

# MINUTES OF THE FLORIDA BAR'S REAL PROPERTY, PROBATE AND TRUST LAW SECTION

## EXECUTIVE COUNCIL MEETING

**Saturday, February 8, 2014**  
**The Ritz-Carlton – Amelia Island, Florida**

**I. Call to Order - Margaret Ann Rolando, Chair**

The meeting was held in the Talbot DE rooms at the Ritz Carlton in Amelia Island, Florida. Ms. Margaret A. Rolando called the meeting to order at 8:35 a.m.

**II. Attendance — Andrew M. O'Malley, Secretary**

Andrew O'Malley reminded members that the attendance roster was circulating to be initialed by council members in attendance at the meeting.

[Secretary's Note: The roster showing members in attendance is attached as Addendum "A"]

**III. Minutes of Previous Meeting — Andrew M. O'Malley, Secretary**

Mr. O'Malley moved:

To approve minutes of November 23, 2013, The Ritz Carlton, Sarasota, Florida appearing on page 11 of the Agenda materials<sup>1</sup>.

The Motion was approved unanimously.

**IV. Chair's Report — Margaret Ann Rolando, Chair**

Ms. Rolando introduced the two sponsors of the Executive Council lunch –The Florida Bar Foundation and U.S. Trust. There was no representative present from the Florida Bar Foundation. Ms. Rolando introduced Stacy Cole from U.S. Trust who commended the Section on its good work and stated that the U.S. Trust has greatly enjoyed being a Section Sponsor.

The following additional sponsors were recognized and thanked for their support:

### GENERAL SPONSORS

**Attorneys' Title Fund Services, LLC - Ted Conner**  
*Overall Sponsors - Legislative Update & Convention & Spouse Breakfast*

**BMO Private Bank - Joan Kayser**  
*Probate Roundtable*

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<sup>1</sup> References in these minutes to Agenda pages are to the Executive Council meeting Agenda and Supplemental Agenda posted at [www.RPPTL.org](http://www.RPPTL.org).

**Fidelity National Title Group - Pat Hancock**  
*Real Property Roundtable*

**First American Title Insurance Company - Alan McCall**  
*Friday Night Dinner*

**JP Morgan - Carlos Battle / Alyssa Feder**  
*Thursday Night Reception*

**Management Planning, Inc. - Roy Meyers / Joe Gitto**  
*Thursday Lunch*

**Old Republic National Title Insurance Company - Jim Russick**  
*Thursday Night Reception*

**Regions Private Wealth Management - Margaret Palmer**  
*Friday Night Dinner*

**SRR (Stout Risius Ross Inc.) - Garry Marshall**  
*Probate Roundtable*

**SunTrust Bank - Debbie Smith Johnson**  
*Saturday Night Reception and Dinner*

**The Florida Bar Foundation - Jane Curran**  
*Saturday Lunch*

**U.S. Trust - Stacey Cole**  
*Saturday Lunch*

**Wells Fargo Private Bank - Mark Middlebrook / George Lange / Alex Hamrick**  
*Friday Night Reception*

**FRIENDS OF THE SECTION**

**BB&T Bank - Rob Frye**

**Business Valuation Analysts, LLC - Tim Bronza**

**Guardian Trust - Ashley Gonnelli**

**Iberia Wealth Advisors**

**Wright Private Asset Management, LLC - Diane Timpany**

**COMMITTEE SPONSORS**

**Attorneys' Title Fund Services, LLC – Ted Conner**  
*Commercial Real Estate Committee*

**BNY Mellon Wealth Management – Joan Crain**  
*IRA, Insurance & Employee Benefits Committee*

Minutes: RPPTL Executive Council

&  
*Probate Law & Procedure Committee*

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

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

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

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

**Guardian Trust – Ashley Gonnelli**  
*Guardianship, Power of Attorney & Advance Directives Committee*

**Key Private Bank – Kathleen A. Saigh**  
*Asset Protection Committee*

**Management Planning, Inc. – Roy Meyers / Joe Gitto**  
*Estate & Trust Tax Planning Committee*

**Northern Trust – Brett Rees**  
*Trust Law Committee*

**Nuview IRA, Inc. – Glen Mathers**  
*IRA, Insurance & Employee Benefits Committee*

Ms. Rolando noted that the South Seas Island Resort in Captiva is fully booked for the May Executive Council Meeting and members wishing to attend should notify the Section Administrator in order to be placed on a waiting list.

Ms. Rolando thanked Linda Bruton for organizing an outstanding event for spouses at Amelia Island. Ms. Rolando then thanked new Section Administrator, Jamie Spradlin for doing a great job under difficult circumstances.

V. **Chair-Elect's Report** — *Michael A. Dribin*

Mr. Dribin noted the 2014-2015 meeting schedule on page 35 of the Agenda and stated that the room block for the out of state meeting in Chicago at the Sofitel Hotel is sold out but that if there is sufficient demand he will look into overflow accommodations at nearby hotels. Mr. Dribin also noted that he is assembling a list serve of members and spouses who will be attending the Chicago meeting.

**VI. Report of Member Communications and Information Technology Committee – *Nicole C. Kibert, Chair***

Co-Vice Chair William Parady reported on the status of the Section's new website; Mr. Parady noted that there were initial log in problems but those have now been largely remedied. He stated that new passwords would be necessary to log in and an email to Section members explaining the process had been sent. Mr. Parady asked that members experiencing glitches with the website notify him and if necessary the webmaster can assist. He encouraged committee chairs to update their committee pages.

**VII. Liaison with Board of Governors' Report – *Andrew B. Sasso***

Mr. Sasso expressed a "call to action" on behalf of the Board of Governors on two matters:

First, there are openings on all 26 judicial nominating commissions ("JNC"). The Supreme Court in its budget has allotted for 49 new judges, so there will be many applicants to be review and considered. Six Florida Bar members are needed on each JNC. He encouraged Section members to apply for the JNC positions and noted that the deadline for submission of applications has been extended to March 21<sup>st</sup>.

Second, Mr. Sasso asked that Section members volunteer to serve on Florida Bar grievance committees. He explained the composition and function of the grievance committees in the Bar disciplinary process. He also requested that members notify Board of Governors members in their circuits of any qualified non-lawyer candidates that might be willing to serve on grievance committees.

Lastly, Mr. Sasso recognized Section executive council member Linda Griffin for her service during four terms on grievance committees and presented her with a certificate of appreciation signed by the President and the Executive Director of the Florida Bar.

**VIII. Treasurer's Report — *S. Katherine Frazier***

Ms. Frazier stated that revenues and expenses for the 2013-2014 fiscal year to date were generally in line with budget projections. She thanked Section sponsors for enabling the Section to perform the functions it does for the benefit of both its members and the citizens of Florida.

**IX. Director of At-Large Member's Report — *Debra L. Boje***

Ms. Boje reported that the at-large-members ("ALMS") are sponsoring receptions following both the Real Estate Certification Seminar on February 21<sup>st</sup> and the Probate and Trust Certification Seminar on April 14, both in Orlando. She also noted that ALMS continue to work with and assist Section committees on a variety of matters.

**X. CLE Seminar Coordination Report — *CLE Seminar Coordination – Robert Freedman (Real Property) and Tae K. Bronner (Probate & Trust), Co-Chairs***

[Secretary Note: This report was presented during the General Standing Committee Reports]

**XI. Kids Committee Report—** *Steven P. Goodall, Chair; Laura Sundberg, Advisor*

[Secretary Note: This committee report was presented out of order but is reported in the minutes in the order in which it appears in the Agenda]

Mr. Goodall noted that the committee will be emailing a survey to Executive Council members to gauge their childrens' attendance and interests at future events and to plan events for the executive council meeting in Captiva in May. Mr. Dribin noted that the meeting at the Breakers will include a trip to the zoo.

**XII Probate and Trust Law Division —** *Deborah P. Goodall, Director*

[Secretary Note: The Probate and Trust Law Reports were presented out of order but are reported in these minutes in the sequence stated in the Agenda]

**Action Items:**

**Probate & Trust Litigation Committee –** *Thomas Karr, Chair*

Mr. Thomas Karr reported that under current Florida law, courts have discretion to award fees relating to trusts but there are no standards. The proposed legislation would provide a non-exclusive list of factors for courts to consider when awarding fees. Mr. Karr moved on behalf of the committee:

To adopt as Section positions to support the amendment of F.S. §733.106 (costs and attorney's fees), F.S. §736.1005 (attorney's fees for services to the trust), and F.S. §736.1006 (costs in trust proceedings) to provide a non-exclusive list of factors for trial courts to consider when exercising discretion whether and to what extent attorney's fees and costs should be awarded against a particular part of an estate or trust and to create a uniform standard for making this determination in the courts of Florida; and finding that such legislative positions are within the purview of the RPPTL Section and to expend funds in support of the position.

A technical question was raised as to whether the term "a person" on line 28, page 49 in the Agenda materials should be changed to "any person" for clarity. Mr. Karr stated on behalf of the committee that he had no objection to that change.

The motion, as amended to substitute the term "any person" for "a person" on line 28, page 49, was approved unanimously.

**Information Items**

**1. Trust Law -** *Shane Kelley, Chair*

Ms. Goodall noted that since the Agenda was distributed to the Executive Council various revisions has been made during the current legislative session to HB 405, which is The Florida Banker Association's ("FBA") proposed legislation dealing with limiting liability for excluded trustees when the terms of a trust provide for more than one trustee and the trust confers powers to one or more trustees, to the exclusion of others.

Mr. Shane Kelley reported that the Trust Law Committee debated HB 405 extensively and plans to model its approach after Delaware law as it pertains to willful misconduct. The Committee in

conjunction with the Legislation Committee are continuing to work with the FBA on technical comments to HB 405 to incorporate revisions to that proposed legislation to address concerns raised by the Trust Law Committee.

**XIII. Real Property Law Division — *Michael J. Gelfand, Real Property Law Division Director***

[Secretary Note: The Real Property Law Division reports were presented out of order but are reported in these minutes in the sequence stated in the Agenda]

**Action Items:**

**1. Commercial Real Estate Committee — *Art Menor, Chair***

Mr. Gelfand noted that a supplement to the Agenda materials with recent revisions to the Committee's proposal amendment, based on feedback the Committee had obtained from other Committees, had been circulated via email to Executive Council Members immediately prior to the Executive Council meeting and hard copies were available at the meeting see Addendum "B".

Mr. Burt Burton reported that the Committee had worked extensively with the Miami-Dade Property Appraisers Office to develop the proposed legislation, which would not apply to condominiums, co-ops or time shares. It addresses the problem that arises in allocating land values for ad valorem tax assessments in multiple ownership vertical developments and accounts for development plan consensual allocation of values.

Mr. Burton moved on behalf of the Committee:

To adopt as a Section position to support issuance of separate property tax folio numbers for separately described portions of a multiple parcel building and provide for allocation of underlying land value among the separate building parcels, including an amendment of Chapter 193., F.S., to find that the position is in the Section's purview; and to expend funds in support of the position.

The Motion was approved unanimously.

**2. Condominium & Planned Development Committee – *Steven H. Mezer***

Mr. Steven Mezer reported on the history of the Distressed Condominium Relief Act enacted in 2009. The Act by its terms was to sunset in July 2015. The Committee had considered making the provisions of the Act permanent but there was no consensus for that approach. The Executive Council at its Sarasota meeting in November 2013 approved a one year extension of the Act which bill is before the legislature in the current session. Mr. Mezer then asked Mr. William Sklar, Committee member to discuss the Committee's motion. Mr. Sklar reported that several minor, technical clarifications and revisions to the proposal amendments contained in the Agenda had been adopted by the Committee as a result of comments made in the Committee meetings and at the Real Estate Division Roundtable in Amelia Island and Mr. Sklar reviewed those changes.

Mr. Mezer moved on behalf of the Committee:

Motion to adopt as a Section position to support amendments to the Florida Condominium Act which set forth the rights and obligations of purchasers and lenders that acquire multiple units, but is not a creating developer of the condominium, including creating a Part VIII, and eliminating application of Part VII, of the Condominium Act to transactions recorded after the

effective date July 1, 2016, to find that the position is in the Section's purview; and to expend funds in support of the position.

The Motion was approved unanimously.

**3. Construction Law Committee – Hardy Roberts, Chair**

Mr. Hardy Roberts reported that a bill introduced in the current legislative session would result in a variety of negative consequences including an excessive penalty for minor mistakes in lien filings. Mr. Hardy moved on behalf of the Committee:

To adopt as a Section position, to oppose selective increase of recording expense to only construction claims of lien, adding additional filing requirements, and concluding that filing a lien beyond the statutory 90 day period is an act of fraud, including opposing amendments to s. 28.24, and s. 713.08, F.S., to find that the position is in the Section's purview; and to expend funds in support of the position.

The Motion was approved unanimously.

**XIV. General Standing Committees — Michael A. Dribin, Director and Chair-Elect**

[Secretary Note: The General Standing Committee reports were presented out of order but are reported in these minutes in the sequence stated in the Agenda.]

**Information Items:**

**1. AD Hoc Leadership Academy Committee – Tae Kelley Bronner, Chair**

Ms. Bronner reported that the committee met in January to consider applications for the second year of the academy. Those who were appointed to the academy in its first year had nothing but good things to say about their experience. The Committee selected Jana Rubin and Steven Liverpool as the Section nominees, subject to approval by the Bar.

**2. Ad Hoc Trust Account Committee – Jerry Aron and John Neukamm, Co-Chairs**

[Secretary Note: Additional information items for this Committee are included in the Supplemental Agenda at pages S3-S12]

Mr. Neukamm reported on the presentation made by the Committee on January 24, 2014 to the Florida Bar Professional Ethics Committee regarding trust account audits by title insurers. The issue of the Bar's Advisory Opinion concerning audits of attorney trust accounts has been reported extensively at previous Executive Council meetings. Mr. Neukamm noted that the revised opinion now contains language the Section favored stating that an audit would be in the client's best interest. He thanked the Ad Hoc Committee members for their tireless efforts to educate the Florida Bar Professional Ethics Committee on the need for such audits to prevent and identify trust account defalcations. Mr. Neukamm singled out Lynwood Arnold for special praise, as Mr. Arnold serves on the Florida Bar Professional Ethics Committee and was instrumental in persuading the Committee to revise its initial opinion to largely address the section concerns.

Mr. Neukamm then discussed recent developments concerning proposed Rule of Professional Conduct 5-1.1 addressing trust account shortage issues arising out of the Roth and Russo decisions. This issue has also been reported in detail at previous Executive Council meetings. The initial

position of the Bar in response to any trust account shortfall was onerous and required an attorney to shut down the attorney's trust account, notify all clients, return monies and then offer to reopen a new account. Mr. Neukamm reported that the Committee has been advised that the proposed amendment to Rule 5-1.1 will now be much more workable and reasonable and will allow attorneys to replenish shortfalls with their own funds with notice to the Bar but without notice to the clients. This will be very useful for de minimus shortfalls.

Mr. Dribin thanked both Mr. Neukamm and Mr. Jerry Aron and the members of the Committee for their persistence in working with the Bar and convincing the Bar that the Section's concerns were meritorious.

**3. Amicus Coordination Committee – Kenneth B. Bell, Gerald B. Cape, Jr., Robert W. Goldman and John W. Little, Co-Chairs**

Mr. Robert Goldman discussed the Section's amicus guidelines and process as detailed in the supplemental Agenda and provided brief updates on the five pending cases before the Committee, as reported on pages S-13-17 of the supplemental Agenda.

**4. Legislation Committee – Robert Swaine, Co-Chair (Real Property), William T. Hennessey, III, Co-Chair (Probate and Trust)**

- A. Mr. William Hennessey reported that pursuant to Article VII, Section 4(c) of RPPTL bylaws, the Executive Committee of the Section by unanimous vote, adopted the following legislative position:

The RPPTL Section is opposed to passage of SB 412 which (i) would change the criteria and limit the discretion of the court in awarding fees in guardianship proceedings for services which benefit the ward, (ii) would seek to significantly change established guardianship laws and procedures concerning the qualification of examining committee members and the content and requirements of their reports, and (iii) would criminalize certain conduct in guardianship proceedings, including proposed amendments to F.S. 744.108, 744.331, and 744.4461; finding the legislative position to be within the purview of the RPPTL Section and authorizing the RPPTL Section to expend funds in support of this legislative position.

Mr. Hennessey stated that the Section's position was approved by the Florida Bar Board of Governors. He said at this point the bill was not likely to proceed and there was no House bill sponsor but the Committee would continue to monitor it closely. Mr. Dribin noted that the Elder Law Section also voted to oppose the bill.

- B. Mr. Hennessey then reported on the Committee's successful effort to work with Sharon Bock, Clerk of the Circuit Court for Palm Beach County, with respect to concerns on the part of the RPPTL Section's Guardianship, Power of Attorney and Advance Directives Committee and the Trust Law Committee with respect to HB 635, which would significantly enhance the role of the clerk's office with respect to guardianship accountings and the possibility of court-ordered accountings of trusts as to which the ward is a beneficiary but which are not otherwise under the control or administration of the guardian.



A copy of the substantially revised HB635 reflecting committee consultations with Clerk, Sharon Brock, is included in the Supplemental Agenda pages S18-S25. The Section is neither supporting nor opposing the bill. Mr. Hennessey expressed thanks to the committee members, particularly Laird Lile, Michael Gelfand, Hung Nguyen and Larry Miller. Mr. Dribin thanked Mr. Hennessey for the enormous time he personally devoted to this successful effort to convert what initially was a very troublesome bill into legislation that works for all concerned.

- C. Mr. Hennessey then described the Committee's "Legislation Approval and Education Process", included at page 139 of the Agenda. The process is intended to improve the work product involving proposed legislation produced and submitted by Section committees and subcommittees, reduce the number of corrective "glitch" bills, avoid legislative redrafting that inadvertently changes a proposal's effect, to encourage collaboration among the Divisions of the RPPTL Section on legislative initiatives and to generally provide greater uniformity and consistency in the process of drafting the documentation associated with proposed legislation. Mr. Hennessey noted several key features of the new process: i) substantive committee chairs will appoint a vice chair for legislation to work with the Legislative Committee. This will provide excellent leadership experience for those vice chairs. Division Directors will be consulted prior to appointment of the legislation vice chair; ii) Committees will work together early in the legislative process to avoid last minute objections to or revisions from committees that may have an interest in legislation proposed by another committee but were unaware of that other committee's proposal. All proposed bills must be provided to the Legislation Committee not less than 45 days prior to Executive Council vote so they can be circulated to, reviewed and commented on by all appropriate committees.

**5. Member Communications and Information Technology Committee - William A. Parady, Co-Vice Chair**

Reported at Section VI of these minutes.

**XV. Probate and Trust Law Division Committee Reports — Deborah P. Goodall, Director**

1. **Ad Hoc Guardianship Law Revision Committee** - David Brennan, Chair; Sean W. Kelley, Charles F. Robinson and Sancha Brennan Whynot, Co-Vice Chairs
2. **Ad Hoc Study Committee on Creditors' Rights to Non-Exempt, Non-Probate Assets** – Angela M. Adams, Chair
3. **Ad Hoc Study Committee on Estate Planning Conflict of Interest** - William T. Hennessey III, Chair; Paul Roman, Vice Chair
4. **Ad Hoc Study Committee on Jurisdiction and Service of Process** – Barry F. Spivey, Chair; Sean W. Kelley and Christopher Q. Wintter, Co-Vice Chairs
5. **Ad Hoc Study Committee on Personal Representative Issues** – Jack A. Falk, Jr., Chair

6. **Ad Hoc Study Committee on Treatment of Life Insurance Payable to Revocable Trust** – Richard R. Gans, Chair
7. **Asset Protection** – Brian C. Sparks, Chair; George Karibjanian, Vice-Chair
8. **Attorney/Trust Officer Liaison Conference** – Jack A. Falk, Jr., Chair; Sharon DaBrusco, Corporate Fiduciary Chair; Patrick Lannon, Deborah Russell and Laura Sundberg, Co-Vice Chairs
9. **Digital Assets and Information Study Committee** – Eric Virgil, Chair; S. Dresden Brunner and Travis Hayes, Co-Vice Chairs
10. **Elective Share Review Committee** – Lauren Detzel and Charles I. Nash, Co-Chairs; Robert Lee McElroy IV, Vice Chairs
11. **Estate and Trust Tax Planning** – Elaine M. Bucher, Chair; David Akins, Tasha Pepper-Dickinson and William Lane, Co-Vice Chairs
12. **Guardianship, Power of Attorney and Advanced Directives** – Sean W. Kelley, Chair; Seth A. Marmor, Tattiana Brenes-Stahl, Cynthia Fallon and David Brennan, Co-Vice Chairs
13. **IRA, Insurance and Employee Benefits** – L. Howard Payne and Lester Law, Co-Chairs
14. **Liaisons with ACTEC** – Michael Simon, Bruce Stone, and Diana S.C. Zeydel
15. **Liaisons with Elder Law Section** – Charles F. Robinson and Marjorie Wolasky
16. **Liaisons with Tax Section** – Harris L. Bonnette, Jr., Lauren Y. Detzel, William R. Lane, Jr., David Pratt, Brian C. Sparks and Donald R. Tescher
17. **Principal and Income** – Edward F. Koren, Chair; Pamela Price, Vice Chair
18. **Probate and Trust Litigation** – Thomas M. Karr, Chair; Jon Scuderi, James George, John Richard Caskey, Jerry Wells, Co-Vice Chairs
19. **Probate Law and Procedure** – John C. Moran, Chair; Sarah S. Butters, Michael Travis Hayes and Marsha G. Madorsky, Co-Vice Chairs
20. **Trust Law** – Shane Kelley, Chair; Angela M. Adams, Tami F. Conetta and Deborah L. Russell, Co-Vice Chairs
21. **Wills, Trusts and Estates Certification Review Course** – Richard R. Gans, Chair; Jeffrey S. Goethe, Linda S. Griffin, Laura Sundberg and Jerome L. Wolf, Co-Vice Chairs

**XVI. Real Property Law Division Reports** — *Michael J. Gelfand, Director*

1. **Ad Hoc Foreclosure Reform** – Jeffrey Sauer, Chair; Mark Brown, Burt Bruton and Alan

Fields, Co-Vice Chairs.

2. **Commercial Real Estate** – Art Menor, Chair; Burt Bruton and Adele Stone, Co- Vice Chairs.
3. **Condominium and Planned Development** – Steven H. Mezer, Chair; Jane Cornett, Christopher Davies and Lisa Van Dien, Co-Vice Chairs.
4. **Construction Law** – Hardy Roberts, Chair; Lisa Colon Heron, Scott Pence and Lee Weintraub, Co-Vice Chairs.
5. **Construction Law Certification Review Course** – Lee Weintraub, Chair; Bruce Alexander, Deborah Mastin and Bryan Rendzio, Co-Vice Chairs.
6. **Construction Law Institute** – Reese Henderson, Chair; Sanjay Kurian, Diane Perera and Jason Quintero, Co-Vice Chairs.
7. **Development & Green Building** – Anne Pollack, Chair; Mike Bedke, Vinette Godelia, and Neil Shoter, Co-Vice Chairs.
8. **Insurance and Surety** – W. Cary Wright, Chair; Fred Dudley and Michael Meyer, Co-Vice Chairs.
9. **Landlord and Tenant** – Lloyd Granet, Chair; Rick Eckhard, Vice Chair.
10. **Legal Opinions** – Kip Thornton, Chair; Robert Stern, Vice-Chair.
11. **Liaisons with FLTA** – Norwood Gay and Alan McCall, Co-Chairs; Alan Fields and James C. Russick, Co-Vice Chairs.
12. **Real Estate Certification Review Course** – Raul Ballaga, Chair; Kip Thornton and Jennifer Tobin, Co-Vice Chairs.
13. **Real Estate Structures and Taxation** – Wilhelmina Kightlinger, Chair; Cristin C. Keane and Salome Zikakis, Co-Vice Chairs.
14. **Real Property Finance & Lending** – Jim Robbins, Chair; Homer Duval, III, Brenda Ezell and Bill Sklar, Co-Vice Chairs.
15. **Real Property Litigation** – Marty Awerbach, Chair; Manny Farach and Susan Spurgeon, Co-Vice Chairs.
16. **Real Property Problems Study** – W. Theodore “Ted” Conner, Chair; Mark A. Brown and Patricia J. Hancock, Co-Vice Chairs.
17. **Residential Real Estate and Industry Liaison** – Frederick W. Jones, Chair; Deborah Boyd and E. Ralph Tirabassi, Co-Vice Chairs.
18. **Title Insurance and Title Insurance Liaison** – Kristopher Fernandez, Chair; Raul Ballaga

and Julie Horstkamp, Co-Vice Chairs.

19. **Title Issues and Standards** – Christopher W. Smart, Chair; Robert M. Graham, Patricia P. Jones and Karla J. Staker, Co-Vice Chairs.

**XVII. General Standing Committee Reports** — *Michael A. Dribin, Director and Chair-Elect*

1. **Ad Hoc Leadership Academy** – Tae Kelley Bronner, Chair

No further report.

2. **Ad Hoc LLC Monitoring** – Lauren Y. Detzel and Ed Burt Bruton, Jr., Co-Chairs

No report.

3. **Ad Hoc Trust Account** – John B. Neukamm and Jerry E. Aron, Co-Chairs

No further report.

4. **Alternative Dispute Resolution (ADR)** – Deborah Bovarnick Mastin and David R. Carlisle, Co-Chairs

Ms. Deborah Mastin reported that the committee will be publishing a directory of ADR Practitioners, Arbitrators and Mediators and to notify her or Co-chair David Carlisle if a member wants to be listed. The committee will also have a regular column in ActionLine.

Mr. David Carlisle reported on Gren v. Gren, 39 Fla. L. Weekly D134, in which a Florida court upheld for the first time an arbitration clause in a trust. The Fourth DCA, overruling the trial court, held that the timeliness of invoking the arbitration clause in the trust is up to the arbitrator. As long as there is a valid written agreement with an arbitrable issue that has not been waived, the court essentially loses the ability to rule on any other issue in the case.

5. **Amicus Coordination** – Robert W. Goldman, John W. Little, III, Kenneth B. Bell and Gerald B. Cope, Jr., Co-Chairs

No further report.

6. **Budget** – S. Katherine Frazier, Chair; Andrew M. O'Malley, Pamela O. Price, Daniel L. DeCubellis, Lee Weintraub, and W. Cary Wright, Co-Vice Chairs

No further report.

7. **CLE Seminar Coordination** – Robert Freedman (Real Property) and Tae K. Bronner (Probate & Trust), Co-Chairs; Laura K. Sundberg (Probate & Trust), Sarah S. Butters (Probate & Trust), Lawrence J. Miller (Ethics), Jennifer S. Tobin (Real Property) and Hardy L. Roberts, III (General E-CLE), Co-Vice Chairs

Mr. Robert Freedman reported that the committee is in the process of revising and expanding its upcoming E-CLE programs. The new schedule will be posted on the Section

Minutes: RPPTL Executive Council

website in the immediate future. Brochures will be distributed as early as possible to appropriate committees and others in the Section to email to Section members via their list serves. Mr. Freedman asked that Seminar chairs get materials from their speakers in a timely fashion. Lastly, Mr. Freedman stated that printed seminar materials are no longer provided to seminar attendees, they are sent by email, although the committee is reconsidering that policy.

8. **Convention Coordination** – Laura K. Sundberg, Chair; Marsha G. Madorsky, S. Dresden Brunner and Chris N. Davies, Co-Vice Chairs

Ms. Laura Sundberg reported that the committee has finalized its CLE plan for the Convention. It will be a little different from previous years in that there will be a segment devoted to the use of technology in law practices. The brochure will be sent to members in 3-4 weeks. Ms. Sundberg also noted that there will be a very unique musician performing Friday night.

9. **Fellows** – Marsha G. Madorsky, Chair; Brenda B. Ezell, Hung V. Nguyen and Benjamin B. Bush, Co-Vice Chairs

Ms. Marsha Madorsky noted that applications for 2014-2015 Fellows program are posted on the website, are in ActionLine and published in the Florida Bar News. The Fellows in attendance at the meeting were then introduced. Ms. Madorsky stated that the probate Fellows are assisting with the April Symposium in Tampa. Fellows are also working on the legislative update. Ms. Madorsky asked members to encourage likely candidates to submit applications. There were 50-60 applications for the 4 positions in the last cycle.

10. **Florida Electronic Filing & Service** – Patricia P. Jones and Rohan Kelley, Co-Chairs

No report.

11. **Homestead Issues Study** – Shane Kelley (Probate & Trust) and Patricia P. Jones (Real Property), Co-Chairs

Mr. Shane Kelley reported that the committee is studying revocable trusts in homestead and expects to have proposed legislation on that topic later this year.

12. **Legislation** – William T. Hennessey, III (Probate & Trust) and Robert S. Swaine (Real Property), Co-Chairs; Sara S. Butters (Probate & Trust) and Alan B. Fields (Real Property), Co-Vice Chairs

No further report.

13. **Legislative Update (2014)** – Stuart H. Altman, Chair; Charles I. Nash, R. James Robbins, Brian F. Spivey, Stacy Kalmanson and Jennifer S. Tobin, Co- Vice Chairs

Mr. Stuart Altman reminded members that the Legislative Update program is scheduled for August 1<sup>st</sup> at the Breakers in Palm Beach.

14. **Liaison with:**

- a. **American Bar Association (ABA)** – Edward F. Koren and Julius J. Zschau  
  
No report.
- b. **Board of Legal Specialization and Education (BLSE)** – Raul P. Ballaga, David M. Silberstein and Deborah L. Russell  
  
No report.
- c. **Clerks of Circuit Court** – Laird A. Lile and William Theodore (Ted) Conner  
  
No report.
- d. **FLEA / FLSSI** – David C. Brennan, John Arthur Jones and Roland “Chip” Waller  
  
Mr. David Brennan reported that the Probate Team Seminar is scheduled for October 10-11, and that editing of 2014 probate forms is complete.
- e. **Florida Bankers Association** – Mark T. Middlebrook  
  
Mr. Mark Middlebrook reported that the Florida Bankers Association (“FBA”) is working with the Section on legislation of interest. The FBA is supporting the Family Trust Company legislation, the Uniform Transfer to Minors legislation and the Insurance Creditors Rights to Insurance Proceeds legislation.
- f. **Judiciary** – Judge Linda R. Allan, Judge Herbert J. Baumann, Jr., Judge Melvin B. Grossman, Judge Hugh D. Hayes, Judge Claudia Rickert Isom, Judge Maria M. Korvick, Judge Lauren Laughlin, Judge Celeste H. Muir, Judge Robert Pleus, Jr., Judge Richard J. Suarez, Judge Morris Silberman, Judge Patricia V. Thomas and Judge Walter L. Schafer, Jr.  
  
No report.
- g. **Out of State Members** – Michael P. Stafford and John E. Fitzgerald, Jr.  
  
No report. Mr. Dribin noted that the Section will be encouraging out of state lawyers to participate in the Chicago meeting this fall.
- h. **TFB Board of Governors** – Andrew Sasso  
  
No report.
- i. **TFB Business Law Section** – Gwynne A. Young  
  
No report.
- j. **TFB CLE Committee** – Robert S. Freedman

No further report.

- k. **TFB Council of Sections** – Margaret A. Rolando and Michael Dribin

No report, Mr. Dribin noted that a meeting scheduled for the Florida Bar Mid-year Meeting was cancelled.

- l. **TFB Pro Bono Committee** – Tasha K. Pepper-Dickinson

No report.

15. **Long-Range Planning** – Michael Dribin, Chair

Mr. Dribin noted the upcoming meeting on February 25.

16. **Meetings Planning** – George Meyer, Chair

No report.

17. **Member Communications and Information Technology** – Nicole C. Kibert, Chair; S. Dresden Brunner, William A. Parady and Michael Travis Hayes, Co- Vice Chairs

No further report.

18. **Membership and Inclusion** – Michael A. Bedke, Chair; Lynwood F. Arnold, Jr., (Diversity); Stacy O. Kalmanson (Law Schools), Phillip A. Baumann (Career Coaching), Navin R. Pasem (Diversity) and Guy S. Emerich (Career Coaching and Liaison to TFB's Scope program), Co-Vice Chairs

Mr. Dribin noted that chair Michael Bedke's wife has been ill but is doing better and wishes her and Michael well.

Ms. Lynwood Arnold reported that the Committee met together with the Fellowship Committee at Amelia Island meeting. It was standing room only, attendees included Gene Pettis, the President of the Florida Bar, who commended the Section as the standard bearer in the Bar on matters of diversity and inclusion. Ms. Arnold noted that the Section at last count has 10,522 members and is growing at a 5% rate annually while other sections of the Bar are either flat or declining in members.

Ms. Arnold then reported on various upcoming events organized or sponsored by the Committee including: i) The National Black Law Student meeting in Jacksonville, on February 12-16; ii) The Hillsborough County Bar Association Diversity event on February 22; iii) The diversity mixer in Hillsborough County on March 7 with various voluntary Bar Associations; iv) The Committee continues to work with the various Florida law schools and 12 law students from several Florida law schools attended the Amelia Island meeting; v) the Committee continues mock interviews for law students and one will be held immediately after the Amelia Island Executive Council Meeting; vi) there will be events on March 6<sup>th</sup> at both Stetson law school and the University of Miami law school.

19. **Model and Uniform Acts** – Bruce M. Stone and S. Katherine Frazier, Co-Chairs

No report.

20. **Professionalism and Ethics--General** – Lawrence J. Miller, Chair; Tasha K. Pepper-Dickinson, Vice Chair

Mr. Dribin noted that the committees would be doing a skit at the end of the Executive Council reports focusing on trust account audits after the Roth, Russo decisions.

21. **Professionalism and Ethics—Special Subcommittee on Integrity Awareness and Coordination** – Jerry Aron and Sandra Diamond, Co-Chairs

Ms. Sandra Diamond reported that the committee met in Amelia Island. It is reviewing how other professional, for profit and non-profit organizations monitor integrity and conflicts of unjust issues. The committee is close to publishing its report and welcomes comments.

22. **Publications (ActionLine)** – Silvia B. Rojas, Chair; Scott P. Pence (Real Property), Shari Ben Moussa (Real Property), Navin R. Pasem (Real Property), Jane L. Cornett (At Large), Brian M. Malec (Probate & Trust), George D. Karibjanian (Probate & Trust), Hung V. Nguyen (Probate & Trust) and Lawrence J. Miller (Professionalism & Ethics), Co-Vice Chairs

Ms. Silvia Rojas reported that April 30<sup>th</sup> is the submission deadline for ActionLine. She encouraged committees to update their webpages.

23. **Publications (Florida Bar Journal)** – Kristen M. Lynch (Probate & Trust) and David R. Brittain (Real Property), Co-Chairs; Jeffrey S. Goethe (Editorial Board– Probate & Trust), Linda Griffin (Editorial Board – Probate & Trust), Michael A. Bedke (Editorial Board – Real Property) and William T. Conner (Editorial Board– Real Property), Co-Vice Chairs

Mr. Dribin solicited articles from members. There are articles lined up through May but asked that members increase their efforts to produce articles for publication.

24. **Sponsor Coordination** – Kristen M. Lynch and Wilhelmina F. Kightlinger, Co-Chairs; J. Michael Swaine, Adele I. Stone, Deborah L. Russell, W. Cary Wright and Benjamin F. Diamond, Co-Vice Chairs

Ms. Wilhelmina F. Kightlinger reminded members to be respectful and attentive when sponsors are making their presentations. The Committee is actively soliciting sponsors for the Chicago meeting. Ms. Kightlinger asked that when members use a sponsor's services that they notify the sponsor that they are doing so in appreciation of the sponsor's contribution to the Section.

25. **Strategic Planning** – Margaret A. Rolando and Michael A. Dribin, Co-Chairs

Mr. Dribin noted that a planning retreat was scheduled for April in Tampa. Leaders of the retreat met in Amelia Island to do preliminary planning. Mr. Dribin reported that a survey



would be emailed to all Executive Council members prior to the retreat soliciting their opinion about various aspects of the Executive Council and the Section and that the survey results would be carefully considered at the retreat.

#### **XVIII. Adjourn**

There being no further business to come before the Executive Council, Ms. Rolando thanked those in attendance and a motion to adjourn was unanimously approved at 10:37 a.m.

Respectfully submitted,

Andrew M. O'Malley, Secretary

**ADDENDUM "A"**  
**ATTENDANCE ROSTER**  
**REAL PROPERTY PROBATE & TRUST LAW SECTION**  
**EXECUTIVE COUNCIL MEETINGS**  
**2013-2014**

Executive Committee	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Rolando, Margaret A., Chair	√		X	X	X	X	
Dribin, Michael A., Chair- Elect		√	X		X	X	
Gelfand, Michael J., Real Property Law Div. Director	√		X	X	X	X	
Goodall, Deborah P., Probate and Trust Law Div. Director		√	X		X	X	
O'Malley, Andrew M., Secretary	√		X		X	X	
Frazier, S. Katherine, Treasurer	√		X		X	X	
Hennessey, William M., Legislation Co-Chair (P&T)		√	X		X	X	
Swaine, Robert S., Legislation Co-Chair (RP)	√		X		X	X	
Bronner, Tae K. Seminar Coordinator (P&T)		√	X		X	X	
Freedman, Robert S., Seminar Coordinator (RP)	√		X	X	X	X	
Boje, Debra L., Director of At-Large Members		√	X		X	X	
Belcher, William F., Immediate Past Chair		√	X		X	X	

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Adams, Angela M.		√	X		X		
Adcock, Jr., Louie N., <b>Past Chair</b>		√					
Akins, David J.		√	X	X	X		
Alexander, Bruce G.	√						
Altman, Stuart H.		√	X		X	X	
Arnold, Jr., Lynwood F.	√	√	X		X	X	

Minutes: RPPTL Executive Council

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Aron Jerry E. <b>Past Chair</b>	√		X		X	X	
Awerbach, Martin S.	√				X		
Bald, Kimberly A.	√		X		X	X	
Ballaga, Raul P.	√		X			X	
Banister, John R.	√						
Battle, Carlos A.		√	X		X	X	
Baumann, Honorable Herbert J.		√					
Baumann, Phillip A.		√	X	X	X	X	
Beales, III, Walter R. <b>Past Chair</b>	√						
Bedke, Michael A.	√		X		X		
Bell, Kenneth B.	√						
Bellew, Brandon D.		√	X		X	X	
Ben Moussa, Shari D.	√		X				
Bonnette, Jr., Harris L.		√	X		X		
Boyd, Deborah	√					X	
Bowser, Robert Wade	√						
Brenes-Stahl, Tattiana P.		√	X		X	X	
Brennan, David C. <b>Past Chair</b>		√	X			X	
Brittain, David R.	√				X		
Brown, Mark A.	√		X			X	
Brunner, S. Dresden		√	X		X	X	
Bruton, Jr., Ed Burt	√		X			X	
Bucher, Elaine M.		√	X		X	X	
Bush, Benjamin B.	√						

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Butters, Sarah S.		√	X		X	X	
Buzby-Walt, Anne		√	X				
Carlisle, David R.		√	X		X	X	
Caskey, John R.		√	X		X		
Christiansen, Patrick T. <b>Past Chair</b>	√		X	X		X	
Cole, John P.		√	X		X	X	
Conetta, Tami F.		√	X			X	
Conner, W. Theodore	√		X		X	X	
Cope, Jr., Gerald B.	√		X				
Cornett, Jane L.	√		X		X	X	
Davies, Christopher	√		X		X	X	
DeCubellis, Daniel L.	√			X			
Detzel, Lauren Y.		√	X	X	X	X	
Diamond, Benjamin F.		√	X		X	X	
Diamond, Sandra F. <b>Past Chair</b>		√	X	X	X	X	
Dollinger, Jeffrey	√		X		X	X	
Dudley, Frederick R.	√		X		X	X	
Duvall, III, Homer	√		X		X	X	
Eckhard, Rick	√		X		X	X	
Ellison, Jason M.	√		X		X	X	
Emerich, Guy S.		√	X		X	X	
Ezell, Brenda B.	√		X		X	X	
Falk, Jr., Jack A.		√	X		X	X	
Fallon, Cynthia		√					

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Farach, Manuel	√		X		X	X	
Felcoski, Brian J., <b>Past Chair</b>		√	X		X	X	
Fernandez, Kristopher E.	√		X		X	X	
Fields, Alan B.	√				X	X	
Fitzgerald, Jr., John E.		√	X		X	X	
Fleece, III, Joseph W.		√	X		X		
Flood, Gerard J.		√	X		X		
Foreman, Michael L.		√	X		X	X	
Galler, Jonathan		√	X			X	
Gans, Richard R.		√	X		X	X	
Gay, III, Robert Norwood	√		X	X	X	X	
George, James		√	X		X	X	
Godelia, Vinette D.	√		X		X		
Goethe, Jeffrey S.		√	X		X	X	
Goldman, Louise "Tray"	√				X	X	
Goldman, Robert W. <b>Past Chair</b>		√	X		X	X	
Graham, Robert M.	√		X		X		
Granet, Lloyd	√		X		X	X	
Griffin, Linda S.		√	X			X	
Grimsley, John G. <b>Past Chair</b>		√					
Grossman, Honorable Melvin B.		√	X				
Guttmann, III, Louis B. <b>Past Chair</b>	√		X		X	X	

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Hamrick, Alexander H.		√	X		X	X	
Hancock, Patricia J.	√		X		X		
Hart, W.C.	√					X	
Hayes, Honorable Hugh D.		√	X		X		
Hayes, Michael Travis		√	X		X	X	
Hearn, Steven L. <b>Past Chair</b>		√	X		X		
Henderson, Jr., Reese J.	√		X		X	X	
Henderson, III, Thomas N.	√		X		X	X	
Heron, Lisa Colon	√		X			X	
Heuston, Stephen P.		√	X		X	X	
Horstkamp, Julie	√						
Isom, Honorable Claudia R.		√					
Isphording, Roger O. <b>Past Chair</b>		√	X	X	X	X	
Johnson, Amber Jade F.		√	X		X	X	
Jones, Darby		√	X		X	X	
Jones, Frederick W.	√		X	X	X	X	
Jones, Jennifer W.		√	X				
Jones, John Arthur <b>Past Chair</b>		√			X		
Jones, Patricia P.H.	√		X	X	X	X	
Judd, Robert B.		√	X		X		
Kalmanson, Stacy O.	√		X		X	X	
Karibjanian, George		√	X			X	
Karr, Thomas M.		√	X		X	X	
Kayser, Joan B. <b>Past Chair</b>		√			X		

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Keane, Cristin C.	√		X		X		
Kelley, Rohan <b>Past Chair</b>		√	X		X		
Kelley, Sean W.		√	X			X	
Kelley, Shane		√	X		X	X	
Kibert, Nicole C.	√		X		X		
Kightlinger, Wilhelmina F.	√		X		X	X	
Kinsolving, Ruth Barnes <b>Past Chair</b>	√					X	
Koren, Edward F. <b>Past Chair</b>		√			X	X	
Korvick, Honorable Maria M.		√	X	X	X		
Kotler, Alan Stephen		√	X			X	
Kromash, Keith S.		√	X		X	X	
Kurian, Sanjay	√		X		X	X	
Kypreos, Theodore S.		√	X			X	
Lancaster, Robert L.		√	X		X	X	
Lane, Jr., William R.		√			X	X	
Lange, George		√	X	X	X		
Lannon, Patrick J.		√				X	
Larson, Roger A.	√		X			X	
Laughlin, Honorable Lauren C.		√					
Law, Lester		√			X	X	
Leebrick, Brian D.	√		X		X	X	
Lile, Laird A. <b>Past Chair</b>		√	X		X		
Little, III, John W.	√		X			X	
Lynch, Kristen M.		√	X				

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Madorsky, Marsha G.		√	X	X	X	X	
Malec, Brian		√	X	X	X	X	
Marger, Bruce <b>Past Chair</b>		√	X		X	X	
Marmor, Seth A.		√	X			X	
Marshall, III, Stewart A.		√	X		X		
Mastin, Deborah Bovarnick	√		X		X	X	
McCall, Alan K.	√		X		X	X	
McElroy, IV, Robert Lee		√	X		X	X	
McRae, Ashley E.	√		X		X	X	
Menor, Arthur J.	√				X		
Meyer, George F. <b>Past Chair</b>	√		X	X	X	X	
Meyer, Michael	√		X		X		
Mezer, Steven H.	√		X		X	X	
Middlebrook, Mark T.		√	X		X	X	
Miller, Lawrence J.		√	X		X		
Moran, John C.		√	X		X	X	
Moule, Jr., Rex E.		√	X			X	
Muir, Honorable Celeste H.		√	X				
Murphy, Melissa J. <b>Past Chair</b>	√		X			X	
Nash, Charles L.		√	X	X	X	X	
Neukamm, John B. <b>Past Chair</b>	√		X		X	X	
Nice, Marina		√	X	X	X	X	
Nguyen, Hung V.		√	X		X	X	
Palmer, Margaret		√			X	X	



Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Parady, William A.		√	X	X	X	X	
Pasem, Navin	√						
Payne, L. Howard		√	X		X	X	
Pence, Scott P.	√		X		X		
Pepper-Dickinson, Tasha K.		√	X		X		
Perera, Diane	√						
Platt, William R.		√	X		X		
Pleus, Jr., Honorable Robert J.							
Pollack, Anne Q.	√		X	X	X		
Polson, Marilyn M.		√	X		X	X	
Pratt, David		√			X		
Price, Pamela O.		√			X	X	
Prince-Troutman, Stacey A.		√					
Pyle, Michael A.		√	X		X	X	
Quintero, Jason	√				X	X	
Rao, Tara		√		X		X	
Rendzio, Bryan	√		X		X	X	
Reynolds, Stephen H.	√				X	X	
Rieman, Alexandra V.		√			X	X	
Robbins, Jr., R.J.	√		X		X	X	
Roberts, III, Hardy L.	√		X	X	X	X	
Robinson, Charles F.		√			X	X	
Rojas, Silvia B.	√		X	X	X	X	
Roman, Paul E.		√	X	X		X	

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Russell, Deborah L.		√	X		X		
Russick, James C.	√		X	X	X	X	
Rydberg, Marsha G.	√		X		X	X	
Sachs, Colleen C.	√		X			X	
Sasso, Andrew		√			X	X	
Sauer, Jeffrey T.	√		X		X	X	
Schafer, Jr., Honorable Walter L.		√					
Schnitker, Clay A.	√						
Schofield, Percy A.	√		X		X		
Schwartz, Robert M.	√				X		
Scuderi, Jon		√			X	X	
Sheets, Sandra G.		√	X		X		
Shoter, Neil B.	√		X		X		
Sibblies, Sharaïne A.		√					
Silberman, Honorable Morris							
Silberstein, David M.		√	X		X		
Simon, Michael		√	X				
Sklar, William P.	√		X		X	X	
Smart, Christopher W.	√		X			X	
Smith, G. Thomas <b>Past Chair</b>	√		X	X		X	
Smith, Wilson <b>Past Chair</b>		√					
Sobien, Wayne J.	√						
Sparks, Brian C.		√	X		X	X	
Spivey, Barry F.		√	X		X	X	

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Spurgeon, Susan K.	√		X		X	X	
Stafford, Michael P.		√	X	X	X	X	
Staker, Karla J.	√		X		X	X	
Stern, Robert G.	√		X		X	X	
Stone, Adele I.	√		X			X	
Stone, Bruce M. <b>Past Chair</b>		√			X		
Suarez, Honorable Richard J.							
Sundberg, Laura K.		√	X	X	X	X	
Swaine, Jack Michael <b>Past Chair</b>	√					X	
Taft, Eleanor W.	√		X		X	X	
Taylor, Richard W.	√		X		X	X	
Tescher, Donald R.		√	X		X		
Thomas, Honorable Patricia V.		√		X	X	X	
Thornton, Kenneth E.	√		X			X	
Tirabassi, Ralph	√						
Tobin, Jennifer S.	√		X		X		
Triggs, Matthew H.		√	X			X	
Udick, Arlene C.	√		X	X		X	
Van Dien, Lisa	√		X		X	X	
Virgil, Eric		√	X				
Waller, Roland D. <b>Past Chair</b>	√		X	X	X	X	
Walters, Hanton H.	√		X		X		
Weintraub, Lee A.	√		X		X	X	
Wells, Jerry B.		√	X			X	

Executive Council Members	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
White, Jr., Richard M.		√			X	X	
Whynot, Sancha B.		√	X		X		
Wilder, Charles D.		√		X		X	
Williamson, Julie Ann S. <b>Past Chair</b>	√		X	X			
Wintter, Christopher Q.		√	X		X	X	
Wohlust, Gary Charles		√	X	X	X	X	
Wolasky, Marjorie E.		√	X	X	X	X	
Wolf, Jerome L.		√	X			X	
Wright, William Cary	√		X	X	X	X	
Wright, Thomas D.	√		X		X		
Young, Gwynne A.		√	X	X	X		
Zeydel, Diana S.C.		√	X				
Zikakis, Salome J.	√		X	X	X	X	
Zschau, Julius J. <b>Past Chair</b>	√		X		X		

RPPTL Fellows	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Christy, Doug					X	X	
Hoffman, Brian W.	√		X		X	X	
Khan, Nishad	√		X		X	X	
Lebowitz, Sean					X	X	
Melanson, Noelle M.		√	X	X	X	X	
Rao, Tara		√	X	X		X	

Rosenberg, Josh					X	X	
Smith, Kym					X		

Legislative Consultants	Division		Jul. 27 Palm Beach	Sept. 21 Lisbon, Portugal	Nov. 23 Sarasota	Feb. 8 Amelia Island	May 31 Captiva
	RP	P&T					
Adams, Howard Eugene		√	X				
DiNunzio, Ashely	√		X		X	X	
Dunbar, Peter M.				X	X	X	
Edenfield, Martha				X	X	X	