



**Westin Excelsior  
Rome, Italy**

**Saturday, September 29, 2018  
7:45 am**

**BRING THIS AGENDA TO THE MEETING**

**NOTE: The Agenda will be posted to the  
meeting APP.**

Real Property, Probate and Trust Law Section  
Executive Council Meeting  
Westin Excelsior  
Rome, Italy  
September 29, 2018

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**Agenda**

**Note: Agenda Items May Be Considered on a Random Basis**

- I. [Presiding](#) — Debra L. Boje, *Chair*
- II. [Attendance](#) — Sarah Swaim Butters, *Secretary*
- III. [Minutes of Previous Meeting](#) — Sarah Swaim Butters, *Secretary*  
  
Motion to approve the minutes of June meeting of Executive Council held at The Tradewinds Resort, St. Petersburg Beach, Florida **pp. 8 -35**
- IV. [Chair's Report](#) — *Debra L. Boje, Chair*
  1. Recognition of Guests
  2. Recognition of Meeting Sponsors
  3. Milestones
  4. Upcoming Executive Council Meetings **p.36**
- V. [Liaison with Board of Governors Report](#) — Steven W. Davis
- VI. [Chair-Elect's Report](#) — *Robert S. Freedman, Chair-Elect*
- VII. [Treasurer's Report](#) — *Wm. Cary Wright, Treasurer*  
  
Statement of Current Financial Conditions. **p.37**
- VIII. [Director of At-Large Members Report](#) — *Lawrence Jay Miller, Director*
- IX. [CLE Seminar Coordination Report](#) — *Steven H. Mezer (Real Property) and John C. Moran (Probate & Trust), Co-Chairs p.*
- X. [General Standing Division](#) — *Robert S. Freedman, General Standing Division Director and Chair-Elect*

**Informational Items:**

1. **2019-2020 Budget** – *Wm. Cary Wright, Treasurer*

2. **Sponsorship Committee** – *Jason J. Quintero and Eric C. Virgil, Co-Chairs*
3. **Amicus Coordination** – Kenneth B. Bell, Gerald B. Cope, Jr., Robert W. Goldman and John W. Little, III, Co-Chairs

XI. **Probate and Trust Law Division Report** – *William T. Hennessey, Director*

XII. **Real Property Law Division Report** — *Robert S. Swaine, Division Director*

XIV. **Probate and Trust Law Division Committee Reports** — *William T. Hennessey, Director*

1. **Ad Hoc Guardianship Law Revision Committee** – David C. Brennan, Chair; Nicklaus J. Curley, Stacey B. Rubel and Sancha Brennan Whynot, Co-Vice Chairs
2. **Ad Hoc Committee on Electronic Wills** – Sarah S. Butters, Chair; Angela McClendon Adams, Thomas M. Karr, Co-Vice-Chairs
3. **Ad Hoc Florida Business Corporation Action Task Force** – Brian C. Sparks and M. Travis Hayes, Co-Chairs
4. **Ad Hoc Study Committee On Professional Fiduciary Licensing** – Angela McClendon Adams and Darby Jones, Co-Chairs
5. **Ad Hoc Study Committee on Estate Planning Conflict of Interest** - William T. Hennessey, Chair; Paul Edward Roman, Vice-Chair
6. **Ad Hoc Study Committee on Due Process, Jurisdiction & Service of Process** – Barry F. Spivey, Chair; Sean W. Kelley and Christopher Q. Wintter, Co-Vice Chairs
7. **Asset Protection** – Brian M. Malec, Chair; Richard R. Gans and Michael A. Sneeringer, Co-Vice-Chairs
8. **Attorney/Trust Officer Liaison Conference** – Tattiana Patricia Brenes-Stahl, Chair; Tae Kelley Bronner, Stacey L. Cole (Corporate Fiduciary), Patrick C. Emans, Gail G. Fagan and Mitchell A. Hipsman, Co-Vice Chairs
9. **Elective Share Review Committee** – Lauren Young Detzel and Charles I. Nash, Co-Chairs; Jenna Rubin, Vice-Chair
10. **Estate and Trust Tax Planning** – Robert L. Lancaster, Chair; Tasha K. Pepper-Dickinson and Jenna G. Rubin, Co-Vice Chairs
11. **Guardianship, Power of Attorney and Advanced Directives** – Nicklaus Joseph Curley, Chair; Brandon D. Bellew, Darby Jones, and Stacey Beth Rubel Co-Vice Chairs

12. **IRA, Insurance and Employee Benefits** – L. Howard Payne Chair; Charles W. Callahan, III and Alfred J. Stashis, Co-Vice Chairs
13. **Liaisons with ACTEC** – Elaine M. Bucher, Bruce M. Stone, and Diana S.C. Zeydel
14. **Liaisons with Elder Law Section** – Charles F. Robinson and Marjorie Ellen Wolasky
15. **Liaisons with Tax Section** – Lauren Young Detzel, William R. Lane, Jr., and Brian C. Sparks
16. **Principal and Income** – Edward F. Koren and Pamela O. Price, Co-Chairs, Joloyon D. Acosta and Keith Braun, Co-Vice Chairs
17. **Probate and Trust Litigation** – John Richard Caskey, Chair; James R. George and R. Lee McElroy, IV, Co-Vice Chairs
18. **Probate Law and Procedure** – M. Travis Hayes, Chair; Amy B. Beller, Theodore S. Kypreos and Cristina Papanikos, Co-Vice Chairs
19. **Trust Law** – Angela McClendon Adams, Chair; Tami Foley Conetta, Jack A. Falk, Mary E. Karr, and Matthew H. Triggs, Co-Vice Chairs
20. **Wills, Trusts and Estates Certification Review Course** – Jeffrey S. Goethe, Chair; J. Allison Archbold, Rachel Lunsford, and Jerome L. Wolf, Co-Vice Chairs

**XIII. Real Property Law Division Reports** — *Robert S. Swaine, Director*

1. **Attorney-Loan Officer Conference** – Robert G. Stern, Chair; Kristopher E. Fernandez and Wilhelmina F. Kightlinger, Co-Vice Chairs
2. **Commercial Real Estate** – Adele Ilene Stone, Chair; E. Burt Bruton, R. James Robbins, Jr. and Martin A. Schwartz, Co-Vice Chairs
3. **Condominium and Planned Development** – William P. Sklar, Chair; Alexander B. Dobrev, Vice Chair
4. **Condominium and Planned Development Law Certification Review Course** – Richard D. DeBoest, II and Sandra Krumbein, Co-Chairs
5. **Construction Law** – Scott P. Pence, Chair; Reese J. Henderson, Jr. and Neal A. Sivyer, Co-Vice Chairs
6. **Construction Law Certification Review Course** – Melinda S. Gentile and Deborah B. Mastin, Co-Chairs; Elizabeth B. Ferguson and Gregg E. Hutt, Co-Vice Chairs
7. **Construction Law Institute** – Sanjay Kurian, Chair; Diane S. Perera, Jason J. Quintero and Bryan R. Rendzio, Co-Vice Chairs.

8. **Development & Land Use Planning** – Julia L. Jennison, Chair; Colleen C. Sachs, Vice Chair
9. **Insurance & Surety** – Scott P. Pence and Michael G. Meyer, Co-Chairs; Frederick R. Dudley, Katherine L. Heckert and Mariela M. Malfeld, Co-Vice Chairs
10. **Liaisons with FLTA** – Alan K. McCall and Melissa Jay Murphy, Co-Chairs; Alan B. Fields and James C. Russick, Co-Vice Chairs
11. **Real Estate Certification Review Course** – Manuel Farach, Chair; Lynwood F. Arnold, Jr., Martin S. Awerbach and Brian W. Hoffman, Co-Vice Chairs
12. **Real Estate Leasing** – Brenda B. Ezell, Chair; Richard D. Eckhard and Christopher A. Sajdera, Co-Vice Chairs
13. **Real Estate Structures and Taxation** – Michael A. Bedke, Chair; Deborah Boyd and Lloyd Granet, Co-Vice Chairs
14. **Real Property Finance & Lending** – David R. Brittain and Richard S. McIver, Co-Chairs; Bridget M. Friedman and Robert G. Stern, Co-Vice Chairs
15. **Real Property Litigation** – Marty J. Solomon, Chair; Amber E. Ashton, Manuel Farach and Michael V. Hargett, Co-Vice Chairs
16. **Real Property Problems Study** – Lee A. Weintraub, Chair; Mark A. Brown, Jason Ellison, Stacy O. Kalmanson, and Susan Spurgeon, Co-Vice Chairs
17. **Residential Real Estate and Industry Liaison** – Salome J. Zikakis, Chair; Raul P. Ballaga, Louis E. “Trey” Goldman, James Marx and Nicole M. Villarroel, Co-Vice Chairs
18. **Title Insurance and Title Insurance Liaison** – Brian W. Hoffman, Chair; Cynthia A. Riddell, Vice Chair
19. **Title Issues and Standards** – Christopher W. Smart, Chair; Robert M. Graham, Brian W. Hoffman, Melissa Sloan Scaletta and Karla J. Staker, Co-Vice Chairs

**XV. General Standing Committee Reports** — *Robert S. Freedman, General Standing Division Director and Chair-Elect*

1. **Ad Hoc Florida Bar Leadership Academy** – Kristopher E. Fernandez and Brian C. Sparks, Co-Chairs; J. Allison Archbold, Vice Chair
2. **Amicus Coordination** – Kenneth B. Bell, Gerald B. Cope, Jr., Robert W. Goldman and John W. Little, III, Co-Chairs
3. **Budget** – Wm. Cary Wright, Chair; Linda S. Griffin, Tae Kelley Bronner, and Pamela O. Price, Co-Vice Chairs
4. **CLE Seminar Coordination** – Steven H. Mezer and John C. Moran, Co-Chairs;

- Alexander H. Hamrick, Hardy L. Roberts, III, Paul E. Roman (Ethics), Silvia B. Rojas, Yoshimi O. Smith, Co-Vice Chairs
5. **Convention Coordination** – Linda S. Griffin, Chair; Angela McLendon Adams, Tae Kelley Bronner and Darby Jones, Co-Vice Chairs
  6. **Fellows** – Jennifer Jones Bloodworth and Benjamin Diamond, Co-Chairs; Joshua Rosenberg and Angel Santos, Co-Vice Chairs
  7. **Florida Electronic Filing & Service** – Rohan Kelley, Chair
  8. **Information Technology** – Neil Barry Shoter, Chair; Erin Christy, Alexander B. Dobrev, Jesse Friedman, Keith S. Kromash, William A. Parady, Hardy Roberts, and Michael Sneeringer, Co-Vice Chairs
  9. **Homestead Issues Study** – Jeffrey S. Goethe (Probate & Trust) and J. Michael Swaine (Real Property), Co-Chairs; Michael J. Gelfand, Melissa Murphy and Charles Nash, Co-Vice Chairs
  10. **Law School Mentoring & Programing** – Lynwood F. Arnold, Jr., Chair; Phillip A. Baumann, Guy Storms Emerich and Elizabeth Hughes, Co-Vice Chairs
  11. **Legislation** – Jon Scuderi (Probate & Trust) and S. Katherine Frazier (Real Property), Co-Chairs; Theodore S. Kypreos and Robert Lee McElroy, IV (Probate & Trust), Manuel Farach and Art Menor (Real Property), Co-Vice Chairs
  12. **Legislative Update (2018)** – Stacy O. Kalmanson, Chair; Brenda Ezell, Michael Travis Hayes, Thomas Karr, Kymberlee Curry Smith, Jennifer S. Tobin and Salome J. Zikakis, Co-Vice Chairs
  13. **Legislative Update (2019)** – Stacy O. Kalmanson and Thomas Karr, Co-Chairs; Brenda Ezell, Theodore Stanley Kypreos, Jennifer S. Tobin and Salome J. Zikakis, Co-Vice Chairs
  14. **Liaison with:**
    - a. **American Bar Association (ABA)** – Edward F. Koren, Julius J. Zschau, George J. Meyer and Robert S. Freedman
    - b. **Clerks of Circuit Court** – Laird A. Lile
    - c. **FLEA / FLSSI** – David C. Brennan and Roland D. “Chip” Waller
    - d. **Florida Bankers Association** – Mark T. Middlebrook
    - e. **Judiciary** – Judge Linda R. Allan, Judge Jaimie R. Goodman, Judge Hugh D. Hayes, Judge Margaret Hudson, Judge Janis B. Keyser, Judge Maria M. Korvick, Judge Norma S. Lindsey, Judge Celeste H. Muir, Judge Robert Pleus, Jr., Judge Morris Silberman, Judge Mark Speiser, Judge Richard J. Suarez, Judge Patricia V. Thomas, and Judge Jessica J. Ticktin
    - f. **Out of State Members** – Nicole Kibert Basler, John E. Fitzgerald, Jr., and Michael P. Stafford
    - g. **TFB Board of Governors** – Steven W. Davis
    - h. **TFB Business Law Section** – Gwynne A. Young and Manuel Farach
    - i. **TFB CLE Committee** – Steven H. Mezer

- j. **TFB Council of Sections** –Debra L. Boje and Robert S. Freedman
- k. **TFB Pro Bono Committee** – Melisa Van Sickle
  
- 15. **Long-Range Planning** – Robert S. Freedman, Chair
- 16. **Meetings Planning** – George J. Meyer, Chair
- 17. **Membership and Inclusion** – Annabella Barboza and Brenda Ezell, Co-Chairs; S. Dresden Brunner, Vinette Dawn Godelia, and Kymberlee Curry Smith
- 18. **Model and Uniform Acts** – Bruce M. Stone and Richard W. Taylor, Co-Chairs
- 19. **Professionalism and Ethics**— Gwynne A. Young, Chair; Alexander B. Dobrev, Andrew B. Sasso, and Laura Sundberg, Co-Vice Chairs
- 20. **Publications (ActionLine)** – Jeffrey Alan Baskies and Michael A. Bedke, Co-Chairs (Editors in Chief); George D. Karibjanian, Sean M. Lebowitz, Paul E. Roman and Lee Weintraub, Co-Vice Chairs.
- 21. **Publications (Florida Bar Journal)** – Jeffrey S. Goethe (Probate & Trust) and Douglas G. Christy (Real Property), Co-Chairs; Brian Sparks (Editorial Board – Probate & Trust), Cindy Basham (Editorial Board – Probate & Trust), Michael A. Bedke (Editorial Board – Real Property), Homer Duvall (Editorial Board – Real Property) and J. Allison Archbold (Editorial Board), Co-Vice Chairs
- 22. **Sponsor Coordination** – Jason J. Quintero and J. Eric Virgil, Co-Chairs; Patrick C. Eman, Marsha G. Madorsky, Deborah L. Russell, J. Michael Swaine, and Arlene C. Udick, Co-Vice Chairs
- 23. **Strategic Planning** – Debra L. Boje and Robert S. Freedman, Co-Chairs

**XVI. [Adjourn:](#)** Motion to Adjourn.

**MINUTES**  
**Of the Real Property, Probate and Trust Law Section**  
**Executive Council Meeting**  
**Saturday, July 28, 2018**  
**The Breakers**  
**Palm Beach, FL**

**I. Call to Order** — Debra L. Boje, *Chair*

The meeting was called to order at approximately 9:45 am by Chair Debra L. Boje, by and through the assistance of an obnoxious crossing guard whistle gifted to her by Section Administrator, Mary Ann Obos. Ms. Boje welcomed all to the meeting at the Breakers and complimented the wonderful Legislative Update Seminar that most members attended the day prior. The Chair then called on the Section Secretary, Sarah Butters.

**II. Attendance** — Sarah Butters, *Secretary*

Ms. Butters announced that the attendance sheet/roster would be circulating and was easily visible on hot pink colored paper. The attendance roster is attached to these Minutes as Addendum A.

Ms. Butters also reminded the Executive Council that the Florida Bar and RPPTL Section dues are due on August 15. If a member does not pay both the FL Bar and Section dues, they cannot serve on the Executive Council and will be automatically deactivated, so it is critical to get your dues in on time.

**III. Minutes of Previous Meeting** — Sarah Butters, *Secretary*

Ms. Butters entertained a Motion to Amend the Minutes of the June 2, 2018 meeting of Executive Council held at The Tradewinds Resort, St. Petersburg Beach, Florida, to reflect that Charles “Chuck” Wohlust was in attendance at that meeting. With that amendment, upon a Motion duly made and seconded, the Minutes were approved.

**IV. Chair's Report** — Debra L. Boje, *Chair*

1. Recognition of Guests – The Chair began with a recognition of guests, including  
Dori Foster-Morales with the Florida Bar, Board of Governors
2. Recognition of General Sponsors and Friends of the Section.

A. General Sponsors: The Chair thanked our General Sponsors, including:

The Attorney’s Title Fund Services, LLC.  
Management Planning, Inc.  
JP Morgan  
Old Republic National Title Insurance  
Wells Fargo Private Bank  
Westcor Land Title  
First American Title

Guardian Trust  
Phillips  
Stout Risius Ross Inc.  
Fidelity National Title Group  
WFG National Title Insurance Co.  
The Florida Bar; and  
The Executive Committee Meeting's sponsor, Stewart Title.

The Chair then called on David Shanks with Stewart Title to say a few words. Mr. Shanks greeted the Council and announced that they were merging with Fidelity Title in the first quarter of 2019. Stewart Title has had great success in the last year and the last 3 quarters are the best they have ever had. They attribute that success, in part, to the fact that they are the only company in Florida that is currently writing title in Mexico. So please keep them in mind if you have clients developing projects or resorts in that area.

B. Friends of the Section: The Chair thanked the Friends of the Section, including:

Business Valuation Analysts, LLC  
Corporate Valuation Services, Inc.  
Fiduciary Trust International of the South  
Jones Lowry  
North American Title Insurance Company  
Valley National Bank  
Valuation Services, Inc.  
CATIC  
Wilmington Trust

3. Recognition of Special Event Sponsors: The Chair thanked the Special Events Sponsors, including:

Kravit Estate Appraisal- Hospitality Room Sponsor  
Bessemer Trust – Breakers Bungalow Sponsor

4. Milestones - The Chair next announced some special milestones reached by members of the Section, including:

Sandy Diamond won the Florida Bar President's Award for Merit for her hard work on behalf of the Bar in monitoring the Constitutional Review Commission.

Lynwood Arnold and Stewart Marshall, III who each won Meritorious Service Awards for their service on the Professional Ethics Committee.

Peggy Rolando was specially recognized for her work on the inaugural year of the Condominium and Planned Development Law Certification Committee.

5. Upcoming Executive Council Meetings – The Chair then reviewed the upcoming meeting schedule for the 2018-2019 Bar year.

Out-of-State Meeting in Rome, Italy - September 26 - 30, 2018 – The next meeting

is the Out-of-State Meeting in Rome, Italy – So far there are about 106 people registered to attend. Please follow the Facebook page for additional info and be on the look-out for an email from Mary Ann Obos with details as well.

Orlando – Four Seasons Hotel – December 5 - 9, 2018 – Room block will open in end of September. Thursday night will begin with an outdoor reception on site. The Friday night event will be at Epcot and will include a candlelight procession for the holiday season, followed by dinner and then a firework show outside of the Italy section of Epcot. There will be a family friendly event on Saturday so the Chair encouraged everyone to please plan to stay over that night as well.

The Chair encouraged the members to mark their calendars for the meeting at Amelia Island Plantation – March 13 – 17, 2019, which is likely during some school spring breaks so it will be a very family friendly meeting.

And finally, the Chair reminded everyone that the Saturday evening event in Palm Beach was bowling tonight. The Executive Committee all wore customized bowling shirts compliments of the Chair, made from a questionable fabric that may or may not result in the whole Committee breaking out in rashes. Antibiotics are on pre-order.

The Chair also made a couple of meeting related announcements:

A. December meeting: The Chair reminded everyone that the Executive Council Agenda for the December meeting must go out prior to Thanksgiving holiday, so please be on high alert to get any agenda items ready earlier than normal.

B. Hotel Registrations: The hotel blocks for future meetings will not be released in advance of the meeting registration. Instead, members will have to register for the meeting before they will receive a code to allow them to register for rooms in the block.

6. Action Item – A motion was made and duly seconded to recognize G. Thomas Smith as an honorary Section member in recognition of his outstanding contributions in the field of real property. The Motion passed unanimously.

#### **V. Liaison with Board of Governors Report** — Steven W. Davis

The Chair then introduced Steven W. Davis as the new Section Liaison to the Board of Governors. Mr. Davis explained that the BOG met Thursday and Friday, where they approved all regular cycle and out of cycle rule proposals.

Mr. Davis also reported on the BOGs discussion of what is required for a practitioner to hold themselves out as a “specialist”. The BOG is considering a rule that would allow someone who is not Board Certified to nonetheless hold themselves out as an expert or specialist if they meet an objectively verifiable standard illustrating their extensive training and expertise in an area of law.

Mr. Davis noted that the BOG is addressing whether the Rules of Judicial Administration should include a parental leave policy for lead counsel on a case. The Judicial Administration Committee of the Florida Bar voted against amending the rules to include any formal policy.

The BOG disagrees, however, and is proposing a rule that would permit a continuance for parental leave where the moving counsel is lead counsel on a case and there is no showing of prejudice to the parties.

Mr. Davis also announced the release of a new CLE service of the FL Bar called Legal Fuel, which should provide substantial resources to FL Bar members.

The Chair also recognized Dori Foster-Morales, Sandy Diamond, Laird Lile, Andy Sasso, John Stewart, Melissa VanSickle and Steven Davis for their service to the Bar and the Section.

#### **VI. Chair-Elect's Report — *Robert S. Freedman, Chair-Elect***

Mr. Freedman announced that the meeting calendar for his year as Chair will not come out until December. The venues have been selected but he wants to wait to announce those locations until after the current Chair's Out-of-State trip.

Mr. Freedman also announced that there has been poor communication about Section events and themes as between the Section and spouses/guests. The Section intends to create a Facebook page (RPPTLs +1 or RPPTLs Plus One) where spouses/guests can better locate information about meeting. The page will be managed by Sheri Freedman. Cary Wright passed around a sign up list for those who wish to be included.

Mr. Freedman reported on his attendance at the Section Leadership Conference at FL Bar last week. The Section is held in high esteem for the way the Section manages its CLEs, meetings and legislative items.

Mr. Freedman also asked the members to make the following notes regarding miscellaneous matters:

A. Events – Please register early for events. The Section needs an accurate count for events so we can better plan food and meeting rooms.

B. Hotels cancellations – Do not go through the hotel to cancel your room if you are in the hotel block. Instead, please call Mary Ann Obos so we can re-book with someone on the waitlist. If not, the Section may get stuck paying for rooms we would otherwise be able to fill through our waitlist.

C. Board certifications – The RPPTLs have 4 certifications within the Section. Please encourage your partners and colleagues to sit for these certifications.

#### **VII. Treasurer's Report — *Wm. Cary Wright, Treasurer***

Treasurer Wright announced that the current finances through May 31, 2018 are in Agenda packet. The Section is in good financial position. Projected year end looks like we should have a surplus of income of about \$150,000. A subcommittee of The Budget Committee met this weekend to begin to discuss the budget for the Chair-Elect's year.

#### **VIII. Director of At-Large Members Report — *Lawrence Jay Miller, Director***

Larry Miller, the new Director of the At Large Members, was not in attendance so Kathrine Frazier gave the report as the outgoing ALMs Director. The ALMs are working on a couple of

projects:

A. Collection of local rules for each circuit – Theo Kypreos and Chris Sajdera are spearheading this project. They can use assistance in some circuits, so please answer the call if they reach out to you.

B. Template or sample communication – A number of ALMs requested a sample template that they could blast out to section members. Ideally, it would include sections on hot topics, new legislation, case law alerts and similar information. ALMs Liz Hughes, Erin Christy and Rebecca Bell will be spearheading this project.

More information about other ALMs projects can be found on the ALMs page of the RPPTL website.

**IX. [CLE Seminar Coordination Report](#)** — *Steven H. Mezer (Real Property) and John C. Moran (Probate & Trust), Co-Chairs*

John Moran gave a report about upcoming CLEs, which are listed in the Agenda. For example, the Attorney Trust Officer meeting is coming up in August and registration is open. The line-up is fantastic. Also, there are a bunch of upcoming webinars that are available online.

John Moran also announced the new “Practice Series” webinar project. The Section plans to build an online library of practice guides for practitioners and judges on specific topics that will be evergreen to any practitioner. Topics will include things like POAs, probate adversarial proceedings, dealing with the IRS, Lost Wills, Condo Arbitration, FARBAR Contracts... John Moran encouraged everyone to send suggested topics and speakers that they would like to include.

John mentioned that he already got one suggestion from Amy Beller, who would like some probate mediation specific seminar that could be used for both certified and non-certified mediators handling probate cases.

Chair Boje next asked that all the new Executive Council Members announce themselves and their division since this was the first meeting for some new members:

Amber Ashton, RP  
Katie Heckert RP  
Ricky Hearn PT  
Patrick Duffey PT  
Mariela Malfeld, RP

Angela Santos PT  
Hon. Margaret “Midge” Hudson  
Christina Papinikos PT  
Julie Horstkamp RP

**X. General Standing Division — Robert S. Freedman, General Standing Division  
Director and Chair-Elect**

The Chair-Elect first explained that during the last legislative session, the Gunster firm had a conflict of interest as a result of the firm's lobbying representation of Notarize, Inc. Currently, the proposed remote notarization legislation is not something the Section and Notarize, Inc. are adverse to each other on, so it is not necessary for members of the Gunster firm to recuse themselves at this time.

**Action Items:**

**1. Ad Hoc Remote Notarization Committee - E. Burt Bruton, Chair**

Motion (A) to adopt as a Section position proposed legislation on the remote notarization of instruments; (B) to find that such legislative position is within the purview of the RPPTL Section; and (C) to expend Section funds in support of the proposed legislative position.

Burt Bruton introduced draft legislation for a remote notarization bill. Some technical tweaks were addressed since the informational item proposed at the St. Pete Executive Council meeting. Not all stakeholders are in agreement with the proposed draft, but Burt explained that it is necessary for the Section to approve a proposal so that the Section has a clear legislative position and instructions for the Section's lobbying team.

In discussion of the proposal, Angela Adams spoke first. Angela was a member of the Ad Hoc Remote Notarization Committee and asked that the Section acknowledge Burt for his very hard work and leadership on the proposal.

Angela next explained that there are protections related to the execution of powers of attorney contained in the current proposed remote notarization bill, but not in the proposed e-wills bill. Angela moved to amend the Section's proposed legislative position so it will reflect the need for these same safeguards to be included in any bill that is filed.

Specifically, Angela moved to amend the Ad Hoc Remote Notarization Committee's motion "to adopt as a Section position proposed legislation on the remote notarization of instruments" and "Proposed Wording of Position for Official Publication" in the Committee's Legislative Position Request Form to add the following to the end of each position statement:

“,including requirements that witnesses and notaries be physically present for the effectiveness of:

1. super powers enumerated in § 709.2202(1) and
2. banking and investment powers enumerated in § 709.2208(1) and (2) in powers of attorney.”

In support of the motion, Angela explained/argued that:

A. These standards and protections for powers of attorney are expressly stated in the proposed bill at pages 96-97 (starting at line 1311) of the Agenda, and if the position is approved, it will be approved based upon these protections in the proposed bill. Therefore, it is appropriate that the position be consistent with these standards and protections in the proposed bill being considered. In other words, if 2/3 of the Executive Council is in favor of the protections for powers of attorney contained in the proposed bill, than why not put those protections in the Section's position statement?

B. If, in the future, a conflict prevents the members of the Gunster firm from participating in discussions regarding amendments to the proposed bill, then at least 3 members of the Executive Committee, all of whom are from the Probate and Trust Division of the Section, will be unable to participate in those discussions. Therefore, it is important for the remaining members of the Executive Committee to understand that these standards and protections are important to the Probate and Trust members of the Executive Council.

Burt explained that the current proposal does not allow online notarization of DPOAs with superpowers. If we are going to amend the position to explicitly state that, Burt prefers that it not be on our published position because it leaves us little wiggle room to support changes in the legislation without having to go back to the BOG for approval of an amended legislative position.

Bruce Stone concurred with most of Angela's concerns. More specifically, Bruce specified that he would like to see an explicit requirement that DPOAs and their superpowers have live witnesses because unlike wills which can be voided before the damage is done, it is too difficult to undo the damage that could be done by fraudulent DPOAs.

Fletch Belcher noted that if there will be an amendment to the E-wills proposal to require live witnessing and notaries on all super power DPOAs, and if that proposal passes, Angela's amendment won't be necessary. Fletch's concern was that our lobbyists and the Executive Committee have clear instructions that they will not concede on the live witnessing requirement for DPOAs and that the public be aware of the Section's position as well.

Rob Freedman explained to Fletch that it was not the Real Property Division's intention in drafting the legislative position to leave off the witnessing requirements to allow itself room to disregard those witnessing requirements later as a negotiating tool.

Deb Boyd expressed FTLA's concerns that there be an acknowledgement on the document about whether there was a live or remote witness to the document. Burt explained that the proposed notary bill currently requires that but other states would not necessarily have that requirement. Deb Boyd expressed concern that

in order for an out of state notarized document to be recorded in Florida, she would like to see Florida require this acknowledgment. Burt explained that this is an issue that needs to be addressed in the universal recognition of out of state notarizations.

Bill Hennessey spoke to clarify that the existing Section position already opposes remote witnessing of DPOAs, so there is no need to do that in the remote notary position. That existing position, however, does not speak to remote notarization, so we may need to address that specifically if that is going to be a Section position.

Chair Boje noted that the current e-wills position only applies to a “testator” not a “principal” on a DPOA.

Burt suggested we defer the remote notary vote until we know whether the proposed e-wills position passes. Based upon that suggestion, the Motion on the remote notary proposal was deferred temporarily to work out the issues raised.

After some discussion among the commenting persons, Bill Hennessey explained that some compromise language had been reached regarding the e-wills and remote notarization positions. Specifically, Angela withdrew her earlier motion and moved to amend Part A of the Ad Hoc Remote Notarization Committee's motion to add the following language to the end of that part and to the "Proposed Wording of Position for Official Publication" in the Committee's Legislative Position Request Form:

“, including limitations on the effectiveness of certain powers of attorney executed online.”

The revised motion was accepted as a friendly amendment. Accordingly, the motion of the Ad Hoc Remote Notarization Committee, as amended, was:

Motion (A) to adopt as a Section position proposed legislation on the remote notarization of instruments, including limitations on the effectiveness of certain powers of attorney executed online.

The approved wording of the position for official publication was: Supports legislation authorizing remote online notarization of certain documents; using audio-video technology meeting specified standards; including limitations on the effectiveness of certain powers of attorney executed online.

For clarification purposes, the powers being referred to in the position are the super powers enumerated in F.S. §709.2202 and the banking and investment powers enumerated in F.S. §709.2208. This language will amend the position and be included in the white paper.

Burt indicated it will be a friendly amendment so no vote needed. Motion then passed unanimously with no opposition.

## **Informational Items:**

### **1. Homestead Issues Study – Jeffrey S. Goethe and J. Michael Swaine, Co-Chairs**

Proposed legislation to amend Section 719.103(25), Florida Statutes, to provide much needed clarification and guidance regarding the inurement of the constitutional exemption from creditors' claims upon the death of a Florida resident who owns a leasehold cooperative unit.

Jeff Goethe explained this informational item was intended to clarify certain judicial opinions that appeal to create confusion about whether interests in co-ops are interests in real property and should get the same protections as homesteads. The proposal has been circulated to various committees and stakeholders with no substantive changes or objections to the proposal. No discussion or comments were received.

### **2. Fellows – Benjamin Frank Diamond and Jennifer Jones Bloodworth, Co-Chair**

Ben Diamond thanked the Fellows Committee for their hard work this year. Ben explained that this year, the Committee received over 60 terrific applicants, making the decision that much more difficult but exciting. Ben then introduced the 2018-20 RPPTL Fellows Class:

Samah Abukodeir PT from Miami

Chris Barr RP from Panama City Beach

Denise Cazobon PT from Naples

Gabrielle Jackson RP from West Palm Beach

### **3. Legislation – S. Katherine Frazier and Jon Scuderi, Co-Chairs**

No report.

### **4. Legislative and Case Law Update - Stacy Ossin Kalmanson, Chair**

Chair-Elect Freedman asked for a round of applause for Stacy Kalmanson and her committee for their excellent program the day before. Stacy also recognized and thanked her committee and program speakers.

The Update had 488 attendees in person, 33 online, 13 exhibitors and 2 phone charger sponsors. The next Legislative Update will be July 28, 2019.

### **5. Liaison with Clerks of the Court – Laird A. Lile**

In full disclosure, Laird reminded the Council that this was his first report as a "Former Clerk of Court". Due to a vacancy in his local circuit, Laird served as Clerk for

Court for Collier County for 4 exhausting days, until Gov. Scott appointed a replacement. Laird is working on his memoirs.

Laird gave an update on discussions with Clerks and their point person Tom Hall (former Florida Supreme Court's Clerk of Court) regarding will deposits, including e-will deposits.

Laird also reported on certain title company requests regarding recording of certain probate documents. The Section is working with these stakeholders to find a consensus on what should be recorded.

**6. Professionalism and Ethics – Gwynne A. Young, Chair**

Gwynne gave a report on the committee's consideration of the ABA Model Rules 4-1.14 regarding representing clients with diminished capacity. The Committee previously tried to propose this in about 2003, but the Public Interest Law Section had some concerns. There is renewed interest in this issue after Diana Zeydel and Jim George presented on the issue at a recent seminar.

**7. Publications (ActionLine) – Jeffrey Alan Baskies and Michael A. Bedke, Co-Chairs**

Mike Bedke gave a status on upcoming editions and articles being drafted for ActionLine. Jeff and Mike are always looking for publications. Jason Ellison is working on an article related to FAR/Bar contracts. They encouraged others to look at recent cases or legislation and write about them.

**8. Publications (Florida Bar Journal) – Jeffrey S. Goethe (Probate & Trust) and Douglas G. Christy (Real Property), Co-Chairs**

Doug Christy and Jeff Goethe gave an update. Their committee is also looking for articles for publications. They aim to publish something from the Section every month or every other month. They often alternate between dirt and death topics. The publication schedule has been modified a bit but please keep submissions coming.

**9. Sponsorship Committee – Jason J. Quintero and Eric C. Virgil, Co-Chairs**

Eric Virgil gave report on new sponsor CATIC becoming a Friend of the Section. Coral Gables Trust is now sponsoring the Probate Law Committee. Bessemer Trust sponsored the Cabanas today at the Breakers.

Chair-Elect Freedman offered a couple meeting notes:

A. Meeting App – Neal Shoter gave report on the new app. The app seems to be much more user friendly than old app. Info about sponsors and committee materials is more easily accessible. Please send any web updates or problems and they will be happy to assist with loading materials or making additions.

B. Uniform Acts - Richard Taylor gave an update on a variety of uniform acts, including Uniform Fiduciary Income and Principal Act, Revised Uniform Law on Notarial Act, amendments to certain UCC articles, draft of e-wills, a draft registration of Canadian Money Act, and a draft act regarding public disclosures of intimate materials (revenge porn).

C. Thank you: Deb Boje also offered a thank you to Mary Ann, Hilary and their moms for all they do for our Section.

**10. Strategic Planning Meeting – Debra L. Boje and Robert S. Freedman, Co-Chairs**

No report.

**XI. [Real Property Law Division Report](#) — Robert S. Swaine, Division Director**

Bob Swaine began by thanking the Real Property Division Committee sponsors.

**Action Items:**

**1. Real Property Problems Study Committee – Lee Weintraub, Chair**

Motion to: (A) adopt as a Section position proposed legislation amending Section 712.03, clarifying how rights are preserved by reference in a deed and Section 712.04, which would address the judicial exception created by *Save Calusa Trust v. St. Andrews Holdings, Ltd.*, 193 So. 3d 910 (Fla. 3d DCA 2016) for restrictions imposed in connection with governmental zoning, development, or building approvals; (B) find that such legislative position is within the purview of the RPPTL Section; and (C) expend Section funds in support of the proposed legislative position.

Chris Smart introduced the action item. Two non-substantive changes are proposed since the legislation was proposed as an information item. First, the word “reimposed” at line 27, is to be replaced with the word “preserved”. And second, a change has been made to address recent changes to MRTA that carve out government imposed restrictions related to the *Calusa* case.

The motion was made and passed with no discussion; no opposition.

**2. Real Property Problems Study Committee – Lee Weintraub, Chair**

Motion to: (A) adopt as a Section position proposed legislation amending Section 270.11(2)(b) pertaining to the automatic release of the right of entry for local government, water management districts, and other agencies of the state consistent with the automatic release provisions applicable to the Board of Trustees of the Internal Improvement Trust Fund and the State Board of Education; (B) find that such legislative position is within the purview of the RPPTL Section; and (C) expend Section funds in support of the proposed legislative position.

Sylvia Rojas presented the motion and indicated that a number of stakeholders were contacted. Some approved and others had no opposition.

The motion was made and passed with no discussion; no opposition.

**Information Item:**

1. **Title Issues and Title Standards Committee** — *Christopher W. Smart, Chair*

Consideration of proposed legislation to create Section 95.2311, F.S., which would establish a method of correcting obvious typographical errors in legal descriptions contained in deeds of real property.

Chris Smart explained the proposal, which is intended to be a curative act to correct obvious typographical errors in deeds and other legal descriptions without need to file a law suit to secure these corrections. No comments or discussion.

**XII. Probate and Trust Law Division Report** – *William T. Hennessey, Director*

Bill Hennessey thanked the Probate and Trust Law Committee sponsors.

**Action Items:**

1. **Guardianship, Power of Attorney, and Advance Directives Committee-**  
*Nicklaus J. Curley, Chair*

Motion to (A) adopt as a Section legislative position support for amendment to Florida Statutes, including Florida Statutes §744.331, amending the current statutory procedure for dismissal of a petition to determine incapacity to require a unanimous finding by the examining committee that a person is not incapacitated; (B) find that such legislative position is within the purview of the RPPTL Section; and (C) expend Section funds in support of the proposed legislative position.

Nick Curley explained that currently the court has to dismiss a guardianship if 2/3 of the examining committee comes back with a finding of capacity. The court cannot hear from the dissenting member or consider other evidence of incapacity. This proposal would allow the court, in its discretion, to hold a hearing prior to dismissal.

Bill Hennessey clarified that the original motion as it appears in the agenda has been slightly modified, and that modification is contained in the Supplemental Agenda.

Michael Gelfand complimented Nick on his committee's work and on his father's recent investiture to the Palm Beach Circuit bench. Michael commented that guardianship can be abusive and a "imprison without bars", and questioned whether this proposal would make it easier for someone to abuse the process.

Nick responded that this proposal just grants the judge the discretion to hold a hearing, rather than being mandated to dismiss without any hearing of contrary evidence. Bill Hennessey noted that the submission of additional/contrary evidence would be done by a verified pleading and that the judge would decide whether the evidence presented was sufficient to conduct further proceedings.

The motion made, as revised by the supplemental agenda, was made and passed without opposition.

Nick thanked Judge Speiser and Josh Rosenberg for their hard work on this proposal over the last two years.

**2. Guardianship, Power of Attorney, and Advance Directives Committee-**  
*Nicklaus J. Curley, Chair*

Motion to (A) adopt as a Section legislative position support for amendment to Florida Statutes, including Florida Statutes § 744.1097, to specifically address venue for the appointment of a guardian in minor guardianships proceedings; (B) find that such legislative position is within the purview of the RPPTL Section; and (c) expend Section funds in support of the proposed legislative position.

Nick explained the proposal to clarify venue where the ward is a child because the current statute only addresses venue for filing guardianships for “incapacitated persons”, which does not in the definition include minors.

The motion was made and passed unanimously, without opposition or further discussion.

**3. Ad Hoc Electronic Wills Study Committee- Sarah Butters, Chair**

Motion to (A) adopt as a Section legislative position support for proposed legislation relating to electronic wills and to the testamentary aspects of electronic revocable trusts that retains the requirement that two subscribing witnesses sign in the physical presence of the testator and provides for protections to ensure the integrity, security, and authenticity of an electronically signed will or trust; (B) find that such legislative position is within the purview of the RPPTL Section; and (c) expend Section funds in support of the proposed legislative position.

Bill Hennessey explained legislation for the Committee Chair, Sarah Butters, who was too occupied taking the meeting minutes. Bill explained the facts of the *Castro* case. In that case, a death bed, electronically signed will on a tablet, which was signed in the physical presence of two witnesses was ultimately admitted to probate. The consensus in committee was that this type of will raises no concerns from a fraud perspective and ought to be admitted to probate. Accordingly, the proposed legislation tries to mirror the safeguards provided by “in the presence” witnessing, while accommodating the convenience of electronic signatures.

Bill Hennessey explained some of the key policy/substantive provisions being incorporated in the proposal, including self-proving/authenticated copies of electronic wills, a requirement that the electronic record be stored in a tamper evident manner, deposit of e-wills with clerks, and the application of the statute to revocable trusts with testamentary aspects.

These key protections requiring live witnesses and safeguards for storage of e-will records are consistent with the Section's current position to oppose e-will legislation if it does not include these safeguards.

The Motion was duly made and passed without further discussion or opposition.

**XVI. Adjourn:** Motion to Adjourn.

Chair Boje then reminded the Council of the poolside bungalows and snacks being provided by Bessemer Trust. The meeting was then adjourned.

**ATTENDANCE ROSTER**  
**REAL PROPERTY PROBATE & TRUST LAW SECTION**  
**EXECUTIVE COUNCIL MEETINGS**  
**2018-2019**

Executive Committee	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Boje, Debra Lynn Chair		√	√				
Freedman, Robert S. Chair-Elect & General Standing Div. Director	√		√				
Hennessey, William Probate & Trust Law Div. Director		√	√				
Swaine, Robert S. Real Property Div. Director	√		√				
Butters, Sarah S. Secretary		√	√				
Wright, Wm. Cary Treasurer	√		√				
Frazier, S. Katherine Legislation Co-Chair Real Property	√		√				
Scuderi, Jon Legislation Co-Chair Probate		√	√				
Moran, John C. CLE Co-Chair Probate		√	√				
Mezer, Steven H. CLE Co-Chair Real Property	√		√				
Miller, Lawrence J. Director, At Large Members		√					
O'Malley, Andrew <b>Immediate Past Chair</b>	√						

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Acosta, Jolyon Delphin		√	√				
Adams, Angela M.		√	√				
Akins, David J.		√	√				
Allan, Hon. Linda R.							
Altman, Stuart H.		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Archbold, J. Allison		√	√				
Arnold, Jr., Lynwood	√		√				
Aron, Jerry E. <b>Past Chair</b>	√		√				
Ashton, Amber E.	√		√				
Awerbach, Martin S.	√		√				
Bald, Kimberly A.		√	√				
Ballaga, Raul P.	√						
Barboza, Annabella	√		√				
Basham, Cindy		√					
Baskies, Jeffrey		√	√				
Battle, Carlos A.		√	√				
Baumann, Phillip A.		√	√				
Beales, III, Walter R. <b>Past Chair</b>	√		√				
Bedke, Michael A.	√		√				
Belcher, William F. <b>Past Chair</b>		√	√				
Bell, Kenneth B.	√						
Bell, Rebecca Coulter		√					
Beller, Amy		√	√				
Bellew, Brandon D.		√	√				
Ben-Moussa, Shari D.	√						
Bloodworth, Jennifer J.	√		√				
Bonevac, Judy B.		√	√				
Bowers, Elizabeth A.		√	√				
Boyd, Deborah	√		√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Braun, Keith Brian		√	√				
Brenes-Stahl, Tattiana		√	√				
Brennan, David C. <b>Past Chair</b>		√	√				
Brittain, David R.	√		√				
Bronner, Tae K.		√	√				
Brown, Mark A.	√		√				
Brown, Shawn	√		√				
Brunner, S. Dresden		√					
Bruton, Jr., Ed Burt	√		√				
Bucher, Elaine M.		√	√				
Butler, Johnathan		√	√				
Callahan, Chad W. III		√					
Carlisle, David R.		√					
Caskey, John R.		√	√				
Christiansen, Patrick <b>Past Chair</b>	√		√				
Christy, Douglas G. III	√		√				
Christy, Erin Hope	√		√				
Cohen, Howard Allen	√		√				
Cole, Stacey L.		√	√				
Conetta, Tami F.		√	√				
Cope, Jr., Gerald B.	√		√				
Cornett, Jane Louise	√						
Costello, T. John, Jr.		√					
Curley, Nick		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Davis, Steven W.	√		√				
DeBoest II, Richard Dearborn	√		√				
Detzel, Lauren Y.		√					
Diamond, Benjamin F.		√	√				
Diamond, Sandra F. <b>Past Chair</b>		√					
Direktor, Kenneth S.	√						
Dobrev, Alex	√		√				
Dollinger, Jeffrey	√						
Dribin, Michael <b>Past Chair</b>		√	√				
Dudley, Frederick R.	√						
Duffey, Patrick J.		√	√				
Duvall, III, Homer	√		√				
Duz, Ashley Nichole		√	√				
Eckhard, Rick	√						
Ellison, Jason M.	√		√				
Emans, Patrick C		√	√				
Emerich, Guy S.		√	√				
Ertl, Christene M.	√		√				
Ezell, Brenda B.	√		√				
Fagan, Gail		√	√				
Falk, Jr., Jack A.		√	√				
Farach, Manuel	√						
Faulkner, Debra Ann		√					
Felcoski, Brian J. <b>Past Chair</b>		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Ferguson, Elizabeth B.	√		√				
Fernandez, Kristopher E.	√		√				
Fields, Alan B.	√						
Fitzgerald, Jr., John E.		√					
Flood, Gerard J.		√	√				
Foreman, Michael L.		√	√				
Friedman, Bridget	√		√				
Friedman, Jesse B.		√	√				
Galler, Jonathan		√	√				
Gans, Richard R.		√	√				
Gelfand, Michael J <b>Past Chair</b>	√		√				
Gentile, Melinda S.	√						
George, James		√	√				
George, Joseph P.	√		√				
Godelia, Vinette D.	√						
Goethe, Jeffrey S.		√	√				
Goldman, Louis "Trey"	√		√				
Goldman, Robert W. <b>Past Chair</b>		√	√				
Goodall, Deborah P. <b>Past Chair</b>		√	√				
Goodman, Hon. Jaimie Randall							
Graham, Robert M.	√		√				
Granet, Lloyd	√		√				
Griffin, Linda S.		√	√				
Grimsley, John G. <b>Past Chair</b>		√					

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Grosso, Jennifer		√					
Gunther, Eamonn W.		√	√				
Gurgold, Eric		√	√				
Guttmann, III, Louis B <b>Past Chair</b>	√		√				
Hamrick, Alexander H		√	√				
Hancock, Patricia J.	√						
Hargett, Michael Van	√		√				
Harriett-Wartenberg, Stephanie		√					
Hayes, Hon. Hugh D.			√				
Hayes, Michael Travis		√	√				
Hearn, Frederick "Ricky"		√	√				
Hearn, Steven L. <b>Past Chair</b>		√	√				
Heckert, Katie	√		√				
Henderson, Jr., Reese J.	√		√				
Henderson, III, Thomas N.	√						
Heuston, Stephen P.		√	√				
Hipsman, Mitchell Alec		√	√				
Hoffman, Brian W.	√		√				
Horstkamp, Julie A.	√		√				
Hudson, Hon. Margaret "Midge"			√				
Hughes, Elizabeth		√	√				
Hutt, Gregg Evan	√		√				
Isphording, Roger O. <b>Past Chair</b>		√					
Jennison, Julia Lee	√		√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Johnson, Amber Jade		√	√				
Jones, Darby		√	√				
Jones, Frederick W.	√		√				
Jones, Patricia P.H.	√		√				
Judd, Robert B.		√	√				
Kalmanson, Stacy O.	√		√				
Kangas, Michael Ryan		√					
Karibjanian, George		√					
Karr, Mary E.		√	√				
Karr, Thomas M.		√	√				
Kayser, Joan B. <b>Past Chair</b>		√					
Keane, Cristin C.	√						
Kelley, Rohan <b>Past Chair</b>		√					
Kelley, Sean W.		√					
Kelley, Shane		√	√				
Keyser, Hon. Janis Brustares							
Khan, Nishad	√		√				
Kibert-Basler, Nicole	√		√				
Kightlinger, Wilhelmina F.	√						
Kinsolving, Ruth Barnes, <b>Past Chair</b>	√						
Koren, Edward F. <b>Past Chair</b>		√	√				
Korvick, Hon. Maria							
Kotler, Alan Stephen		√	√				
Kromash, Keith S.		√					

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Krumbein, Sandra Elizabeth	√		√				
Kurian, Sanjay	√		√				
Kypreos, Theodore S.		√	√				
LaFemina, Rose M.		√	√				
Lancaster, Robert L.		√	√				
Lane, Jr., William R.		√	√				
Larson, Roger A.	√		√				
Leathe, Jeremy Paul		√					
Lebowitz, Sean M.		√	√				
Leebrick, Brian D.	√						
Lile, Laird A. <b>Past Chair</b>		√	√				
Lindsey, Hon. Norma							
Little, III, John W.	√		√				
Lopez, Sophia A.		√					
Lunsford, Rachel Albritton		√					
Madorsky, Marsha G.		√					
Malec, Brian		√	√				
Malfeld, Mariela	√		√				
Marger, Bruce <b>Past Chair</b>		√					
Marshall, III, Stewart		√	√				
Marx, James A.		√	√				
Mastin, Deborah Bovarnick	√		√				
McCall, Alan K.	√		√				
McElroy, IV, Robert Lee		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
McIver, Richard	√		√				
McRae, Ashley E.	√		√				
Melanson, Noelle M.		√	√				
Menor, Arthur J.	√						
Meyer, George F. <b>Past Chair</b>	√		√				
Meyer, Michael	√		√				
Middlebrook, Mark T.		√	√				
Mize, Patrick		√					
Moule, Jr., Rex Everet		√					
Muir, Hon. Celeste H.			√				
Murphy, Melissa J. <b>Past Chair</b>	√		√				
Nash, Charles I.		√					
Neukamm, John B. <b>Past Chair</b>	√		√				
Nguyen, Hung V.		√	√				
Papanikos, Cristina		√	√				
Parady, William A.	√		√				
Payne, L. Howard		√	√				
Pence, Scott P.	√		√				
Pepper-Dickinson, Tasha K.		√	√				
Perera, Diane	√						
Pilotte, Frank		√	√				
Pleus, Jr., Hon. Robert							
Pollack, Anne Q.	√		√				
Price, Pamela O.		√					

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Pyle, Michael A.		√					
Quintero, Jason	√		√				
Redding, John N.	√		√				
Renzio, Bryan	√						
Reynolds, Stephen H.		√					
Riddell, Cynthia	√						
Rieman, Alexandra V.		√	√				
Robbins, Jr., R.J.	√		√				
Roberts, III, Hardy L.	√						
Robinson, Charles F.		√					
Rodstein, David William	√						
Rojas, Silvia B.	√		√				
Rolando, Margaret A. <b>Past Chair</b>	√		√				
Roman, Paul E.		√	√				
Rosenberg, Joshua		√	√				
Rubel, Stacy		√	√				
Rubin, Jenna		√	√				
Russell, Deborah L.		√					
Russick, James C.	√		√				
Rydberg, Marsha G.	√		√				
Sachs, Colleen C.	√		√				
Santos, Angela		√	√				
Sajdera, Christopher	√		√				
Sasso, Andrew	√		√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Scaletta, Melissa Sloan	√		√				
Schwartz, Martin	√		√				
Schwartz, Robert M.	√		√				
Schwinghamer, Jamie		√	√				
Seaford, Susan	√						
Seigel, Daniel A.	√		√				
Sheets, Sandra G.		√	√				
Sherrill, Richard		√	√				
Shoter, Neil B.	√		√				
Silberman, Hon. Morris							
Silberstein, David M.		√					
Sivyer, Neal Allen	√		√				
Sklar, William P.	√		√				
Smart, Christopher W.	√		√				
Smith, Kymberlee C.	√		√				
Smith, G. Thomas <b>Past Chair/Honorary Member</b>	√						
Smith, Yoshimi O.		√	√				
Sneeringer, Michael		√	√				
Solomon, Marty	√						
Sparks, Brian C.		√	√				
Speiser, Hon. Mark A.							
Spivey, Barry F.		√	√				
Spurgeon, Susan K.	√		√				
Stafford, Michael P.		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Staker, Karla J.	√		√				
Stashis, Alfred Joseph		√	√				
Stern, Robert G.	√		√				
Stone, Adele I.	√		√				
Stone, Bruce M. <b>Past Chair</b>		√	√				
Suarez, Hon. Richard							
Sundberg, Laura K.		√	√				
Swaine, Jack Michael <b>Past Chair</b>	√		√				
Taylor, Richard W.	√		√				
Thomas, Hon. Patricia			√				
Thornton, Kenneth E.	√		√				
Ticktin, Hon. Jessica J.							
Tobin, Jennifer S.	√		√				
Triggs, Matthew H.		√	√				
Tschida, Joseph John	√		√				
Tucker, Kristine L.		√					
Udick, Arlene C.	√		√				
Van Dien, Lisa Barnett	√		√				
Van Lenten, Jason Paul		√	√				
Van Pelt, Kit E.		√	√				
VanSickle, Melissa	√		√				
Villarroel, Nicole Marie	√		√				
Villavicencio, Stephanie		√					
Virgil, Eric		√	√				

Executive Council Members	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Waller, Roland D. <b>Past Chair</b>	√		√				
Weintraub, Lee A.	√		√				
Wells, Jerry B.		√					
White, Jr., Richard M.		√	√				
Whynot, Sancha B.	√		√				
Wilder, Charles			√				
Williams, Margaret A.	√		√				
Williamson, Julie Ann <b>Past Chair</b>	√						
Wintter, Christopher		√					
Wohlust, Gary Charles		√	√				
Wolasky, Marjorie E.		√					
Wolf, Jerome L.		√	√				
Young, Gwynne A.		√	√				
Zeydel, Diana S.C.		√	√				
Zikakis, Salome J.		√	√				
Zschau, Julius J. <b>Past Chair</b>	√		√				

RPPTL Fellows	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Abukodeir, Samah		√	√				
Barr, James C.	√						
Cazobon, Denise		√	√				
Coleman, Jami		√					
de la Riva, Lian		√	√				
Jackson, Gabrielle	√		√				
McDermott, Daniel L.		√	√				

RPPTL Fellows	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Peregrin, Jacqueline J.	√		√				

Legislative Consultants	Division		July 28 Breakers	Sept. 29 Italy	Dec. 8 Orlando	March 16 Amelia	June 1 Clearwater
	RP	P&T					
Brown, French		√	√				
Dobson, Michael	√		√				
Dunbar, Peter M.	√		√				
Edenfield, Martha Jane	√	√	√				
Finkbeiner, Brittany		√	√				
Roth, Cari L.			√				

Guest sign in	Division	
	RP	P&T
Alaimo, Marve Ann		√
Behar, Jacobeli J.		√
Broadwater, Carolyn	√	
Davis, Steven BOG Liaison	√	
Finchum, Travis		√
Foster-Morales, Dori BOG	n/a	n/a
Groover, Lea Anne		√
Hall, Thomas		√
Noll, R. Dale		√

# Real Property, Probate & Trust Law Section

## 2018-2019 Executive Council Meetings

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DATES	LOCATIONS
<i>July 25-28, 2018</i>	<b>Executive Council Meeting &amp; Legislative Update</b> The Breakers Palm Beach, Florida Room Rate: \$225/ Deluxe King
<i>September 26-30, 2018</i>	<b>Out of State Executive Council Meeting</b> The Westin Excelsior Rome, Italy (with pre-event in Florence, Italy-TBA) Standard Room: Euro 325.00 Euro (single) Euro 335.00 (double) - includes Breakfast
<i>December 5-9, 2018</i>	<b>Executive Council Meeting</b> Four Seasons Hotel Orlando, Florida Room Rates: Standard Guest Rooms: \$285 (single/double occupancy) Park View Rooms: \$399 (single/double occupancy)
<i>March 13-17, 2019</i>	<b>Executive Council Meeting</b> Omni Resorts Amelia Island Plantation Room Rates: Hotel/Villa Guestrooms \$259 (single/double occupancy) One Bedroom Oceanfront Villa: \$299 (single/double occupancy) Two Bedroom Oceanfront Villa: \$399.00 (single/double occupancy) Three Bedroom Oceanfront Villa: \$459 (single/double occupancy)
<b><i>May 30 - June 1, 2019</i></b>	<b>Executive Council Meeting &amp; Convention</b> Opal Sands Resort Clearwater Beach, Florida Room Rate: \$239 Deluxe Gulf Front (single/double occupancy)

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NOTE: All Reservations will have strict cancellation policies that will result in forfeiture of deposits and/or payment in full for rooms cancelled. Please carefully review cancellation policies before booking your room. When the link opens up for booking more details will be provided.



**RPPTL Financial Summary from Separate Budgets**  
2018-2019 [July 1 - August 31] YEAR  
TO DATE REPORT

**General Budget**

**YTD**

Revenue	\$ 1,014,189
Expenses	\$ (300,969)
<b>Net:</b>	<b>\$ 713,221</b>

**Attorney Loan Officer**

**YTD**

Revenue	\$ 7,875
Expenses	\$ (1,078)
<b>Net:</b>	<b>\$ 6,797</b>

**CLI**

**YTD**

Revenue	\$ 200
Expenses	\$ (64)
<b>Net:</b>	<b>\$ 136</b>

**Trust Officer Conference**

Revenue	\$ 271,989
Expenses	\$ (34,630)
<b>Net:</b>	<b>\$ 237,359</b>

**Legislative Update**

Revenue	\$ 38,084
Expenses	\$ (23,400)
<b>Net:</b>	<b>\$ 14,684</b>

**Convention**

Revenue	\$ -
Expenses	\$ -
<b>Net:</b>	<b>\$ -</b>

**Roll-up Summary (Total)**

Revenue:	\$ 1,332,337
Expenses	\$ (360,141)
<b>Net Operations</b>	<b>\$ 972,196</b>

<b>Beginning Fund Balance:</b>	<b>\$ 1,823,975</b>
<b>Current Fund Balance (YTD):</b>	<b>\$ 2,796,171</b>
<b>Projected June 2018 Fund Balance</b>	<b>\$ 1,678,493</b>

THE FLORIDA BAR  
Real Property, Probate and Trust Law General  
For the Two Months Ending Friday, August 31, 2018

	This Month <u>August</u>	YTD <u>2019</u>	FY 18-19 <u>Budget</u>	Budget <u>% Utilized</u>
3001-Annual Fees	\$82,800	\$604,200	\$597,000	101.21%
3002-Affiliate Fees	\$840	\$8,180	\$4,400	185.91%
<b>Total Fee Revenue</b>	<b>\$83,640</b>	<b>\$612,380</b>	<b>\$601,400</b>	<b>101.83%</b>
3301-Registration-Live	\$3,490	\$56,130	\$170,000	33.02%
<b>Total Registration Revenue</b>	<b>\$3,490</b>	<b>\$56,130</b>	<b>\$170,000</b>	<b>33.02%</b>
3351-Sponsorships	(\$12,500)	\$228,750	\$180,000	127.08%
3391 Section Profit Split	\$40,530	\$76,347	\$250,000	30.54%
3392-Section Differential	\$2,160	\$3,480	\$27,000	12.89%
<b>Other Event Revenue</b>	<b>\$30,190</b>	<b>\$308,577</b>	<b>\$457,000</b>	<b>67.52%</b>
3561-Advertising	\$3,735	\$7,803	\$8,000	97.54%
<b>Advertising &amp; Subscription Revenue</b>	<b>\$3,735</b>	<b>\$7,803</b>	<b>\$8,000</b>	<b>97.54%</b>
3899-Investment Allocation		\$29,300	\$101,383	28.90%
<b>Non-Operating Income</b>	<b>\$</b>	<b>\$29,300</b>	<b>\$101,383</b>	<b>28.90%</b>
<b>Total Revenue</b>	<b>\$121,055</b>	<b>\$1,014,189</b>	<b>\$1,337,783</b>	<b>75.81%</b>
4131-Telephone Expense			\$2,000	0.00%
4134-Web Services	\$3,188	\$5,508	\$75,000	7.34%
4301-Photocopying			\$300	0.00%
4311-Office Supplies	\$84	\$84	\$700	11.99%
<b>Total Staff &amp; Office Expense</b>	<b>\$3,271</b>	<b>\$5,591</b>	<b>\$78,000</b>	<b>7.17%</b>
5051-Credit Card Fees	\$899	\$2,502	\$4,000	62.55%
5101-Consultants		\$10,000	\$120,000	8.33%
5121-Printing-Outside	\$9,979	\$21,264	\$118,500	17.94%
5199-Other Contract Services	\$1,713	\$2,673	\$10,000	26.73%
<b>Total Contract Services</b>	<b>\$12,590</b>	<b>\$36,438</b>	<b>\$252,500</b>	<b>14.43%</b>
5501-Employee Travel	\$450	\$738	\$12,000	6.15%
5531-Board/Off/Memb Travel		\$594	\$35,000	1.70%
<b>Total Travel</b>	<b>\$450</b>	<b>\$1,332</b>	<b>\$47,000</b>	<b>2.83%</b>
6001-Post 1st Class/Bulk	\$45	\$110	\$2,000	5.49%
6311-Mtgs General Meeting	\$152	\$41,750	\$550,000	7.59%
6325-Mtgs Hospitality			\$35,000	0.00%
6399-Mtgs Other			\$19,000	0.00%
6401-Speaker Expense			\$7,500	0.00%

**THE FLORIDA BAR**  
**Real Property, Probate and Trust Law General**  
**For the Two Months Ending Friday, August 31, 2018**

	<u>This Month</u>	<u>YTD</u>	<u>FY 18-19</u>	<u>Budget</u>
	<u>August</u>	<u>2019</u>	<u>Budget</u>	<u>% Utilized</u>
6451-Committee Expense	\$446	\$1,186	\$100,000	1.19%
6531-Brd/Off Special Project			\$35,000	0.00%
6599-Brd/Off Other			\$11,000	0.00%
7001-Grant/Award/Donation	\$1,000	\$1,000	\$28,500	3.51%
7011-Scholarship/Fellowship	\$1,065	\$4,047	\$27,000	14.99%
7999-Other Operating Exp			\$5,000	0.00%
<b>Total Other Expense</b>	<b>\$2,708</b>	<b>\$48,093</b>	<b>\$820,000</b>	<b>5.86%</b>
8021-Section Admin Fee	\$209,169	\$209,513	\$207,500	100.97%
8101-Printing In-House	\$2	\$2	\$1,000	0.15%
<b>Total Admin &amp; Internal Expense</b>	<b>\$209,170</b>	<b>\$209,514</b>	<b>\$208,500</b>	<b>100.49%</b>
9692-Transfer Out-Council of Sections			\$300	0.00%
<b>Total InterFund Transfers Out</b>	<b>\$</b>	<b>\$</b>	<b>\$300</b>	<b>0.00%</b>
<b>Total Expense</b>	<b>\$228,189</b>	<b>\$300,969</b>	<b>\$1,406,300</b>	<b>21.40%</b>
<b>Net Income</b>	<b>(\$107,134)</b>	<b>\$713,221</b>	<b>(\$68,517)</b>	<b>(1040.94%)</b>

THE FLORIDA BAR  
Attorney Loan Officer  
For the Two Months Ending Friday, August 31, 2018

	<u>This Month</u> <u>August</u>	<u>YTD</u> <u>2019</u>	<u>FY 18-19</u> <u>Budget</u>	<u>Budget</u> <u>% Utilized</u>
3301-Registration-Live	\$625	\$625	\$12,000	5.21%
<b>Total Registration Revenue</b>	<b>\$625</b>	<b>\$625</b>	<b>\$12,000</b>	<b>5.21%</b>
3341-Exhibit Fees	\$750	\$750	\$5,000	15.00%
3351-Sponsorships	\$6,500	\$6,500	\$5,000	130.00%
<b>Other Event Revenue</b>	<b>\$7,250</b>	<b>\$7,250</b>	<b>\$10,000</b>	<b>72.50%</b>
<b>Total Revenue</b>	<b>\$7,875</b>	<b>\$7,875</b>	<b>\$22,000</b>	<b>35.80%</b>
5051-Credit Card Fees	\$28	\$123	\$500	24.56%
<b>Total Contract Services</b>	<b>\$28</b>	<b>\$123</b>	<b>\$500</b>	<b>24.56%</b>
5501-Employee Travel			\$2,000	0.00%
5571-Speaker Travel		\$712		0.00%
<b>Total Travel</b>	<b>\$</b>	<b>\$712</b>	<b>\$2,000</b>	<b>35.58%</b>
6321-Mtgs Meals			\$25,000	0.00%
6341-Mtgs Equip Rental			\$5,000	0.00%
6401-Speaker Expense			\$2,000	0.00%
7999-Other Operating Exp			\$3,725	0.00%
<b>Total Other Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$35,725</b>	<b>0.00%</b>
8011-Administration CLE			\$10,000	0.00%
8121-Graphics & Arts	\$94	\$94		0.00%
8171-Course Approval Fee	\$150	\$150	\$150	100.00%
<b>Total Admin &amp; Internal Expense</b>	<b>\$244</b>	<b>\$244</b>	<b>\$10,150</b>	<b>2.40%</b>
<b>Total Expense</b>	<b>\$272</b>	<b>\$1,078</b>	<b>\$48,375</b>	<b>2.23%</b>
<b>Net Income</b>	<b>\$7,603</b>	<b>\$6,797</b>	<b>(\$26,375)</b>	<b>(25.77%)</b>

THE FLORIDA BAR  
Real Property Construction Law Institute  
For the Two Months Ending Friday, August 31, 2018

	This Month <u>August</u>	YTD <u>2019</u>	FY 18-19 <u>Budget</u>	Budget <u>% Utilized</u>
3301-Registration-Live			\$80,000	0.00%
3331-Registration-Ticket			<u>\$2,000</u>	<u>0.00%</u>
<b>Total Registration Revenue</b>	<b>\$</b>	<b>\$</b>	<b>\$82,000</b>	<b>0.00%</b>
3351-Sponsorships	(\$2,200)	(\$2,200)	\$170,000	(1.29%)
<b>Other Event Revenue</b>	<b>(\$2,200)</b>	<b>(\$2,200)</b>	<b>\$170,000</b>	<b>(1.29%)</b>
3401-Sales-CD/DVD	\$1,170	\$2,340	\$15,000	15.60%
3411-Sales-Published Materials	\$60	\$60	\$500	12.00%
<b>Sales, Rents &amp; Royalties Revenue</b>	<b>\$1,230</b>	<b>\$2,400</b>	<b>\$15,500</b>	<b>15.48%</b>
3699-Other Operating Revenue			\$800	0.00%
<b>Other Revenue Sources</b>	<b>\$</b>	<b>\$</b>	<b>\$800</b>	<b>0.00%</b>
<b>Total Revenue</b>	<b>(\$970)</b>	<b>\$200</b>	<b>\$268,300</b>	<b>0.07%</b>
5051-Credit Card Fees	\$25	\$50	\$4,000	1.25%
5181-Speaker Honorarium			\$1,000	0.00%
<b>Total Contract Services</b>	<b>\$25</b>	<b>\$50</b>	<b>\$5,000</b>	<b>1.00%</b>
5501-Employee Travel			\$1,500	0.00%
5571-Speaker Travel			\$4,000	0.00%
<b>Total Travel</b>	<b>\$</b>	<b>\$</b>	<b>\$5,500</b>	<b>0.00%</b>
6001-Post 1st Class/Bulk			\$25	0.00%
6021-Post Express Mail			\$45	0.00%
6319-Mtgs Other Functions			\$18,000	0.00%
6321-Mtgs Meals			\$50,000	0.00%
6325-Mtgs Hospitality			\$30,000	0.00%
6341-Mtgs Equip Rental			\$22,000	0.00%
6401-Speaker Expense			\$10,900	0.00%
<b>Total Other Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$130,970</b>	<b>0.00%</b>
8011-Administration CLE			\$25,000	0.00%
8101-Printing In-House			\$2,000	0.00%
8131-A/V Services	\$14	\$14	\$3,250	0.43%
8141-Journal/News Service			\$1,650	0.00%
8171-Course Approval Fee			\$150	0.00%
<b>Total Admin &amp; Internal Expense</b>	<b>\$14</b>	<b>\$14</b>	<b>\$32,050</b>	<b>0.04%</b>
<b>Total Expense</b>	<b>\$39</b>	<b>\$64</b>	<b>\$173,520</b>	<b>0.04%</b>

THE FLORIDA BAR  
Real Property Construction Law Institute  
For the Two Months Ending Friday, August 31, 2018

	<u>This Month</u> <u>August</u>	<u>YTD</u> <u>2019</u>	<u>FY 18-19</u> <u>Budget</u>	<u>Budget</u> <u>% Utilized</u>
Net Income	<u>(\$1,009)</u>	<u>\$136</u>	<u>\$94,780</u>	<u>0.14%</u>

THE FLORIDA BAR  
Real Property Trust Officer Liaison Conference  
For the Two Months Ending Friday, August 31, 2018

	This Month <u>August</u>	YTD <u>2019</u>	FY 18-19 <u>Budget</u>	Budget <u>% Utilized</u>
3301-Registration-Live	\$25,759	\$161,929	\$150,000	107.95%
3331-Registration-Ticket	\$1,280	\$12,170	\$10,000	121.70%
<b>Total Registration Revenue</b>	<b>\$27,039</b>	<b>\$174,099</b>	<b>\$160,000</b>	<b>108.81%</b>
3341-Exhibit Fees	\$7,900	\$20,700	\$40,000	51.75%
3351-Sponsorships	\$3,850	\$70,850	\$60,000	118.08%
<b>Other Event Revenue</b>	<b>\$11,750</b>	<b>\$91,550</b>	<b>\$100,000</b>	<b>91.55%</b>
3401-Sales-CD/DVD	\$2,140	\$4,720	\$3,000	157.33%
3411-Sales-Published Materials	\$960	\$1,620	\$1,000	162.00%
<b>Sales, Rents &amp; Royalties Revenue</b>	<b>\$3,100</b>	<b>\$6,340</b>	<b>\$4,000</b>	<b>158.50%</b>
<b>Total Revenue</b>	<b>\$41,889</b>	<b>\$271,989</b>	<b>\$264,000</b>	<b>103.03%</b>
4111-Rent Equipment			\$17,000	0.00%
<b>Total Staff &amp; Office Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$17,000</b>	<b>0.00%</b>
5051-Credit Card Fees	\$612	\$1,247	\$8,000	15.59%
5121-Printing-Outside			\$3,500	0.00%
<b>Total Contract Services</b>	<b>\$612</b>	<b>\$1,247</b>	<b>\$11,500</b>	<b>10.84%</b>
5501-Employee Travel	\$392	\$392	\$3,000	13.08%
5571-Speaker Travel			\$4,000	0.00%
<b>Total Travel</b>	<b>\$392</b>	<b>\$392</b>	<b>\$7,000</b>	<b>5.60%</b>
6021-Post Express Mail		\$4	\$150	2.48%
6319-Mtgs Other Functions	\$75	\$75	\$8,000	0.94%
6321-Mtgs Meals			\$57,000	0.00%
6325-Mtgs Hospitality			\$85,000	0.00%
6401-Speaker Expense	\$1,339	\$1,339	\$4,100	32.66%
<b>Total Other Expense</b>	<b>\$1,414</b>	<b>\$1,418</b>	<b>\$154,250</b>	<b>0.92%</b>
8011-Administration CLE	\$25,000	\$25,000	\$25,000	100.00%
8101-Printing In-House	\$1,308	\$1,308	\$2,000	65.41%
8131-A/V Services	\$5,265	\$5,265	\$6,200	84.92%
8141-Journal/News Service		\$	\$1,600	0.00%
8171-Course Approval Fee			\$750	0.00%
<b>Total Admin &amp; Internal Expense</b>	<b>\$31,573</b>	<b>\$31,573</b>	<b>\$35,550</b>	<b>88.81%</b>
<b>Total Expense</b>	<b>\$33,992</b>	<b>\$34,630</b>	<b>\$225,300</b>	<b>15.37%</b>

THE FLORIDA BAR  
 Real Property Trust Officer Liaison Conference  
 For the Two Months Ending Friday, August 31, 2018

	<u>This Month</u>	<u>YTD</u>	<u>FY 18-19</u>	<u>Budget</u>
	<u>August</u>	<u>2019</u>	<u>Budget</u>	<u>% Utilized</u>
Net Income	<u>\$7,898</u>	<u>\$237,359</u>	<u>\$38,700</u>	<u>613.33%</u>

THE FLORIDA BAR  
Real Property Legislative Update  
For the Two Months Ending Friday, August 31, 2018

	This Month August	YTD 2019	FY 18-19 Budget	Budget % Utilized
3321-Registration-Webcast	\$	\$8,509	\$15,000	56.72%
<b>Total Registration Revenue</b>	<b>\$</b>	<b>\$8,509</b>	<b>\$15,000</b>	<b>56.72%</b>
3341-Exhibit Fees		\$18,250	\$14,000	130.36%
<b>Other Event Revenue</b>	<b>\$</b>	<b>\$18,250</b>	<b>\$14,000</b>	<b>130.36%</b>
3401-Sales-CD/DVD	\$3,555	\$10,975	\$34,000	32.28%
3411-Sales-Published Materials	\$60	\$350	\$500	70.00%
<b>Sales, Rents &amp; Royalties Revenue</b>	<b>\$3,615</b>	<b>\$11,325</b>	<b>\$34,500</b>	<b>32.83%</b>
<b>Total Revenue</b>	<b>\$3,615</b>	<b>\$38,084</b>	<b>\$63,500</b>	<b>59.97%</b>
4111-Rent Equipment		\$12,181		0.00%
4301-Photocopying		\$127	\$50	253.38%
4311-Office Supplies		\$35	\$150	23.33%
<b>Total Staff &amp; Office Expense</b>	<b>\$</b>	<b>\$12,342</b>	<b>\$200</b>	<b>6171.24%</b>
5031-A/V Services		\$1,495	\$1,500	99.67%
5051-Credit Card Fees	\$62	\$224	\$1,270	17.64%
5121-Printing-Outside		\$281	\$4,500	6.25%
<b>Total Contract Services</b>	<b>\$62</b>	<b>\$2,000</b>	<b>\$7,270</b>	<b>27.52%</b>
5501-Employee Travel	\$219	\$507	\$2,000	25.36%
5571-Speaker Travel		\$227	\$1,300	17.48%
<b>Total Travel</b>	<b>\$219</b>	<b>\$734</b>	<b>\$3,300</b>	<b>22.26%</b>
6001-Post 1st Class/Bulk	\$15	\$15	\$50	29.50%
6021-Post Express Mail	\$31	\$33	\$500	6.68%
6311-Mtgs General Meeting		\$2		0.00%
6321-Mtgs Meals			\$55,500	0.00%
6325-Mtgs Hospitality			\$1,500	0.00%
6341-Mtgs Equip Rental		\$3,550	\$13,500	26.30%
6401-Speaker Expense	\$267	\$1,267	\$6,600	19.19%
7999-Other Operating Exp			\$500	0.00%
<b>Total Other Expense</b>	<b>\$313</b>	<b>\$4,866</b>	<b>\$78,150</b>	<b>6.23%</b>
8011-Administration CLE			\$1,000	0.00%
8101-Printing In-House			\$300	0.00%
8131-A/V Services	\$3,435	\$3,456	\$6,000	57.60%
8141-Journal/News Service			\$1,600	0.00%
8171-Course Approval Fee			\$150	0.00%

THE FLORIDA BAR  
 Real Property Legislative Update  
 For the Two Months Ending Friday, August 31, 2018

	<u>This Month</u> August	<u>YTD</u> 2019	<u>FY 18-19</u> Budget	<u>Budget</u> % Utilized
Total Admin & Internal Expense	\$3,435	\$3,456	\$9,050	38.19%
Total Expense	\$4,029	\$23,400	\$97,970	23.88%
Net Income	(\$414)	\$14,684	(\$34,470)	(42.60%)

**THE FLORIDA BAR**  
**Real Property Convention**  
For the Two Months Ending Friday, August 31, 2018

	<u>This Month</u> <u>August</u>	<u>YTD</u> <u>2019</u>	<u>FY 18-19</u> <u>Budget</u>	<u>Budget</u> <u>% Utilized</u>
3301-Registration-Live			\$45,000	0.00%
<b>Total Registration Revenue</b>	<b>\$</b>	<b>\$</b>	<b>\$45,000</b>	<b>0.00%</b>
3341-Exhibit Fees			\$10,000	0.00%
3351-Sponsorships			\$10,000	0.00%
<b>Other Event Revenue</b>	<b>\$</b>	<b>\$</b>	<b>\$20,000</b>	<b>0.00%</b>
<b>Total Revenue</b>	<b>\$</b>	<b>\$</b>	<b>\$65,000</b>	<b>0.00%</b>
4111-Rent Equipment			\$21,000	0.00%
<b>Total Staff &amp; Office Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$21,000</b>	<b>0.00%</b>
5051-Credit Card Fees			\$1,200	0.00%
<b>Total Contract Services</b>	<b>\$</b>	<b>\$</b>	<b>\$1,200</b>	<b>0.00%</b>
5501-Employee Travel			\$2,500	0.00%
<b>Total Travel</b>	<b>\$</b>	<b>\$</b>	<b>\$2,500</b>	<b>0.00%</b>
6001-Post 1st Class/Bulk			\$500	0.00%
6321-Mtgs Meals			\$175,000	0.00%
6361-Mtgs Entertainment		\$	\$14,000	0.00%
<b>Total Other Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$189,500</b>	<b>0.00%</b>
8101-Printing In-House			\$400	0.00%
<b>Total Admin &amp; Internal Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$400</b>	<b>0.00%</b>
<b>Total Expense</b>	<b>\$</b>	<b>\$</b>	<b>\$214,600</b>	<b>0.00%</b>
<b>Net Income</b>	<b>\$</b>	<b>\$</b>	<b>(\$149,600)</b>	<b>0.00%</b>