

**Real Property, Probate and Trust Law (“RPPTL”) Section
Executive Council Meeting
Fairmont Le Château Frontenac
Québec City, Québec, Canada
September 23, 2023
8:00 a.m. (E.T.)**

Agenda

- I. **Presiding** — *S. Katherine Frazier, Chair*
- II. **Secretary’s Report** — *Lee A. Weintraub, Secretary*
 1. Motion to approve the minutes of the July 22, 2023 meeting of the Executive Council held at The Breakers in Palm Beach, Florida. **p. 7**
 2. Meeting Attendance. **p. 17**
- III. **Chair's Report** — *S. Katherine Frazier, Chair*
 1. Recognition of Special Guests
 2. Thank you to all of our Sponsors! **p. 31**
 3. Formation of new committee:
 - (A) GS Division – Historian Committee
David C. Brennan, Chair
 4. Interim Actions Approved by the Executive Committee.
 - (A) August 23, 2023: On July 6, 2023, the Florida Supreme Court issued its Corrected Opinion in In Re: Code for Resolving Professionalism Referrals and Amendments to Rule Regulating the Florida Bar 6-10.3. Subsequent to the Section’s Executive Council meeting on July 22, 2023, the Professionalism & Ethics Committee prepared a proposed Comment for submission to the Court by the September 19, 2023 deadline. On August 23, 2023, the Executive Committee voted unanimously to seek an extension of time from the Court to allow for the RPPTL Section’s full Executive Committee to provide opportunity for discussion and to approve the filing of a Comment on the matter, should the full Executive Committee decide to file one.

The Executive Committee also voted unanimously to direct the Professionalism and Ethics Committee to collaborate with the CLE Committee to present a series of CLEs focused on non-discrimination

principles and bias recognition and elimination in the substantive context of real property, probate and trust law.

- (B) September 7, 2023: The Executive Committee voted to ask the Florida Supreme Court for an extension of time through December 15, 2023 to provide the Section with an opportunity to discuss, consider and debate whether to comment on the two proposed procedural tracks for changes to the Rules of Civil Procedure being considered by the Court and, if deemed advisable, for the Section to provide a comment.
- (C) September 7, 2023: Consistent with the direction provide by the Executive Council at its July 22, 2023 meeting, the Executive Committee voted unanimously to adopt a legislative position clarifying the common law expressly validating easements, servitudes and other interests in real property notwithstanding that, at the time of creation, all of the affected real property is under common ownership. The Committee found this legislative position to be within the purview of the RPPTL Section and voted to expend funds in support of the proposed legislative position. **p. 33**

5. 2023-2024 Executive Council Meetings. **p. 42**

6. General Comments of the Chair.

IV. [Board of Governors Report](#) — *Rosalyn Sia (“Sia”) Baker-Barnes, Liaison*

V. [Chair-Elect’s Report](#) — *John C. Moran, Chair-Elect*

1. 2024-2025 Executive Council meetings. **p. 43**

VI. [Treasurer’s Report](#) — *S. Dresden Brunner, Treasurer*

1. Statement of Current Financial Conditions. **p. 44**

VII. [CLE Seminar Coordination Report](#) — *Angela M. Adams (Probate & Trust) and Brenda Ezell (Real Property), Co-Chairs*

1. Upcoming CLE programs and opportunities. **p. 55**

VIII. [Real Property Law Division Report](#) — *Wm. Cary Wright, Division Director*

IX. [General Standing Committees Report](#) — *John C. Moran, Chair-Elect*

1. **Liaisons with Business Law Section** -- Manuel ("Manny") Farach and Gwynne A. Young

X. Probate and Trust Law Division Committee Reports — Jon Scuderi, Division Director

1. **Ad Hoc Guardianship Law Revision** – Nicklaus ("Nick") J. Curley, Stacy B. Rubel, and David C. Brennan, Co-Chairs; Sancha K. Brennan, Vice Chair
2. **Ad Hoc Committee on Electronic Wills** — Frederick ("Ricky") L. Hearn, Chair; Jenna G. Rubin, Vice Chair
3. **Ad Hoc Study Committee on Jurisdiction and Due Process** — Barry F. Spivey, Chair; Sean W. Kelley and Shelly Wald Harris, Co-Vice Chairs
4. **Ad Hoc ART** — Alyse Reiser Comiter, Chair; Jack A. Falk, Jr. and Sean M. Lebowitz, Co-Vice Chairs
5. **Asset Protection** — Michael A. Sneeringer, Chair; Richard ("Rick") R. Gans, Patrick J. Lannon, and Justin M. Savioli, Co-Vice-Chairs
6. **Attorney/Trust Officer Liaison Conference** — Mitchell A. Hipsman, Chair; Stacey L. Cole, Michael M. Rubenstein, Gail G. Fagan, and Eammon W. Gunther, Co-Vice Chairs
7. **Charitable Planning and Exempt Organizations** — Denise S. Cazobon, Chair; Kelly L. Hellmuth and Alyssa R. Wan, Co-Vice-Chairs
8. **Elective Share Review** — Jenna G. Rubin, Chair; Cristina Papanikos, Jason P. Van Lenten and Lauren Y. Detzel, Co-Vice-Chairs
9. **Estate and Trust Tax Planning** — Richard N. Sherrill, Chair; Alfred ("Al") J. Stashis, Jr., Andrew H. Thompson and Jolyon D. Acosta, Co-Vice Chairs
10. **Guardianship, Power of Attorney and Advanced Directives** — Stacy B. Rubel, Chair; Elizabeth ("Liz") M. Hughes, Stephanie L. Cook, Caitlin M. Powell and Jacobeli J. Behar, Co-Vice Chairs
11. **IRA, Insurance and Employee Benefits** — Charles ("Chad") W. Callahan, III, Chair; Rebecca C. Bell and Rachel N. Barlow, Co-Vice-Chairs
12. **Liaisons with ACTEC** — Elaine M. Bucher, Tami F. Conetta, Jerome L. Wolf, Charles I. Nash, L. Howard Payne and Diana S.C. Zeydel
13. **Liaisons with Elder Law Section** — Travis D. Finchum and Marjorie E. Wolasky
14. **Liaison with the FSGA** – Stephanie Cook
15. **Liaisons with Tax Section** — William R. Lane, Jr., Brian M. Malec and Brian C. Sparks
16. **Liaison with Professional Fiduciary Council** — Darby Jones
17. **OPPG Delegate** — Nicklaus ("Nick") J. Curley
18. **Principal and Income** — Edward F. Koren and Pamela O. Price, Co-Chairs, Jolyon D. Acosta and Keith B. Braun, Co-Vice Chairs
19. **Probate and Trust Litigation** — R. Lee McElroy, IV, Chair; Cady L. Huss and Darren M. Stotts, Co-Vice Chairs
20. **Probate Law and Procedure** — Theodore S. Kypreos, Chair; Benjamin F. Diamond, Stacey Prince-Troutman, and J. Grier Pressley, III, Co-Vice Chairs

21. **Trust Law** — David J. Akins, Chair; Jennifer J. Robinson, Jenna G. Rubin, and M. Travis Hayes, Co-Vice Chairs
22. **Wills, Trusts and Estates Certification Review Course** — Rachel A. Lunsford, Chair; J. Allison Archbold and J. Eric Virgil, Co-Vice Chairs

XI. [Real Property Law Division Committee Reports](#) — *Wm. Cary Wright, Division Director*

1. **Ad Hoc Hayslip** – Brian W. Hoffman, Chair; James (“Jim”) C. Russick and Russell M. Robbins, Co-Vice Chairs
2. **Ad Hoc UCRERA** - Manuel (“Manny”) Farach, Chair; Jason M. Ellison and James (“Jim”) C. Russick, Co-Vice Chairs
3. **Attorney Banker Conference** — Kristopher E. Fernandez and Salome J. Zikakis, Co-Chairs; R. James (“Jim”) Robbins, Jr., Vice Chair
4. **Commercial Real Estate** — E. Ashley McRae, Chair; Annabella Barboza, Erin M. Miller, and Alexandra D. Gabel, Co-Vice Chairs
5. **Condominium and Planned Development** — Alexander B. Dobrev and Allison L. Hertz, Co-Chairs; Russel M. Robbins, Vice Chair
6. **Condominium and Planned Development Law Certification Review Course** —Christine M. Ertl, Chair; Alessandra Stivelman, Vice Chair
7. **Construction Law** — Sanjay Kurian, Chair; Bruce D. Partington and Elizabeth B. Ferguson, Co-Vice Chairs
8. **Construction Law Certification Review Course** — Gregg E. Hutt, Chair; Jason J. Quinterro and Scott P. Pence, Co-Vice Chairs
9. **Construction Law Institute** — Bradley R. Weiss, Chair; Haley R. Maple and Trevor B. Arnold, Co-Vice Chairs
10. **Development & Land Use** —Lisa B. Van Dien, Chair; Jin Liu, Vice Chair
11. **Insurance & Surety** — Adele I. Stone and Debbie S. Crockett, Co-Chairs; Anne Q. Pollack, Vice Chair
12. **Liaisons with FLTA** — Alan K. McCall, Melissa J. Murphy, Alan B. Fields and James (“Jim”) C. Russick
13. **Liaison with American College of Real Estate Lawyers (ACREL)** — Martin A. Schwartz and William (“Bill”) P. Sklar
14. **Liaison with American College of Construction Lawyers (ACCL)** — George J. Meyer
15. **Liaison with Florida Realtors** – Louis (“Trey”) E. Goldman, III
16. **Real Estate Certification Review Course** — Lloyd Granet, Chair; Martin (“Marty”) S. Awerbach, Laura M. Licastro and Jason M. Ellison, Co-Vice Chairs
17. **Real Estate Leasing** —Christopher (“Chris”) A. Sajdera, Chair; Kristen K. Jaiven and Ryan J. McConnell, Co-Vice Chairs
18. **Real Property Finance & Lending** — Jason M. Ellison, Chair; Deborah B. Boyd and Jin Liu, Co-Vice Chairs
19. **Real Property Litigation** — Manuel (“Manny”) Farach and Shawn G. Brown, Co-Chairs; Amanda R. Kison and Terrence L. Harvey, Co-Vice Chairs
20. **Real Property Problems Study** — Susan K. Spurgeon, Chair; Amber E. Ashton and Brian W. Hoffman, Co-Vice Chairs

21. **Residential Real Estate and Industry Liaison** — Nicole M. Villarroel and Kristen K. Jaiven, Co-Chairs; James (“Jamie”) A. Marx and Richard (“Rich”) S. McIver, Co-Vice Chairs
22. **Title Insurance and Title Insurance Industry Liaison** — Christopher W. Smart, Chair; Leonard F. Prescott, IV, Jeremy T. Cranford, and Michelle G. Hinden, Co-Vice Chairs
23. **Title Issues and Standards** — Rebecca L.A. Wood and Amanda K. Hersem, Co-Chairs; Robert (“Bob”) M. Graham, Karla J. Staker and Melissa Scaletta, Co-Vice Chairs

XII. General Standing Committee Reports — *John C. Moran, Chair-Elect*

1. **Ad Hoc Bylaws** - Robert (“Bob”) S. Swaine and William (“Bill”) T. Hennessey, III, Co-Chairs
2. **Ad Hoc Protocols** – Stacy O. Kalmanson, Chair; Colleen C. Sachs, Vice Chair
3. **Ad Hoc Rules Revisions** – Michael V. Hargett, Thomas M. Karr, and J. Richard Caskey, Co-Chairs
4. **Ad Hoc RTODD** — Alan (“Steve”) S. Kotler and Christopher (“Chris”) W. Smart, Co-Chairs; Jeffrey (“Jeff”) S. Goethe, Vice Chair
5. **Ad Hoc Series LLC** - James A. Marx, James C. Russick and Michael A. Sneeringer, Co-Chairs
6. **Amicus Coordination** — Kenneth B. Bell, Gerald B. Cope, Jr., Robert W. Goldman and John W. Little, III, Co-Chairs
7. **Budget** — S. Dresden Brunner, Chair; Tae K. Bronner, Linda S. Griffin, Alfred (“Al”) J. Stashis, Jr. and Pamela O. Price, Co-Vice Chairs
8. **Communications** – Michael V. Hargett, Chair; Laura K. Sundberg, Vice Chair
9. **CLE Coordination** — Brenda B. Ezell and Angela M. Adams, Co-Chairs; Tatianna Brenes-Stahl, Silvia B. Rojas, Robert (“Rob”) Lancaster, Amanda R. Kison, Yoshimi O. Smith, and Stacy O. Kalmanson, Co-Vice Chairs
10. **Convention Coordination** —Tae K. Bronner and Stacy O. Kalmanson, Co-Chairs
11. **Disaster and Emergency Preparedness and Response** — Colleen C. Sachs, Chair; Amy B. Beller and Michael A. Bedke, Co-Vice Chairs
12. **Fellows** — Bridget M. Friedman and Terrence L. Harvey, Co-Chairs; Taniquea C. Reid, Vice Chair
13. **Historian Committee** – David C. Brennan, Chair
14. **Homestead Issues Study** — Jeffrey (“Jeff”) A. Baskies, Chair; Shane Kelley, Jeremy T. Cranford and E. Burt Bruton, Co-Vice Chairs
15. **Information Technology** — Hardy L. Roberts III, Chair; Alexander (“Alex”) B. Dobrev, Jesse B. Friedman and Jourdan Haynes, Co-Vice Chairs
16. **Law School Outreach** — Kymberlee C. Smith, Chair; Amanda C. Cummins, Lilleth Bailey and Kristine L. Tucker, Co-Vice Chairs
17. **Legislation** — Sancha C. Brennan (PT) and Steven H. Mezer (RP), Co-Chairs; M. Travis Hayes, Benjamin (“Ben”) F. Diamond and Nicklaus (“Nick”) J. Curley (PT), Christopher (“Chris”) W. Smart, Michael V. Hargett and Arthur J. Menor (RP), Co-Vice Chairs

18. **Legislative Update** — Salome J. Zikakis (RP) and Kit van Pelt (PT), Co-Chairs; Terrence L. Harvey (RP), Gutman Skrande (PT) and Jennifer S. Tobin (RP), Co-Vice Chairs
19. **Liaison with:**
 - a. **American Bar Association (ABA)** — Robert (“Rob”) S. Freedman, Edward F. Koren, George J. Meyer and Julius J. Zschau
 - b. **Business Law Section** – Manuel (“Manny”) Farach and Gwynne A. Young
 - c. **Clerks of Circuit Courts** — Laird A. Lile
 - d. **FLEA / FLSSI** — David C. Brennan and Roland D. (“Chip”) Waller
 - e. **Florida Bankers Association** — Mark T. Middlebrook and Robert G. Stern
 - f. **Judiciary** — Judge Mary Hatcher, Judge Hugh D. Hayes, Judge Mark A. Speiser, and Judge Michael Rudisill
 - g. **Out of State Members** — Nicole C. Kibert Basler, John E. Fitzgerald, Jr., and Michael P. Stafford
 - h. **TFB Board of Governors** — Rosalyn Sia Baker-Barnes
 - i. **TFB CLE Committee** — Angela M. Adams and Brenda B. Ezell
 - j. **TFB Council of Sections** — S. Katherine Frazier and John C. Moran
 - k. **TFB Pro Bono Legal Services** — Lorna E. Brown-Burton
20. **Long-Range Planning** — S. Katherine Frazier, Chair
21. **Meetings Planning** — George J. Meyer, Chair
22. **Membership and Inclusion** — Lawrence (“Larry”) J. Miller, Chair; Annabella Barboza, Shayla M. Johnson-Mount, Eryn E. Riconda, and Joseph M. Percopo, Co-Vice Chairs
23. **Model and Uniform Acts** — Patrick J. Duffey and Amber E. Ashton, Co-Chairs; Michael A. Bedke and Cullen I. Boggus, Co-Vice Chairs
24. **Professionalism and Ethics** — Andrew B. Sasso, Chair; Elizabeth A. Bowers Stoops, Alexander (“Alex”) B. Dobrev, Rt. Judge Celeste H. Muir, and Laura K. Sundberg, Co-Vice Chairs
25. **Publications ActionLine** — Erin F. Finlen and Michelle G. Hinden, Co-Chairs; Alexander S. Douglas, II, Daniel (“Danny”) L. McDermott, Gregg I. Strock, Paul E. Roman, and Seth R. Kaplan, Co-Vice Chairs
26. **Publications Florida Bar Journal** — J. Allison Archbold (PT) and Homer Duvall, III (RP), Co-Chairs; Marty J. Solomon, Brian C. Sparks, and Jonathan A. Galler, Co-Vice Chairs
27. **Sponsor Coordination** — Arlene C. Udick and Rebecca C. Bell, Co-Chairs; Marsha G. Madorsky, Jason J. Quintero, and J. Michael Swaine, Co-Vice Chairs
28. **Strategic Planning** — Robert (“Rob”) S. Freedman and William (“Bill”) T. Hennessey, III, Co-Chairs
29. **Strategic Planning Implementation** — Robert (“Rob”) S. Freedman, Robert (“Bob”) S. Swaine, William (“Bill”) T. Hennessey, III, Debra L. Boje, and Sarah S. Butters, Co-Chairs

XIII. Adjourn: Motion to Adjourn.

**Real Property, Probate and Trust Law (“RPPTL”) Section
Executive Council Meeting
The Breakers
Palm Beach, Florida
July 22, 2023
9:45 a.m. (E.T.)**

Meeting Minutes

I. Presiding — *S. Katherine Frazier, Chair*

II. Secretary’s Report — *Lee A. Weintraub, Secretary*

1. Motion to approve the minutes of the June 3, 2023 meeting of the Executive Council held at The Opal Grand in Delray Beach, Florida. Minutes approved.
2. Meeting Attendance. Attendance sheet attached

III. Chair’s Report — *S. Katherine Frazier, Chair*

1. Thank you to our Sponsors.
2. Interim Actions Approved by the Executive Committee.
 - (A) Approval of 2023 revisions to The Florida Realtors and The Florida Bar (“FR/BAR”) forms submitted by the Florida Realtor-Attorney Joint Committee, as follows: The Residential Contract for Sale and Purchase and the As-Is Residential Contract For Sale and Purchase, revising the form version, making a format change to the As-Is version, and including language related to SB 264 concerning the purchase of certain Florida real property by certain foreign principals, as reflected in the Residential Contract for Sale and Purchase (Florida Realtors-Florida Bar-fix) and As Is Residential Contract for Sale and Purchase (Florida Realtors-Florida Bar-As Is-fix) draft forms.
 - (B) Approval of Website/Social Media Accounts contract with Tracey Eller as web administrator for one year extension from July 1, 2023, to June 30, 2024.
 - (C) Approval of contract with graphic designer, Laura Pichard-Murphy, d/b/a Paisley Design, for layout and design work for the ActionLine magazine, from July 1, 2023 to June 30, 2024.

- (D) Approval of letter and forms on behalf of the RPPTL Section to the Florida Court Clerks & Comptrollers (“FCCC”) which provides as assistance to the FCCC forms that comply with House Bill 1419 for further use as the FCCC deems necessary.

- (E) Per Section 4, Article V, RPPTL Section Bylaws – the Executive Committee is required to publish the list of members to whom good cause attendance waivers are granted. Chari Frazier announced to the Council that since the last Executive Council meeting, the Executive Committee met and granted attendance waivers for the 2022-23 Bar Year to the following for good cause:

Kenneth Bell
Jonathan Galler
Hon. Mary Hatcher
Sharifa Jarrett
William Lane
John Little
Alan McCall
Howard Payne
Gwynne Young
Diana Zeydel
Alyssa Wan Razook
Hon. Mark Speiser
Bruce Partington
Stuart Altman

- 3. Announced the 2023-2024 Executive Council Meetings

- 4. Milestones. Congratulated Danielle Clark and Terrence Harvey for their appointment to the Leadership Academy. Also presented Lynwood Arnold Memorial Award to Guy Emerich and the John Arthur Jones Annual Service Awards to Andy Sasso, who was not available at the Delray Beach Convention meeting when the awards were first announced.

- 5. Thanked Legislative Update Committee for an outstanding program.

IV. Board of Governors Report— *F. Scott Westheimer, President of the Florida Bar; Rosalyn Sia (“Sia”) Baker-Barnes, Liaison from the Board of Governors*
IOTA issues will be addressed at next week’s BOG meeting. Sia is also the Section legislative liaison on BOG.

V. Chair-Elect’s Report — *John C. Moran, Chair-Elect*

- 1. Unveiled the 2024-2025 Executive Council meetings.
The Breakers, Coral Gables, Colorado Springs, Amelia Island and Orlando

VI. Treasurer's Report — *S. Dresden Brunner, Treasurer*

1. **Statement of Current Financial Conditions.**
Does not include the final expenses from the Convention. Will be included in the next report. Will begin working on the budget for next year once June expenses are in.

VII. Director of At-Large Members Report — *Wilhelmina F. Kightlinger, Director*
Introduced this year's ALMS and explained they are available to work on projects like the No Place Like Home initiative. ALM of the Year is Colleen Sachs. Contact Willie if anyone wants to work with the ALMS.

VIII. CLE Seminar Coordination Report — *Angela M. Adams (Probate & Trust) and Brenda Ezell (Real Property), Co-Chairs*

Announced upcoming CLE programs and opportunities. Brenda thanked the Legislative Update team. Angela said this past year was extremely successful financially. She thanked all the past year's programming chairs and steering committees. She recognized Hilary Stephens' work given a high volume of CLE programs. This year there are already numerous programs in the works. Presented the CLE Calendar, but some dates are being adjusted. Committee chairs promoting CLEs cannot forward Section CLE e-blasts because of tech rules with our promotional vendors. They need to be converted to pdfs to be circulated. Andy Sasso will present later in the meeting on a recent Supreme Court opinion impacting CLEs.

IX. Legislation Committee – *Steven H. Mezer (Real Property) and Sancha Brennan (Probate & Trust), Co-Chairs*

Sancha discussed new forms on the website to be used for legislative activities. She recognized the Committee's vice-chairs. There are already a lot of inquiries from legislative staff members on a number of items, so each committee needs to appoint a legislative liaison for quick turnaround time.

Steve stated this is an early legislative session. Immediate committee responses to requests for input from our lobbyists are needed.

X. Probate and Trust Law Division Report — *Jon Scuderi, Division Director*

General Comments and Recognition of Division Sponsors.

Action Items:

1. **Principal and Income Committee** - *Edward F. Koren and Pamela O. Price, Co-Chairs*

Proposed legislation to update Florida's Uniform Principal and Income Act, which generally follows the new Uniform Fiduciary Income and Principal Act, in order to

achieve greater consistency among state laws, but including certain modifications that reflect Florida public policy choices.

Motion to:

- (A) update Florida’s Uniform Principal and Income Act, which generally follows the new Uniform Fiduciary Income and Principal Act, in order to achieve greater consistency among state laws, but including certain modifications that reflect Florida public policy choices;
- (B) find that the legislative position is within the purview of the RPPTL Section; and
- (C) expend funds in support of the proposed legislative position.

Jolyon Acosta presented. Allows for fiduciaries to invest for better return. Seven states have already adopted this uniform act. Unanimously approved.

2. Probate Law and Procedure Committee – Theodore S. Kypreos, Chair

The *Johnson v. Townsend* Fix: Proposed legislation to clarify existing Florida law by statutorily exempting title disputes arising under the Florida Uniform Disposition of Community Property Rights at Death Act (“Act”) from Florida’s probate creditor claims procedure; creating a new dispute resolution mechanism and 2 year statute of repose specifically designed for title disputes arising under the Act, and making narrowly focused modifications to the Act and other related provisions of the Florida Probate Code to reduce the risk of unintended forfeitures of the property rights the Act is intended to preserve.

Motion to:

- (A) clarify existing Florida law by statutorily exempting title disputes arising under the Florida Uniform Disposition of Community Property Rights at Death Act (“Act”) from Florida’s probate creditor claims procedure; creating a new dispute resolution mechanism and 2-year statute of repose specifically designed for title disputes arising under the Act, and making narrowly focused modifications to the Act and other related provisions of the Florida Probate Code to reduce the risk of unintended forfeitures of the property rights the Act is intended to preserve;
- (B) find that the legislative position is within the purview of the RPPTL Section; and
- (C) expend funds in support of the proposed legislative position.

Presented by Theo Kypreos & Juan Antunez. Changes were made to

address comments made at the Delray Beach meeting. This is an amendment to the Florida Uniform Disposition of Community Property Rights at Death Act responding to the *Johnson v Townsend* case. The opinion added ambiguity to the statute that needed to be addressed. Juan thanked people from both Section divisions who assisted with this bill. Passed unanimously.

XI. Real Property Law Division Report — Wm. Cary Wright, Division Director

General Comments and Recognition of Division Sponsors.

Action Items:

1. **Insurance and Surety Committee** – *Debbie S. Crockett and Adele I. Stone, Co-Chairs*

Motion for the RPPTL Section to support the Insurance and Surety Committee's application to the Board of Legal Specialization and Education and The Florida Bar for the creation of a new board certification called "Insurance Coverage Law."

Debbie Crockett and Cary Wright presented. The Committee is asking the Section to endorse their efforts to create the new certification area. Cary explained the process to be followed to achieve this. The Action Item is only for support for this process. Debbie said only two other states have this certification area – Ohio & Texas, although Texas' isn't limited to coverage. The Committee has 198 signatures on the petition, but their goal is 250 signatures. Passed unanimously.

2. **Title Insurance and Title Insurance Industry Liaison** – *Christopher W. Smart, Chair*

Proposed legislation to amend section 28.223, Florida Statutes, governing Clerks of the Circuit Courts, to ensure the availability of necessary information about deceased individuals contained in the land records maintained by the Clerks so that proper heirs can be identified in the chain of title and protect the public interest of certainty in the ownership of real property.

Motion to:

- (A) amend section 28.223, Florida Statutes, governing Clerks of the Circuit Courts, to ensure the availability of necessary information about deceased individuals contained in the land records maintained by the Clerks so that proper heirs can be identified in the chain of title and protect the public interest of certainty in the ownership of real property;
- (B) find that the legislative position is within the purview of the RPPTL Section; and

(C) expend funds in support of the proposed legislative position.

Chris Smart presented. Court orders are required in probate that affect title, but title examiners need to go to the clerks' offices to examine them, plus some clerks destroy the records after five years, all of which create uncertainty in title to property. Passed unanimously.

3. Real Property Problems Study – Susan K. Spurgeon, Chair

Proposed legislation relating to notice by mail or courier; amending section 1.101 (corrected as stated below), Florida Statutes to: include electronic confirmation; providing retroactive application; providing an effective date.

Motion to:

(A) amend section 1.101 (corrected as stated below), Florida Statutes to: include electronic confirmation; providing retroactive application; providing an effective date.

(B) find that the legislative position is within the purview of the RPPTL Section; and

(C) expend funds in support of the proposed legislative position.

Amber Ashton presented. Requested a friendly amendment to the motion to correct the statute number reference to section 1.01 rather than 1.101. Changes the definition of certified mail to include any overnight courier with a signature confirmation process. Steve Hearn asked if "overnight courier" is a recognized term requiring overnight rather than 2-day delivery. Amber said all you need to do is prove actual notice rather than whether it was overnight or not. "Overnight courier" means someone who offers overnight services, but doesn't require that service be done overnight. Passed unanimously.

Information Items:

1. Title Issues and Standards – Rebecca Wood and Amanda K. Hersem, Co-Chairs.

Amanda Hersem presented. Presentation of a proposed amendment to Standard 00 to remove the masculine pronoun in the recognition of the diversity in the legal community and in the spirit of inclusivity.

2. Real Property Problems Study Committee - Merger and Easement – Colleen Sachs and Jennifer Bloodworth presented. Case law provides that

one cannot grant himself or herself an easement over their own property, which affects condominium associations, commercial shopping centers and others. Those easements are void ab initio as they merge into the property title. A statutory bill has been proposed that owners can create an easement on their own property without merger, unless the owner has separate properties that come back together. The bill doesn't reinstate any interest which has been fully and finally adjudicated as invalid before the bill's effective date. The goal is to present this bill before the Supreme Court rules on upcoming cases about the merger doctrine in this context. This is the heart of how things have been developed in Florida. The version of the bill that was circulated in the supplemental agenda for this meeting has been changed based upon committee meetings at The Breakers. The current copy of the bill is attached hereto.

Michael Gelfand thanked the committee for its hard work and moved that the executive committee be authorized to pass this bill as an Interim Action to expedite Section approval. Unanimously approved.

XII. General Standing Committees Report — John C. Moran, Chair-Elect

Action Item:

- Ad Hoc Bylaws Committee -- Robert ("Bob") S. Swaine and William ("Bill") T. Hennessey, III, Co-Chairs**

Motion to: (A) recommend approval of the proposed amendments to Articles IV, V, and VII of the RPPTL Section's Bylaws; and (B) authorize transmittal to The Florida Bar Board of Governors with a request for the Board's consent.

The proposed amendments were reflected in blackline as an attachment to the meeting agenda. A complete copy of the RPPTL Section's Bylaws is available on the RPPTL Section website: www.rpptl.org.

John Moran presented. The proposed changes tweak the nomination procedure for corporate officers & ALMS to change the time of nominations, reducing the notice period to the members of the Section of the names of nominees from 60 days to 45 days. The changes also authorize moving the slate as a vote for officers and ALMS by deleting the requirement for a written, secret ballot. Members need to be in person for at least two in-state meetings or be deemed to have resigned from the Executive Council. The proposed changes provide some flexibility to allow virtual attendance. There used to be a stated governmental emergency to allow virtual attendance. This change will give the Section Chair the discretion to allow a virtual meeting without a stated governmental emergency. The vote of officers and ALMS at the convention meeting needs to be in person absent an emergency. The Florida Bar made comments a day or so ago to correct semantics that aren't reflected in the motion attached to the agenda. Passed unanimously.

Information Items:

1. **Ad Hoc Rules Revisions Committee** -- *Michael V. Hargett, Thomas M. Karr, J. Richard ("Rich") Caskey, Co-Chairs*

Update on Fast Track Report of the Civil Procedure Rules Committee filed July 3, 2023.

Mike Hargett presented. The Big Bar's Civil Rules Committee stated they were going to provide alternatives to the Supreme Court instead of comments, which could impact the Section. The Board of Governors requested the Civil Rules Committee to make one recommendation, which they did in June. The recommendation includes changing Rule 1.280, the initial disclosure rule, to adopt the federal rule 26 initial disclosures rule. The recommendation left intact the exclusion for probate, guardianship & trust law proceedings. We don't know when the Supreme Court is going to act and how much time they will give us to respond, but this Committee is ready to act with assistance when requested.

2. **Communications Committee** -- *Michael V. Hargett, Chair*

Update on "microsite" and matters of interest.

Mike Hargett presented. The updated plan is for the microsite to become the part of the Section website that is public facing. A subcommittee, including several past Section chairs, provided comments. Melissa Murphy commented, saying the website will not be perfect, but will be usable by the target audience. She thinks we need to make a decision and get it open, then we can continue refining it thereafter. Mike said we want members to be featured in website photos, but all the photos we have are of members drinking at the bar and not in court, so photos need to be created for this. The website is 12 pages in length when you count all the links. The existing website won't go away, but this microsite will be the face page for the public.

3. **Fellows Committee** -- *Bridget M. Friedman and Terrence L. Harvey, Co-Chairs*

Bridget Friedman and Terrence Harvey introduced the new Fellows: John Curtis Wade Cherneski, Danielle N. Clark, Sara Ashley Harmon, and Natasha Selvaraj. There were 50 applicants to fill 4 available spots.

4. **Information Technology Committee** -- *Hardy L. Roberts, III, Chair*

Update on matters of interests related to artificial intelligence.

Hardy Roberts presented on Alex Dobrev's work on updating the Section listservs. Hardy sits on the Big Bar's Artificial Intelligence Committee. They are studying the future of AI and how it impacts professionalism and our

practices. CLE will be forthcoming.

5. **Professionalism and Ethics Committee** -- *Andrew B. Sasso, Chair*

Update on Florida Supreme Court's July 7, 2023 Opinion In Re: Code for Resolving Professionalism Referrals and Amendments to Rule Regulating The Florida Bar 6-10.3, Case No. SC2023-0884.

Andy Sasso presented on the new Supreme Court decision approving The Florida Bar's recommendation to review professionalism in Florida. Repealed the Code of resolving professionalism complaints and replaced it with professionalism referrals to local professionalism panels. It modified Professionalism Expectations by saying professionalism standards apply to online communications, as well as communications made virtually and in person. The Supreme Court added an additional 2-hour course being created by The Florida Bar which will involve professionalism and will be offered free to lawyers. Our 33-hour CLE requirement per cycle will be reduced to 30 hours. The Supreme Court removed bias elimination from the list of approved course titles that satisfy the five credit hour per cycle requirement of ethics, professionalism, substance abuse and mental health and wellness. The Supreme Court provided a 75-day comment period for the reduction of CLE hours & elimination of the bias elimination requirement.

6. **Liaison with Clerks of Circuit Courts** -- *Laird A. Lile*

Update on matters of interest.

Laird Lile presented. Some clerks were looking for witness addresses in documents and refusing to record now rather than waiting until January 1, but that has now been addressed. Participating in the drafting of new rules forms. Laird has been invited to sit on a committee studying whether to recommend to the courts that some judicial circuits within a single district be consolidated.

7. **Liaisons with Business Law Section** -- *Manuel ("Manny") Farach and Gwynne A. Young*

Update on Business Law Section initiative regarding UCC Article 12 (i.e., cryptocurrency).

Amber Ashton presented. The Business Law Section has a task force on the cryptocurrency issue. Manny Farach discussed how the Business Law Section works.

8. **Liaison with Pro Bono Committee** – *Lorna E. Brown-Burton*

Update on matters of interest.

Lorna presented on the Annual Convention meeting on June 21, 2023.

Discussed the Circuit Committee Handbook that is almost ready to go. Discussion greater public access to legal services and how the Committee could facilitate this. Discussed establishing a commission on self-representation. Looking at connecting more individuals in need with attorneys. Discussed what legal aid groups are doing in lower income areas and how to get with lawyers earlier. Considering allowing second year law students being approved as legal service providers. Considering creating a pro bono page on The Florida Bar's website. Council of Judges from around the state will meet three times per year. Will consider at the next meeting whether paralegals can work pro bono and whether lawyers can report the paralegal pro bono participation in the lawyer's annual pro bono reporting.

Adjourn: Motion to Adjourn.

ATTENDANCE ROSTER
REAL PROPERTY PROBATE & TRUST LAW SECTION
EXECUTIVE COUNCIL MEETINGS
2022-2023

Executive Committee	Division		7/22/23 Breakers	9/23/23 Quebec City, Canada	11/11/23 Tampa	2/24/24 Orlando	6/1/24 Bonita Springs
	R	P					
Frazier, S. Katherine Chair	RP						
Moran, John C., Chair-Elect		PT	√				
Wright, Wm. Cary Division Director Real Property	RP		√				
Jon Scuderi, Division Director, Probate & Trust		PT	√				
Lee Weintraub Secretary	RP		√				
Dresden Brunner, Treasurer		PT	√				
Kightlinger, Wilhelmina Director, At-Large Members	RP		√				
Sancha Brennan, Legislation Co-Chair Probate & Trust		PT	√				
Steven H. Mezer, Legislation Co-Chair, Real Property	RP		√				
Adams, Angela M. CLE Co-Chair Probate & Trust		PT	√				
Brenda Ezell, CLE Co-Chair Real Property	RP		√				
Sarah Butters, Immediate Past Chair		PT	√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Acosta, Jolyon Delphin		PT	√				
Adams, Angela M.							
Akins, David J.		PT	√				
Alaimo, Marve Ann M.		PT	√				
Altman, Stuart H.		PT					
Archbold, J. Allison		PT					
Arnold, Casey		PT	√				
Arnold, Trevor	RP		√				
Aron, Jerry E. Past Chair	RP						
Ashton, Amber E.	RP		√				
Awerbach, Martin S.	RP		√				
Bald, Kimberly A.		PT					
Bailey, Lilleth		PT	√				
Baker-Barnes, Rosalyn Sia							
Ballaga, Raul	RP		√				
Barboza, Annabella	RP		√				
Barlow, Rachel N.			√				
Baskies, Jeffrey		PT	√				
Battle, Carlos A.		PT	√				
Baumann, Phillip A.		PT	√				
Beales, III, Walter R. Past Chair	RP		√				
Bedke, Michael A.	RP		√				
Behar, Jacobeli J.		PT	√				
Belcher, William F.		PT	√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Bell, Kenneth B.	RP						
Bell, Rebecca Coulter		PT	√				
Beller, Amy		PT					
Bloodworth, Jennifer J.	RP						
Boggus, Cullen			√				
Boje, Debra Lynn Past Chair		PT	√				
Bouchard, Eve		PT	√				
Bowers-Stoops, Elizabeth A.		PT					
Boyd, Deborah	RP		√				
Braun, Keith Brian		PT	√				
Brenes-Stahl, Tattiana		PT	√				
Brennan, David C. Past Chair		PT					
Brennan, Sancha C.							
Bronner, Tae K.		PT	√				
Brown, Shawn	RP		√				
Brown-Burton, Lorna	RP		√				
Brunner, S. Dresden		PT					
Bruton, Jr., Ed Burt	RP		√				
Bucher, Elaine M.		PT	√				
Callahan, Chad W. III		PT	√				
Caskey, John Richard "Rich"		PT					
Cazobon, Denise		PT					
Christiansen, Patrick Past Chair	RP						

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Cole, Stacey L.		PT	√				
Coleman, Jami A.		PT					
Comiter, Alyse Reiser		PT	√				
Conetta, Tami F.		PT	√				
Cook, Stephanie		PT	√				
Cope, Jr., Gerald B.	RP						
Cornett, Jane Louise	RP		√				
Cranford, Jeremy	RP		√				
Crockett, Debbie	RP		√				
Cummins, Amanda			√				
Curley, Nick		PT	√				
Detzel, Lauren Y.		PT	√				
Diamond, Benjamin F.		PT	√				
Diamond, Sandra F. Past Chair		PT	√				
Dobrev, Alex	RP		√				
Dollinger, Jeffrey	RP						
Douglas, Alexander		PT	√				
Dribin, Michael Past Chair		PT	√				
Duffey, Patrick J.		PT	√				
Duvall, III, Homer	RP		√				
Eisel, Jeffrey		PT	√				
Ellison, Jason M.	RP		√				
Emerich, Guy S.		PT	√				
Ertl, Christene M.	RP		√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Evert, Jamison C.		PT					
Ezell, Brenda B.	RP						
Fagan, Gail		PT	√				
Falk, Jr., Jack A.		PT	√				
Farach, Manuel	RP		√				
Felcoski, Brian J. Past Chair		PT	√				
Ferguson, Elizabeth B.	RP						
Fernandez, Kristopher E.	RP		√				
Fields, Alan B.	RP		√				
Finchum, Travis		PT	√				
Finlen, Erin F.		PT	√				
Fitzgerald, Jr., John E.		PT					
Frazier, S. Katherine							
Freedman, Robert (Rob) Past Chair	RP						
Friedman, Bridget		PT	√				
Friedman, Jesse B.		PT	√				
Fugate, Norm	RP		√				
Gabel, Alexandra	RP		√				
Galler, Jonathan		PT					
Gans, Richard R.		PT	√				
Gelfand, Michael J Past Chair	RP		√				
George, Joseph P.		PT	√				
Getzan, Roberta							

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Goethe, Jeffrey S.		PT	√				
Goldman, Louis "Trey"	RP		√				
Goldman, Robert W. Past Chair		PT	√				
Goodall, Deborah P. Past Chair		PT	√				
Graham, Robert M.	RP		√				
Granet, Lloyd	RP		√				
Griffin, Linda S.		PT					
Grimsley, John G. Past Chair		PT					
Gunther, Eamonn W.		PT	√				
Guttmann, III, Louis B Past Chair	RP		√				
Hargett, Michael V.	RP		√				
Harris, Shelly W.		PT					
Harvey, Terrance	RP		√				
Hatcher, Hon. Mary							
Hayes, Hon. Hugh D.			√				
Hayes, Michael Travis		PT	√				
Haynes, Jourdan	RP		√				
Hearn, Frederick "Ricky"		PT	√				
Hearn, Steven L. Past Chair		PT	√				
Hellmuth, Kelly		PT					
Henderson, III, Thomas N.	RP		√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Hennessey, William (“Bill”) Past Chair		PT					
Hersem, Amanda	RP		√				
Hertz, Allison	RP		√				
Heuston, Stephen P.		PT	√				
Hinden, Michelle	RP		√				
Hipsman, Mitchell Alec		PT	√				
Hoffman, Brian W.	RP		√				
Hughes, Elizabeth		PT	√				
Huss, Cady L.		PT	√				
Hutt, Gregg Evan	RP						
Isphording, Roger O. Past Chair		PT					
Jaiven, Kristen King	RP		√				
Jarrett, Sharifa K.		PT					
Johnson, Amber Jade		PT	√				
Jones, Darby		PT					
Jones, Frederick W.	RP						
Kalmanson, Stacy O.	RP		√				
Kangas, Michael R.		PT	√				
Kaplan, Seth		PT					
Karr, Thomas M.		PT					
Kayser, Joan B. Past Chair		PT					
Kelley, Rohan Past Chair		PT	√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Kelley, Sean W.		PT					
Kelley, Shane		PT					
Kibert-Basler, Nicole	RP						
Kinsolving, Ruth Barnes Past Chair	RP						
Kison, Amanda	RP		√				
Koren, Edward F. Past Chair		PT	√				
Kotler, Alan Stephen		PT	√				
Kurian, Sanjay	RP		√				
Kypreos, Theodore S.		PT	√				
Lancaster, Rob			√				
Lane, Jr., William R.		PT					
Lannon, Patrick			√				
Lebowitz, Sean		PT					
Licastro, Laura	RP		√				
Lile, Laird A. Past Chair		PT	√				
Little, III, John W.	RP		√				
Liu, Jin	RP		√				
Lunsford, Rachel Albritton		PT	√				
Madorsky, Marsha G.		PT	√				
Malec, Brian		PT	√				
Maple, Hayley			√				
Marger, Bruce Past Chair		PT					

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Marx, James A.	RP						
McCall, Alan K.	RP		√				
McConnell, Eryn							
McConnell, Ryan	RP		√				
McDermott, Daniel		PT					
McElroy, IV, Robert Lee		PT	√				
McIver, Richard	RP		√				
McRae, Ashley E.	RP		√				
Menor, Arthur J.	RP						
Meyer, George F. Past Chair	RP		√				
Meyer, Michael	RP		√				
Mezer, Steven H.							
Middlebrook, Mark	RP		√				
Miller, Erin			√				
Miller, Lawrence ("Larry")		PT	√				
Moran, John C.							
Mount, Shayla							
Muir, Hon. Celeste H.		PT					
Murphy, Melissa J. Past Chair	RP		√				
Nash, Charles I.		PT					
Neukamm, John B. Past Chair	RP						
Nguyen, Hung V.		PT					
O'Malley, Andrew M.	RP						

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Papanikos, Cristina		PT	√				
Partington, Bruce	RP		√				
Payne, L. Howard		PT					
Pence, Scott P.	RP		√				
Percopo, Joe		PT	√				
Pilotte, Frank		PT	√				
Pollack, Anne Q.	RP		√				
Powell, Caitlin		PT	√				
Prescott, Leonard	RP		√				
Pressley, Grier James		PT	√				
Price, Pamela O.		PT					
Prince-Troutman, Stacy		PT	√				
Quintero, Jason	RP		√				
Reid, Taniquea			√				
Redding, John N.	RP		√				
Riconda, Eryn		PT	√				
Robbins, Jr., R. James	RP		√				
Robbins, Russell	RP		√				
Roberts, III, Hardy L.	RP		√				
Roberts, Tance		PT	√				
Robinson, Jennifer		PT					
Rojas, Silvia B.	RP		√				
Rolando, Margaret A.	RP		√				
Past Chair							
Roman, Paul E.		PT	√				
Romano, Antonio		PT					

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Rubel, Stacy		PT	√				
Rubenstein, Michael		PT	√				
Rubin, Jenna		PT	√				
Rudisill, Hon. Michael	RP		√				
Russick, James C.	RP		√				
Sachs, Colleen C.	RP		√				
Sajdera, Christopher	RP						
Sanchez-Medina, Roland							
Sasso, Andrew		PT	√				
Savioli, Justin		PT					
Scaletta, Melissa	RP		√				
Schwartz, Martin	RP						
Schwartz, Robert M.	RP		√				
Shanks, David	RP		√				
Sheets, Sandra G.		PT	√				
Sherrill, Richard		PT	√				
Sklar, William P.	RP						
Skrande, Gutman		PT	√				
Smart, Christopher W.		PT	√				
Smith, Kymberlee C.	RP		√				
Smith, G. Thomas Past Chair/Hon. Member	RP						
Smith, Yoshimi O.		PT					
Sneeringer, Michael A.		PT	√				
Solomon, Marty	RP		√				
Sparks, Brian C.		PT	√				

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Speiser, Hon. Mark A.		PT	√				
Spivey, Barry F.		PT	√				
Spurgeon, Susan K.	RP						
Stafford, Michael P.		PT	√				
Staker, Karla J.	RP		√				
Stashis, Alfred Joseph		PT					
Stern, Robert G.	RP		√				
Stivelman, Alessandra			√				
Stoops, Elizabeth			√				
Stone, Adele I.	RP						
Stone, Bruce M. Past Chair		PT					
Stotts, Darren		PT	√				
Strock, Gregg			√				
Sundberg, Laura K.		PT	√				
Swaine, Jack Michael Past Chair	RP						
Swaine, Robert S. Past Chair							
Taft, Ellie	RP		√				
Taylor, Richard W.	RP						
Thomas, Hon. Patricia		PT	√				
Thompson, Andrew		PT	√				
Thornton, Kenneth E. "Kip"	RP		√				
Tobin, Jennifer S.	RP		√				
Tschida, Joseph John	RP		√				
Tucker, Kristine L.		PT					

Executive Council Members	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Breakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Udick, Arlene C.	RP		√				
Van Dien, Lisa Barnett	RP						
Van Lenten, Jason Paul		PT	√				
Van Pelt, Kit E.		PT	√				
Villarroel, Nicole Marie	RP		√				
Virgil, Eric		PT					
Waller, Roland D. Past Chair	RP		√				
Wan, Alyssa Razook		PT	√				
Warner, Richard		PT					
Weiss, Brad R.	RP		√				
Williams, Margaret A.	RP						
Williams, Jorja		PT	√				
Williamson, Julie Ann Past Chair	RP						
Wolasky, Marjorie E.		PT	√				
Wolf, Jerome L.		PT					
Wood, Rebecca	RP		√				
Young, Gwynne A.		PT					
Zeydel, Diana S.C.		PT					
Zikakis, Salome J.	RP		√				
Zschau, Julius J. Past Chair	RP						
Zuroweste, Zack		PT	√				

Affiliate Members

Fellows	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Beakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Boisrond, Sandra							
Cherneski, John		PT	√				
Curtis, Wade							
Clark, Danielle		PT	√				
Davis, Jade							
Harmon, Sara Ashley		PT	√				
Mora, Jeanette		PT	√				
Pieczynski, Janaye			√				
Selvaraj, Natasha			√				

Legislative Consultants	Division		7/22/2023	9/23/2023	11/11/2023	2/24/2024	6/1/2024
	R	P	Beakers	Quebec City, Canada	Tampa	Orlando	Bonita Springs
Brown, French	RP		√				
Dunbar, Marc							
Dunbar, Peter M.	RP		√				
Edenfield, Martha Jane		PT	√				

	Division						
	R	P					



Thank you to Our Sponsors

<u>Event Name</u>	<u>Sponsor</u>	<u>Contact Name</u>	<u>Email</u>
Platinum	Old Republic Title	Jim Russick	jrussick@oldrepublictitle.com
Platinum	The Fund	Melissa Murphy	mmurphy@thefund.com
Platinum	RealAdvice	Todd Jones	Todd.jones@realadvice.com
APP	WFG National Title Insurance	Joseph J. Tschida	jtschida@wfgnationaltitle.com
Gold	CATIC	Deb Boyd	dboyd@catic.com
Gold	Coral Gables Trust	John Harris	jharris@cgtrust.com
Gold	First American Title Insurance Company	Len Prescott	lprescott@firstam.com
Gold	FNF Family of Companies – Florida	Karla Staker	Karla.staker@fnf.com
Gold	Guardian Trust	Travis Finchum	travis@specialneedslawyers.com
Gold	JP Morgan Private Bank	Carlos Batlle	Carlos.a.batlle@jpmorgan.com
Gold	Stewart Title Guaranty Company	David Shanks	David.shanks@stewart.com
Gold	Stout	Garry Marshall	gmarshall@stout.com

Gold	Westcor Land Title Insurance Company	Laura Licastro	Laura.licastro@wltic.com
Silver	Management Planning, Inc.	Roy Meyers	rmeyers@mpival.com
Silver	Provisie	Steve Athanassie	athanassie@provisie.com
Silver	Title Resources Group	Lee Offir	Lee.offir@titleresources.com
Silver	Valuation Services Inc.	Jeff Bae	jeff@valuationservice.com
Bronze	Amerant Bank	Madelayne Cordero	mcordero@amerantbank.com
Bronze	BNY Mellon Wealth Management	Rafaela Vianna	Rafaela.vianna@bnymellon
Bronze	Business Valuation Analysts	Tim Bronza	tbronza@bvalysts.com
Bronze	Cumberland Trust	Bob Carville	bcarville@cumberlandtrust.com
Bronze	Fiduciary Trust International of the South	Vaughn Yeager	Vaughn.yeager@ftci.com
Bronze	Grove Bank & Trust	Marta Goldberg	mgoldberg@grovebankandtrust.com
Legislative Update	The Fund	Melissa Murphy	mmpurphy@thefund.com



The Florida Bar

651 East Jefferson Street
Tallahassee, FL 32399-2300

Joshua E. Doyle
Executive Director

(850) 561-5600
www.FLORIDABAR.org

REAL PROPERTY, PROBATE AND TRUST LAW SECTION LEGISLATIVE OR POLITICAL ACTIVITY REQUEST FORM

- This form is for Section Committees to seek approval for Section legislative or political activities.
- Legislative or political activity is defined in the Standing Board Policies of The Florida Bar (SBP 9.11) as “activity by The Florida Bar or a bar group including, but not limited to, filing a comment in a federal administrative law case, taking a position on an action by an elected or appointed governmental official, appearing before a government entity, submitting comments to a regulatory entity on a regulatory matter, or any type of public commentary on an issue of significant public interest or debate.”
- Requests for legislative and political activity must be made on this form and submitted to the RPPTL Legislation Committee, with your Committee’s white paper.
- Pursuant to SBP 9.50(d), the Section must advise The Florida Bar of proposed legislative or political activity AND circulate the proposal to all Bar divisions, sections and committees that might be interested in the issue.
 - Committees must check with other interested Bar divisions, sections and committees to see if there are comments or issues.
 - If comments have been received from another interested group, the comments must be included.
 - If comments have not yet been received, the proposal may still be submitted to the Legislation Committee, with a list of the interested groups that have been notified and the dates and methods of notification.
 - If a decision needs to be expedited, the proposal must explain the need for an expedited decision and request a specific deadline for a decision by the Bar.
- The Legislation Committee will review the proposal.
 - The proposal will then need to be presented at the Division Round Table.
 - Then, published as an Information Item to the Executive Council.
 - Then, published as an Action Item to the Executive Council.

651 East Jefferson Street • Tallahassee, FL 32399-2300 • FAX: (850) 561-9405

General Information

Submitted by: *(name of Section Committee)* Real Property Problems Study

Contact: *(Name of Committee Chair(s), address and phone number)* Susan Spurgeon
ssurgeon@shutts.com, 813-227-8164

(Name of Sub-committee Chair, if any, address and phone number, if any) _____

Colleen Sachs, 800-432-9594 [EXT. 7711], csachs@thefund.com and Jennifer Bloodworth, 407-691-5296, jbloodworth@firstam.com.

Proposed Advocacy

Complete #1 below if the issue is legislative OR #2 if the issue is political; AND #3 must be completed.

1. Proposed Wording of Legislative Position for Official Publication

Clarification of common law expressly validating easements, servitudes, and other interests in real property notwithstanding that, at the time of creation, all of the affected real property is under common ownership.

2. Political Proposal

n/a

3. Reasons For Proposed Advocacy

a. Per SBP 9.50(a), does the proposal meet all three of the following requirements? *(select one)* Yes No

- It is within the group’s subject matter jurisdiction as described in the Section’s Bylaws;
- It is beyond the scope of the Section/Bar’s permissible legislative or political activity, **or** within the Section/Bar’s permissible scope of legislative or political activity **and** consistent with an official Section/Bar position on that issue; **and**
- It does not have the potential for deep philosophical or emotional division among a substantial segment of the Bar’s membership.

b. Additional Information: _____

Referrals to Other Committees, Divisions & Sections/Voluntary Bar Groups

Pursuant to SBP 9.50(d), the Section must provide copies of its proposed legislative or political actions to all Bar committees, divisions, sections and voluntary bar groups that may be interested in the issue. **List** all Bar committees, divisions, sections and voluntary bar **groups that this proposal has been shared with** pursuant to this requirement, **the date the proposal was shared**, and **provide all comments** received from such groups as part of your submission. The Section may submit its proposal before receiving comments, but only after the proposal has been provided to other bar divisions, sections or committees. A form for sharing proposals is available for this purpose.

Public Interest Law Section
Environmental & Land Use Law Section
City, County & Local Government Law Section

Contacts

Legislation Committee Appearance *(list name, address and phone #)*

Colleen Sachs, Attorneys' Title Fund Services, LLC, 6545 Corporate Centre Boulevard,
Orlando, Florida 32822, 800-432-9594 [EXT. 7711],

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with legislators)

(Draft as of 07/21/2023)

WHITE PAPER

CREATION OF EASEMENTS, SERVITUDES, AND OTHER MATTERS AFFECTING REAL PROPERTY OWNED BY THE SAME PERSON

I. SUMMARY

This Bill reiterates the longstanding rule in Florida that an owner can create an interest in their own real property notwithstanding that the owner owns all of the affected real property.

Florida has been one of the fastest-growing states in the nation for decades, and has led other states in passing laws, requiring proper planning at all levels of Florida government.¹ These include requirements for statewide, regional, county and local planning and comprehensive plans, which implement zoning ordinances, land use restrictions, and development orders through the creation of easements, covenants, restrictions, declarations, and other written instruments establishing servitudes upon real property, which are often imposed while the property owner owns all of the affected real property.

It also common practice to record covenants, prior to the first sale of any portion of the affected property, requiring a planned property owners' association to bear the costs of establishing and maintaining surface water management facilities, drainage and retention areas, roads, parks, environmental areas, and other parts of the planned community.

Recent judicial interpretations, discussed below, have called into question the validity of easements, and by extension any easement, surface water management agreement, utility easement, access easement, parking easement, negative easement, environmental easement, solar easement, other rights in the nature of an easement, servitude, profit, use right, restriction, obligation, condition, reservation, or other covenant, contained in a written instrument, if such is created at a time when all of the real property is in common ownership. These judicial interpretations misapply the doctrine of merger or other common-law rules to invalidate easements, servitudes and other interests that the grantor intended to bind and benefit the property after its division into separately owned estates, but that were granted before such division.

This misapplication of these common law doctrines is contrary to the long-established land planning regime implemented in Florida, would deprive land planners, governments, and real property owners of an important tool long used in implementing planning and development decisions, and would negate the justifiable expectations of real property owners as to their rights and protections, especially when buying in a condominium, planned development, or community association.

II. CURRENT SITUATION

¹ See e.g. Chapter 380, Florida Statutes (creating the state land planning agency, setting standards for developments of regional impact, and coastal planning) and Chapter 163, Part II, Florida Statutes (mandating county and municipal comprehensive plans)

The practice in Florida has long been for a developer of real property planned for sale to create easements, deeds, plats, declarations, covenants, conditions, restrictions, servitudes, or other written instruments creating an interest in the real property before the first parcel is sold.

Recent appellate level cases have held that an easement is void if the dominant and servient estates are owned by the same party at the time the easement is created. These cases include *King v. Roorda*, 335 So. 3d 1001 (Fla. 2d DCA 2023)² and *AFP 103 Corp. v. Common Wealth Trust Services, LLC*, 2023 WL 2146247, (Fla. 3d DCA 2023)³

These cases call into question not only express stand-alone easements granted prior to, but in contemplation of a sale of a portion of the property, but many easements, servitudes, use rights, restrictions, or other covenants such as those routinely contained in recorded plats, declarations of condominium, homeowners' association documents.

Such rulings frustrate the goals of property owners who clearly intended to create an easement or other interest by recording the instruments in question. A broad application of these rulings also has the potential to adversely and unexpectedly impact the buyers of properties in any number of subdivisions, property owners' associations, condominiums and other communities across the state, who bought rightly expecting to have the access, use of parks and common areas and be subject to the community standards spelled out in the recorded instruments governing their communities.

This broad application has the potential to upend decades of land planning under Chapter 380, Florida Statutes (creating the state land planning agency, setting standards for developments of regional impact, and coastal planning) and Chapter 163, Part II, Florida Statutes (mandating county and municipal comprehensive plans) to the extent it was implemented through easements, deeds, plats, declarations, covenants, conditions, restrictions, servitudes, or otherwise at a time when the affected real property was under common ownership.

III. EFFECT OF PROPOSED CHANGES

New section 704.09(1) reiterates and clarifies existing law, and expressly validates the creation of easements, servitudes, or other interests in real property notwithstanding that, at the time of creation, all of the affected real property is under common ownership.

New section 704.09(2) makes clear that this applies to a broad group of rights and interests in land – specifically listing “any easement, surface water management agreement, utility easement, access easement, parking easement, negative easement, environmental easement, solar easement, other rights in the nature of an easement, servitude, profit, use right, restriction,

² Relying on *Morris v. Garcia*, 224 So. 3d 268 (Mem) (Fla. 3d DCA 2017) citing *One Harbor Fin. Ltd. Co. v. Hynes Properties, LLC*, 884 So. 2d 1039 (Fla. 5th DCA 2004) and *Hensel v. Aurilio*, 417 So. 2d 1035, 1038 (Fla. 4th DCA 1982).

³ Citing as black letter law *One Harbor Fin. Ltd. Co. v. Hynes Properties, LLC*, 884 So. 2d 1039 (5th DCA 2004), *Hensel v. Aurilio*, 417 So. 2d 1035, 1038 (Fla. 4th DCA 1982), and *Morris v. Garcia*, 224 So. 3d 268 (Mem) (Fla. 3d DCA 2017).

obligation, condition, reservation, or other covenant, contained in a written instrument” – without regard to the nature of the instrument by which it is created – listing “an easement, deed, plat, declaration, covenant, condition, restriction, servitude, or otherwise.”

The bill limits the misapplication of these common law doctrines only as of the time of creation of an easement or other interest. The bill does not alter the application of the doctrine of merger after properties have been reacquired into common ownership, or the ability of the holders of all properties affected to terminate or modify easements, covenants, and reservations in accord with existing law. The bill does not affect the application of the Marketable Record Title Act, statutes of limitation or repose, or other legal doctrines which may have the effect of terminating or limiting interests in real property after initial creation.

The bill is simply a reiteration and clarification of existing law and should be interpreted to validate and preserve previously granted easements, restrictions, and other written covenants and to apply prospectively to prevent questions as to the validity of such interests created after the effective date.

The owners of properties which have been subject to litigation in which final judgments have been rendered and all appeals periods have run prior to the effective date of this bill, have reasonable expectations as to their property rights as established in those cases, even if the ruling may have been in error or inconsistent with this bill. Consistent with *res judicata*, rules of collateral estoppel and the law of the case, section 704.09(3) provides that the bill does not reinstate any interest which has been fully and finally adjudicated as invalid prior to the effective date hereof.

IV. FISCAL IMPACT ON STATE AND LOCAL GOVERNMENTS

There is no direct fiscal impact on state or local governments.

The bill may have an indirect operational benefit by preserving easements, covenants, restrictions and the like which were imposed as part of land planning, comprehensive plans, or development orders, and by avoiding the shifting of the costs of building and maintaining surface water management facilities, drainage and retention areas, roads, parks, environmental areas, and other parts of the planned community away from the designated property owners’ associations and potentially back to a government entity.

V. DIRECT IMPACT ON PRIVATE SECTOR

Real property owners are, for the most part, impacted positively by this legislation through having their reasonable expectations met by receiving the benefit of written easements, plats, deeds, declarations, covenants, conditions, restrictions, servitudes, or otherwise.

VI. CONSTITUTIONAL ISSUES

There are no constitutional issues with the clarification of this law.

VII. OTHER INTERESTED PARTIES

None contacted yet.

1 Section 1. Section 704.09 Florida Statutes is created
2 to read as follows:

3 704.09. Creation of easements, servitudes, and other
4 matters affecting real property owned by the same owner.-

5 (1) The owner of real property may create an easement,
6 servitude, or other interest in the owner's real property, and
7 such easement, servitude, or other interest is valid
8 notwithstanding that the owner owns all of the affected real
9 property.

10 (2) Subsection (1) clarifies existing law, and applies to,
11 without limitation, any easement, surface water management
12 agreement, utility easement, access easement, parking easement,
13 negative easement, environmental easement, solar easement, other
14 rights in the nature of an easement, servitude, profit, use
15 right, restriction, obligation, condition, reservation, or other
16 covenant, contained in a written instrument, whether denominated
17 as an easement, deed, plat, declaration, covenant, condition,
18 restriction, servitude, or otherwise.

19 (3) This section shall not reinstate any interest in real
20 property which was the subject of a court proceeding and which
21 has been fully and finally adjudicated as invalid prior to the
22 effective date hereof.

23 Section 2. This act shall take effect upon becoming law.
24

RPPTL 2023-2024
Executive Council Meeting Schedule
Katherine Frazier's Year

Limit 1 reservation per registrant, additional rooms will be approved upon special request.

NOTE- Committee meetings may be conducted virtually via Zoom prior to the Executive Council meeting weekend.

Date	Location
July 19 – July 23, 2023	Executive Council Meeting & Legislative Update The Breakers Palm Beach, Florida Room Rate (Deluxe Room – King): \$257 Premium Room Rate: \$314
September 20 – September 24, 2023	Executive Council Meeting Fairmont Le Chateau Frontenac Quebec City, Quebec, Canada Standard Guest Room Rate (King): \$359 CAD (Canadian Dollars) *Reminder – You will need your passport!
November 8 – November 12, 2023	Executive Council Meeting JW Marriott Tampa Water Street Tampa, Florida Standard Guest Room Rate: \$259 King Suite Room Rate: \$289
February 21 – February 25, 2024	Executive Council Meeting Ritz Carlton Grande Lakes Orlando, Florida Standard Room Rate: \$359 JW Marriott Standard Room Rate: \$329
May 29 – June 2, 2024	Executive Council Meeting & Annual Convention Hyatt Regency Coconut Point Bonita Springs, Florida Standard Guest Room Rate: \$209

RPPTL 2024-2025
Executive Council Meeting Schedule
John Moran's Year

Limit 1 reservation per registrant, additional rooms will be approved upon special request.

NOTE- Committee meetings may be conducted virtually via Zoom prior to the Executive Council meeting weekend.

Date	Location
July 24 – July 27, 2024	Executive Council Meeting & Legislative Update The Breakers Palm Beach, Florida Room Rate (Deluxe Room – King): \$295 Premium Room Rate: \$365
September 4 – September 8, 2024	Executive Council Meeting Loews Coral Gables Coral Gables, Florida Room Rate (Run of house): \$229
December 4 – December 08, 2024	Executive Council Meeting The Broadmoor Colorado Springs, Colorado Room Rate (Run of West): \$265
February 5 – February 9, 2025	Executive Council Meeting The Ritz Carlton Amelia Island Amelia Island, Florida Room Rate (Coastal View): \$399
May 28 – June 1, 2025	Executive Council Meeting & Annual Convention Four Seasons Orlando Orlando, Florida Room Rate (Run of house): \$399

THE FLORIDA BAR
Real Property Probate and Trust Law Section Rollup
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior YTD Variance (\$)	FYE Actual 2022
3001-Annual Fees	(60)	679,210	625,200	54,010	625,200	666,280	12,930	666,280
3002-Affiliate Fees	-	12,540	5,000	7,540	5,000	10,780	1,760	10,780
Total Fee Revenue	(60)	691,750	630,200	61,550	630,200	677,060	14,690	677,060
3301-Registration-Live	(112)	676,879	512,500	164,379	512,500	545,073	131,806	545,073
3331-Registration-Ticket	-	12,300	12,000	300	12,000	-	12,300	-
Total Registration Revenue	(112)	689,179	524,500	164,679	524,500	545,073	144,106	545,073
3341-Exhibit Fees	2,600	99,900	65,500	34,400	65,500	9,400	90,500	9,400
3351-Sponsorships	-	578,950	468,000	110,950	468,000	523,675	55,275	523,675
3391 Section Profit Split	9,742	627,487	260,000	367,487	260,000	451,920	175,567	451,920
3392-Section Differential	1,740	21,300	15,000	6,300	15,000	18,300	3,000	18,300
Other Event Revenue	14,082	1,327,637	808,500	519,137	808,500	1,003,295	324,342	1,003,295
3401-Sales-CD/DVD	9,095	68,427	22,000	46,427	22,000	56,340	12,087	56,340
3411-Sales-Published Materials	-	-	1,500	(1,500)	1,500	-	-	-
Sales, Rents & Royalties Revenue	9,095	68,427	23,500	44,927	23,500	56,340	12,087	56,340
3561-Advertising	-	8,840	18,000	(9,160)	18,000	8,969	(129)	8,969
Other Revenue Sources	-	8,840	18,000	(9,160)	18,000	8,969	(129)	8,969
3699-Other Operating Revenue	-	-	800	(800)	800	-	-	-
3901-Eliminated InterFund Revenue	-	350	-	350	-	-	350	-
Other Revenue Sources	-	350	800	(450)	800	-	350	-
Total Revenue	23,005	2,786,184	2,005,500	780,684	2,005,500	2,290,737	495,446	2,290,737
4134-Web Services	7,988	48,648	75,000	(26,352)	75,000	58,168	(9,520)	58,168
4301-Photocopying	-	-	100	(100)	100	-	-	-
4311-Office Supplies	32	2,301	5,150	(2,849)	5,150	1,672	629	1,672
Total Staff & Office Expense	8,020	50,949	80,250	(29,301)	80,250	59,841	(8,892)	59,841
5031-AV Services	-	79	-	79	-	-	79	-
5051-Credit Card Fees	11,601	45,115	29,200	15,915	29,200	29,152	15,962	29,152
5101-Consultants	30,000	150,600	120,000	30,600	120,000	108,634	41,966	108,634
5121-Printing-Outside	-	80,712	127,500	(46,788)	127,500	79,460	1,252	79,460
5181-Speaker Honorarium	-	-	5,000	(5,000)	5,000	-	-	-
5199-Other Contract Services	1,748	55,703	125,000	(69,297)	125,000	3,769	51,934	3,769
Total Contract Services	43,349	332,208	406,700	(74,492)	406,700	221,015	111,193	221,015
5501-Employee Travel	1,484	19,908	33,250	(13,342)	33,250	25,411	(5,503)	25,411
5531-Board/Off/Memb Travel	695	3,755	20,000	(16,245)	20,000	9,895	(6,140)	9,895
5571-Speaker Travel	745	24,734	27,600	(2,866)	27,600	21,863	2,872	21,863
5581-Consultant Travel	4,456	15,344	15,000	344	15,000	5,543	9,801	5,543
5599-Other Travel	-	636	-	636	-	-	636	-
Total Travel	7,379	64,378	95,850	(31,472)	95,850	62,712	1,666	62,712
6001-Post 1st Class/Bulk	10,160	37,036	11,575	25,461	11,575	35,477	1,559	35,477
6021-Post Express Mail	-	165	850	(685)	850	633	(468)	633
6211-Promot Exhibit Exp	-	-	-	-	-	535	(535)	535
6251-Promotion Sponsorship	-	-	-	-	-	500	(500)	500
6311-Mtgs General Meeting	26,412	791,312	750,000	41,312	750,000	656,515	134,798	656,515
6319-Mtgs Other Functions	-	45,575	35,000	10,575	35,000	27,579	17,995	27,579
6321-Mtgs Meals	37,593	313,601	357,000	(43,399)	357,000	540,786	(227,185)	540,786
6325-Mtgs Hospitality	-	256,264	156,500	99,764	156,500	140,081	116,184	140,081
6341-Mtgs Equip Rental	-	78,517	103,000	(24,483)	103,000	114,534	(36,017)	114,534
6361-Mtgs Entertainment	1,153	35,800	40,000	(4,200)	40,000	50,646	(14,846)	50,646
6399-Mtgs Other	-	3,320	15,000	(11,680)	15,000	4,823	(1,503)	4,823
6401-Speaker Expense	-	-	7,500	(7,500)	7,500	2,942	(2,942)	2,942
6451-Committee Expense	25,461	161,842	100,000	61,842	100,000	91,776	70,066	91,776
6531-Brd/Off Special Project	-	265	50,000	(49,735)	50,000	21,133	(20,868)	21,133
6599-Brd/Off Other	-	1,000	15,000	(14,000)	15,000	727	273	727
7001-Grant/Award/Donation	1,299	9,373	13,000	(3,627)	13,000	6,551	2,821	6,551
7003-Div Int Grants	500	3,084	12,000	(8,916)	12,000	2,000	1,084	2,000
7004-Law School Prog.	-	1,859	5,500	(3,641)	5,500	412	1,448	412
7006-Professional Outreach	-	500	3,000	(2,500)	3,000	-	500	-

7011-Scholarship/Fellowship	5,736	19,097	27,000	(7,903)	27,000	18,667	429	18,667
7999-Other Operating Exp	1,527	3,607	8,300	(4,693)	8,300	(12,471)	16,078	(12,471)
Total Other Expense	109,840	1,762,217	1,710,225	51,992	1,710,225	1,703,847	58,370	1,703,847
8011-Administration CLE	-	37,850	56,500	(18,650)	56,500	51,000	(13,150)	51,000
8021-Section Admin Fee	-	251,865	229,354	22,511	229,354	245,819	6,047	245,819
8101-Printing In-House	119	1,349	8,600	(7,251)	8,600	3,507	(2,157)	3,507
8131-A/V Services	140	5,827	10,800	(4,973)	10,800	11,099	(5,272)	11,099
8141-Journal/News Service	-	1,275	5,850	(4,575)	5,850	425	850	425
8171-Course Approval Fee	300	750	450	300	450	300	450	300
8901-Eliminated IntEnt Exp	1,000	7,500	3,000	4,500	3,000	6,000	1,500	6,000
Total Admin & Internal Expense	1,559	306,417	314,554	(8,137)	314,554	318,149	(11,733)	318,149
9692-Transfer Out-Council of Sections	-	500	500	-	500	500	-	500
Total InterFund Transfers Out	-	500	500	-	500	500	-	500
Total Expense	170,148	2,516,670	2,608,079	(91,409)	2,608,079	2,366,064	150,605	2,366,064
Operating Income	(147,143)	269,514	(602,579)	872,093	(602,579)	(75,327)	344,841	(75,327)
3899-Investment Income (loss)	86,715	228,505	148,906	79,599	148,906	(347,542)	576,047	(347,542)
Total Nonoperating Revenue (Expenses)	86,715	228,505	148,906	79,599	148,906	(347,542)	576,047	(347,542)
Change in Net Position	(60,428)	498,019	(453,673)	951,692	(453,673)	(422,869)	920,889	(422,869)
Net Position								
2001-Beginning of the year, restated (Fund Balance)	-	2,607,751				3,030,620		3,030,620
End of the Year (Current Month)	-	3,105,770				2,607,751		2,607,751

THE FLORIDA BAR
Real Property, Probate and Trust Law General
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3001-Annual Fees	(60)	679,210	625,200	54,010	625,200	666,280	12,930	666,280
3002-Affiliate Fees	-	12,540	5,000	7,540	5,000	10,780	1,760	10,780
Total Fee Revenue	(60)	691,750	630,200	61,550	630,200	677,060	14,690	677,060
3301-Registration-Live	601	249,176	180,000	69,176	180,000	148,347	100,829	148,347
Total Registration Revenue	601	249,176	180,000	69,176	180,000	148,347	100,829	148,347
3351-Sponsorships	-	181,875	180,000	1,875	180,000	198,750	(16,875)	198,750
3391 Section Profit Split	9,742	627,487	260,000	367,487	260,000	451,920	175,567	451,920
3392-Section Differential	1,740	21,300	15,000	6,300	15,000	18,300	3,000	18,300
Other Event Revenue	11,482	830,662	455,000	375,662	455,000	668,970	161,692	668,970
3561-Advertising	-	8,840	18,000	(9,160)	18,000	8,969	(129)	8,969
Other Revenue Sources	-	8,840	18,000	(9,160)	18,000	8,969	(129)	8,969
3901-Eliminated InterFund Revenue	-	350	-	350	-	-	350	-
Other Revenue Sources	-	350	-	350	-	-	350	-
Total Revenue	12,023	1,780,778	1,283,200	497,578	1,283,200	1,503,346	277,432	1,503,346
4134-Web Services	7,988	48,648	75,000	(26,352)	75,000	58,168	(9,520)	58,168
4311-Office Supplies	32	2,301	5,000	(2,699)	5,000	1,672	629	1,672
Total Staff & Office Expense	8,020	50,949	80,000	(29,051)	80,000	59,841	(8,892)	59,841
5051-Credit Card Fees	6,304	16,084	13,000	3,084	13,000	17,063	(979)	17,063
5101-Consultants	30,000	150,600	120,000	30,600	120,000	108,634	41,966	108,634
5121-Printing-Outside	-	77,942	120,000	(42,058)	120,000	79,170	(1,228)	79,170
5199-Other Contract Services	1,748	55,028	125,000	(69,972)	125,000	2,500	52,528	2,500
Total Contract Services	38,052	299,654	378,000	(78,346)	378,000	207,367	92,287	207,367
5501-Employee Travel	-	14,191	20,000	(5,809)	20,000	15,585	(1,394)	15,585
5531-Board/Off/Memb Travel	695	3,755	20,000	(16,245)	20,000	9,895	(6,140)	9,895
5581-Consultant Travel	4,456	15,344	15,000	344	15,000	5,543	9,801	5,543
5599-Other Travel	-	636	-	636	-	-	636	-
Total Travel	5,151	33,926	55,000	(21,074)	55,000	31,023	2,903	31,023
6001-Post 1st Class/Bulk	9,882	35,445	10,000	25,445	10,000	34,883	561	34,883
6211-Promot Exhibit Exp	-	-	-	-	-	535	(535)	535
6251-Promotion Sponsorship	-	-	-	-	-	500	(500)	500
6311-Mtgs General Meeting	26,412	780,243	750,000	30,243	750,000	651,612	128,632	651,612
6319-Mtgs Other Functions	-	818	-	818	-	2,139	(1,321)	2,139
6325-Mtgs Hospitality	-	33,654	35,000	(1,346)	35,000	27,911	5,743	27,911
6399-Mtgs Other	-	-	15,000	(15,000)	15,000	3,377	(3,377)	3,377
6401-Speaker Expense	-	-	7,500	(7,500)	7,500	2,942	(2,942)	2,942
6451-Committee Expense	25,461	161,842	100,000	61,842	100,000	91,776	70,066	91,776
6531-Brd/Off Special Project	-	265	50,000	(49,735)	50,000	21,133	(20,868)	21,133
6599-Brd/Off Other	-	1,000	15,000	(14,000)	15,000	727	273	727
7001-Grant/Award/Donation	1,229	7,344	8,000	(656)	8,000	4,950	2,394	4,950
7003-Div Int Grants	500	3,084	12,000	(8,916)	12,000	2,000	1,084	2,000
7004-Law School Prog.	-	1,859	5,500	(3,641)	5,500	412	1,448	412
7006-Professional Outreach	-	500	3,000	(2,500)	3,000	-	500	-
7011-Scholarship/Fellowship	5,736	19,097	27,000	(7,903)	27,000	18,667	429	18,667
7999-Other Operating Exp	-	-	5,000	(5,000)	5,000	3	(3)	3
Total Other Expense	69,220	1,045,152	1,043,000	2,152	1,043,000	863,567	181,585	863,567
8021-Section Admin Fee	-	251,865	229,354	22,511	229,354	245,819	6,047	245,819
8101-Printing In-House	119	928	2,000	(1,072)	2,000	2,769	(1,841)	2,769
8901-Eliminated IntEnt Exp	1,000	7,500	3,000	4,500	3,000	6,000	1,500	6,000
Total Admin & Internal Expense	1,119	260,293	234,354	25,939	234,354	254,588	5,705	254,588
9692-Transfer Out-Council of Sections	-	500	500	-	500	500	-	500
Total InterFund Transfers Out	-	500	500	-	500	500	-	500
Total Expense	121,562	1,690,474	1,790,854	(100,380)	1,790,854	1,416,886	273,589	1,416,886

Operating Income	(109,539)	90,304	(507,654)	597,958	(507,654)	86,460	3,844	86,460
3899-Investment Income (loss)	86,715	228,505	148,906	79,599	148,906	(347,542)	576,047	(347,542)
Total Nonoperating Revenue (Expenses)	86,715	228,505	148,906	79,599	148,906	(347,542)	576,047	(347,542)
Change in Net Position	(22,824)	318,809	(358,748)	677,557	(358,748)	(261,082)	579,891	(261,082)

THE FLORIDA BAR
Real Property Legislative Update
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3341-Exhibit Fees	-	-	14,000	(14,000)	14,000	9,400	(9,400)	9,400
3351-Sponsorships	-	20,400	-	20,400	-	-	20,400	-
Other Event Revenue	-	20,400	14,000	6,400	14,000	9,400	11,000	9,400
3401-Sales-CD/DVD	275	10,925	-	10,925	-	-	10,925	-
Sales, Rents & Royalties Revenue	275	10,925	-	10,925	-	-	10,925	-
Total Revenue	275	31,325	14,000	17,325	14,000	9,400	21,925	9,400
4301-Photocopying	-	-	100	(100)	100	-	-	-
4311-Office Supplies	-	-	150	(150)	150	-	-	-
Total Staff & Office Expense	-	-	250	(250)	250	-	-	-
5031-AV Services	-	79	-	79	-	-	79	-
5051-Credit Card Fees	329	1,240	700	540	700	261	979	261
5121-Printing-Outside	-	2,663	5,000	(2,337)	5,000	290	2,373	290
Total Contract Services	329	3,982	5,700	(1,718)	5,700	551	3,431	551
5501-Employee Travel	-	1,106	3,000	(1,895)	3,000	1,457	(352)	1,457
5571-Speaker Travel	-	5,165	6,500	(1,335)	6,500	4,626	539	4,626
Total Travel	-	6,271	9,500	(3,229)	9,500	6,083	188	6,083
6001-Post 1st Class/Bulk	61	458	50	408	50	3	455	3
6021-Post Express Mail	-	-	500	(500)	500	10	(10)	10
6311-Mtgs General Meeting	-	1,069	-	1,069	-	-	1,069	-
6321-Mtgs Meals	-	44,878	45,000	(122)	45,000	26,998	17,880	26,998
6325-Mtgs Hospitality	-	-	1,500	(1,500)	1,500	679	(679)	679
6341-Mtgs Equip Rental	-	9,359	15,000	(5,641)	15,000	10,871	(1,512)	10,871
7001-Grant/Award/Donation	70	2,028	5,000	(2,972)	5,000	1,601	427	1,601
7999-Other Operating Exp	157	157	500	(343)	500	280	(123)	280
Total Other Expense	288	57,949	67,550	(9,601)	67,550	40,443	17,506	40,443
8011-Administration CLE	-	1,000	500	500	500	1,000	-	1,000
8101-Printing In-House	-	200	1,000	(800)	1,000	-	200	-
8131-A/V Services	-	175	-	175	-	-	175	-
8141-Journal/News Service	-	-	1,600	(1,600)	1,600	-	-	-
8171-Course Approval Fee	150	300	-	300	-	-	300	-
Total Admin & Internal Expense	150	1,675	3,100	(1,425)	3,100	1,000	675	1,000
Total Expense	767	69,877	86,100	(16,223)	86,100	48,077	21,800	48,077
Operating Income	(492)	(38,552)	(72,100)	33,548	(72,100)	(38,677)	125	(38,677)

THE FLORIDA BAR
Real Property Trust Officer Liaison Conference
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3301-Registration-Live	-	219,443	160,000	59,443	160,000	176,610	42,833	176,610
3331-Registration-Ticket	-	8,550	10,000	(1,450)	10,000	-	8,550	-
Total Registration Revenue	-	227,993	170,000	57,993	170,000	176,610	51,383	176,610
3341-Exhibit Fees	-	73,400	40,000	33,400	40,000	-	73,400	-
3351-Sponsorships	-	89,875	80,000	9,875	80,000	107,950	(18,075)	107,950
Other Event Revenue	-	163,275	120,000	43,275	120,000	107,950	55,325	107,950
3401-Sales-CD/DVD	3,280	16,992	5,000	11,992	5,000	22,320	(5,328)	22,320
3411-Sales-Published Materials	-	-	1,000	(1,000)	1,000	-	-	-
Sales, Rents & Royalties Revenue	3,280	16,992	6,000	10,992	6,000	22,320	(5,328)	22,320
Total Revenue	3,280	408,260	296,000	112,260	296,000	306,880	101,380	306,880
5051-Credit Card Fees	4,854	14,683	8,000	6,683	8,000	6,648	8,035	6,648
5121-Printing-Outside	-	107	2,500	(2,393)	2,500	-	107	-
Total Contract Services	4,854	14,790	10,500	4,290	10,500	6,648	8,142	6,648
5501-Employee Travel	-	1,303	2,000	(697)	2,000	2,061	(758)	2,061
5571-Speaker Travel	-	5,098	8,100	(3,002)	8,100	6,656	(1,558)	6,656
Total Travel	-	6,401	10,100	(3,699)	10,100	8,717	(2,316)	8,717
6001-Post 1st Class/Bulk	46	267	1,000	(733)	1,000	85	182	85
6021-Post Express Mail	-	98	150	(52)	150	297	(199)	297
6319-Mtgs Other Functions	-	5,198	10,000	(4,802)	10,000	5,899	(702)	5,899
6321-Mtgs Meals	-	63,970	57,000	6,970	57,000	48,345	15,625	48,345
6325-Mtgs Hospitality	-	135,613	70,000	65,613	70,000	52,218	83,395	52,218
6341-Mtgs Equip Rental	-	19,683	30,000	(10,317)	30,000	19,151	532	19,151
6399-Mtgs Other	-	3,320	-	3,320	-	1,447	1,874	1,447
7999-Other Operating Exp	1,370	1,374	1,000	374	1,000	2,869	(1,495)	2,869
Total Other Expense	1,416	229,522	169,150	60,372	169,150	130,310	99,213	130,310
8011-Administration CLE	-	14,850	25,000	(10,150)	25,000	25,000	(10,150)	25,000
8101-Printing In-House	-	6	3,000	(2,994)	3,000	-	6	-
8131-A/V Services	35	5,155	7,000	(1,845)	7,000	5,427	(272)	5,427
8141-Journal/News Service	-	850	1,600	(750)	1,600	-	850	-
8171-Course Approval Fee	150	150	150	-	150	150	-	150
Total Admin & Internal Expense	185	21,011	36,750	(15,739)	36,750	30,577	(9,566)	30,577
Total Expense	6,455	271,724	226,500	45,224	226,500	176,252	95,472	176,252
Operating Income	(3,175)	136,536	69,500	67,036	69,500	130,628	5,908	130,628

THE FLORIDA BAR
Real Property Trust Attorney Loan Officer
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3301-Registration-Live	-	8,400	12,500	(4,100)	12,500	-	8,400	-
Total Registration Revenue	-	8,400	12,500	(4,100)	12,500	-	8,400	-
3341-Exhibit Fees	-	-	1,500	(1,500)	1,500	-	-	-
3351-Sponsorships	-	8,500	8,000	500	8,000	-	8,500	-
Other Event Revenue	-	8,500	9,500	(1,000)	9,500	-	8,500	-
3401-Sales-CD/DVD	-	-	2,000	(2,000)	2,000	150	(150)	150
Sales, Rents & Royalties Revenue	-	-	2,000	(2,000)	2,000	150	(150)	150
Total Revenue	-	16,900	24,000	(7,100)	24,000	150	16,750	150
5051-Credit Card Fees	-	409	500	(91)	500	4	405	4
Total Contract Services	-	409	500	(91)	500	4	405	4
5501-Employee Travel	-	1,100	1,250	(150)	1,250	-	1,100	-
5571-Speaker Travel	-	318	4,000	(3,682)	4,000	-	318	-
Total Travel	-	1,418	5,250	(3,832)	5,250	-	1,418	-
6021-Post Express Mail	-	-	-	-	-	1	(1)	1
6321-Mtgs Meals	-	2,500	5,000	(2,500)	5,000	-	2,500	-
6325-Mtgs Hospitality	-	4,077	5,000	(923)	5,000	-	4,077	-
6341-Mtgs Equip Rental	-	-	3,000	(3,000)	3,000	-	-	-
7999-Other Operating Exp	-	-	300	(300)	300	-	-	-
Total Other Expense	-	6,577	13,300	(6,723)	13,300	1	6,576	1
8011-Administration CLE	-	7,150	6,000	1,150	6,000	-	7,150	-
8101-Printing In-House	-	137	200	(63)	200	-	137	-
8131-A/V Services	-	-	550	(550)	550	-	-	-
8141-Journal/News Service	-	-	1,000	(1,000)	1,000	-	-	-
8171-Course Approval Fee	-	150	150	-	150	-	150	-
Total Admin & Internal Expense	-	7,437	7,900	(463)	7,900	-	7,437	-
Total Expense	-	15,841	26,950	(11,109)	26,950	5	15,836	5
Operating Income	-	1,059	(2,950)	4,009	(2,950)	145	914	145

THE FLORIDA BAR
Real Property Construction Law Institute
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3301-Registration-Live	-	129,560	100,000	29,560	100,000	122,760	6,800	122,760
3331-Registration-Ticket	-	3,750	2,000	1,750	2,000	-	3,750	-
Total Registration Revenue	-	133,310	102,000	31,310	102,000	122,760	10,550	122,760
3351-Sponsorships	-	244,300	190,000	54,300	190,000	216,975	27,325	216,975
Other Event Revenue	-	244,300	190,000	54,300	190,000	216,975	27,325	216,975
3401-Sales-CD/DVD	5,540	40,510	15,000	25,510	15,000	33,870	6,640	33,870
3411-Sales-Published Materials	-	-	500	(500)	500	-	-	-
Sales, Rents & Royalties Revenue	5,540	40,510	15,500	25,010	15,500	33,870	6,640	33,870
3699-Other Operating Revenue	-	-	800	(800)	800	-	-	-
Other Revenue Sources	-	-	800	(800)	800	-	-	-
Total Revenue	5,540	418,120	308,300	109,820	308,300	373,605	44,515	373,605
5051-Credit Card Fees	132	10,357	4,000	6,357	4,000	5,179	5,179	5,179
5181-Speaker Honorarium	-	-	5,000	(5,000)	5,000	-	-	-
5199-Other Contract Services	-	675	-	675	-	1,269	(594)	1,269
Total Contract Services	132	11,032	9,000	2,032	9,000	6,448	4,585	6,448
5501-Employee Travel	-	725	2,000	(1,275)	2,000	534	191	534
5571-Speaker Travel	-	11,671	9,000	2,671	9,000	10,581	1,090	10,581
Total Travel	-	12,396	11,000	1,396	11,000	11,115	1,281	11,115
6001-Post 1st Class/Bulk	172	867	25	842	25	261	606	261
6021-Post Express Mail	-	67	200	(133)	200	325	(258)	325
6319-Mtgs Other Functions	-	39,559	25,000	14,559	25,000	19,541	20,018	19,541
6321-Mtgs Meals	-	88,130	75,000	13,130	75,000	102,477	(14,347)	102,477
6325-Mtgs Hospitality	-	82,920	45,000	37,920	45,000	59,272	23,648	59,272
6341-Mtgs Equip Rental	-	49,240	35,000	14,240	35,000	50,747	(1,507)	50,747
7999-Other Operating Exp	-	2,076	1,500	576	1,500	(15,623)	17,699	(15,623)
Total Other Expense	172	262,859	181,725	81,134	181,725	217,000	45,859	217,000
8011-Administration CLE	-	14,850	25,000	(10,150)	25,000	25,000	(10,150)	25,000
8101-Printing In-House	-	78	2,000	(1,922)	2,000	737	(660)	737
8131-A/V Services	105	497	3,250	(2,753)	3,250	5,672	(5,175)	5,672
8141-Journal/News Service	-	425	1,650	(1,225)	1,650	425	-	425
8171-Course Approval Fee	-	150	150	-	150	150	-	150
Total Admin & Internal Expense	105	16,000	32,050	(16,050)	32,050	31,984	(15,985)	31,984
Total Expense	409	302,287	233,775	68,512	233,775	266,548	35,739	266,548
Operating Income	5,131	115,833	74,525	41,308	74,525	107,057	8,776	107,057

THE FLORIDA BAR
Real Property Convention
For the Twelve Months Ending June 30, 2023

	June	YTD 2023	YTD 22-23 Budget	YTD/YTD Variance (\$)	FY 22-23 Budget	YTD 2022	YTD/Prior Variance (\$)	FYE Actual 2022
3301-Registration-Live	(713)	70,300	60,000	10,300	60,000	97,357	(27,056)	97,357
Total Registration Revenue	(713)	70,300	60,000	10,300	60,000	97,357	(27,056)	97,357
3341-Exhibit Fees	2,600	26,500	10,000	16,500	10,000	-	26,500	-
3351-Sponsorships	-	34,000	10,000	24,000	10,000	-	34,000	-
Other Event Revenue	2,600	60,500	20,000	40,500	20,000	-	60,500	-
Total Revenue	1,887	130,800	80,000	50,800	80,000	97,357	33,444	97,357
5051-Credit Card Fees	(18)	2,341	3,000	(659)	3,000	(2)	2,344	(2)
Total Contract Services	(18)	2,341	3,000	(659)	3,000	(2)	2,344	(2)
5501-Employee Travel	1,484	1,484	5,000	(3,516)	5,000	5,774	(4,290)	5,774
5571-Speaker Travel	745	2,483	-	2,483	-	-	2,483	-
Total Travel	2,228	3,967	5,000	(1,033)	5,000	5,774	(1,807)	5,774
6001-Post 1st Class/Bulk	-	-	500	(500)	500	246	(246)	246
6311-Mtgs General Meeting	-	10,000	-	10,000	-	4,903	5,097	4,903
6321-Mtgs Meals	37,593	114,123	175,000	(60,877)	175,000	362,967	(248,843)	362,967
6341-Mtgs Equip Rental	-	235	20,000	(19,765)	20,000	33,765	(33,530)	33,765
6361-Mtgs Entertainment	1,153	35,800	40,000	(4,200)	40,000	50,646	(14,846)	50,646
Total Other Expense	38,745	160,158	235,500	(75,342)	235,500	452,526	(292,368)	452,526
8101-Printing In-House	-	-	400	(400)	400	-	-	-
Total Admin & Internal Expense	-	-	400	(400)	400	-	-	-
Total Expense	40,956	166,466	243,900	(77,434)	243,900	458,297	(291,832)	458,297
Operating Income	(39,069)	(35,665)	(163,900)	128,235	(163,900)	(360,941)	325,275	(360,941)

THE FLORIDA BAR
RPPTL Joint CLE
For the Twelve Months Ending Friday, June 30, 2023

	June	YTD 2023	Prior Year June	FYE Actual 2022
3301-Registration-Live	(\$1,350)	\$189,575		\$124,063
3321-Registration-Webcast	\$41,235	\$869,931	\$39,547	\$618,094
Total Registration Revenue	\$39,885	\$1,059,506	\$39,547	\$742,157
3351-Sponsorships		\$6,500		\$5,000
3392-Section Differential	(\$1,740)	(\$21,300)	(\$2,880)	(\$18,300)
Other Event Revenue	(\$1,740)	(\$14,800)	(\$2,880)	(\$13,300)
3401-Sales-CD/DVD	\$23,625	\$226,926	\$26,525	\$234,620
3411-Sales-Published Materials	\$1,040	\$14,480	\$760	\$11,460
Sales, Rents & Royalties Revenue	\$24,665	\$241,406	\$27,285	\$246,080
Total Revenue	\$62,810	\$1,286,112	\$63,952	\$974,938
5031-A/V Services	\$5,509	\$65,160	(\$2,406)	\$67,844
5051-Credit Card Fees	\$475	\$10,955	\$685	\$10,103
5121-Printing-Outside				\$200
Total Contract Services	\$5,984	\$76,115	(\$1,722)	\$78,147
5501-Employee Travel	\$28	\$5,735		\$3,494
5571-Speaker Travel	\$2,678	\$43,823	(\$2,992)	\$28,449
Total Travel	\$2,706	\$49,558	(\$2,992)	\$31,942
6001-Post 1st Class/Bulk	\$1,774	\$8,071	\$721	\$3,967
6021-Post Express Mail	\$55	\$1,826	\$1,021	\$5,227
6321-Mtgs Meals	\$21,108	\$95,220	\$22,299	\$69,605
6325-Mtgs Hospitality		\$51,820		\$43,524
6331-Mtgs Room Rental		\$1,650	\$23,858	\$26,181
6332-Mtgs Room Attrition	\$11,375	\$11,375		
6341-Mtgs Equip Rental		\$1,658	\$2,861	\$5,213
6401-Speaker Expense	\$233	\$2,665	\$1,480	\$3,297
Total Other Expense	\$34,546	\$174,285	\$52,241	\$157,015
8011-Administration CLE	\$5,400	\$130,050	(\$2,600)	\$87,475
8101-Printing In-House		\$9,922		\$16,580
8131-A/V Services	\$2,412	\$57,592	\$413	\$35,418
8141-Journal/News Service		\$2,126		\$2,126
8171-Course Approval Fee		\$2,520		\$1,920
Total Admin & Internal Expense	\$7,812	\$202,210	(\$2,187)	\$143,519
Total Expense	\$51,047	\$502,168	\$45,340	\$410,623

	June	YTD 2023	Prior Year June	FYE Actual 2022
Net Income	\$11,763	\$783,944	\$18,612	\$564,314
3391-Profit Split	\$9,742	\$627,487	\$14,892	\$451,452
Net Income After Profit Split	\$2,021	\$156,457	\$3,720	\$112,863

CLE Calendar (as of 9/13/23)

Date of Presentation	Crs. #	Title	Location
9/21/23	7980	Foreign Interests in Real Property - The New Florida Law You Need to Know	Webcast
10/18/23	8003	Making the Law - The Top 25 Real Estate Decisions of 2023	Webcast
10/20/23	8004	Charitable Planning Symposium	Webcast
10/24/23	8015	RESPA and Unlawful Rebates in Real Estate Transactions	Webcast
10/26/23	8038	No Place Like Home CLE	Webcast
11/17/23	8005	Probate Law	Ft. Lauderdale, Marriott Harbor Beach Resort & Spa
12/7/23	8074	Condominium ADR/Mediation/Arbitration Program	Webcast
12/14/23		4th Annual RPPTL Death & Dirt Mid-Year Case Law Review?	Zoom
1/11/24		Real Estate Certification Review "Academy"	Webcast
1/11/24	8075	Joint CLE with Lender Finance on Association Borrowing after Surfside	Webcast
1/17/24	7985	A Primer on the Live Local Act	Webcast
1/24/24		Partitions	Webcast
2/2/24 – 2/3/24	8025	Advanced Condominium and Planned Development Certification Review	Tampa Marriott Airport
2/2/24 – 2/3/24	8006	Advanced Real Property Certification Review	Tampa Marriott Airport
2/2/24 – 2/3/24	8007	Advanced Wills, Trusts and Estates Certification Review	Tampa Marriott Airport
3/6/24		Derivative Actions (joint with Condo Committee)	Webcast
3/14/24		Transitioning from Residential to Commercial Real Estate Practice	Webcast
3/20/24 – 3/24/24	8008	Advanced Construction Law Certification Review Course	Orlando
3/20/24 – 3/24/24	8009	Construction Law Institute	Orlando
4/8/24		Fair Debt Litigation (joint with Lender Finance)	Webcast
4/11/24	8011	Litigation & Trust Law Symposium	Tampa

**CLE Calendar
(as of 9/13/23)**

4/12/24	8076	Guardianship	Tampa
4/12/24		Attorney-Bankers Conference	Tampa
4/25/24	8026	Technology in Disaster CLE	Webcast
5/15/24		Title Claims (joint with Title Insurance)	Webcast
6/19/24		Charging and Retaining Liens	Webcast