

THE REAL PROPERTY, PROBATE AND TRUST  
LAW SECTION OF THE FLORIDA BAR

# 2019 ANNUAL CONVENTION



## GO ALL IN!

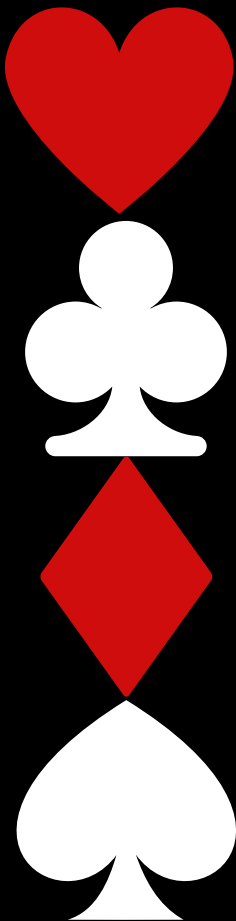
continuing  
legal  
education

committee  
meetings

FUN family  
activities

awards banquet  
& casino  
night

# Welcome from the Chair



## Welcome to the 2019 Real Property, Probate and Trust Law Section's Annual Convention!

It has been my honor and privilege to serve as your Section Chair this year. We have many events planned throughout the weekend that we hope you all will all enjoy.

### **Highlights include:**

- Thursday:** Exhibitor Hall  
Committee Meetings  
Spouse/Guest Tour to Dunedin  
New Member Welcome Orientation  
Pre-Reception at the Clearwater Aquarium  
Welcome Reception at the Marina Cantina  
Hospitality Suite
- Friday:** Exhibitor Hall  
CLE Programming: *Tricky Homestead*  
*Issues and Other Hot Topics*  
Jail-N-Bail Fundraiser  
Spouse/Guest Sea Life Safari  
Annual Membership Luncheon  
General Sponsor Reception (invitation only)  
Law Student Reception (students only)  
Kids Camp  
Friday Reception and Awards Dinner  
Casino Night
- Saturday:** Division Roundtable Meetings  
Executive Council Meeting  
Free Time to Enjoy the Pool and Beach  
Poolside BBQ

I encourage you to attend committee meetings, network, take in the beautiful surroundings of Clearwater Beach, **GO ALL IN!**



# COMMITTEE MEETINGS

**Thursday, May 30, 2019**

6:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
7:00 am – 4:00 pm	<b>Registration Desk Hours</b>	<i>Opal Ballroom Foyer</i>
7:30 am – 9:00 am	<b>Breakfast</b>	<i>Beach Breeze</i>
8:00 am – 5:00 pm	<b>Exhibit Booth Hours</b>	<i>Opal Ballroom Foyer</i>
8:00 am – 8:30 am	<b>Fellows</b>	<i>Sunset Salon</i>
8:00 am – 9:00 am	<b>Title Issues &amp; Standards</b>	<i>Sea Salon</i>
8:00 am – 9:30 am	<b>Estate &amp; Trust Tax Planning</b>	<i>Opal Sea/Opal Sun</i>
8:00 am – 9:30 am	<b>Sponsorship Coordination</b>	<i>Beach View</i>
8:00 am – 9:30 am	<b>Real Property Problems Study</b>	<i>Opal Sand</i>
9:30 am – 11:30 am	<b>Joint Meeting of Commercial Real Estate, REST and Development &amp; Land Use</b>	<i>Opal Sand</i>
9:30 am – 11:00 am	<b>Joint Meeting of Construction Law and Insurance &amp; Surety</b>	<i>Beach View</i>
9:30 am – 11:30 am	<b>Trust Law</b>	<i>Opal Sea/Opal Sun</i>
11:00 am – 3:00 pm	<b>Spouse/Guest Event: Dunedin Excursion</b>	<i>Meet in Hotel Lobby</i>
11:30 am – 1:00 pm	<b>Real Property Litigation</b>	<i>Opal Sand</i>
11:30 am – 12:30 pm	<b>New Attendee Welcome &amp; Orientation</b>	<i>Beach Breeze</i>
11:30 am – 1:30 pm	<b>Box Lunch \$</b>	<i>Opal Ballroom Foyer</i>
11:30 am – 1:00 pm	<b>Guardianship, Power of Attorneys &amp; Advance Directives</b>	<i>Opal Sea/Opal Sun</i>
11:30 am – 1:00 pm	<b>Homestead Issues Study</b>	<i>Beach View</i>
11:30 am – 1:00 pm	<b>Charitable Planning and Exempt Organizations</b>	<i>Sunset Salon</i>
12:00 pm – 1:30 pm	<b>Residential Real Estate and Industry Liaison</b>	<i>Sand Dune/Sand Dollar</i>
12:00 pm – 1:30 pm	<b>Condominium and Planned Development</b>	<i>Sea Salons</i>
1:00 pm – 2:30 pm	<b>Probate Law and Procedure</b>	<i>Opal Sea/Opal Sun</i>
1:00 pm – 2:30 pm	<b>Information and Technology</b>	<i>Sunset Salon</i>
1:30 pm – 2:30 pm	<b>Title Insurance and Title Industry Liaison</b>	<i>Sand Dune/Sand Dollar</i>
2:15 pm – 2:45 pm	<b>Afternoon Snack Break</b>	<i>Opal Ballroom Foyer</i>
2:30 pm – 4:00 pm	<b>Mandatory Chairs and Vice Chair Meeting</b>	<i>Opal Sand</i>
4:00 pm – 5:00 pm	<b>At Large Members</b>	<i>Opal Sea/Opal Sun</i>
4:00 pm – 5:00 pm	<b>Principal and Income</b>	<i>Sea Salon</i>
4:00 pm – 5:00 pm	<b>Ad Hoc Study Committee on Jurisdiction &amp; Due Process**</b>	<i>Chair's Suite</i>
5:00 pm – 7:00 pm	<b>Pre-Reception at the Clearwater Aquarium</b>	<i>Pick up in Lobby</i>
7:00 pm – 9:00 pm	<b>Reception at Marina Cantina</b>	<i>Pick up in Lobby</i>
9:00 pm – 11:00 pm	<b>Hospitality Suite</b>	<i>Sand Bar</i>

**Be on the lookout for our Event App sponsored by  
WFG National Title Insurance Company.**





# COMMITTEE MEETINGS

## Friday, May 31, 2019

7:30 am – 5:00 pm	<b>Registration &amp; Exhibit Booth Hours</b>	<i>Opal Ballroom Foyer</i>
7:30 am – 11:30 am	<b>CLE: TRICKY HOMESTEAD ISSUES &amp; OTHER HOT TOPICS</b> <b>(Breakfast included with CLE Registration) \$</b>	<i>Opal Sand</i>
9:00 am – 11:30 am	<b>Kids Event: Sealife Expedition \$</b>	<i>Meet in Hotel Lobby</i>
9:00 am – 11:30 am	<b>Florida Realtor-Attorney Joint Committee</b>	<i>Beach Salons</i>
10:00 am – 11:30 am	<b>Construction Law Institute Planning</b>	<i>Sand Dollar</i>
12:00 pm – 1:15 pm	<b>Annual Membership Luncheon \$</b>	<i>Opal Sea/Opal Sun</i>
1:15 pm – 2:45 pm	<b>Probate &amp; Trust Litigation</b>	<i>Opal Sand</i>
1:15 pm – 2:30 pm	<b>Real Estate Leasing</b>	<i>Beach Salons</i>
1:15 pm – 2:45 pm	<b>IRA, Insurance &amp; Employee Benefits</b>	<i>Sand Dollar</i>
2:30 pm – 3:45 pm	<b>Membership &amp; Inclusion</b>	<i>Sunset Salon</i>
2:30 pm – 3:45 pm	<b>Real Property Finance &amp; Lending</b>	<i>Beach Salons</i>
2:45 pm – 4:15 pm	<b>Asset Protection</b>	<i>Sea Side/Sea Shore</i>
2:45 pm – 4:15 pm	<b>Ad Hoc Fiduciary Licensing Study</b>	<i>Sand Dollar</i>
2:45 pm – 4:15 pm	<b>Professionalism &amp; Ethics</b>	<i>Sea Watch</i>
2:45 pm – 4:00 pm	<b>Law School &amp; Mentoring</b>	<i>Sand Dune</i>
4:15 pm – 5:00 pm	<b>Attorney Trust Officer</b>	<i>Sand Dollar</i>
4:15 pm – 5:00 pm	<b>PAC</b>	<i>Sea Side/Sea Shore</i>
5:00 pm – 6:00 pm	<b>General Sponsor Reception (by invitation only)</b>	<i>Beach Salons</i>
5:00 pm – 6:00 pm	<b>Student Reception</b>	<i>Sand Bar</i>
6:00 pm – 7:00 pm	<b>Pre-Dinner Reception \$</b>	<i>Event Lawn</i>
6:00 pm – 11:00 pm	<b>Kids Camp \$</b>	<i>Sea Salons</i>
7:00 pm – 8:45 pm	<b>Awards Dinner \$</b>	<i>Opal Sand/Sea</i>
8:45 pm – 11:00 pm	<b>Casino Night \$</b>	<i>Opal Sun</i>

## Saturday, June 1, 2019

6:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
7:30 am – 9:30 am	<b>Probate &amp; Trust Law Division</b> <b>Roundtable Breakfast * \$</b>	<i>Opal Sun</i>
8:00 am – 9:30 am	<b>Real Property Law Division</b> <b>Roundtable Breakfast * \$</b>	<i>Sea Salons</i>
7:30 am – 10:00 am	<b>Spouse/Guest Breakfast \$</b>	<i>Beach View</i>
9:30 am – 12:30 pm	<b>Executive Council Meeting *</b>	<i>Opal Sea/Opal Sand</i>
12:30 pm – 5:00 pm	<b>Enjoy the Hotel Amenities &amp; Clearwater Beach</b> <b>On Your Own (see activities flier on app)</b>	
5:00 pm – 7:30 pm	<b>Poolside BBQ \$</b>	<i>Pool Lawn</i>







Registration for  
Section members:

**\$125**

Webcast:

**\$200**

# CLE PROGRAMING

## Tricky Homestead Issues and Other Hot Topics

**Friday, May 31, 2019**

*Intermediate Level*

Earn: 3.5 Hours General

Certification Credit: Real Estate 3.5 Hours, Tax 1.0 Hour, Wills, Trusts and Estates 1.0 Hour

- 7:30 am** **Late Registration & Breakfast** - sponsored by: Fidelity National Title Group  
**7:50 am** **Welcome & Opening Remarks**  
**8:00 am - 8:45 am** **Homestead Trusts – Yes? No? Maybe? If so, How?**  
Rohan Kelley, Fort Lauderdale  
Bruce Stone, Coral Gables  
**8:45 am - 9:15 am** **Homestead Waivers & Taking Possession of the Homestead after Death**  
Jeffrey S. Goethe, Bradenton  
**9:15 am - 9:30 am** **BREAK**  
**9:30 am - 10:15 am** **Homestead Bonanza: Common Issues in Insuring Title**  
Melissa S. Scaletta, Orlando  
Karla J. Staker, Maitland  
Jennifer Jones Bloodworth, Orlando  
**10:15 am - 10:35 am** **Can We Justifiably Rely on the Current State of the Law Regarding Fraud?**  
Manuel Farach, Fort Lauderdale  
**10:35 am – 11:05 am** **Homestead Tax Issues: Documentary Stamp Tax & Ad Valorem Tax**  
Brian C. Sparks, Tampa  
**11:05 am – 11:25 am** **Update on 2019 House & Senate Bills Regarding Remote Online Notarization & Electronic Wills, Trusts, POAs, etc.**  
Sarah Butters, Tallahassee  
E. Burt Bruton, Miami

## ANNUAL LUNCHEON

FRIDAY, MAY 31, 2019

Join us for the Annual Meeting and Luncheon with special guest speaker, David Yates, CEO of the Clearwater Marine Aquarium.



David Yates joined Clearwater Marine Aquarium (CMA) in 2006 as its CEO. He assumed this position at a time when CMA was on the verge of insolvency, and created a vision, business model and an award-winning management team that has successfully resurrected CMA into a thriving global organization. When Winter the disabled dolphin came to Clearwater Marine Aquarium, Yates had the foresight to see her story of survival as an inspiration to others. Yates has produced a documentary on Winter's story and has helped produce six books about her. Yates is also Co-Producer/Executive Producer of the #1 box office hit *Dolphin Tale* and its sequel, *Dolphin Tale 2*.



# Thank you to our Section Sponsors

## General Sponsors

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Welcome Reception Sponsors



Real Property Roundtable Sponsor



Saturday Night Dinner Sponsor



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Spouse/Guest Breakfast Sponsor



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Friday Reception Sponsors



Friday Dinner Sponsor



Probate Roundtable Sponsors



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## Friends of the Section





# Convention Sponsors

Overall Convention Sponsor



## Special Event Sponsors



CLEARWATER MARINE  
AQUARIUM™  
Thursday Reception



Casino Night Sponsor



TESS

Total Estate Settlement Services, Inc.  
Friday Luncheon Co-Sponsor

RAYMOND JAMES Trust  
Thursday Reception



## Exhibitors

RAYMOND JAMES Trust



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# Property Map



## INFORMATION:

### PARKING

Valet Parking is available at \$15/day.

### APP DOWNLOAD

1. Go to App store/Play Store on your device.
2. Look for CrowdCompass AttendeeHub and download it.
3. Search for the event by its name, 2019 RPPTL Annual Convention (You can also use keywords like RPPTL).
4. Click on Download and enter Event Password, opal2019

### WIFI

Select: WiFi

Choose Network: Opal\_SandsMeeting

Password: PilotBank

