



The Real Property, Probate and Trust Law
Section of The Florida Bar presents the

41st ANNUAL ATTORNEY/TRUST OFFICER LIAISON CONFERENCE

August 17-19, 2023
The Breakers, Palm Beach

[ATO 2023 Registration Link](#)

In Person Seminar

\$650 - Section Members

\$710 - Non-Members

****This registration does not include the
Zoom link****

Virtual Seminar

\$650 - Section Members

\$710 - Non-Members

****This registration does not include in-
person attendance****

\$175 - Golf*

\$160 - Guest Registration**

**Must be registered for the conference to play. Includes
boxed lunch and one drink ticket.*

***Must be a guest of a registered attendee. Includes
receptions only (not breakfast or lunch).*

➤ Cancellation deadline for
hotel room: **July 14, 2023**

➤ Cancellation deadline for in-
person seminar: **August 11, 2023**

**Cancellation of an in person seminar registration will result in
cancellation of your hotel room.*

*Room block information will be sent with a confirmation email **within 24 hours** after you register for the seminar.

Schedule of Events

Thursday, August 17, 2023

11:00 am

Golf Lunch and Golf Registration - Ocean Course

12:00 pm - 5:00 pm

Golf Tournament - Ocean Course

Sponsored by Stout and Wells Fargo Wealth & Investment Management

3:00 pm - 6:00 pm

Registration - Ponce de Leon Foyer

5:30 pm - 7:30 pm

Opening Reception - The Circle

Sponsored by Heritage Auctions and Northern Trust

Friday, August 18, 2023

Presentation Room Sponsored by Wilmington Trust

7:30 am - 8:25 am

Continental Breakfast

Sponsored by Fiduciary Trust International of the South

8:00 am - 8:15 am

Welcome & Opening Remarks

Mitchell A. Hipsman, Aventura

8:15 am - 9:05 am

Top Ten (or So) Mistakes (or Traps) for Estate and Trust Professionals

Laird A. Lile, Naples

9:05 am - 9:55 am

The Unexpected Dividend: Fiduciary Investment Litigation

Zackary T. Zuroweste, Clearwater

Mark R. Parthemer, West Palm Beach

9:55 am - 10:10 am

Break

Sponsored by Grove Bank & Trust

Friday, August 18, 2023 (cont.)

10:10 am - 11:00 am

Off the Beaten Path: Unusual Approaches to Creditor's Claims

Jenna G. Rubin, Boca Raton

11:00 am - 12:15 pm

Florida Case Law and Legislative Update

J. Eric Virgil, Coral Gables

Lawrence J. Miller, Boca Raton

12:15 pm - 1:30 pm

Lunch - The Circle

Sponsored by Coral Gables Trust Company

1:30 pm - 2:20 pm

Snowbird Domicile and Choice of Law

Bruce D. Steiner, New York, NY

2:20 pm - 3:10 pm

Dawn of the Dead - Post-Mortem IRA Planning and Pre-Mortem Plan Repairs

Robert K. Kirkland, Liberty, MO

3:10 pm - 3:25 pm

Break

Sponsored by Raymond James Trust, N.A.

3:25 pm - 4:15 pm

Love, Sex, Money, Marriage and Death: Estate Planning and Tax Aspects of Divorce Every Advisor Should Know

Jeremiah W. Doyle, IV, Boston, MA

4:15 pm - 5:05 pm

Best Practices for Trustee Resignation

Patrick J. Lannon, Miami

5:30 pm - 7:30 pm

Reception

Sponsored by BNY Mellon Wealth Management & Empire Valuation Consultants

Schedule of Events

Saturday, August 19, 2023

*Presentation Room Sponsored by
Wilmington Trust*

7:30 am - 8:30 am

Continental Breakfast

Sponsored by Synovus Trust Company, N.A.

7:55 am - 8:00 am

Good Morning, Announcements

Mitchell A. Hipsman, Aventura

8:00 am - 8:50 am

**TAG, You're It: The Various Roles of Trustees,
Agents and Guardians in Confronting Incapacity**

Stacy B. Rubel, Coral Gables

8:50 am - 9:40 am

Therapeutic Consulting & Trust Management

W. Todd Weatherly, Asheville, NC

Dorian Sylvester, Greensboro, NC

9:40 am - 10:30 am

**Virtual Representation Under the Florida Trust
Code - I'm sure it'll be fine... Probably... Or not**

Nicklaus J. Curley, West Palm Beach

10:30 am - 10:45 am

Break

10:45 am - 11:35 am

**What's Mine is Yours and What's Yours is Mine:
An Examination of the Florida Community
Property Trust Act and the Use of Community
Property Trusts**

M. Travis Hayes, Naples

11:35 am - 12:25 pm

**Probate and Estate Planning Ethics Update -
Some Things Old, A Few Things New, and A Bit
More That Is Tried and True**

Sandra F. Diamond, St. Petersburg

Credit Information

CLE Credits

General 13.5

Ethics 1.0

Certification Credits

Wills, Trusts and Estates 13.5

Civil Trial 1.0

Elder Law 13.5

Tax Law 5.0

Marital & Family Law 2.0

CFP Credits

Credit Applied For

CPE Credits

Technical Business 12.5

Behavioral 1.0

CPWA Credits

Credit Applied for

CTFA Credits

13.5

Questions?

**Please contact Hilary
Stephens at**

hstephens@floridabar.org

EXHIBITORS

**Almost Family West Palm Beach
- LHC Group**

American Cancer Society

The Art Loss Register

Art Peritus

Ashar Group, LLC

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Christie's

**Deutsche Bank Trust Company,
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Friday Lunch Sponsor

Coral Gables Trust Company

Friday Evening Reception Sponsor

Empire Valuation Consultants
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Saturday Breakfast Sponsor

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Refreshment Break Sponsors

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Presentation Room Sponsor

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