AGENDA RPPTL AT LARGE MEMBERS ("ALMS")

Thursday, July 26, 2018 5:00pm -6:00pm (TBA) The Breakers, Palm Beach

- I. Welcome. S. Katherine Frazier, Esq. (filling in for Lawrence J. Miller, Director)
- II. Roster.
- **III.** Approval of Minutes for At-Large Members Meeting held at Tradewinds Island Resort, St. Petersburg Beach, Florida on May 31, 2018 (see Item 1 Page 3)
- **IV.** ALMs Welcome.
 - A. Introduction of new ALMs. (see Item 2 Page 7)
 - B. Review of Duties of an ALM. (see Item 3 Page 9)

Note: Reminder that each ALM must participate in at least one project per year e.g., law school event, meet & greet and/or CLE receptions, judges or NPLH.

- C. Reminder: New applications and Reapplications due in December.
- V. Committee Liaison Appointments. (see Item 4 Page 11) The Committee Liaison role is to notify the applicable committee chair that he/she is the ALM Committee Liaison and encourage the chair to let the Committee Liaison know if there are any projects that could use the ALMs involvement.
- VI. Lead ALM Appointments. (see Item 5 Page 14). Please note that each Lead ALM has an Action Plan for their circuit and that the Action Plans should be regularly considered and updated. If you are a new Lead ALM and need a copy of the Action Plan for your circuit, please email Lawrence J. Miller at <u>lmiller@floridatax.com</u>. Reminder that all Lead ALMs must submit their updated Action Plan along with their Reapplication. Action Plan templates are located on the RPPTL website under the Committees tab/At Large Members Committee tab.
- **VII.** ALMs and Political Ties. Please note that the Lead ALMS have been asked to solicit ALMs in their circuit to identify attorneys who have close connections with each of the Representatives and Senators in their area. Please forward this information to your Lead ALM and to Lawrence J. Miller at <u>lmiller@floridatax.com</u>.
- VIII. No Place Like Home. Katherine Frazier Now available throughout the state.

ALMs Agenda (Breakers July 2018)

- IX. Projects:
 - A. Florida Customary Practice Commercial Transactions Ashley McRae (see Item 6 Page 17).
 - **B.** Probate Ethics Orders **Jamie Schwinghamer**
 - C. Local Court and Judiciary Procedures. Creating a template to compile information or links from Lead ALMs about local court and judiciary procedures that real estate and probate/trust lawyers need for courts and judges (i.e., required notaries, original document requirements, recording requirements, case law requirements, hearing coordination procedures, contact information, technology procedures, telephone hearings, etc.). Compile procedures for opening estates. Chris Sajdera (see Item 7 Page 24).
 - D. ALM's Newsletter Project. Create a newsletter to have more consistent communications about RPPTL events in local areas, i.e., reminders about upcoming RPPTL happenings and deadlines. Elizabeth Hughes, Rebecca Bell, Erin H. Christy (see Item 8 Page 26).
- X. Communications/Sponsorship. Please note that that all communications should be copied to Lawrence J. Miller (<u>lmiller@floridatax.com</u>) and Arlene Udick (<u>arlene@udicklaw.com</u>).
 - A. Each Lead ALM should have a listserv hyperlink for your circuit. Reminder that the listservs are not updated automatically but manually and we plan on providing updated listserv hyperlinks to Lead ALMs on or about October 15 (after new Florida Bar renewals and Florida Bar exam results) and January 15 of each year.
 - B. Tracy Eller will now be attending all ALMs meetings. Please be sure to get any and all information for upcoming events to Tracy for Tracy to add to social media posts. Additionally, forward all after event photos along with a brief blurb to Tracy as well.
- XI. Open Discussion.
- XII. Adjournment.

ALMs Meeting Minutes Thursday May 31, 2018 430 – 5:30 pm Tarpon/Sawyer Room Tradewinds Resort, St. Petersburg Beach

- I. **Welcome**-Katherine Frazier-Approval of the minutes and pass arounds roster.
- II. **Sponsors:** General sponsors
 - Stuart Title Tampa Center Commercial Services. Offer escrow agents, title agents & underwriting services. Also has an international division.
 - Renee Forbow Westcore Title:
 - Mora Smith with Phillips:
 - > If anyone knows of a sponsor, please let Willie know.
 - > If you use a sponsor, please tell them about RPPTL tie in.

III. Lead ALM Circuit Highlight.

- Stephen Kotler from 20th Circuit Update-Discussed event at Ava Maria Law School: Career day and local bar associations and statewide groups to attend & help them to network and learn about associations. Panel discussion also. ALMS had a table @ event.
- Noelle held a panel discussion in February and it was one-on-one Q&A especially regarding transitioning from law school to a job. All RPPTL members. In the Fall, the Circuit is having a social event to invite students & attorneys in the community.

IV. Project Updates

- Membership & Inclusion/Diversity Events-Sophia Lopez gave update: Compiling a list of minority bars and events so we can get more involved and attend. If we know of one, or belong to one, please forward information to Sophia.
- Membership & Inclusion/Law Students: Students introduced himself (Race Smith, FSU). We are also looking for ambassadors to partner with law students during RPPTL meetings.
- Membership & Inclusion/Mentoring: Elizabeth Hughes & Lynwood Arnold & she are working to put together a program to have RPPTL member to serve as a mentor to students & LLM students. General career advice, learn about practice area and help them learn the ropes for RPPTL

meetings. Three applications for people seeking mentors from St. Augustine.

- New Attendees-Susan Seaford-Initiative to have a new attendee welcome & tremendous volunteers from ALMS and RPPTL members. It was a great turnout and attendees felt welcome. Need to get word out to new people. Tip sheet was created
- Projects: new RPPTL member initiative: Reach out to new section members, law students, attorneys who didn't renew. Need to get the word out on benefits of the section. Personal correspondence from lead ALM helps.
- > **No Place Like Home**-Needs volunteers.
- Political Ties-Sandra is compiling the list. Asked to create a database to people who have connections sot state legislatures. Lead ALMS could ask section members to see if anyone has any connections. Goal is to have information for a legislative session.
- Local Rules-Lead ALMS will be getting a template chart on information to pull together local rules & Admin Orders. Second, is to get ALMS to help fill in the blanks.
- Customary Practice-Ashley is almost done with chart. Need 3-4 more county information.
- Miscellaneous Project Update: Gwen announced a veteran project. Special thanks to Old Republic Title Insurance agreed to offer five free searches for No Place Like Home initiative. Anabella Barbosa in Broward County & Ashley in Hillsborough, workshop on Friday June 22nd @ Legal Aide Services in Plantation, to draft Adv Directives for indigent Veterans.

V. Committee Liaison Updates:

- Information Technology & Communications-If you are hosting an event & want pics online (social media) send to Tracey Elle.
- Insurance & Surety Committee-Howard Cohen-Liability Insurance Law Committee-Series of conference call meeting on the 3rd Monday of each month, Fundamentals of Insurance (covering various topics). Today held a meeting (joint meeting) @ Tradewinds.
- Real Estate Structures & Taxation Committee-Kip Thorton-Real Estate Structure Committee-Business law proposed an amendment of a statute.

VI. Open Discussion

- Ben Diamond breakfast tomorrow morning. Donations appreciated. Friends of Ben Diamond sponsoring the breakfast.
- Jonathan Butler-Stetson event on April 3, 2018 first time homebuyer presentation panel. Looking at closing and things first time buyers need to know. Looking to make it an annual event. Also looking to do a fall initiative on Hanging Your Own Shingle.
- > Joint Committee on BitCoin was informative.
- Katherine's last meeting and Larry Miller will be the new director moving forward.

Meeting adjourned @ 5:30.

Submitted by: Kit Van Pelt

<u>RPPTL NEW ALMS FOR 2018 – 2019</u>

NAME	RE/PT	CIRCUIT	NEW
Akins, David J.	РТ	9	Yes
Duffey, Patrick J.	РТ	13	Yes
George, Joseph P., Jr.	РТ	11	Yes
Hearn, Frederick "Ricky"	РТ	13	Yes
Horstkamp, Julie A.	RP	12	Yes
Kromash, Keith	РТ	18	Yes
LaFemina, Rose M.	РТ	17	Yes
Madorsky, Marsha G.	РТ	11	Yes
Papanikos, Cristina	РТ	11	Yes
Santos, Angela K.	РТ	15	Yes
Seigel, Daniel Aaron	РТ	15	Yes
Villavicencio, Stephanie M.	РТ	11	Yes

THE SPECIFIC RESPONSIBILITIES OF THE AT LARGE MEMBERS

- 1. An ALM is <u>required</u> to attend the minimum number of Executive Council Meeting required by the Section's Bylaws to maintain that person's position on the Council.
- 2. An ALM is <u>required</u> to attend in person at least two (2) ALM meetings each Bar year.
- 3. An ALM is <u>required</u> to be active in at least one Section Committee.
- 4. An ALM is <u>expected</u> to be active in his or her Circuit's local Bar activities (especially those concerning any local real property, probate or trust law committees).
- 5. An ALM is <u>required</u> to be a communication conduit between the Section and the Section members in his or her Circuit. AN ALM must attempt to communicate Section news and activities to the Section members in his or her Circuit on a regular basis (at least after each Executive Council meeting). It is preferred if such communications are coordinated with the other ALMs in your Circuit. An ALM is also <u>encouraged</u> to know who the legislators and Florida Bar Governing Committee members are from their Circuit and should be available, if directed, to contact such legislators and members to communicate Section positions and requests.
- 6. An ALM is <u>expected</u> to contact new Section members in his or her Circuit, to let them know how they might get involved in the Section.
- 7. An ALM is <u>expected</u> to participate in ALM projects.
- 8. It is <u>required</u> that once each year, at a minimum, each Circuit hold an organization meeting to assign tasks and report back to the ALM Director the activities and projects that the Circuit has undertaken the past year.

ALMS COMMITTEE LIAISONS

REAL PROPERTY DIVISION COMMITTEES	ALM LIAISON
Attorney Loan Officer Conference	E. Ashley McRae
Commercial Real Estate	Anne Q. Pollack
Community Association Law Certification Review	Jane L. Cornett
Condominium & Planned Development	Robert M. Schwartz
Construction Law	Alexandra V. Rieman
Construction Law Certification Review Course	Alexandra V. Rieman
Construction Law Institute	Alexandra V. Rieman
Development and Land Use	Erin H. Christy
Insurance and Surety	Howard A. Cohen
Real Estate Certification Review Course	Robert M. Schwartz
Real Estate Leasing	PENDING
Real Estate Structures and Taxation	Kenneth E. Thornton
Real Property Finance and Lending	Lisa B. Van Dien
Real Property Litigation	Marsha G. Rydberg
Real Property Problems Study	Patrick F. Mize
Residential Real Estate & Industry Liaison (RREIL)	Frederick W. Jones
Title Insurance & Title Industry Liaison	Silvia B. Rojas
Title Issues & Title Standards	PENDING
PROBATE AND TRUST LAW DIVISION COMMITTEES	ALM LIAISON
Ad Hoc Guardianship Law Revision	PENDING
Ad Hoc Study Committee on Estate Planning Conflict of Interest	David R. Carlisle
Ad Hoc Study Committee on Due Process, Jurisdiction & Service of Process	David R. Carlisle

ALMS COMMITTEE LIAISONS

Asset Protection	Debra A. Faulkner
Attorney/Trust Officer Liaison Conference	Johnathan L. Butler
Elective Share Review	Eamonn W. Gunther
Estate & Trust Tax Planning	Carlos A. Batlle
Guardianship, Power of Attorney and Advanced Directives	Patrick F. Mize
IRAs, Insurance & Employee Benefits	Richard M. White, Jr.
Principal and Income	Ashley N. Duz
Probate and Trust Litigation	David J. Akins
Probate Law & Procedure	Jonathan A. Galler
Trust Law	Judy B. Bonevac
Wills, Trusts & Estates Certification Review Course	PENDING
STANDING COMMITTEES	ALM LIAISON
Fellows	PENDING
Information Technology and Communication	Michael A. Sneeringer
Membership and Inclusion	Amber Jade F. Johnson/Lynwood F. Arnold
Publications (Florida Bar Journal)	PENDING
Publications (Action line)	Arlene C. Udick
Professionalism & Ethics	Jonathan A. Galler

Lead ALMS List 2018-2019

1st Circuit: Colleen C. Sachs Colleen@dunlapshipman.com (Escambia Okaloosa, Santa Rosa, Walton) 2nd Circuit: Lynwood F. Arnold larnold@arnold-law.com (Franklin, Gadsden, Jefferson, Leon, Liberty, Wakulla) 3rd Circuit (by 8th Circuit): Richard M. White, Jr. RMW@GATE.NET (Columbia, Dixie, Hamilton, Lafayette, Madison, Suwannee, Taylor 4th Circuit: Christene M. Ertl cme@ansbacher.net (Clay, Duval, Nassau) 5th Circuit: Arlene C. Udick arlene@udicklaw.com (Citrus, Hernando, Lake, Marion, Sumter) 6th Circuit: Rebecca C. Bell Rebecca@delzercoulter.com (Pasco and Pinellas) 7th Circuit: Jerry B. Wells jbw@jerrybwells.com (St. Johns, Volusia, Flagler and Putnam) 8th Circuit: (also 3rd Circuit) Richard M. White, Jr. RMW@GATE.NET (Alachua, Baker, Bradford, Gilchrist, Levy and Union) 9th Circuit: Alex H. Hamrick alex.hamrick@wellsfargo.com (Orange and Osceola) 10th Circuit: Sandra G. Sheets sandra.sheets@gray-robinson.com (Hardee, Highlands and Polk)

11th Circuit: (also 16th Circuit) Stuart H. Altman (Dade)

saltman@fowler-white.com

Lead ALMS List 2018-2019

	cuit: Erin H. Christy DeSoto, Manatee and Sarasota)	echristy@williamsparker.com
	cuit: Thomas N. Henderson, III Hillsborough)	thenderson@hwhlaw.com
14 th Circ	cuit: PENDING (Bay, Calhoun, Gulf, Holmes, Jacks	son and Washington)
	cuit: Robert M. Schwartz Palm Beach)	Bob@RobertSchwartzPA.Com
S	cuit (by 11 th Circuit) Stuart Altman Monroe)	saltman@fowler-white.com
_	cuit: Robert B. Judd Broward)	rjudd@hojlaw.com
	cuit: Stephen Paul Heuston Brevard and Seminole)	heuston.legal@heustonlegal.com
	cuit: ane L. Cornett Indian River, Martin, Okeechobee a	jcornett@beckerlawyers.com and St. Lucie)
	cuit: Alan Stephen Kotler Charlotte, Collier, Glades, Hendry a	skotler@kotlerpl.com and Lee)

Florida Customary Practice – Commercial Transactions

1 Alachua □ Buyer □ Seller □ Other □
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2 Baker Buyer 2 Baker 3 Bay 3 Bay 3 Buyer 3 Buyer 4 Bradford 3 Buyer 4 Bradford 3 Buyer
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8 Charlotte 🗆 Buyer 🗆 Buyer
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9 Citrus 🗆 Buyer 🖓 Buyer
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1 Collier Buyer
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1 DeSoto Buyer Buyer
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☐ Other ☐ Other

ALMs Agenda (Breakers July 2018)

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1	<mark>Dixie</mark>	🗌 Buyer	🗌 Buyer	
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1	<mark>Duval</mark>	🗌 Buyer	□ Buyer	
		Seller	☑ Seller	
		Other	\Box Other	
1	Escambia	□ Buyer	🗹 Buyer	
		☑ Seller	□ Seller	
		□ Other	□ Other	
1	Flagler	□ Buyer	□ Buyer	
		☑ Seller	☑ Seller	
		□ Other	□ Other	
1	<mark>Franklin</mark>	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		□ Other	Other	
<mark>1</mark>	Gadsden	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		□ Other	Other	
2	Gilchrist	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		Contenence	Other	
2	Glades	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		Other	Other	
2	Gulf	□ Buyer	□ Buyer	
		☑ Seller	☑ Seller	
		□ Other	□ Other	
2	Hamilton	🗌 Buyer	🗆 Buyer	
		Seller	Seller	
		Other	Other	
<mark>2</mark>	Hardee	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		Other	Other	
<mark>2</mark>	Hendry 	🗌 Buyer	🗌 Buyer	
		Seller	Seller	
		Other	Other	
<mark>2</mark>	Hernando	🗌 Buyer	🗌 Buyer	
		□ Seller	□ Seller	

		□ Other	□ Other	
2	Highlands	🗌 Buyer	Buyer	
		□ Seller	Seller	
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2	Hillsborough	□ Buyer	□ Buyer	
		☑ Seller	☑ Seller	
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2	Holmes	Buyer	Buyer	Buyer
		Seller		
2	Indian Discon		Other	
3	Indian River		Buyer	
3	Jackson	Other	Other	
5	Jackson	□ Buyer ☑ Seller	□ Buyer ☑ Seller	
		\square Other	\Box Other	
3	Jefferson	Buyer		
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<mark>3</mark>	Lafayette			
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3	Lake	🗹 Buyer	🗆 Buyer	
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3	Lee	□ Buyer	□ Buyer	
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4	Manatee	☐ Buyer ☑ Seller □ Other	☐ Buyer ☐ Seller ☐ Other	
4	Marion	□ Buyer ☑ Seller □ Other	□ Buyer ☑ Seller □ Other	
4	Martin	☐ Buyer ☐ Seller ☐ Other	☐ Buyer ☐ Seller ☐ Other	
4	Miami-Dade	□ Buyer ☑ Seller □ Other	☑ Buyer □ Seller □ Other	
4	Monroe	□ Buyer □ Seller □ Other	 Buyer Seller Other 	
<mark>4</mark>		Buyer Seller Other	 Buyer Seller Other 	
4	Okaloosa	□ Buyer☑ Seller□ Other	☑ Buyer□ Seller□ Other	
4	Okeechobee	☐ Buyer ☐ Seller ☐ Other	□ Buyer □ Seller □ Other	
4	Orange	□ Buyer ☑ Seller □ Other	 □ Buyer ☑ Seller □ Other 	
4	Osceola	□ Buyer ☑ Seller □ Other	□ Buyer☑ Seller□ Other	
5	Palm Beach	□ Buyer☑ Seller□ Other	□ Buyer☑ Seller□ Other	
5	Pasco	□ Buyer ☑ Seller □ Other	□ Buyer☑ Seller□ Other	
5	Pinellas	□ Buyer ☑ Seller	□ Buyer ☑ Seller	

		□ Other	□ Other	
5	Polk	Buyer	🗌 Buyer	
		Seller	□ Seller	
		□ Other	□ Other	
5	Putnam	Buyer	🗖 Buyer	
		Seller	□ Seller	
		Other	□ Other	
5	Santa Rosa	□ Buyer	🗹 Buyer	
		☑ Seller	□ Seller	
		□ Other	□ Other	
5	Sarasota	□ Buyer	☑ Buyer	
		☑ Seller	□ Seller	
		□ Other	□ Other	
5	Seminole	🗖 Buyer	🗖 Buyer	
		Seller	Seller	
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<mark>5</mark>	<mark>St. John's</mark>	🗖 Buyer	🗖 Buyer	
		Seller	Seller	
		Context Instant Instan	□ Other	
<mark>5</mark>	St. Lucie	🗖 Buyer	🗖 Buyer	
		Seller	Seller	
		Context Other	Other	
6	Sumter	🗹 Buyer	□ Buyer	
		□ Seller	☑ Seller	
	~	□ Other	□ Other	
6	Suwannee	Buyer	🗖 Buyer	
		Seller	Seller	
		Context Instant Instan	Other	
<mark>6</mark>	Taylor	Buyer	🗖 Buyer	
		Seller	Seller	
		Context Instant Instan	Contraction Other	
<mark>6</mark>	Union	Buyer	🗖 Buyer	
		Seller	Seller	
		Contension Office Contension	Contraction Other	
6	Volusia	□ Buyer	⊠ Buyer	Mike Pyle indicates Buyer pay for
		☑ Seller		Owner's. Need to verify it's not
		□ Other	□ Other	Seller pay.
6	<mark>Wakulla</mark>	Buyer	🗆 Buyer	
		Seller	Seller	

Florida Customary Practice – Commercial Transactions

		Other	Contract Other	
6	Walton	□ Buyer ☑ Seller	⊠ Buyer □ Seller	
		\Box Other	\Box Other	
6	Washington	□ Buyer☑ Seller□ Other	□ Buyer ☑ Seller □ Other	

Note: While every contract is different and subject to negotiation, the above is a general tool of which party <u>typically</u> pays.

Local Court and Judiciary Procedures

Circuit	Appointment of Guardian	Appointment of Personal Representative	Civil Emergency Matters	Eminent Domain	Foreclosure	Judicial Sales	Lis Pendens	Probate Division Assignments	Probate Emergency Matters	Residential Evictions	Writs of Possession	Mandatory Forms/ Checklists
1st												
2nd												
3rd												
4th												
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6th												
7th												
8th												
9th												
10th												
11th												
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13th												
14th												
15th				Eminent Domain - Quick Take Proceedings								
16th												
17th										Residential Eviction Summons		
18th												Summary Administration
19th												
20th												

ALMs Agenda (Breakers July 2018)

The RPPTL _____ Circuit E-Newsletter

Proposed Legislation in Progress:

- Real Property:
- Probate & Trust:

Upcoming _____ Circuit Events (Your Circuit):

Upcoming _____ Circuit Events (Surrounding Circuit(s)):

Upcoming CLEs:

Opportunities To Be Further Involved:

- Fellowship Program -- The application for the Section's Fellowship Program is attached. It is due ______. The Fellowship Program is a great way to become involved in the Section if you are younger than 38 or have been admitted to the bar for fewer than 12 years. More information and a fillable application is on the Section's website (www.rpptl.org).
- If you are interested in publishing an article, the next deadline for ActionLine is ______, and articles are due for The Florida Bar Journal the first of every month.

Upcoming RPPTL Executive Council Meetings:

• (Date) (Location) (Link to New Attendee Tips?)