



The Florida Bar  
Real Property, Probate & Trust Law Section  
**36th Annual Legislative &  
Case Law Update  
and  
Executive Council Meeting  
The Breakers  
July 28 – July 31, 2016**



*Sponsored by*



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

# EVENT SCHEDULE

## Thursday, July 28, 2016

6:30 am - 7:30 am	Reptile Run/Walk Club	Meet in Hotel Lobby
7:30 am - 9:00 am	Ad Hoc Decanting	Gulfstream 1
8:00 am - 5:00 pm	Registration Desk Hours	Ponce de Leon Foyer
8:00 am - 9:00 am	Sponsor Coordination	Gulfstream 2
8:00 am - 9:00 am	Insurance & Surety	Gulfstream 3
8:00 am - 9:00 am	Attorney Trust Officer	Gulfstream 5
8:00 am - 9:00 am	Ad Hoc Study on Spendthrift Trust Issues *	Gulfstream 4
9:00 am - 10:00 am	Real Estate Structures and Taxation	Ponce de Leon 5
9:00 am - 10:30 am	Estate and Trust Tax Planning	Ponce de Leon 4
9:00 am - 10:30 pm	Real Property Financing & Lending	Ponce de Leon 6
10:00 am - 11:30 am	Membership Communication & Information Technology	Gulfstream 1
10:30 am - 12:00 pm	Construction Law	Gulfstream 2
10:30 am - 12:00 pm	Probate Law & Procedure	Ponce de Leon 4
10:30 am - 12:00 pm	Commercial Real Estate	Ponce de Leon 5
10:30 am - 12:00 pm	Title Issues & Standards	Gulfstream 5
11:30 am - 1:30 pm	Buffet Lunch (GRAB AND GO) \$ <i>Sponsored By Management Planning, Inc.</i>	Ponce de Leon Foyer
12:00 pm - 1:30 pm	Residential Real Estate & Industry Liaison	Ponce de Leon 6
12:00 pm - 1:30 pm	Development and Land Use	Gulfstream 3
12:00 pm - 1:30 pm	Real Property Litigation	Ponce de Leon 5
12:00 pm - 2:00 pm	Probate & Trust Litigation	Ponce de Leon 4
12:30 pm - 2:00 pm	IRA, Insurance & Employee Benefits	Gulfstream 5
1:30 pm - 3:00 pm	Title Insurance & Title Insurance Liaison	Ponce de Leon 5
1:30 pm - 3:00 pm	Condominium and Planned Development Law Certification**	Gulfstream 1
2:00 pm - 3:00 pm	Real Estate Leasing	Gulfstream 5
2:00 pm - 3:30 pm	Membership & Inclusion	Gulfstream 3
2:00 pm - 3:30 pm	Digital Assets	Gulfstream 4
2:00 pm - 3:30 pm	Guardianship & Advanced Directives	Ponce de Leon 6
2:00 pm - 3:30 pm	Elective Share Review*	Gulfstream 2
2:00 pm - 3:30 pm	Asset Protection	Ponce de Leon 4
3:00 pm - 4:30 pm	Real Property Problems Study	Ponce de Leon 5
3:30 pm - 5:00 pm	Condominium & Planned Development	Ponce de Leon 6
3:30 pm - 5:00 pm	Trust Law	Ponce de Leon 4
4:00 pm - 5:00 pm	Fellows and Mentoring	Gulfstream 3
5:00 pm - 6:00 pm	Legislative Update Rehearsal**	Ponce de Leon 5
5:00 pm - 6:00 pm	At Large Members	Ponce de Leon 4
7:00 pm - 9:00 pm	Reception \$ <i>Sponsored By JP Morgan &amp; Old Republic National Title Insurance Company</i>	Venetian Ballroom
9:00 pm - 11:00 pm	Hospitality Suite	Gold Room

## Friday, July 29, 2016

6:30 am - 7:30 am	Reptile Run/Walk Club	Meet in Hotel Lobby
7:30 am - 4:45 pm	Legislative Update Seminar \$ <i>Sponsored by Attorney's Title Fund Services, LLC</i>	Ponce de Leon 4,5,6
12:00 pm - 1:30 pm	Homestead Issues Study	Gulfstream 5
5:00 pm - 6:00 pm	PAC	Gulfstream 3,4

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

*\*\*Attendance by invitation only*

*\$ Pre-registration and ticket required*

# EVENT SCHEDULE (cont.)

## **Friday, July 29, 2016 (cont.)**

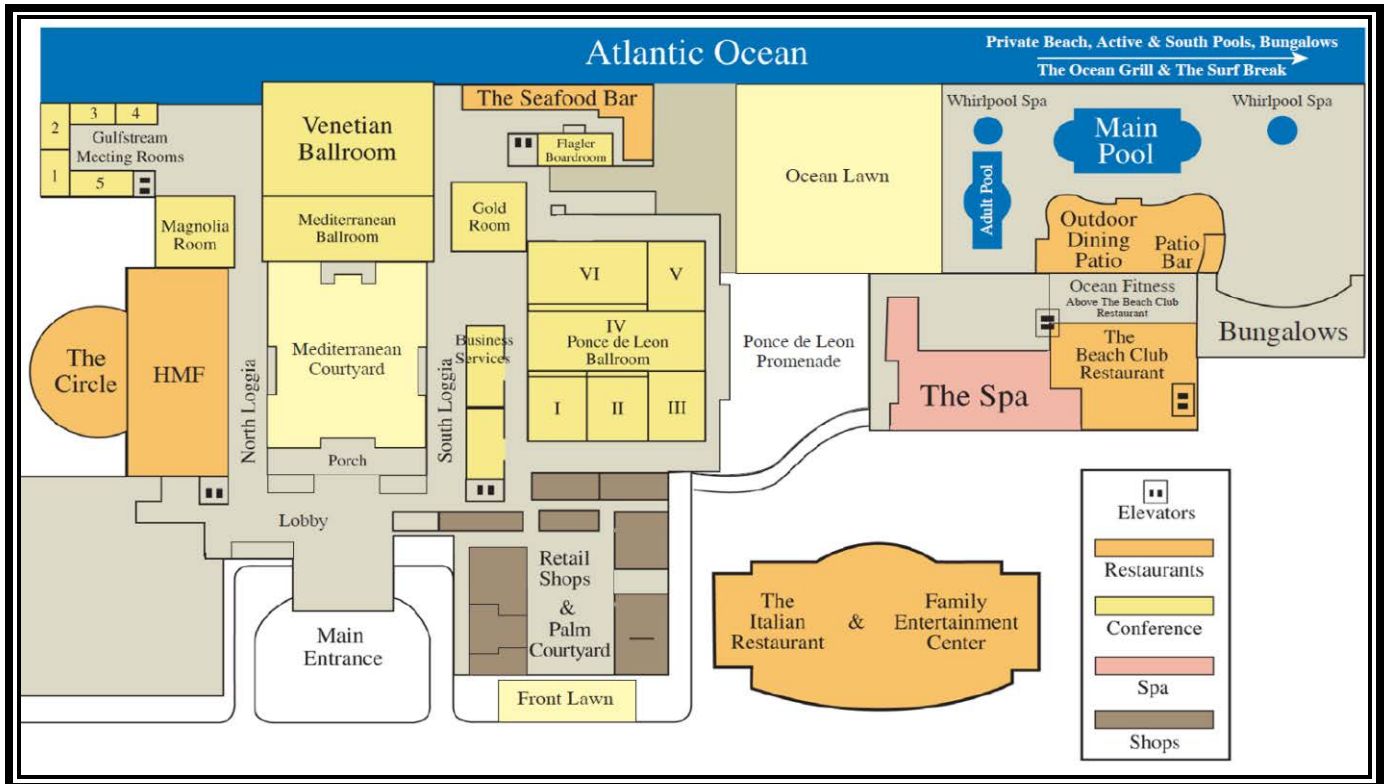
6:30 pm - 7:30 pm	<b>Friday Night Reception \$</b> <i>Sponsored By Wells Fargo Private Bank</i>	Magnolia
7:30 pm - 9:30 pm	<b>Friday Night Dinner \$</b> <i>Sponsored By First American Title Insurance Company &amp; Regions Private Wealth Management</i>	Venetian Ballroom
9:30 pm - 11:30 pm	<b>Hospitality Suite</b>	Gold Room

## **Saturday, Friday 30, 2016**

6:30 am - 7:30 am	<b>Reptile Run/Walk Club</b> <i>Meet in Hotel Lobby</i>	
7:30 am - 9:45 am	<b>Probate Division Roundtable</b> <i>Sponsored by SRR (Stout Risius Ross Inc.) &amp; Guardian Trusts</i>	Mediterranean Ballroom
7:30 am - 9:45 am	<b>Real Property Division Roundtable</b> <i>Sponsored by Fidelity National Title Group</i>	Ponce de Leon 1, 2, 3
7:30 am - 10:30 am	<b>Spouse/Guest Breakfast \$</b> <i>Sponsored by Attorney's Title Fund Services, LLC</i>	Magnolia Room
10:00 am - 1:00 pm	<b>Executive Council Meeting &amp; Lunch</b> <i>Sponsored by The Florida Bar Foundation</i>	Ponce de Leon 4
5:45 pm	<b>Busses Depart for Uptown Art</b>	Ponce Porte Cochere
6:00 pm - 9:00 pm	<b>Offsite Reception \$</b> <i>Sponsored by Wright Investors' Service</i>	Uptown Art

*Thank You to Our App Sponsor WFG National Title Insurance Company*

## EVENT MAP



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## THANK YOU TO THE LEGISLATIVE UPDATE EXHIBITORS\*

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### Attorneys' Closing Services, LLC

Attorney's Closing Services (ACS) provides complete commercial and residential document preparation for real estate attorneys including ordering title commitments, drafting Closing Disclosures/Closing Statements, deeds and mortgages, obtaining title and lien searches, securing estoppel letters, and preparing final policies. We also offer expert services for reconciliation of trust and escrow accounts.

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Sandy Davis • 5850 T.G. Lee Blvd., #330, Orlando, FL 32822 • 407-270-8855 • [sandy@attyclosingservices.com](mailto:sandy@attyclosingservices.com)

### Fund Insurance Solutions, LLC/ Attorneys' Title Insurance Fund, Inc.

The Funds' commercial services division- a single point of contact for agents Fund Ins. Sold - fiduciary bonds, cyber and commercial insurance.

John H. Simmons • 6545 Corporate Centre Blvd., Suite 200 Orlando, FL • 855-730-4745 • [jsimmons@atif.com](mailto:jsimmons@atif.com)  
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### Guardian Trust

Professional trustee services - focusing on special needs trusts.

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### Gurr Johns

Gurr Johns is the foremost international independent art appraisal and advisory firm that proudly holds the highest market standards for specialist expertise in all tangible assets, including fine and decorative art, jewelry, wine, collectibles, and memorabilia. Our specialists provide confidential, objective appraisals and are uniquely positioned to advise on buying, selling, and managing collections.

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### Florida Lawyers Support Services, Inc.

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

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### Lawgic, LLC

Lawgic combines an intuitive question-and-answer process with relevant legal research, strategic analysis and dynamic text to guide professionals systematically through the creation of comprehensive, fully customized, complex legal documents.

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### Life Audit Professionals

Life Audit Professional's is an advanced planning firm that uses: Insurance, Life, Long Term Care, Disability or Sale of unneeded or unwanted policies to assist clients with their planning needs.

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Richard Newman • 2101 NW Corporate Blvd., STE 300, Boca Raton, FL • 561-948-2421 • [rnewman@mylifeaudit.com](mailto:rnewman@mylifeaudit.com)

### Management Planning Inc.

Business valuation and advisory firm providing valuations for a variety of tax, financial reporting and other business applications as well as corporate advisory services to business owners and their representatives.

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### Old Republic Title Insurance

We provide qualified intermediary services for IRC §1031 delayed exchanges of real property and personal property.

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Janet Schaum • 1410 N. Westshore Blvd. #800, Tampa, FL 14817 • 813-849-2816 • [jschaum@orexco1031.com](mailto:jschaum@orexco1031.com)

\*Note: All exhibitor descriptions were provided by sponsors.

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## Upcoming RPPTL Executive Council & Committee Meetings

Check [www.rpptl.org](http://www.rpptl.org) for a complete listing of 2016-17 meeting venues, hotel and room rate information and committee meeting schedules.



# RPPTL Disney Meeting 2016

October 5-9, 2016

The Walt Disney World BoardWalk Inn

Lake Buena Vista, FL

Room Rate: \$249 – (email [wkirk@flabar.org](mailto:wkirk@flabar.org) to be added to the waitlist)  
Visit [www.rpptl.org](http://www.rpptl.org) for the most up to date information for scheduled events.