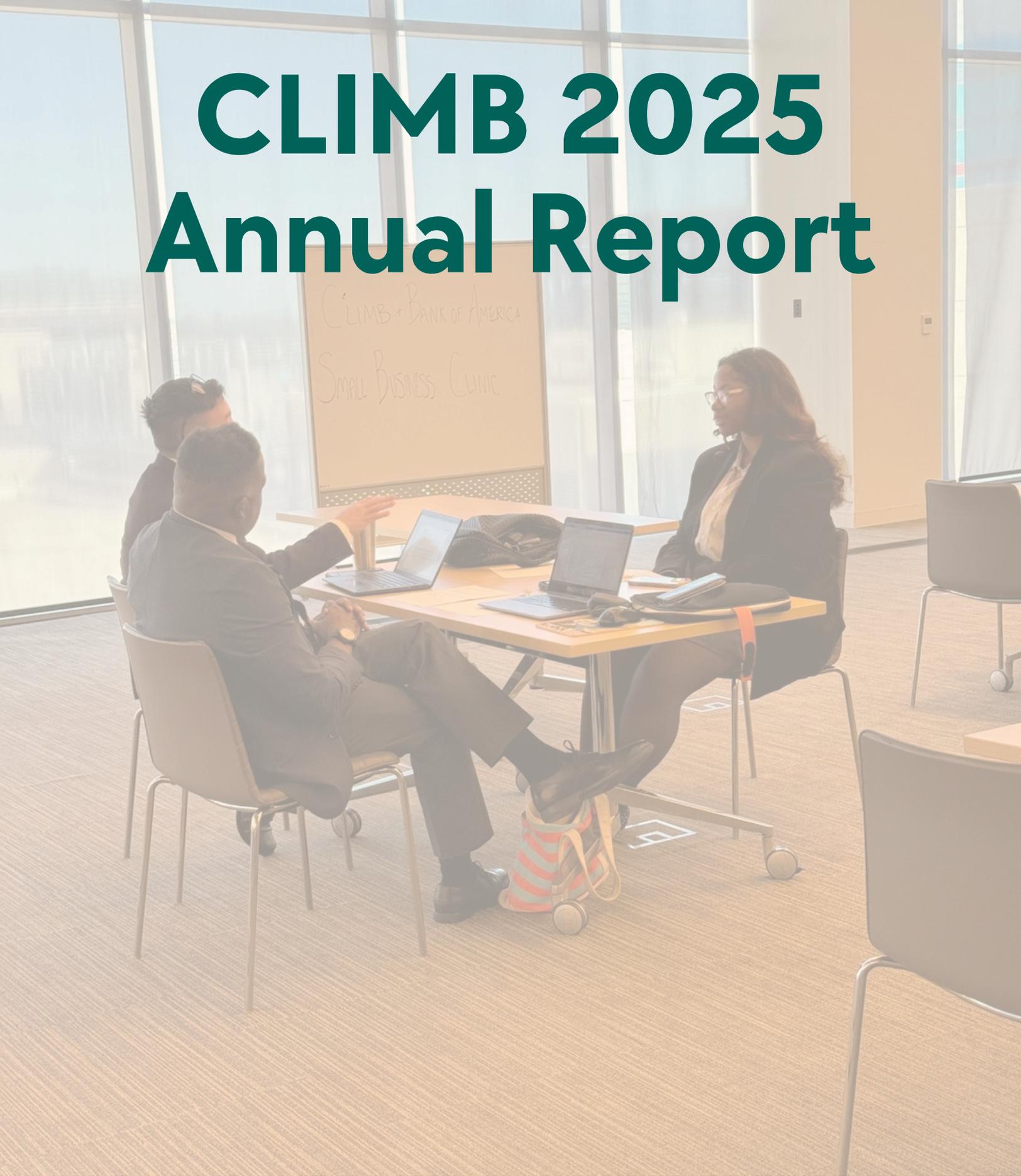
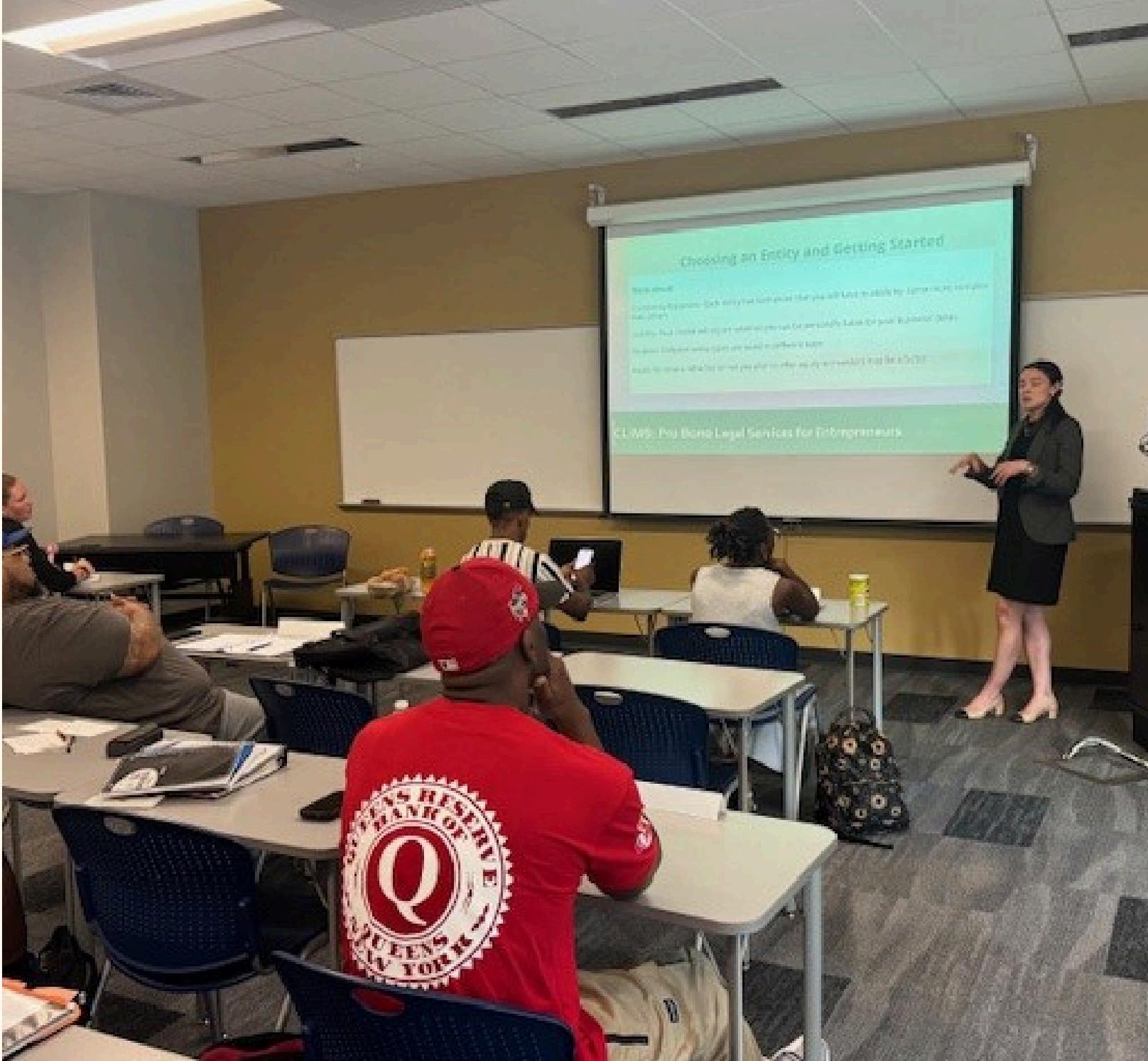


CLIMB 2025 Annual Report



CLIMB: Charlotte Legal Initiative to Mobilize Businesses



Making the inaccessible accessible

Providing pro bono legal representation to under resourced small business owners and entrepreneurs in Mecklenburg County, North Carolina.



Who we are

CLIMB is a nonprofit legal services organization based in Mecklenburg County that provides pro bono legal support to under-resourced entrepreneurs and small business owners. We partner with volunteer attorneys from top law firms across Charlotte to deliver high-quality legal assistance at no cost to our clients. Our mission is to increase economic mobility and equity by removing legal barriers to small business success. At CLIMB, we believe access to justice is a critical tool for building stronger, more inclusive communities. The legal support that we provide to our community driven 100% by volunteer attorneys.

"CLIMB has been a meaningful way for me to give back to a community that has given so much to me."
Jeffrey Joseph, Esq.
Troutman Pepper Locke

What we do

Direct Representation

With volunteers from Charlotte's largest firms, eligible clients receive direct representation, often from teams of skilled attorneys.

Legal Clinics

CLIMB partners with business development organizations to hold legal clinics, providing one-hour brief advice consults to small businesses.

Education

CLIMB volunteer attorneys bring their expertise to groups of small business owners, educating them on a wide variety of topics.

A Message from Our Board

Kimberly Zirkle, Board Chair, Bradley

There's a justice gap facing diverse small business owners who often lack access to affordable legal support. CLIMB was created to close that gap—providing free legal services to help entrepreneurs protect and grow their businesses. I've been proud to support CLIMB since day one, and with continued support, we can expand our reach and build a more equitable small business landscape.



Tammy Nicholson, Board Member, Truist Bank

I was honored to join CLIMB's Board, representing the first Board Member to join from a corporate legal department. CLIMB has grown tremendously over the last year, and we continue to seek out new and innovative ways for corporate legal departments to engage in pro bono by using their knowledge and expertise to support under-resourced small business owners. CLIMB offers a unique opportunity for in-house counsel colleagues to engage in pro bono in a way that is meaningful but also within their skill set. CLIMB's support of economic mobility and local small business growth aligns with my professional and personal values, and I'm excited to continue to invite my in-house counsel colleagues to see how they, too, can use pro bono opportunities to power change in Charlotte.



A Message from Our Executive Director

Dear Friends,

As I write this letter, it has been nearly two years since I joined CLIMB as its first Executive Director. I've learned so much in this time, and I'm grateful for how much CLIMB has grown as well as how much I have grown personally. I've always cared about making our legal system accessible for everyone. As a public defender, I saw firsthand the many ways in which the legal system could work to exclude people and perpetuate unfair systems. As the managing attorney of the Pro Bono Unit for a civil legal services organization, I saw how the legal community could come together, sometimes to heal the old wounds, and sometimes to create new vehicles for justice. At CLIMB, I've had the privilege of being a part of an organization that has opened the doors to access to a whole new underserved community. Small business owners and entrepreneurs of limited means have never before been able to access the legal system.

The direct legal support that CLIMB provided last year to 119 small business owners reflects our organization's remarkable growth. But this number is more than a statistic- it reflects 119 entrepreneurs moving towards achieving their dreams, supporting their families, strengthening their communities, and hopefully, one day, combatting poverty by building generational wealth. It represents new and strengthened businesses in communities that have long been excluded from traditional pathways to economic mobility and ownership.

CLIMB has grown in reach, but as we have grown, we have stayed true to our fundamental values. Our pro bono clients become clients of the firms that take them on, providing them access to teams of attorneys with broad, varied expertise. This is the kind of tailored, compassionate legal support that not only helps an entrepreneur- it empowers them. And we have done this through deep collaboration with firms across our city, all of whom have joined together to support our shared mission.

As we grow, let's continue to do this together. I can't wait to expand our programming, serve more clients, work with more of you, and help to build and strengthen more small businesses in Charlotte. When we work together, we can truly make the inaccessible accessible.

Thank you for believing in CLIMB. Thank you for donating your time, your expertise, your knowledge, your support. Let's keep building.

With gratitude,

Casey Burke

Casey Burke, Esq.



The Client's Perspective: Emiliano Portino



I've worked for years as a brand strategist and creative consultant. I've led big projects, built strong partnerships, and helped organizations tell their stories. But even with all that experience, I've had moments where the business side didn't protect me. Clients who didn't pay. Projects that grew beyond the original plan, with no extra payment. Or legal documents so long and complicated, they made me feel like I was being pushed into a corner.

These kinds of things don't happen because you're new. They happen when your contracts aren't clear—and that can hold you back from working with bigger clients. That's when I found CLIMB.

While I was part of Mecklenburg County's Business LaunchPad, CLIMB connected me with a team of lawyers. They took the time to go over my contracts, explain what each part meant, and help me improve them so they actually fit how my business works—and protected me. Thanks to that, I now send contracts I fully understand. I can talk through the terms with clients, and I know I'm covered.

It's not just peace of mind—it's being empowered. I can walk into meetings with bigger organizations and feel confident that I'm bringing not just creativity, but a strong business structure. These updated contracts also helped me improve how I work—from how I start a project to how I deliver results.

CLIMB gave me something every small business needs: real support, smart tools, and the chance to grow without fear. I recommend every business owner go through this process. Even if you can't hire a full-time lawyer yet, you'll be in a much better place to protect your work—and plan for the future.

Emiliano Portino, The Brand Building Shop

The Volunteer's Perspective: Allison Crowley, King & Spalding



Working as a corporate lawyer is engaging and gratifying on many levels, but rarely is it as truly rewarding, both personally and emotionally, as when I am working with CLIMB. In my day-to-day practice, I counsel large private equity firms and Fortune500 companies in their mergers and acquisitions, commercial contracts, and general corporate governance matters.

CLIMB has given me the unique opportunity to use the skills that I have honed over many years in this field to give back to my community and make an impact on the Charlotte business landscape. CLIMB has connected me with many small businesses in the Charlotte area that, while they cannot yet afford to hire corporate attorneys, have promising businesses that can benefit greatly from the support of a transactional attorney.

I recently had the opportunity to collaborate with one such small business owner, Emiliano at the Brand Building Shop, to create form customer contracts tailored to Emiliano's business that provided him with the protections he needed to continue to grow. Seeing the impact that work had on Emiliano and the Brand Building Shop's business was priceless. I am so grateful that I have had the opportunity to work with CLIMB over the past several years and I encourage my fellow corporate attorneys to take advantage of the opportunity that CLIMB offers – to use your unique skillset to advise small business owners in your own backyard. I look forward to CLIMB's future and to assisting many more Charlotte businesses to protect their interests and grow their footprint in the queen city.

Allison Crowley, King & Spalding

CLIMB's Impact and Growth

61

Small businesses placed directly with firms in 2024

58

Small businesses served through legal clinics in 2024

171

Small businesses attended legal education seminars in 2024



74

Small businesses placed directly with firms already in 2025

30

Small businesses served through legal clinics already in 2025

244

Small businesses attended legal education seminars already in 2025

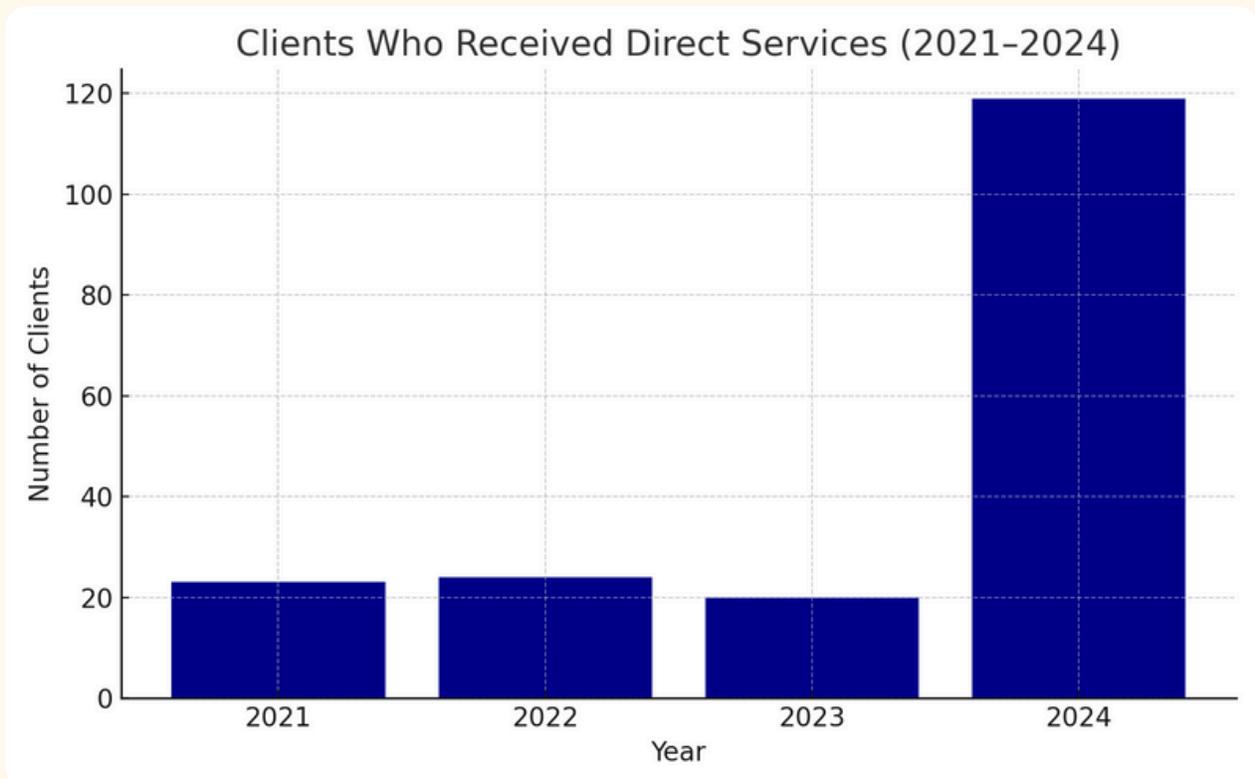
92%

BIPOC business owners



66%

Women business owners



Using Your Support to Increase Access

In 2024, CLIMB received funding from generous contributions from 15 law firm partners, the City of Charlotte (allowing us to hire staff), LISC, and others. Thanks to this support:

- 119 entrepreneurs received direct legal services
- We hosted 3 legal clinics, with support from partners including Bank of America’s Legal Department and Mecklenburg County’s Office of Economic Opportunity
- We delivered 8 substantive legal presentations to 171 small businesses
- We provided 9 community presentations, reaching 341 small business owners
- We engaged 15 law firms in pro bono legal work, providing nearly \$1 million in donated legal services

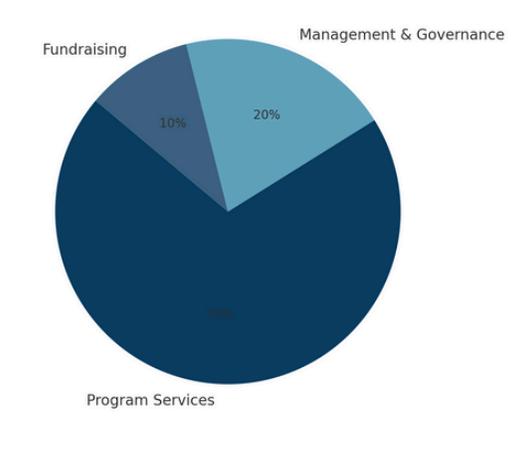


These numbers represent more than output—they reflect the growing reach of our mission and the transformative power of pro bono. With every dollar donated, we provide three times the value in donated legal services.



CLIMB invested resources with purpose and integrity:

- 70% went directly to program services, such as clinics, attorney coordination, and legal education
- 20% supported governance and operations
- 10% went to fundraising and donor engagement



We also expanded our programming in 2024, including the launch of Intellectual Property as a new service area to help entrepreneurs protect their hard work and vision.

Looking Ahead



Bank of America volunteer attorney Aaron Longo speaks to the HIIVE program

With your help we can serve more clients, reach more volunteers, and continue to spread awareness of our services, reaching ALL under resourced small business owners and entrepreneurs in Mecklenburg County who need access to legal services.

This means more access to legal services... more small business growth more economic development in Charlotte... all within a more equitable landscape.



CLIMB'S GOALS

COLLABORATE

Engage volunteers from corporate counsel offices

EMPOWER

Increase the number of clients served through direct representation

EDUCATE

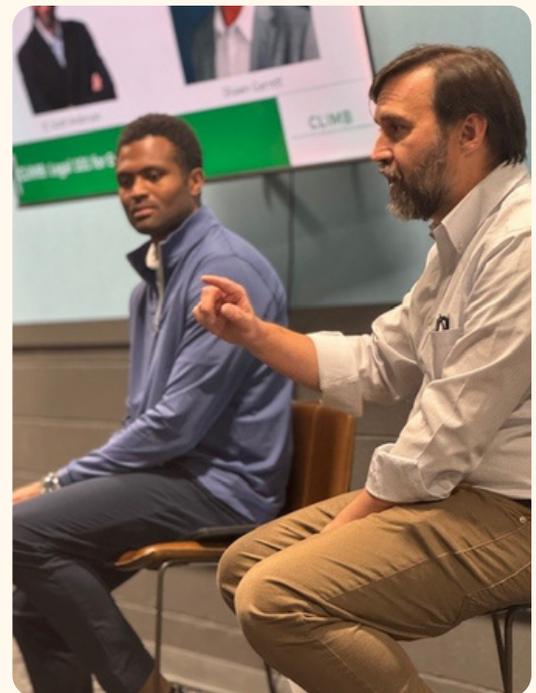
Increase the number of clients served through legal clinics and educational programs

SUSTAIN

Fund our program to allow us to fulfill our mission for years to come

CLIMB volunteer attorneys use their professional skills and expertise to make the transformative change they want to see in OUR community. Your support makes this possible.

Womble Bond Dickinson volunteer attorney and CLIMB Board Member Scott Anderson and Shawn Garrett speak to the Launch CLT cohort



Thank You To Our Funders

Sustaining Partner Firms:



Alston & Bird
Bradley
Cadwalader
King & Spalding
Mayer Brown
McGuire Woods
Moore & Van Allen, PLLC
Parker Poe
Robinson Bradshaw
Troutman Pepper
Womble Bond Dickinson



Legacy Firm:

Hunton Andrews Kurth

2025 Partner Firm:

Katten Muchin Rosenman LLP



Our Valued Donors:

City of Charlotte
LISC
LPL Financial
Cynthia & George Mitchell Foundation
Individual Donors



**Join us today by making a tax-deductible
donation at www.climbnc.org/donate**



Your Giving Makes This Possible

“CLIMB was truly the difference between me profiting and winning or in debt and overwhelmed.” - client served by both Robinson Bradshaw and Bradley

“Thank you for helping small businesses through legal frameworks—it’s truly appreciated.” - Troutman Pepper Locke client

“I would have never been able to afford this kind of assistance on my own.” - McGuire Woods client



Cadwalader volunteer attorney Patrick Coffee and Holland & Knight volunteer attorney Kevin Smith present for a Black History Month event

Moore & Van Allen volunteer attorney Toni-Ann Hines presents at the Freedom Business Collective



Volunteer attorneys from Honeywell, Duke Energy, and Robinson Bradshaw team up to serve Prospera clients at a clinic



Parker Poe volunteer attorney Elizabeth Trenary speaks to the Bootst Pad

