

THE FLORIDA BAR REAL PROPERTY, PROBATE AND TRUST LAW SECTION

# 2017 ANNUAL CONVENTION

JUNE 1, 2017 - JUNE 4, 2017

**WORK. LEARN. MEET. REPEAT.**

HYATT REGENCY COCONUT POINT  
5001 COCONUT ROAD, BONITA SPRINGS, FL 34134  
(239) 444-1234

THANK YOU TO OUR GENERAL

# SPONSORS

Overall Sponsors - Legislative Update & Convention & Spouse Breakfast



Thursday Lunch



Thursday Night Reception



Friday Night Reception



Friday Night Dinner



First American Title™

Probate Roundtable



Real Property Roundtable



Saturday Lunch



Saturday Dinner



APP Sponsor



# SCHEDULE

Thursday, June 1, 2017

6:30 am	<b>Reptiles Run/ Bicycle Club</b>	<i>Meet in Hotel Lobby</i>
7:00 am – 5:00 pm	<b>Registration Desk Hours</b>	<i>Conference Foyer</i>
7:30 am – 9:00 am	<b>Continental Breakfast</b>	<i>Estero Prefunction</i>
8:00 am – 10:00 am	<b>Homestead Issues Study</b>	<i>Sanibel</i>
8:30 am – 5:00 pm	<b>Exhibit Booth</b>	<i>Estero Prefunction</i>
10:00 am – 12:00 pm	<b>Probate Law &amp; Procedure</b>	<i>Estero B &amp; C</i>
10:30 am – 12:00 pm	<b>Construction Law</b>	<i>Sanibel</i>
10:30 am – 12:00 pm	<b>Real Property Finance &amp; Lending</b>	<i>Estero A</i>
11:00 am – 12:30 pm	<b>Residential Real Estate &amp; Industry Liaison</b>	<i>Pine</i>
11:30 am – 12:30 pm	<b>Fellows</b>	<i>Driftwood</i>
11:30 am – 1:30 pm	<b>Working Buffet Lunch \$</b>	<i>Estero Prefunction</i>
12:00 pm – 1:00 pm	<b>Probate &amp; Trust Division Mandatory Chair and Vice Chair</b>	<i>Estero B &amp; C</i>
12:30 pm – 4:00 pm	<b>Spouse/Guest Event: Chocolate and Wine Tasting at Norman Love Confections \$</b>	<i>Meet in Hotel Lobby for Bus Transport</i>
12:30 pm – 2:15 pm	<b>Information, Technology and Communication</b>	<i>Driftwood</i>
12:30 pm – 2:15 pm	<b>Condominium and Planned Development</b>	<i>Estero A</i>
1:00 pm – 2:30 pm	<b>Attorney Trust Officer</b>	<i>Sanibel</i>
1:00 pm – 2:30 pm	<b>Estate &amp; Trust Tax Planning</b>	<i>Estero B &amp; C</i>
1:30 pm – 2:30 pm	<b>Title Insurance &amp; Title Insurance Liaison</b>	<i>Pine</i>
2:30 pm – 4:00 pm	<b>Real Property Problem Study</b>	<i>Sanibel</i>
2:30 pm – 4:00 pm	<b>Probate &amp; Trust Litigation</b>	<i>Estero B &amp; C</i>
2:30 pm – 4:00 pm	<b>IRA, Insurance &amp; Employee Benefits</b>	<i>Driftwood</i>
3:30 pm – 5:00 pm	<b>POLST*</b>	<i>Captiva</i>
3:30 pm – 5:00 pm	<b>Real Estate Leasing</b>	<i>Pine</i>
4:00 pm – 5:00 pm	<b>Open/Expired Permits Joint Meeting</b>	<i>Estero A</i>
4:00 pm – 5:00 pm	<b>Ad Hoc Jurisdiction/Service Process*</b>	<i>Great Egret C</i>
4:30 pm – 5:30 pm	<b>At Large Members</b>	<i>Estero B &amp; C</i>
4:00 pm – 5:00 pm	<b>Elective Share Review Committee</b>	<i>Blue Heron A</i>
5:00 pm – 6:00 pm	<b>ActionLine</b>	<i>Blue Heron C</i>
5:30 pm – 6:30 pm	<b>General Sponsor Reception **</b>	<i>Driftwood</i>
6:00 pm - 7:00 pm	<b>ACTEC Fellows Reception **</b>	
6:00 pm - 7:00 pm	<b>Kids Only Carnival Reception (Doors Open Early for Children)</b>	<i>Estero Terrace &amp; Royal</i>
7:00 pm – 9:30 pm	<b>Welcome Reception Carnival \$</b>	<i>Palm Courtyard</i>
9:30 pm – 11:30 pm	<b>Hospitality Suite</b>	<i>Driftwood</i>

\*Participation in deliberations and voting is limited to committee members only

\*\* Attendance by invitation only

**\$ Registration is required**

# SCHEDULE

**Friday, June 2, 2017**

6:30 am	<b>Reptiles Run/Bicycle Club</b>	<i>Meet in Hotel Lobby</i>
7:30 am – 5:00 pm	<b>Registration Desk Hours</b>	<i>Confention Foyer</i>
8:30 am – 5:00 pm	<b>Exhibit Booth Hours</b>	<i>Estero Prefunction</i>
8:30 am – 10:30 am	<b>Continental Breakfast \$</b>	<i>Driftwood</i>
8:00 am – 11:20 am	<b>CLE: A LAWYER'S GUIDE TO DISASTER PREPAREDNESS,INSURANCE AND TECHNOLOGY SECURITY \$</b>	<i>Estero A</i>
8:30 am – 11:30 am	<b>Florida Realtor-Attorney Joint Committee</b>	<i>Captiva</i>
11:30 am – 1:25 pm	<b>Annual Membership Luncheon \$</b>	<i>Estero B &amp; C</i>
1:30 pm – 2:30 pm	<b>Development and Land Use</b>	<i>Captiva</i>
1:30 pm – 2:30 pm	<b>Insurance &amp; Surety</b>	<i>Great Egret</i>
1:30 pm – 3:00 pm	<b>Real Estate Structures and Taxation</b>	<i>Sanibel</i>
1:30 pm – 3:30 pm	<b>Trust Law</b>	<i>Calusa F &amp; G</i>
2:00 pm – 3:00 pm	<b>Title Issues &amp; Standards</b>	<i>Blue Heron</i>
2:30 pm – 4:00 pm	<b>Real Property Litigation</b>	<i>Pine</i>
2:30 pm – 4:00 pm	<b>Commercial Real Estate</b>	<i>Captiva</i>
3:30 pm – 5:00 pm	<b>Asset Protection</b>	<i>Estero A</i>
3:30 pm – 5:00 pm	<b>Guardianship, Power of Attorney &amp; Advanced Directives</b>	<i>Calusa F &amp; G</i>
3:30 pm – 5:00 pm	<b>Membership &amp; Inclusion</b>	<i>Blue Heron</i>
3:30 pm – 5:00 pm	<b>Fiduciary Practice Group</b>	<i>Sanibel</i>
5:00 pm – 6:00 pm	<b>PAC</b>	<i>Estero A</i>
7:00 pm – 9:30 pm	<b>Friday Reception and Awards Dinner \$</b>	<i>Estero Ballroom</i>
9:30 pm – 11:30 pm	<b>Hospitality Suite</b>	<i>Driftwood</i>

**Saturday, June 3, 2017**

6:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
7:30 am – 10:00 am	<b>Spouse/Guest Breakfast \$</b>	<i>Driftwood</i>
8:00 am – 10:00 am	<b>Real Property Law Division Roundtable Breakfast</b>	<i>Estero A</i>
8:00 am – 10:00 am	<b>Probate and Trust Law Division Roundtable Breakfast</b>	<i>Calusa F &amp; G</i>
10:00 am – 1:30 pm	<b>Executive Council Meeting and Lunch</b>	<i>Estero B &amp; C</i>
1:30 pm – 5:30 pm	<b>Outdoor Fun at Pool \$</b>	<i>Cypress Courtyard and Pool</i>
7:00 pm – 8:30 pm	<b>S'Mores and More</b>	<i>Cypress Fire Pit</i>

**Sunday, June 4, 2017**

9:00 am- 11:00 am	<b>Brunch \$</b>	<i>Tanglewood Restaurant</i>
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THANK YOU TO OUR

# SPONSORS

## FRIENDS OF THE SECTION

*Business Valuation Analysts, LLC - Tim Bronza*  
*Corporate Valuation Services, Inc. - Tony Garvy*  
*Fiduciary Trust International - Claudia Reithauser*  
*North American Title Insurance Company - Valerie Grandin*  
*Valley National Bank - Jacquelyn McIntosh*  
*Valuation Services, Inc. - Jeff Bae, JD, CVA*  
*Wilmington Trust - David Fritz*

## COMMITTEE SPONSORS

*Attorneys' Title Fund Services, LLC - Melissa Murphy*  
*Commercial Real Estate Committee*

*Kravit Estate Appraisal - Bianca Morabito*  
*Estate and Trust Tax Planning Committee*

*BNY Mellon Wealth Management - Joan Crain*  
*Estate and Trust Tax Planning Committee*  
&

*Life Audit Professionals - Joe Gitto and Andrea Obey*  
*IRA, Insurance & Employee Benefits Committee*  
&

*IRA, Insurance and Employee Benefits Committee*

*Estate and Trust Tax Planning Committee*

*Business Valuation Analysts - Tim Bronza*  
*Trust Law Committee*

*Management Planning, Inc. - Roy Meyers*  
*Estate & Trust Tax Planning Committee*

*Coral Gables Trust - John Harris*  
*Probate and Trust Litigation Committee*

*Northern Trust - Tami Conetta*  
*Trust Law Committee*

*First American Title Insurance Company - Alan McCall*  
*Condominium & Planned Development Committee*

*Pluris Valuation Advisors - Miranda McCray*  
*Asset Protection Committee*

*First American Title Insurance Company - Wayne Sobien*  
*Real Estate Structures and Taxation Committee*

*Seaside National Bank and Trust - H. Wayne Griest*  
*Commercial Real Estate*

*Hopping Green & Sams - Vinette Godelia*  
*Development and Land Use*

# UPCOMING CLE

FOR MORE INFORMATION REGISTER FOR [WWW.RPPTL.ORG](http://WWW.RPPTL.ORG)

## **ATTORNEY LOAN OFFICER CONFERENCE**

July 26, 2017  
The Kravis Center  
Palm Beach

## **37TH ANNUAL LEGISLATIVE UPDATE**

July 28, 2017  
The Breakers  
Palm Beach

## **36TH ANNUAL ATO CONFERENCE**

August 24-26, 2017  
The Breakers  
Palm Beach

**It's Not Too Late to Register  
for Friday's CLE Program!**

## **A LAWYER'S GUIDE TO DISASTER PREPAREDNESS, INSURANCE AND TECHNOLOGY SECURITY**

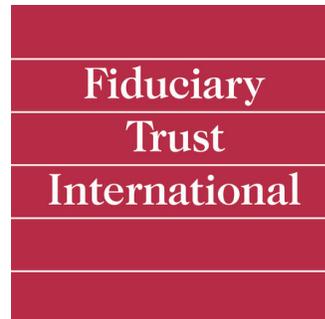
**Credits: General 3.0 hours, Technology 2.0 hours,  
Ethics 1.0 hour, Real Estate 1.5 hours**  
Register onsite or online through The Florida Bar's Member Portal at  
[www.members.floridabar.org](http://www.members.floridabar.org).

Disaster & Emergency Preparedness for the 21st Century: Applying New  
Tools, Technologies, and Techniques to Longstanding Risks to Persons and Property  
Brian C. Sparks, Tampa

Insurance Component of a Catastrophic Event  
Jon Lyon, Insurance Office of America

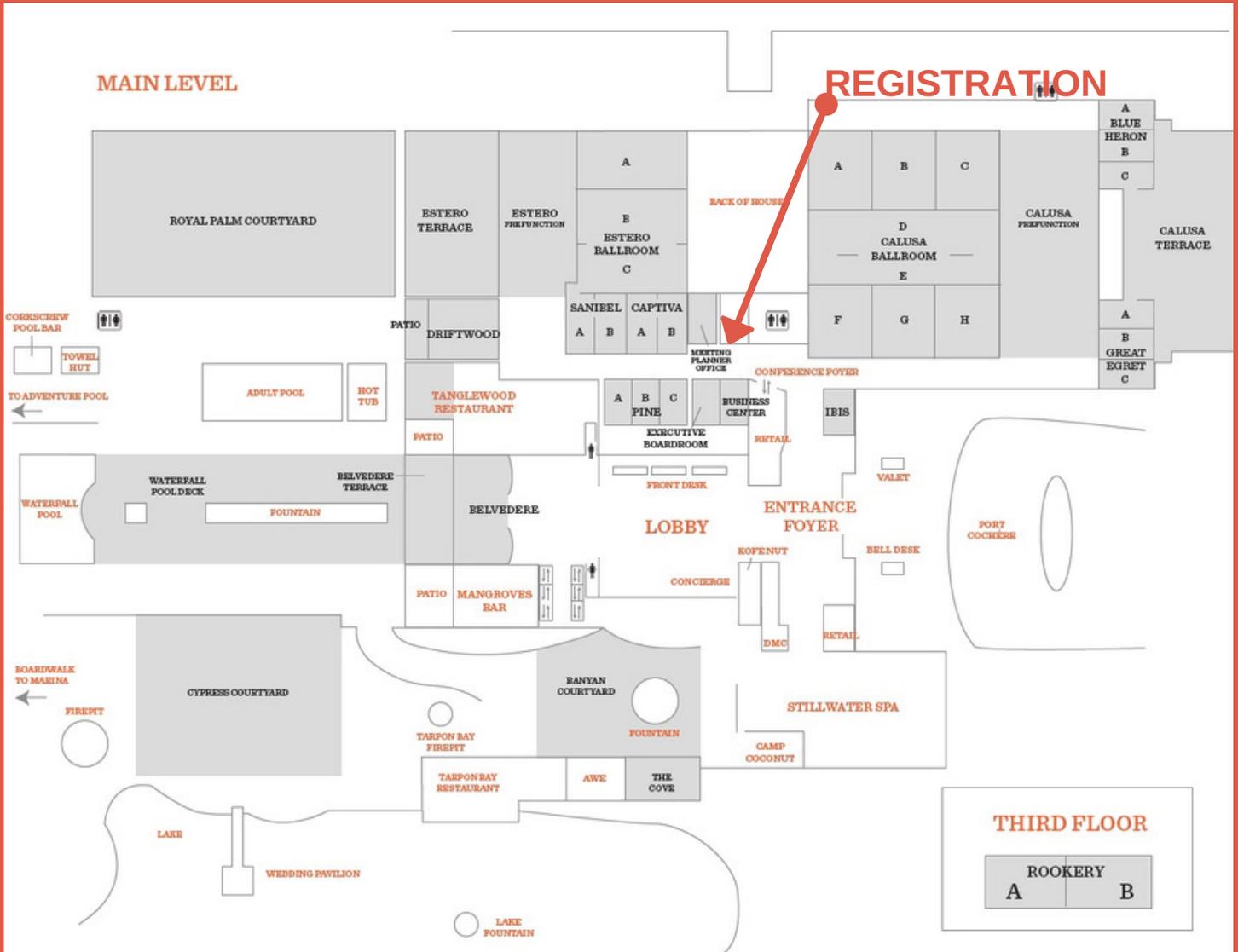
Modern Technology and Disaster Planning: Lessons We Learned From The Three  
Little Pigs  
Michael Simon, West Palm Beach

thank you



Exhibitors

# MAP



## Wifi Code: FLABAR17

1. For wireless connections activate your wireless network connection
2. Select the "Hyatt Meeting" network
3. Start your Web Browser. The login page will open automatically
4. Go to "Login with an Access Code:" and fill in Access Code
5. Hit the "Login" button and you are online!