



The Florida Bar
Real Property, Probate & Trust Law Section
34th Annual Legislative & Case Law Update
and
Executive Council Meeting

The Breakers
July 31 – August 2, 2014



Sponsored by

The Fund[®]

EVENT SCHEDULE

***FREE Wifi – LOG ONTO BREAKERS GUEST WIRELESS.
NO PASSWORD NEEDED.***

EVENT SCHEDULE

Thursday, July 31, 2014

6:30 am – 7:30 am	Reptile Run/Walk Club		<i>Hotel Lobby</i>
7:30 am – 9:00 am	Executive Committee Planning Meeting **		<i>Imperial Suite 5148</i>
7:30 am – 9:00 am	Breakfast On Own		
8:00 am – 5:00 pm	Registration Desk Opens		<i>Ponce de Leon Foyer</i>
8:00 am – 9:00 am	Sponsor Coordination Committee		<i>South Mezzanine 3 & 4</i>
9:00 am – 10:00am	Kids Committee		<i>South Mezzanine 6</i>
9:00 am – 10:30am	Estate and Trust Tax Planning	P	<i>Ponce de Leon 6</i>
9:00 am – 10:30am	Real Property Financing & Lending	R	<i>Ponce de Leon 1 & 2</i>
10:00 am – 11:00am	Orientation for new Executive Council members**		<i>Flagler Boardroom</i>
10:00 am – 11:30am	Membership Communication	GS	<i>South Mezzanine 9 & 10</i>
10:00 am – 12:00pm	Construction Law	R	<i>Ponce de Leon 5</i>
10:30 am – 12:00pm	Probate Law & Procedure	P	<i>Mediterranean Ballroom</i>
10:30 am – 12:00pm	Commercial Real Estate	R	<i>Magnolia Room</i>
10:30 am – 12:00pm	Title Issues & Standards	R	<i>South Mezzanine 6</i>
11:30 am – 1:30 pm	Grab and Go Buffet Lunch		<i>Foyers</i>
12:00 pm – 1:30 pm	Construction Law Institute	R	<i>South Mezzanine 6</i>
12:00 pm – 1:30 pm	Residential Real Estate & Industry Liaison	R	<i>Magnolia Room</i>
12:00 pm – 1:30 pm	Real Property Litigation	R	<i>Ponce de Leon 4</i>
12:00 pm – 2:00 pm	Probate & Trust Litigation	P	<i>Mediterranean Ballroom</i>
12:30 pm – 2:00 pm	IRA, Insurance & Employee Benefits	P	<i>Ponce de Leon 1 & 2</i>
1:00 pm – 3:00 pm	Membership, Diversity & Law Schools	GS	<i>South Mezzanine 9 & 10</i>
1:30 pm – 3:00 pm	Title Insurance & Title Insurance Liaison	R	<i>Magnolia Room</i>
2:00 pm – 3:30 pm	Guardianship & Power of Attorney	P	<i>Ponce de Leon 6</i>
2:00 pm – 3:30 pm	Elective Share Review *	P	<i>Flagler Boardroom</i>
2:00 pm – 3:30 pm	Attorney Trust Officer Liaison	P	<i>Ponce de Leon 1 & 2</i>
3:00 pm – 4:30 pm	Real Property Problems Study	R	<i>Ponce de Leon 5</i>
3:00 pm – 4:30 pm	Landlord & Tenant	R	<i>South Mezzanine 6</i>
3:00 pm – 5:00 pm	Condo and Planned Development	R	<i>Ponce de Leon 4</i>
3:30 pm – 5:00 pm	Trust Law	P	<i>Mediterranean Ballroom</i>
3:30 pm – 5:00 pm	Asset Protection	P	<i>Ponce de Leon 1 & 2</i>
5:00 pm – 6:00 pm	Fiduciary Practice Group	P	<i>South Mezzanine 6</i>
5:00 pm – 6:00 pm	At Large Members Meeting		<i>Ponce de Leon 6</i>
5:00 pm – 6:00 pm	Legislative Update Rehearsal **		<i>Ponce de Leon 3</i>
6:30 pm – 8:30 pm	Reception		<i>The Circle</i>
9:00 pm – 11:00pm	Hospitality		<i>Imperial Suite 5148</i>

Friday, August 1, 2014

6:30 am – 7:30 am	Reptile Run/Walk Club		<i>Hotel Lobby</i>
7:30 am – 4:30 pm	Legislative Update Seminar		<i>Ponce de Leon Ballroom</i>
12:00 pm – 1:30 pm	Ad Hoc Homestead Study Committee*	P	<i>Magnolia Room</i>
4:30 pm – 5:30 pm	PAC **		<i>Magnolia Room</i>
6:30 pm – 7:30 pm	Reception		<i>Venetian Ballroom</i>
7:30 pm – 9:30 pm	Dinner		<i>Venetian Ballroom</i>
9:30 pm – 11:30pm	Hospitality		<i>Imperial Suite 5148</i>

EVENT SCHEDULE (cont.)

Saturday, August 2, 2014

8:00 am – 10:00 am	Probate Roundtable	P	<i>Ponce de Leon 1, 2 & 3</i>
8:00 am – 10:00 am	Real Estate Roundtable	R	<i>Ponce de Leon 5 & 6</i>
8:00 am – 10:00 am	Spouse/Guest Breakfast		<i>Mediterranean Ballroom</i>
10:00 am – 2:00 pm	Executive Council Meeting		<i>Ponce de Leon 4</i>
12:00 pm – 1:00 pm	Box lunch (Executive Council members only)		<i>Ponce de Leon 4</i>
2:00 pm – 4:00 pm	Budget Committee Meeting **	GS	<i>South Mezzanine 9 & 10</i>
6:00 pm – 8:30 pm	Reptiles Slither to Zoo (bus departs from lobby at 5:00 PM)		<i>Lobby</i>
9:00 pm – 11:00 pm	Hospitality		<i>Imperial Suite 5148</i>

*Participation in deliberations is limited to committee members only

**Attendance by invitation only

R ___ Real Property Law Division Committee

P ___ Probate and Trust Law Division Committee

GS ___ General Standing Committee



THANK YOU TO OUR EXHIBITORS

Attorneys' Title Insurance Fund, Inc. (Booth 6)

Fund Office Solutions offers insurance and closing support products designed for attorneys including professional liability surety bonds, trust account reconciliation and virtual paralegal support for real estate closings.

Nicole Lopez ▪ 6545 Corporate Centre Blvd., Suite 200 Orlando, FL ▪ 407-490-2818 ▪ nlopez@atif.com

Community Foundation Partners (Booth 8)

A Coalition of Community Foundations in Florida committed to serving Professional Advisors and their philanthropic clients.

Terri Murru ▪ 200 S. Biscayne Blvd, Ste. 505, Miami, FL ▪ 954-565-2811 ▪ terri@murru.org

eRecording Partners Network (Booth 5)

eRecording Partners Network (ePN) is the premier eRecording provider in Florida. We provide strategic technological leadership, competitive pricing and outstanding customer support. GO ePN!

Lee Swaffield ▪ 223 Doverwood Road, Fern Park, FL ▪ 407-480-8148 ▪ lee@erecordingpartners.net

Florida Lawyers Mutual Insurance Company (Booth 10)

Florida Lawyer's Mutual Insurance has provided professional liability insurance coverage to attorneys for over 25 years. FLMIC was created by The Florida Bar, by lawyers, for lawyers.

Nancy Stuparich ▪ 541 Mitchell Hammock Rd., Oviedo, FL ▪ 800-633-6458 ▪ nancys@flmic.com

Florida Lawyers Support Services, Inc. (Booth 12)

For 33 years, FLSSI, a non-profit corporation, has provided quality legal forms for practice in probate, guardianship and real property.

Erin B. Chambers ▪ P.O. Box 568157 Orlando, FL ▪ 407-515-1501 ▪ info@flssi.org

Guardian Trust (Booth 3)

Guardian Trust serves as a professional Trustee, primarily for Special Needs Trusts (SNT), for clients throughout the United States. Established by the charity National Non-Profit for Americans with Disabilities, Inc. (NNAD) in 2002, Guardian Trust was created for the sole purpose of helping people with disabilities manage their finances while financially qualifying for Public Assistance Programs such as Medicaid and Supplemental Security Income (SSI).

Steve Hitchcock ▪ 901 Chestnut Street, Suite C, Clearwater, FL ▪ 727-631-0970 ▪ info@guardiantrusts.org

Lawgic, LLC (Booth 1)

Lawgic offers a sophisticated software tool designed exclusively for trusts and estates attorneys.

Allison Carbonneau ▪ 4745 Sutton Park Court #404, Jacksonville, FL ▪ 904-223-2223 ▪ allison@lawgic.com

Life Audit Professionals, LLC (Booth 4)

What sets Life Audit Professionals apart from a traditional insurance agency is our in depth knowledge of life insurance matters and tax law. We use our expertise to work in tandem with estate planning professionals, attorneys, CPA's, registered advisors, wealth managers and bank trust officers.

Richard Newman ▪ 2101 NW Corporate Blvd. #300, Boca Raton, FL ▪ 561-948-2421 ▪ rnewman@mylifeaudit.com

Management Planning Inc. (Booth 7)

MPI is a specialized financial services firm providing Tax-based valuations, valuations for Financial Reporting purposes and Transaction and Advisory Services.

Roy Meyers & Joe Gitto ▪ 101 Poor Farm Dr., Princeton, NJ ▪ 609-924-4200 ▪ roymeyers@mpival.com

My Personal DataSafe (Booth 2)

My Personal DataSafe offers professionals a secure portal to collaborate with their clients. Our Xchange Port lets you upload your clients documents and provide them access to their own virtual safe deposit box to store their medical, financial, legal & personal information.

Jim Everett ▪ 78 Horizon View Drive., Farmingville, NY ▪ 813-793-7146 ▪ jeverett@mypersonaldatasafe.com

Old Republic Title Insurance Co. (Booth 9)

Old Republic Title is an underwriter that is focused on agents, providing outstanding commercial and residential title products with over a century of service through strength and stability.

Jason Vanner ▪ 600 W. Hillsboro Blvd. #450, Deerfield Beach, FL ▪ 954-421-4599 ▪ jvanner@oldrepublictitle.com

RBC Wealth Management (Booth 11)

RBC Wealth Management offers an open-architecture trustee and investment platform with multiple providers, ensuring the best fit for the client.

Bill Chamberlain ▪ 4301 W. Boy Scout Blvd. #600, Tampa, FL ▪ 727-895-8867 ▪ bill.chamberlain@rbc.com