

38TH ANNUAL

ATTORNEY TRUST OFFICER LIAISON CONFERENCE



AUGUST 22-24, 2019

**The Breakers, Palm Beach
Thursday, August 22, 2019**

**Golf Tournament and Conference Opening Reception
Friday, August 23, 2019 – Saturday, August 24, 2019
Live Presentation**



CLE Credits

General 14.5

Ethics 1.0

Technology 1.0

Certification Credits

Elder Law 14.5

Tax Law 2.0

Wills, Trusts and Estates 14.5

Other Credits

CFP: Pending

CPWA: Pending

CTFA: Pending

THURSDAY, AUGUST 22, 2019

10:00 a.m.

Golf Tournament Check-In

11:00 a.m.

Golf Tee Time:

6:00 p.m. – 8:00 p.m.

Opening Night Reception

Hosted By: Heritage Auctions and Northern Trust

FRIDAY, AUGUST 23, 2019

7:00 – 7:50 a.m.

Late Registration/Check-In

Breakfast

Hosted by: Fifth Third Bank

7:50 – 8:00 a.m.

Opening Remarks

Tattiana Brenes-Stahl,, Katz Baskies & Wolf PLLC

8:00 – 8:50 a.m.

Battle of the Titans: Guardians vs. Trustees

Elizabeth Hughes, Greenspoon Marder

Cady Huss, Spivey & Huss, P.A.

8:50 – 9:50 a.m.

Grantor Trusts: The Good, The Bad, The Ugly, and The Unknown

Diana Zeydel, Greenberg Traurig,PA

9:50 – 10:05 a.m.

Break

Hosted by: Raymond James Trust, N.A.

10:05 – 10:55 a.m.

Florida Community Property Rights Simplified

Richard Warner, Law Offices of Richard E Warner P.A.

10:55 – 11:45 a.m.

Is There Substance to my Anxiety? Mental Health and Substance Abuse Issues and Solutions

Eric Virgil, The Virgil Law Firm

The Honorable Yvonne Colodny, Eleventh Judicial Circuit

Habsi Kaba, Eleventh Judicial Circuit Criminal Mental Health Project

11:45 a.m. – 12:35 p.m.

Avoiding Trustee Liability for Terminating Trust Distributions

Jack Falk, Dunwoody White & Landon, P.A.

12:35 – 1:35 p.m.

Lunch

Hosted by: Coral Gables Trust

FRIDAY, AUGUST 23, 2019 (CONTINUED)

1:35 – 2:25 p.m.

The Long and Winding Road of Remote Online Notarization and Electronic Estate Planning Documents

Angela Adams, Law Office of Wm. Fletcher Belcher

Jennifer Bloodworth, First American Title Insurance Company

2:25 – 3:40 p.m.

Cool Charitable Contribution Strategies in the New Tax Climate

Conrad Teitell

Presented by Cummings & Lockwood, LLC

3:40 – 3:55 p.m.

Break

Hosted by: Raymond James Trust, N.A.

3:55 – 4:45 p.m.

Here be Dragons: What to Do When the UTC (Maybe) Doesn't Help

Deborah King

Presented by Wells Fargo Bank, N.A.

4:45 – 5:35 p.m.

Quicksand! Post-Mortem Escapes from IRA Beneficiary Disasters

Robert "Bob" Kirkland, Kirkland Woods & Martinsen LLP

5:35 – 7:00 p.m.

Reception

Hosted by: BNY Mellon Wealth Management and Empire Valuation Consultant

SATURDAY, AUGUST 24, 2019

8:00 – 8:50 a.m.

The Best Part of Waking Up: Some Current Ethical Concerns That Can Ruin Your Morning Coffee Cup

Larry Miller, Gutter Chaves Josepher Rubin Forman Fleisher Miller P.A.

Jerry Wolf, Katz Baskies & Wolf PLLC

8:50 – 9:40 a.m.

What You Don't Know You Don't Know About International Tax: Topics for Estate and Tax Professionals

David Barnhill, Gunster Yoakley & Stewart P.A.

9:40 – 10:30 a.m.

Hello Goodbye: Resignation, Removal, and Succession of Personal Representatives and Trustees

John Moran, Gunster Yoakley & Stewart P.A.

10:30 – 10:45 a.m.

Break

Hosted by: Raymond James Trust, N.A.

10:45 – 11:35 a.m.

Case Law Update

Steve Hearn, Steven L. Hearn P.A.

11:35 a.m. – 12:25 p.m.

Legislative Update

Jon Scuderi, Goldman Felcoski & Stone, P.A.

CORPORATE SPONSORS

Fifth Third Private Bank – Friday Breakfast Sponsor
Bank of America Private Bank – Lanyard Sponsor
BNY Mellon Wealth Management – Friday Reception Co-Sponsor
Christie's – General Sponsor
Coral Cables Trust – Luncheon Sponsor
Empire Valuation Consultants - Friday Reception Co-Sponsor
Grove Bank and Trust – General Sponsor
Heritage Auctions – Thursday Reception Co-Sponsor
Heritage Investment Group – General Sponsor
Investors' Security Trust – General Sponsor
National Philanthropic Trust – General Sponsor
Northern Trust – Thursday Reception Co-Sponsor
Raymond James Trust – Break Sponsor
Regions Private Wealth – General Sponsor
Suntrust Private Wealth – General Sponsor
Synovus Trust Company – General Sponsor
The Naples Trust Company – General Sponsor

LAW FIRM SPONSORS

Goldman Felcoski & Stone P.A.
Harlee & Bald, P.A.
Quarles & Brady LLP
Shuffield Lowman, P.A.
Katz Baskies & Wolf PLLC
Gutter Chaves Josepher Rubin Forman Fleisher Miller, P.A.
DG Law Bridging Generations LLP
Williams Parker Harrison Dietz & Getzen
Farr, Farr, Emerich, Hackett, Carr & Holmes, P.A.
Jones Foster P.A.
Ferguson Skipper, P.A.
Fisher & Sauls, P.A.
Trenam Law
Holland & Knight, LLP
Gunster Yoakley & Stewart, P.A.
Shutts & Bowen, LLP
Zimmerman Kiser Sutcliffe, P.A.
Greenberg Traurig, P.A.

EXHIBITORS

ADVOCARE - Care Advocates
Bank OZK
Christie's
Doyle
Fiduciary Trust International
Firstat RN Care Management Services
FirstLantic Healthcare
Heritage Auctions
Heritage Investment Group

Hindman Auctions
Members Trust Company
ResCare Home Care
Sabal Trust
Sheldrick, McGehee & Kohler, LLC.
Sotheby's
Wells Fargo Private Bank
Management Planning Inc.
Deutsche Bank Wealth Management

STEERING COMMITTEE

Special thanks to these individuals for their dedicated service to the conference.

Program Chair

Tattiana Brenes-Stahl, Boca Raton

Vice Chairs

Stacey Cole, Winter Park
Patrick Emans, Miami
Gail Fagan, Winston-Salem
Mitchell A. Hipsman, Miami
Tae Kelley Bronner, Tampa

Speaker Coordinators

Eamonn Gunther, Boca Raton
Mitchell Hipsman, Miami
Cady Huss, Sarasota

Exhibitors

Lonni Cibants, Fort Lauderdale
Michael Rubenstein, Naples

Law Firm Sponsors

Kimberly Bald, Bradenton
Gentry Byrnes, St. Petersburg

Fiduciary Sponsors

Stacey Cole, Winter Park
Gail Fagan, Winston-Salem
Michael Rubenstein, Naples

Continuing Education Credits

Chuck Runge, Bal Harbour



REGISTRATION

Price to attend: **\$550**

Early Bird Price: **\$490** (REGISTER BY JULY 8TH)

Fee Waiver: **\$250** (FOR MEMBERS OF JUDICIARY)

Golf: **\$90** (LUNCH CAN BE INCLUDED FOR AN ADDITIONAL \$40)

Guest/Spouse Ticket: **\$250** (INCLUDES FOOD FUNCTIONS AND
REQUIRES A HOST TICKET AT FULL PRICE FOR THE CONFERENCE)

To register, log into The Florida Bar Members Portal at
www.member.floridabar.org, click Meetings/CLE Events and scroll
to the desired course.

LAST DAY FOR REFUND IS AUGUST 9TH!