



The Real Property, Probate and Trust Law
Section of The Florida Bar presents the

40th ANNUAL ATTORNEY/TRUST OFFICER LIAISON CONFERENCE

August 18-20, 2022

The Breakers, Palm Beach

Special thanks to these individuals for their dedicated service to the conference.

Program Chair: Cady L. Huss, St. Petersburg; **Vice Chairs:** Stacey Cole, Winter Park; Eamonn Gunther, Boca Raton; Gail Fagan, Sarasota; Mitchell A. Hipsman, Aventura; Tae Kelley Bronner, Arizona; Michael Rubenstein, Naples; **Speaker Coordinators:** Eamonn Gunther, Boca Raton; Mitchell A. Hipsman, Aventura; Alisa Heedy, Sarasota; Tattiana Brenes-Stahl, Boca Raton; **Corporate Sponsors:** Stacey Cole, Winter Park; Gail Fagan, Sarasota; **Law Firm Sponsors:** Kimberly Bald, Bradenton; Gentry Byrnes, St. Petersburg; Lea Anne Groover, Orlando; **Exhibitors:** Michael Rubenstein, Naples; **Continuing Education Credits:** Chuck Runge, Bal Harbour; **Tech Liaison:** Patrick Lannon, Miami; **Golf Coordinators:** Paul Roman, Boca Raton; Mark Middlebrook, North Venice; Andrew Thompson, Orlando

Schedule

Thursday, August 18, 2022

12:00 PM - 5:00 PM

Golf Tournament

Sponsored by Coral Gables Trust and Stout

5:00 PM - 7:00 PM

Opening Reception

Sponsored by Heritage Auctions and Northern Trust

Friday, August 19, 2022

Presentation Room Sponsored by Wilmington Trust

7:30 AM - 8:25 AM

BREAKFAST

Sponsored by Fifth Third Bank

8:15 AM - 8:25 AM

Welcoming Remarks

Cady L. Huss, St. Petersburg

8:25 AM - 9:15 AM

Name That Tune: How to Get the Attorney and Trustee Harmonizing for the Best Interest of Their Clients

Laura Sundberg, Orlando

Johnathan Butler, Tampa

9:15 AM - 10:05 AM

Live Like a Rock Star (But Don't Die Like One)

Cristina Papanikos, Miami

Shaina Kamen, Miami

10:05 AM - 10:20 AM

BREAK

Sponsored by Raymond James Trust, N.A.

10:20 AM - 11:10 AM

The Joint Revocable Trust - Swiss Army Knife or Swiss Cheese?

Jennifer Wioncek, Miami

Paul Roman, Boca Raton

11:10 AM - 12:00 PM

Managing Digital Assets and Cryptocurrency in Trusts

Stacy Singer, Chicago

12:00 PM - 1:15 PM

LUNCH

Sponsored by Coral Gables Trust

Friday, August 19, 2022 (cont.)

1:15 PM - 2:05 PM

Modern Dispute Resolution Panel

Kimberly A. Bald, Bradenton

Cady L. Huss, St. Petersburg

J. Richard Caskey, Tampa

2:05 PM - 2:55 PM

Trust School: Envisioning Beneficiaries as Leaders in the Family Business

Stephen Salley, Orlando

2:55 PM - 3:10 PM

BREAK

Sponsored by Raymond James Trust, N.A.

3:10 PM - 4:00 PM

A Fiduciary's Perspective

Darby Jones, St. Petersburg

Gentry Byrnes, St. Petersburg

4:00 PM - 4:50 PM

Twenty Things You Should Know About Funding and Administering Charitable Trusts and Foundations

Louis Nostro, Miami

5:00 PM - 6:45 PM

RECEPTION

Sponsored by BNY Mellon and Empire Valuation Consultants

Saturday, August 20, 2022

Presentation Room Sponsored by Wilmington Trust

7:30 AM - 8:15 AM

BREAKFAST

Sponsored by Fifth Third Bank

8:15 AM - 9:30 AM

2022 Federal Tax Update

Samuel A. Donaldson, Atlanta

Sponsored by Grove Bank & Trust

9:30 AM - 10:20 AM

Don't Miss the Boat: Waypoints every trust officer needs to know to successfully navigate the stormy waters of qualified beneficiaries, interested persons, and representation under the Florida Trust Code.

Alexander S. Douglas, Orlando

10:20 AM - 10:35 AM

BREAK

Sponsored by Raymond James Trust, N.A.

10:35 AM - 11:25 AM

A Field Trip to Tallahassee: 2022 Probate, Trust and Guardianship Legislation

Lawrence Jay Miller, Boca Raton

11:25 AM - 12:15 PM

Case Law Update

Hung Nguyen, Coral Gables

Accreditation Info:

CLE CREDITS:
12.5 General
1.0 Technology
1.0 Professionalism

Certification CREDITS:

12.5 Elder Law
1.0 Tax Law
12.5 Wills Trusts and Estates

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Registration Information

Live or Virtual (by Zoom)

\$620 (Section Members)

\$680 (non-members)

Golf: \$125 (must be registered for the conference to play, includes boxed lunch and drink ticket)

Spouse/Guest Registration: \$150 (receptions only/excludes breakfast and lunch events)

Click here to register:

[ATO 2022 Registration Link*](#)

CANCELLATION DEADLINE FOR HOTEL ROOM - JULY 15, 2022

*The Breakers Room block is currently sold out.

*As of 7/11/22

Please contact Hilary Stephens at hstephens@floridabar.org for more information