

Real Property, Probate Trust Law Section

# 2015 Annual Convention



**June 3 - 7, 2015**

**Fontainebleau Miami Beach  
Miami Beach, FL**

**WiFi Password: RPPTL2015**

# 2015 Annual Convention Schedule

## Wednesday, June 3, 2015

3:00 pm – 6:00 pm	<b>Registration Desk Hours</b>	<i>Splash Foyer</i>
3:00 pm – 5:00 pm	<b>Attorneys Real Estate Councils of Florida - Board Meeting</b>	<i>Soar</i>
6:00 pm – 8:30 pm	<b>Attorneys Real Estate Councils of Florida - Member Reception</b>	<i>Flash</i>
7:00 pm – 9:30 pm	<b>Executive Committee Dinner**</b>	<i>Cafe Avanti</i>

## Thursday, June 4, 2015

7:30 am – 5:00 pm	<b>Registration Desk Hours</b>	<i>Splash Foyer</i>
8:00 am – 11:00 am	<b>Executive Committee**</b>	<i>Splash 1-2</i>
7:30 am – 9:30 am	<b>Continental Breakfast (GRAB AND GO)</b>	<i>Splash Foyer</i>
8:00 am – 9:30 am	<b>Trust Law</b>	<i>Fleur de Lis Ballroom</i>
	> <b>Sponsored by Business Valuation Analysts, LLC &amp; Northern Trust Bank of Florida</b>	
8:00 am – 9:30 am	<b>Legislative Update</b>	<i>Splash 3-4</i>
8:00 am – 9:30 am	<b>Title Issues &amp; Standards</b>	<i>Dive Boardroom</i>
9:30 am – 11:00 am	<b>Development and Land Use</b>	<i>Splash 3-4</i>
9:30 am – 11:00 am	<b>Residential Real Estate &amp; Industry Liaison</b>	<i>Splash 11-12</i>
9:30 am – 11:00 am	<b>Landlord &amp; Tenant</b>	<i>Dive Boardroom</i>
9:30 am – 11:00 am	<b>Homestead Problem Study*</b>	<i>Splash 7-8</i>
9:30 am – 11:30 am	<b>Asset Protection</b>	<i>Fleur de Lis Ballroom</i>
11:00 am – 12:30 pm	<b>Digital Assets and Information Study</b>	<i>Splash 11-12</i>
11:00 am – 12:30 pm	<b>Construction Law</b>	<i>Splash 1-2</i>
11:30 am – 1:30 pm	<b>Working Boxed Lunch</b>	<i>Splash Foyer</i>
	> <b>Sponsored by Management Planning, Inc.</b>	
11:30 pm – 1:30 pm	<b>Probate &amp; Trust Litigation</b>	<i>Fleur de Lis Ballroom</i>
	> <b>Sponsored by Coral Gables Trust</b>	
12:30 pm – 1:30 pm	<b>Sponsorship Committee</b>	<i>Dive Boardroom</i>
12:30 pm – 2:00 pm	<b>Real Property Finance &amp; Lending</b>	<i>Splash 5-6</i>
12:30 pm – 2:00 pm	<b>Condominium and Planned Development</b>	<i>Splash 11-12</i>
	> <b>Sponsored by First American Title Insurance Company</b>	
1:30 pm – 2:30 pm	<b>Ad Hoc Study on Spendthrift Trust Issues*</b>	<i>Splash 3-4</i>
2:30 pm – 4:00 pm	<b>Real Property Problem Study</b>	<i>Splash 3-4</i>
2:00 pm – 5:00 pm	<b>The Realitor -Attorney Joint Committee Meeting</b>	<i>Splash 5-6</i>
2:00 pm – 4:00 pm	<b>Guardianship, Power of Attorney &amp; Advanced Directives</b>	<i>Splash 11-12</i>
	> <b>Sponsored by Guardian Trust</b>	
2:30 pm – 4:00 pm	<b>Construction Law Institute</b>	<i>Plunge Boardroom</i>
2:30 pm – 4:00 pm	<b>Attorney Trust Officer</b>	<i>Splash 1-2</i>
2:30 pm – 3:30 pm	<b>Elective Share Review*</b>	<i>Dive Boardroom</i>
3:30 pm – 5:00 pm	<b>Ad Hoc Decanting*</b>	<i>Splash 7-8</i>
4:00 pm – 5:00 pm	<b>IRA, Insurance &amp; Employee Benefits</b>	<i>Splash 11-12</i>
	> <b>Sponsored by BNY Mellon Wealth Management &amp; Life Audit Professionals</b>	
4:00 pm – 5:00 pm	<b>At Large Members</b>	<i>Splash 9-10</i>
4:00 pm – 5:00 pm	<b>ALTA Best Practices Task Force</b>	<i>Splash 3-4</i>
4:00 pm – 5:00 pm	<b>Fellows and Mentoring</b>	<i>Splash 1-2</i>
5:00 pm – 6:00 pm	<b>General Sponsor Reception**</b>	<i>Fleur de Lis Ballroom</i>

6:30 pm – 7:00 pm	<b>Busses depart for Reception</b>	<i>North Side of Lobby - Collins Avenue</i>
7:00 pm – 9:00 pm	<b>Welcome Reception at PAMM</b>	<i>Perez Art Museum Miami</i>
	▶ <b>Sponsored by Old Republic Title Insurance Company JP Morgan</b>	
9:30 pm – 11:30 pm	<b>Hospitality Suite</b>	<i>Splash 1-4</i>
	▶ <b>Sponsored by Professional Lien Search, LLC</b>	

## Friday, June 5, 2015

6:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
7:30 am – 9:00 am	<b>Continental Breakfast (GRAB AND GO)</b>	<i>Splash Foyer</i>
8:00 am – 11:20 am	<b>SEMINAR: SAME SEX MARRIAGE</b>	<i>Splash 9-11</i>
11:30 am – 1:15 pm	<b>Annual Membership Luncheon</b>	<i>Fontaine Ballroom</i>
1:30 pm – 2:30 pm	<b>Estate &amp; Trust Tax Planning</b>	<i>Splash 9-11</i>
	▶ <b>Sponsored by Management Planning Inc, Kravit Estate Appraisal &amp; Life Audit Professionals</b>	
1:30 pm – 3:00 pm	<b>Real Estate Structures and Taxation</b>	<i>Splash 5-6</i>
	▶ <b>Sponsored by First American Title Insurance Company</b>	
1:30 pm – 3:00 pm	<b>Real Property Litigation</b>	<i>Splash 7-8</i>
2:30 pm – 4:00 pm	<b>Membership and Inclusion</b>	<i>Dive Boardroom</i>
2:30 pm – 4:00 pm	<b>Probate Law &amp; Procedure</b>	<i>Splash 9-11</i>
	▶ <b>Sponsored by BNY Mellon Wealth Management</b>	
2:30 pm – 4:00 pm	<b>Commercial Real Estate</b>	<i>Flicker 1-2 Ballroom</i>
	▶ <b>Sponsored by Attorney's Title Fund Services, LLC</b>	
3:00 pm – 4:00 pm	<b>Insurance &amp; Surety</b>	<i>Splash 5-6</i>
3:00 pm – 4:00 pm	<b>Ad Hoc Jurisdiction/Service Process*</b>	<i>Splash 12</i>
3:00 pm – 4:00 pm	<b>Title Insurance &amp; Title Insurance Liaison</b>	<i>Splash 13-14</i>
4:00 pm – 5:00 pm	<b>Training Session for Committee Chairs</b>	<i>Flicker 1-2 Ballroom</i>
5:00 pm – 6:00 pm	<b>PAC</b>	<i>Splash 9-10</i>
7:00 pm – 8:00 pm	<b>Reception</b>	<i>Lapis Pool</i>
	▶ <b>Sponsored by Wells Fargo Private Bank</b>	
8:00 pm – 9:30 pm	<b>Dinner</b>	<i>Fontaine Ballroom</i>
	▶ <b>Sponsored by First American Insurance Company &amp; Regions Private Wealth Management</b>	
9:30 pm – 11:30 pm	<b>Hospitality Suite</b>	<i>Splash 1-4</i>
	▶ <b>Sponsored by Professional Lien Search, LLC</b>	

## Saturday, June 6, 2015

6:00 am	<b>Reptiles Run</b>	<i>Hotel Lobby</i>
8:00 am - 10:00 am	<b>Spouse/Guest Breakfast</b>	<i>Splash 1-2</i>
	▶ <b>Sponsored by Attorney's Title Fund Services, LLC</b>	
8:00 am - 10:00 am	<b>Real Property Law Division Roundtable Breakfast</b>	<i>Splash 11-12</i>
	▶ <b>Sponsored by Fidelity National Title Group</b>	
8:00 am - 10:00 am	<b>Probate and Trust Law Division Roundtable Breakfast</b>	<i>Splash 9-10</i>
9:45 am – 1:30 pm	<b>Executive Council Meeting and Lunch</b>	<i>Fontaine Ballroom</i>
	▶ <b>Sponsored by The Florida Bar Foundation</b>	
7:00 pm – 9:30 pm	<b>Dinner</b>	<i>Smith and Wolensky</i>

# Convention Exhibitors

## Lawgic, LLC

Showcasing our Florida Wills & Trusts drafting software.

*Represented by:* Allison Carbonneau  
904-716-7888  
[allison@lawgic.com](mailto:allison@lawgic.com)

Rick Stockton  
904-223-2223

## Old Republic Title Insurance

Old Republic National Title is an underwriter that is focused on Agents, providing outstanding Commercial and Residential Title products with over a century of service through Strength and Stability.

*Represented by:* Holly Culp  
954-421-4599  
[hculp@oldrepublictitle.com](mailto:hculp@oldrepublictitle.com)

## Corporation Service Company

Web-based document recording solution that allows submitters to electronically record real estate docs with county offices.

*Represented by:* Kevin Kinderman  
302-636-5401 x 62884  
[kevin.kinderman@cscglobal.com](mailto:kevin.kinderman@cscglobal.com)

## Professional Lien Search

Municipal Lien Search Company.

*Represented by:* Alice Bell  
941-444-7142  
[alice@proliensearch.com](mailto:alice@proliensearch.com)

Andrea Penton  
941-444-7142  
[andrea@proliensearch.com](mailto:andrea@proliensearch.com)

## Management Planning, Inc.

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

*Represented by:* Roy Meyers  
609-955-5744,  
[rmeyers@mpival.com](mailto:rmeyers@mpival.com)

## The Florida Bar Foundation

Non-profit statewide organization linking 30 legal services programs to form a comprehensive, statewide legal services delivery system promoting access to justice and improvements in addressing the civil legal needs of the poor.

*Represented by:* Donna Marino, CFRE  
407-960-7000  
[dmarino@FloridaBarFoundation.org](mailto:dmarino@FloridaBarFoundation.org)

## Guardian Trust

*Represented by:* Ashley Gonnelli  
800-669-2499 Ext. 3  
[ashley@guardianpooledtrust.org](mailto:ashley@guardianpooledtrust.org)

Steve Hitchcock, Esq.  
800-669-2499, Ext. 3  
[steve@guardianpooledtrust.org](mailto:steve@guardianpooledtrust.org)

## North American Title Insurance Company

NATIC has the attributes most essential to your title business- Financial Responsibility and White-Glove Service. Now operating in 39 states and the District of Columbia, NATIC is the 8th largest underwriter in the United States. A simple plan, well executed.

*Represented by:* Andres San Jorge, Esq.  
305-505-6562  
[asanjorge@natic.com](mailto:asanjorge@natic.com)

## FLSSI

Florida Lawyers Support Services, Inc. (FLSSI) has served as a resource for RPPTL attorneys for 34 years. Production of reliable forms for practice in probate, guardianship, and real property has been their purpose and goal.

*Represented by:* Erin B. Chambers  
407-515-1501  
[erinchambers@flssi.org](mailto:erinchambers@flssi.org)

Sheila Brennan,  
[assistant1@flssi.org](mailto:assistant1@flssi.org)

## My Personal Datasafe

My Personal DataSafe offers professionals a secure portal to collaborate with their clients. Our Xchange Port lets you easily upload documents securely to our encrypted servers and collaborate with clients and their professional advisors. In addition, you can provide clients' access to their own virtual safe deposit box to store their medical, financial, legal & personal information. Our patent pending software provides them complete sharing right controls. By creating share users they can decide the specific information to share and are always in complete control.

*Represented by:* Jim Everett  
813-793-7146  
[jeverett@mypersonaldatasafe.com](mailto:jeverett@mypersonaldatasafe.com)

# Thank you to our Sponsors

## **GENERAL SPONSORS**

**Attorneys' Title Fund Services, LLC** – Melissa Murphy

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**First American Title Insurance Company** - Alan McCall

**Regions Private Wealth Management** - Margaret Palmer

**Professional Lien Search, LLC** – Jesse Biter

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

**Fidelity National Title Group** - Pat Hancock

**The Florida Bar Foundation** - Jane Curran

## **FRIENDS OF THE SECTION**

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**Guardian Trust** - Ashley Gonnelli

**Kravit, The Estate Department** – Van Stillman

**North American Title Insurance Company** – Geoff Harris

**Valuation Services, Inc.** - Jeff Bae, JD, CVA

**Wilmington Trust** – David Fritz



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## **COMMITTEE SPONSORS**

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&  
*Probate Law & Procedure Committee*

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THE  
FLORIDA  
BAR  
**CLE**

The Florida Bar Continuing Legal Education Committee and  
the Real Property, Probate and Trust Law Section present

# Florida, Same-Sex Marriage, RPPTL and the U.S. Supreme Court Finality, Futility or Both?

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live and Webcast Presentation: Friday, June 5, 2015  
Fontainebleau • 4441 Collins Avenue  
Miami Beach, FL 33140 • (305) 538-2000



Course No. 1869R

7:45 a.m. – 8:15 a.m.

**Late Registration**

8:15 a.m. – 8:30 a.m.

**Welcome and Opening Remarks**

*Jeffrey R. Dollinger, Gainesville, Program Co-Chair  
George D. Karibjanian, Boca Raton, Program Co-Chair*

8:30 a.m. – 9:20 a.m.

**The State Law GPS Is Set For Washington**

*George D. Karibjanian, Boca Raton*

9:20 a.m. – 9:50 a.m.

**Co-Tenancies in Florida After SCOTUS terminates  
DOMA?**

*Robert M. Schwartz, Boca Raton*

9:50 a.m. – 10:00 a.m.

**Break**

10:00 a.m. – 10:30 a.m.

**Title Insurance is Not Marriage Insurance**

*Patricia J. Hancock, Orlando*

10:30 a.m. – 11:00 a.m.

**Estate Planning and Probate Considerations  
Anticipating a SCOTUS decision on DOMA**

*Sarah S. Butters, Tallahassee*

11:00 a.m. – 11:30 a.m.

**Roundtable Discussion on the Effect of a Supreme  
Court Ruling Declaring or Not Declaring that Florida's  
DOMA laws are Unconstitutional**

*Sarah S. Butters, Tallahassee*

*Patricia J. Hancock, Orlando*

*George D. Karibjanian, Boca Raton*

*Robert M. Schwartz, Boca Raton*

**CLE CREDITS**

**CLER PROGRAM**

(Max. Credit: 3.5 hours)

General: 3.5 hours

Ethics: 1.0 hour

**CERTIFICATION PROGRAM**

(Max. Credit: 3.5 hours)

Marital and Family Law: 3.5 hours

Real Estate: 1.0 hour

State & Federal Gov't & Administrative Practice: 3.5 hours

Wills, Trusts & Estates: 3.5 hours

**REAL PROPERTY, PROBATE AND  
TRUST LAW SECTION**

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Michael J. Gelfand, West Palm Beach — Chair-elect

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**TO REGISTER**



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[www.floridabar.org/CLE](http://www.floridabar.org/CLE)



**MAIL:**

Completed form with check



**FAX:**

Completed form to 850/561-9413

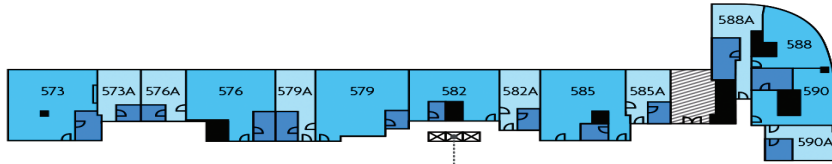
**WEBCAST: [www.tinyurl.com/FloridaBarCLE1869R](http://www.tinyurl.com/FloridaBarCLE1869R)**

# Meeting Rooms Locations




## CONFERENCE CENTER

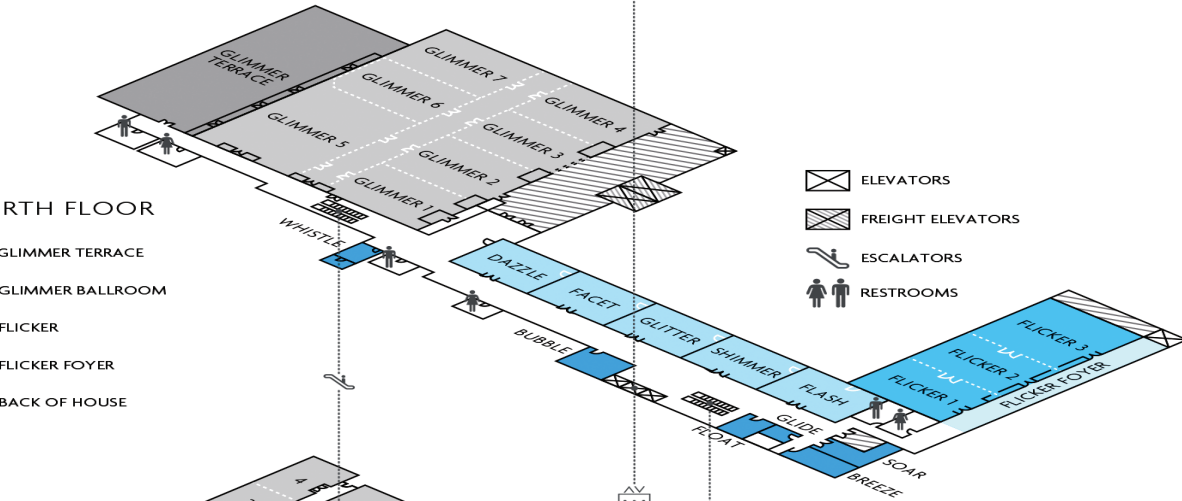
### FIFTH FLOOR - VERSAILLES

-  CONFERENCE SUITE A
-  CONFERENCE SUITE
-  RESTROOM
-  BACK OF HOUSE






### FOURTH FLOOR

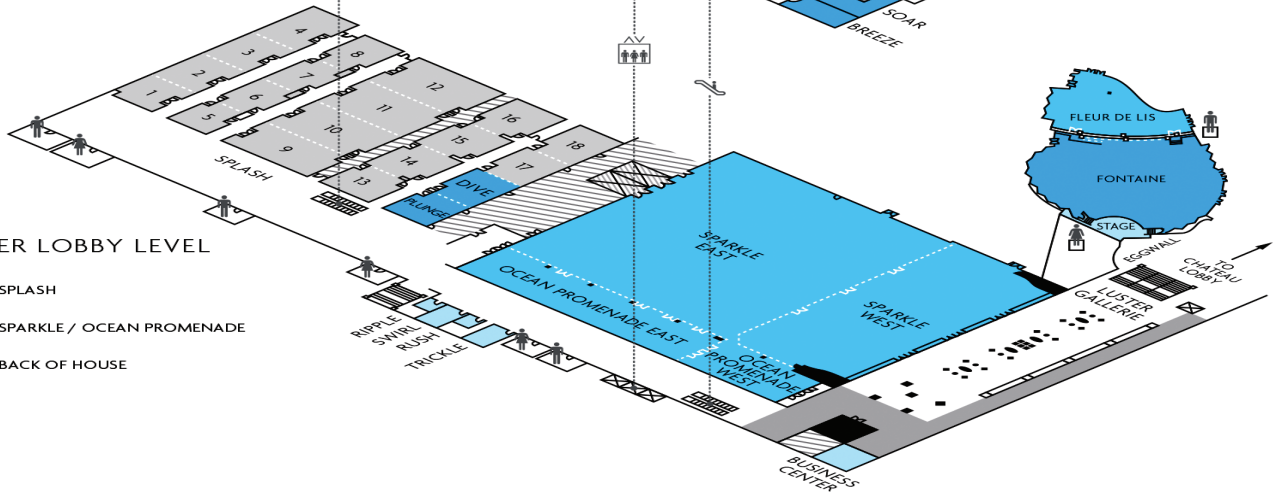
-  GLIMMER TERRACE
-  GLIMMER BALLROOM
-  FLICKER
-  FLICKER FOYER
-  BACK OF HOUSE



-  ELEVATORS
-  FREIGHT ELEVATORS
-  ESCALATORS
-  RESTROOMS

### UPPER LOBBY LEVEL

-  SPLASH
-  SPARKLE / OCEAN PROMENADE
-  BACK OF HOUSE



## High Speed Internet Connection Instructions

Select the Florida Bar – WIRELESS network

Start your Web Browser.

The login page will open automatically.

Fill in the login field with the following passcode: (case sensitive)

**RPPTL2015**

Click Submit. You're online!