

August 2026

Message from the Chair



Dear RPPTL Members,

Welcome to the inaugural edition of the Dirt and Death Digest, the monthly digital newsletter from the RPPTL Section of The Florida Bar.

This newsletter was created to keep you informed about what's happening in our Section — upcoming CLEs, events, committee updates, and other important news — all in one quick, easy-to-read format. Our goal is to reduce the volume of separate emails you receive each month while still making sure you stay connected and up to date.

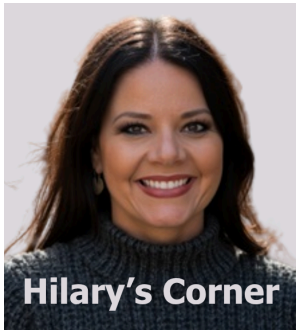
We know you're busy, so we've designed this to be a fast, practical read. As always, we're open to your feedback and suggestions — please don't hesitate to reach out to me directly.

I'd like to thank Mike Hargett and Laura Sundberg, along with the entire Communications Committee, for their excellent work in launching this newsletter.

Having officially begun my term as Chair on July 1st, I am honored to serve in this role and look forward to a productive and engaging year ahead for the RPPTL Section. Thank you for being part of our Section.

Jon Scuderi





Here are some tips from our Section Administrator, Hilary Stephens, on how to get the most from your membership.

Please check here first before contacting the Bar with questions. You might just find the answers here!

FAQ's



Executive Council Meeting and Legislative and Case Law Update
August 19, 2026 – August 22, 2026
Executive Council Meeting and Legislative and Case Law Update
The Breakers
Palm Beach, Florida

Executive Council Meeting
November 11, 2026 – November 14, 2026
Executive Council Meeting
JW Marriott Marco Island
Marco Island, Florida

Calendar

RPPTLs in Alaska

A group of us from the RPPTL Section just wrapped up an unforgettable trip to Alaska, staying at the stunning Alyeska Resort in Girdwood. We traded courtrooms for glaciers, soaking up breathtaking views, hiking the mountains around Girdwood, rafting on a glacier lake, and spotting whales on a coastal cruise. It was the perfect mix of adventure and great camaraderie—definitely a trip none of us will forget.







ActionLine Highlights



From Private Equity to Public Good Pre-Closing Considerations When Using DAFs as Tools for Business Owners
By Carla A. DeLoach, Cypress Row Advisors, PL, Orlando, Florida
Read more

Walking the Balance Beam of Fla. Stat. § 738.409: Allocating Payments From An Individual Retirement Account To A Trust
By David S. Sennett, LL.M. (tax), Independent IRA Consultant, Creve Coeur, Missouri, Sasha A. Klein, LL.M. (tax) of PwC US, Palm Beach Gardens, Florida, and Alexander M. Parthemer, LL.M. (tax), Jones Foster P.A., West Palm Beach, Florida
Read more

Read the latest ActionLine

Legislation of Interest



Proposed Florida Property Tax Amendment

House Joint Resolution 1F (Amendment 3) — quick facts for the general election ballot.

REQUIRES 60% VOTER
APPROVAL · GENERAL ELECTION 2026

Quick Facts — **HJR 1F**

- Creates a $250,000 homestead exemption for non-school ad valorem taxes.
- Applicants must establish permanent Florida residency on or before December 31, 2026 to qualify for the enhanced exemption immediately. New residents after that date receive the historic $50,000 exemption for 4 years first, then the $250,000 exemption begins.
- Reduces the annual assessment increase cap on nonhomestead properties from 10% to 5% per year.
- Limits local governments' use of ad valorem tax revenue to a defined list of "core services" set out in the proposal.

Companion Legislation -- **SB 4F**

Adjusts the formula local governments use to calculate the **rolled-back millage rate** — the rate that keeps ad valorem revenue flat year-over-year absent a stated tax increase.

Read more

From The Florida Bar Journal

The "Dutiful Child" Debate: Carpenter, Kester, and the Presumption of Undue Influence Revisited
By Alexander Douglas II and J. Richard Caskey

Read more



In Loving Memory

Roland "Chip" D. Waller
A Life of Service, Friendship, Wit and Integrity. It is with profound sadness, deep gratitude, and great affection that the members of the Section remember the life and legacy of Roland "Chip" D. Waller. Following news of Chip's passing, members from the Section shared their memories and sentiments in honor of a man who touched countless lives through his professionalism, generosity, humor, wisdom and unwavering dedication to the practice of law and to the people around him.

Read more

Honorable Judge Patricia "Trish" Thomas (Ret.)
It is with great sadness that we share the passing of the Honorable Judge Patricia "Trish" Thomas (Ret.), a valued member of the RPPTL Section and our legal community. The first woman elected to a circuit judicial seat in the Fifth Circuit, Judge Thomas's contributions to the legal profession and to her community will be long remembered, not only by her Section friends and colleagues, but also by those who will continue to benefit from her legacy of impactful community involvement.

Her obituary, may be found **here**.

Former Senator Fred Dudley
As a political leader, longtime RPPTL Section member, Senate Committee Chairman, and board-certified construction lawyer, Fred Dudley spent more than 4 decades in the professional world of real estate and construction law prior to his passing. During his service in the Florida House of Representatives and the Florida Senate, he was always a helping hand with pending Section initiatives and other legislation initiatives in our areas of practice. As a friend and professional, he will be sadly missed.

His obituary can be found **here.**

Continuing Legal Education

Featured Program

46th Annual Legislative & Case Law Update Seminar

August 21, 2026
The Breakers Palm Beach



Please join us at the iconic Breakers Hotel in Palm Beach, Florida on August 21, 2026 for the 46th Annual RPPTL Legislative and Caselaw Update. Topics will include current case law and legislation affecting real property, probate, trust, guardianship and construction law.
Learn more

New Release



Annual Guardianship Seminar 2026

Don't miss the 2026 Annual Guardianship Seminar! This CLE addresses issues for both new and experienced guardianship practitioners. This CLE will include presentations on jurisdictional issues, what professional guardians and fiduciaries want from their attorneys, a legislative and case law update, and a presentation on mediator and litigator tactics in Guardianship. The program also includes presentations on issues surrounding attorney fees, Medicaid Planning and Special Needs Trust in existing Guardianships, the intersection of Trusts and Guardianship, and insights into the best practices in Guardianship cases.
Order now



CLE Calendar

Member Resources

There are over 11,000 RPPTL members. The Section has two divisions: Real Property (“Dirt”) and Probate and Trust (“Death”). Its Committees cover nearly all aspects of the practices and the Section is intimately involved in the oversight and drafting of legislation to improve the statutory framework of the practice. In addition, the Section has a very active amicus curiae Committee

that files briefs in appellate cases to give guidance to the court on issues affecting the practice.

Are you a new member? Check out these **New Member Resources**.

Real Property Probate & Trust Law Section of The Florida Bar | 651 East Jefferson Street | Tallahassee, FL 32399 US

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