



Real Property, Probate & Trust Law Section

2016 Annual Convention



June 2 - 5, 2016

**Loews Portofino Bay Hotel
5601 Universal Boulevard
Orlando, FL**

WiFi Password: RPPTL2016

2016 Annual Convention Schedule

Thursday, June 2, 2016

6:30 am	Reptiles Run	Hotel Lobby
7:30 am – 5:00 pm	Registration Desk Hours	Venetian Foyer
8:00 am – 9:30 am	Guardianship, Power of Attorney & Advanced Directives	Venetian III
8:00 am – 9:30 am	Asset Protection	Venetian IV & V
8:30 am – 11:00 am	Executive Committee **	Chair's Suite
9:30 am – 11:30 am	Trust Law	Venetian IV & V
11:00 am – 12:30 pm	Sponsorship	Venetian II
11:00 am – 12:30 pm	Digital Assets and Information Study	Ligurian I
11:00 am – 12:30 pm	Construction Law	Venetian I
11:00 am – 12:30 pm	Residential Real Estate & Industry Liaison	Venetian III
11:30 am – 12:30 pm	Fellows and Mentoring	Ligurian II
11:30 am – 1:00 pm	Ad Hoc Same Sex Marriage Implication *	Ligurian III
11:30 am – 1:00 pm	Ad Hoc Study on Spendthrift Trust Issues *	Donatello Boardroom
11:30 am – 1:30 pm	Grab and Go Buffet Lunch \$	Venetian Foyer
	<i>Sponsored by Management Planning, Inc.</i>	
12:30 pm – 2:00 pm	Real Property Finance & Lending	Venetian III
12:30 pm – 2:00 pm	Condominium and Planned Development	Venetian IV & V
12:30 pm – 2:00 pm	Member Communication and Information Technology	Venetian II
1:00 pm – 2:00 pm	Title Issues & Standards	Ligurian II
1:00 pm – 2:30 pm	Homestead Issues Study*	Ligurian I
1:00 pm – 2:30 pm	Attorney Trust Officer	Venetian I
2:30 pm – 4:00 pm	Real Property Problem Study	Ligurian II
2:30 pm – 3:30 pm	Elective Share Review Committee *	Venetian II
2:30 pm – 4:00 pm	Probate & Trust Litigation	Venetian IV & V
2:30 pm – 4:00 pm	Real Estate Leasing f/k/a Landlord & Tenant	Ligurian I
3:00 pm – 4:00 pm	IRA, Insurance & Employee Benefits	Venetian III
3:30 pm – 5:00 pm	POLST*	Donatello Boardroom
4:00 pm – 5:00 pm	Legislative Update	Ligurian II
4:00 pm – 5:00 pm	At Large Members	Venetian IV & V
5:00 pm – 6:00 pm	ActionLine	Venetian I
7:00 pm – 9:00 pm	Welcome Reception \$	Citrus Piazza
	<i>Sponsored by Old Republic Title and JP Morgan</i>	
9:30 pm – 11:30 pm	Hospitality Suite	Bernini

* Participation in deliberations and voting is limited to committee members only

** Attendance by invitation only

\$ Payment and Registration Required – Tickets available for purchase at registration desk.

Friday, June 3, 2016

6:30 am	-----Reptiles Run	-----Hotel Lobby
7:30 am – 5:00 pm	-----Registration Desk Hours	-----Venetian Foyer
8:30 am – 10:30 am	-----Spouse/Guest Breakfast \$	-----Venetian III
8:00 am – 11:30 am	-----SEMINAR:The RPPTL's Guide to the International Investor Client: Scaling "The Wall" of Cross Border Legal Issues \$	-----Tuscan IV
9:00 am – 12:00 pm	-----FL Realtor-Attorney Jt. Cmtee & FR/BAR Contract Revision	-----Ligurian II
11:30 am – 1:25 pm	-----Annual Membership Election Meeting & Luncheon \$	-----Venetian IV & V
1:30 pm – 2:30 pm	-----Development and Land Use	-----Ligurian II
1:30 pm – 2:30 pm	-----Estate & Trust Tax Planning	-----Tuscan I & II
1:30 pm – 3:00 pm	-----Real Estate Structures and Taxation	-----Ligurian I
1:30 pm – 3:00 pm	-----Real Property Litigation	-----Venetian I
2:30 pm – 4:00 pm	-----Probate Law & Procedure	-----Tuscan I & II
2:30 pm – 4:00 pm	-----Commercial Real Estate	-----Venetian II
3:00 pm – 4:00 pm	-----Insurance & Surety	-----Ligurian II
3:00 pm – 4:00 pm	-----Title Insurance & Title Insurance Liaison	-----Venetian I
4:00 pm – 5:00 pm	-----Ad Hoc Jurisdiction/Service Process*	-----Donatello Boardroom
4:00 pm – 5:00 pm	-----Fiduciary Practice Group	-----Ligurian II
4:00 pm – 5:00 pm	-----Membership & Inclusion	-----Venetian II
5:00 pm – 6:00 pm	-----PAC	-----Venetian IV & V
7:00 pm – 9:30 pm	-----Friday Reception and Dinner \$ <i>(Transportation by watertaxi to restaurant begins at 6:30 pm)</i> Reception Sponsored by: Wells Fargo Private Bank Dinner Sponsored by: First American Title Insurance Company Regions Private Wealth Management	-----Emeril's Tchoup Chop
9:30 pm – 11:30 pm	-----Hospitality Suite	-----Bernini

Saturday, June 4, 2016

6:30 am	-----Reptiles Run	-----Hotel Lobby
7:30 am – 10:00 am	-----Spouse/Guest Breakfast \$ <i>Sponsored by Attorneys Title Fund Services, LLC</i>	-----Tuscan II
8:00 am – 10:00 am	-----Real Property Law Division Roundtable Breakfast <i>Sponsored by Fidelity National Title Group</i>	-----Venetian III
8:00 am – 10:00 am	-----Probate and Trust Law Division Roundtable Breakfast <i>Sponsored by Stout Risius Ross, Inc.</i>	-----Tuscan I
10:00 am – 1:30 pm	-----Executive Council Meeting and Lunch <i>Lunch Sponsored by The Florida Bar Foundation</i>	-----Venetian IV & V
7:00 pm – 9:30 pm	-----Dinner \$	-----Mama Dellos

Sunday, June 5, 2016

9:00 am – 11:00 am	-----Brunch \$	-----Trattoria del Porto
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** Attendance by invitation only

\$ Payment and Registration Required– Tickets available for purchase at registration desk.

Convention Exhibitors

AGED, Inc

A nonprofit special needs trust company helping the elderly/disabled qualify for Medicaid when over the income/asset limit. Specializing in D4A, D4C, and Third Party trusts.

Represented by:

Nick Barton
407-682-4111
nick@trustaged.org

Sharon Reich
407-682-4111
sharon@trustaged.org

Corporate Services Group

Corporation Service Company® (CSC®) provides a web-based document recording (eRecording) solution that allows document submitters including title companies, banks, and law firms to electronically record real estate documents with county offices throughout the U.S.

Our system bridges the gap between submitters and county offices and enables easier document creation on the submitter side and faster recordation, indexing, and acknowledgement on the recorder side. CSC was first to market with an eRecording solution and our services remain the benchmark for speed, efficiency, and security. For more on how CSC can improve the way you work, visit www.erecording.com.

Represented by:

Matt Netta
302-636-5400
matthew.netta@cscglobal.com

Corporate Valuation Services

Business appraisals, FLLC/FLP discount studies, expert witness testimony.

Represented by:

Tony Garvy
239-231-1140
tgarvy@corporatevaluationservices.com

Florida Lawyers Support Services, Inc.

Florida Lawyers Support Services, Inc. (FLSSI) has served as a resource for RPPTL attorneys for 35 years. Production of reliable forms for probate, guardianship and real property transactions is their goal.

Represented by:

Erin B. Chambers
407-515-1501
erinchambers@flssi.org

Guardian Trust

Professional Trustee Services with a focus on Special Needs Trusts.

Represented by:

Ashley Gonnelli
800-669-2499
ashley@guardiantrust.org

LinguaOne, Inc.

LinguaOne, Inc. is an international interpretation and translation company providing live, video, and telephonic services in over 300 languages.

Represented by:

Tessa Donato
507-351-8787
tessa@lingua-one.com

Misti Winters
407-617-3670
misti@lingua-one.com

Natolie Adkins
ncadkins@outlook.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
609-955-5743
rmeyers@mpival.com

North American Title Insurance

Growth does not happen by magic. Currently the 8th largest title insurance underwriter in the country, NATIC is dedicated to providing its Agents the tools and resources that offer scientifically proven success rates, time and again. We believe in simple done right.

Represented by:

Andres San Jorge
786-574-0281
asanjorge@natic.com

Old Republic Title

We provide qualified intermediary services for IRC §1031 delayed exchanges of real property and personal property.

Represented by:

Janet L. Schaum
813-849-2816
jschaum@orexco1031.com

Lesla Lemonds
llemonds@oldrepublictitle.com

The Florida Bar Foundation

The Florida Bar Foundation is the only statewide organization linking 30 legal services programs in Florida to form a comprehensive, statewide legal services delivery system. Its funding promotes access to justice and improvements in addressing the civil legal needs of the poor. The Florida Bar Foundation is a public charity under Section 501(c)(3) of the Internal Revenue Code. Contributions to the Foundation are deductible to the fullest extent permitted by law.

Represented by:

Donna Marino
407-960-7000
dmarino@flabarfdn.org

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Board certification is The Florida Bar's highest level of evaluation of the competency and experience of attorneys in the 26 areas of law approved for certification.

Represented by:

Arlee Colman
850-561-5805
acolman@flabar.org

Wells Fargo Private Bank

Wells Fargo Private Bank provides specialty services on the trust platform in the philanthropic, estate settlement, life management, and real estate management areas.

Represented by:

Candace Marshall
Candace.r.marshall@wellsfargo.com
407-649-5368

Jessica Lillesand
Jessica.lillesand@wellsfargo.com
727-954-1521

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GENERAL SPONSORS

Overall Sponsors - Legislative Update & Convention & Spouse Breakfast
Attorneys' Title Fund Services, LLC – Melissa Murphy

Thursday Lunch
Management Planning, Inc. – Roy Meyers

Thursday Night Reception
JP Morgan – Carlos Batlle / Alyssa Feder

Old Republic National Title Insurance Company – Jim Russick

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

Friday Night Dinner
First American Title Insurance Company – Alan McCall

Regions Private Wealth Management – Margaret Palmer

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

Real Property Roundtable
Fidelity National Title Group – Pat Hancock

Saturday Lunch
The Florida Bar Foundation – Bruce Blackwell

FRIENDS OF THE SECTION

Business Valuation Analysts, LLC – Tim Bronza

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IRA, Insurance & Employee Benefits Committee

Life Audit Professionals – Joe Gitto
Estate & Tax Planning Committee

Management Planning, Inc. – Roy Meyers
Estate & Tax Planning Committee

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Trust Law Committee



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



The RPPTL's Guide to the International Investor Client: Scaling "The Wall" of Cross Border Legal Issues

COURSE CLASSIFICATION: INTERMEDIATE LEVEL

Live and Webcast Presentation: Friday, June 3, 2016

Loews Portofino Bay Hotel • 5601 Universal Boulevard
Orlando, FL 32819 • (407) 503-1000

Course No. 2057R

- Live
- Live Webcast
- Audio CD
- Video DVD

7:30 am – 8:00 am
Late Registration

8:00 am – 8:15 am
Welcome and Opening Remarks

8:15 am – 8:45 am
Avoiding US Landmines: Foreign Investment and Immigration Issues
Jeffrey Devore, Palm Beach Gardens

8:45 am – 9:45 am
Preparing a Solid Foundation: International Aspects of Estate Planning for Multi-National Families
Scott Bowman, Boca Raton

9:45 am – 10:00 am
Break

10:00 am – 10:45 am
Tearing Down the Walls: Corporate and Tax Structuring of International Business Transactions
Juan Carlos Ferrucho, Miami

10:45 am – 11:30 am
Navigating Border Patrol: Litigation and Service Issues for Non-US Residents
Sean Kelley, St. Augustine

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CLE CREDITS

CLER PROGRAM

(Max. Credit: 3.5 hours)
General: 3.5 hours
Ethics: 0.0 hours

CERTIFICATION PROGRAM

(Max. Credit: 3.5 hours)
International Law: 3.5 hours

Seminar credit may be applied to satisfy CLER / Certification requirements in the amounts specified above, not to exceed the maximum credit. See the CLE link at www.floridabar.org for more information.

Prior to your CLER reporting date (located on the mailing label of your Florida Bar News or available in your CLE record on-line) you will be sent a Reporting Affidavit if you have not completed your required hours (must be returned by your CLER reporting date).

TO REGISTER



ON-LINE:
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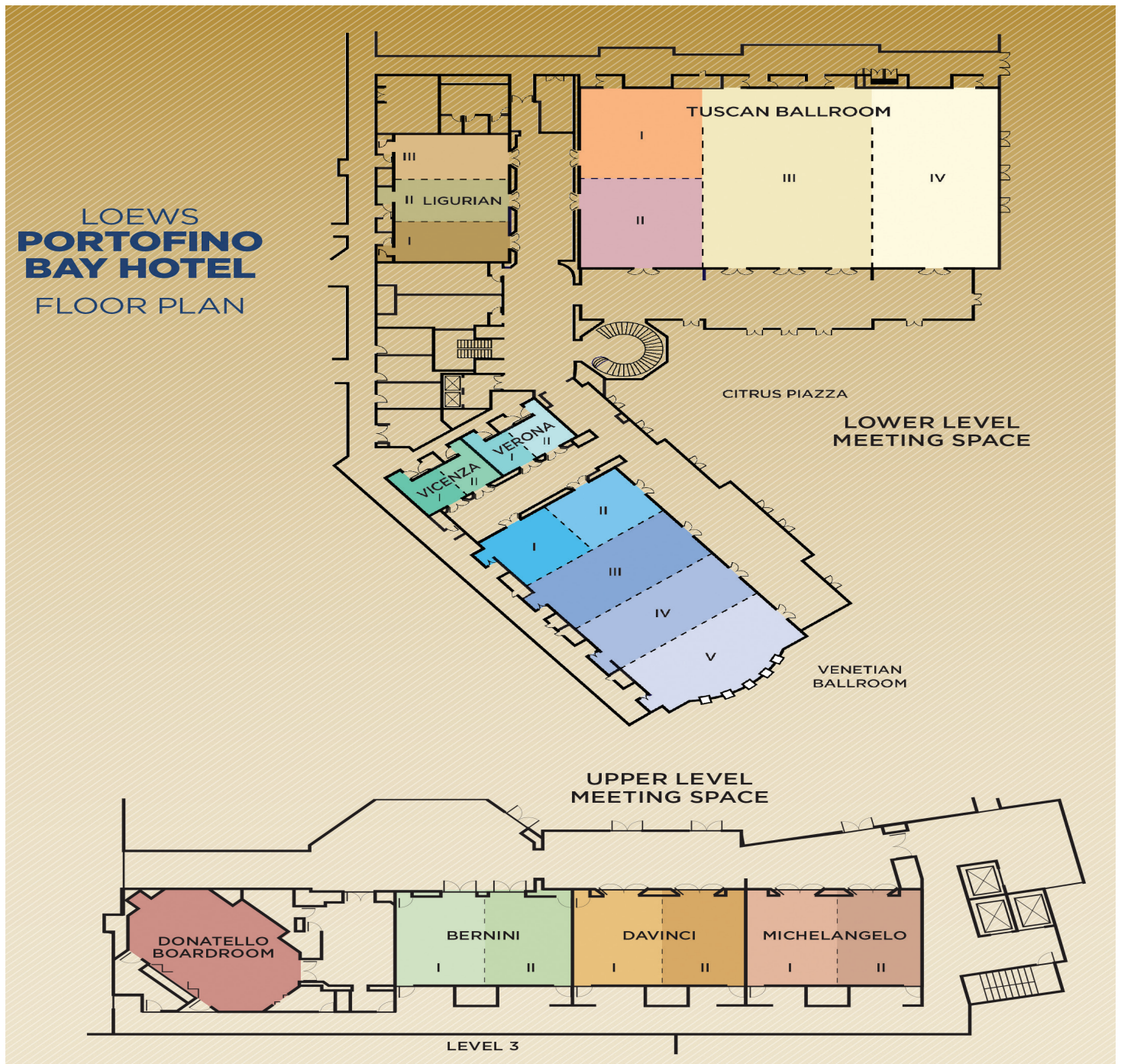
MAIL:
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Meeting Rooms Locations



High Speed Internet Connection Instructions

Select **loews_conf**

Start your Web Browser.

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

RPPTL2016

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