

# 2020 RPPTL EXECUTIVE COUNCIL MEETING & LEGISLATIVE AND CASE LAW UPDATE SEMINAR



## THE BREAKERS

PALM BEACH, FL



AUG 20 - 23, 2020

# COVID UPDATES

Greetings friends! We have been working closely with the Breakers staff and our plans for an in-person Legislative and Case Law Update Seminar and in-person Executive Council meetings remain a go at this time. We will be ready to adjust our plans as the circumstances dictate. That may even include cancellation and a switch to a complete virtual program.

We want to make it absolutely --- 100%--- clear that no one is obligated to attend this meeting or seminar in person. The seminar will be simulcast live over the internet. We will be making arrangements to permit committee meetings and the Executive Council meeting to proceed in a hybrid in-person and Zoom format. No one will be punished, left out, or shamed in any way if they do not want to attend in-person. If you are in a high risk category or are uncomfortable attending, we would encourage you to stay home for this meeting and join us for our next set of meetings when COVID-19 is behind us (hopefully soon!).

We will be working with The Breakers to comply with the most current recommendations and guidelines set by the Centers for Disease Control and Prevention, the World Health Organization, and the Florida and Palm Beach County Departments of Health. The Breakers most current list of Health & Safety Precautions can be found on their website at <https://www.thebreakers.com/updates/>. The attendance numbers for the Legislative and Case Law Update and committee meetings will be capped so that we can appropriately plan for the use of space based upon parameters provided to us by the Breakers. We will also be requesting that all attendees at any events affirm on the day of attendance that they meet and agree to the conditions set forth in an Attendee Health Attestation on the next page. If you cannot affirm and attest to the information on the Attendee Health Attestation on the day of the event, you will not be permitted to attend the in-person event. We will be updating our own COVID-19 guidelines on the RPPTL Website to address matters such as social distancing and facial coverings as the meeting approaches.

Finally, we will be modifying our refund policies for this meeting. The deadline to cancel your hotel room will be July 20, 2020. The deadline for cancellation of your RPPTL registration for this meeting will be August 6, 2020. We would suggest that on each of those dates that you assess the current circumstances and make a decision as to whether you are willing to attend a meeting in-person. If you would like to cancel, and you do so by these dates, you will receive a full refund. We realize that circumstances are currently evolving and that you may need to cancel after those dates. We will work with you to try to obtain refunds from the Breakers after the cancellation date. The RPPTL Section will be issuing full refunds for any attendee who cannot affirm to the Attendee Health Attestation on the day of the event.



# COVID UPDATES

## Attendee Health Attestation

To do our part in preventing the spread of COVID-19, we are restricting attendance at any of our Executive Council meetings or the Legislative and Case Law Update Seminar from anyone with knowledge that they have a COVID-19 Infection or have recently been exposed to the virus. Please read the following carefully:

By attending any in-person meeting or seminar of the RPPTL Section, you are affirming and attesting that:

(a) You do not have a COVID-19 infection and are not currently experiencing or displaying, and have not in the last 14 days experience or displayed, any of the following symptoms:

- Fever or chills
- Cough
- Shortness of breath or difficulty breathing
- Fatigue
- Muscle or body aches
- Headache
- New loss of taste or smell
- Sore throat
- Congestion or runny nose
- Nausea or vomiting
- Diarrhea

(b) You have not in the last 14 days had any close contact with anyone who is either confirmed or suspected of being infected with COVID-19, including anyone who was experiencing or displaying any of the known symptoms of COVID-19.

(c) You have not in the last 14 days traveled from (1) areas of substantial community spreading requiring quarantine per the Florida Department of Health, or (2) traveled internationally- based on the current US State Department Level 4 travel advisory for all international travel due to the global impact of COVID-19.

If you cannot affirm or attest to any of the above on the day of the event, please do not attend. We will gladly provide you with a full refund. There is a risk of COVID-19 exposure in any public place where people are present. COVID-19 is highly contagious and can lead to illness and death. By attending the event, you voluntarily assume all risks related to COVID-19 exposure. Thank you for your cooperation.

# GENERAL INFORMATION

## Accommodations



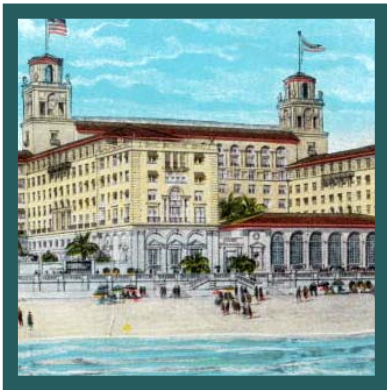
Join us back at The Breakers., situated oceanside in sunny South Florida. The Breakers history dates back to the late 1890s, when Henry Flagler invited industry tycoons and elegant socialites to flock to the pristine shores of a new destination—a long strip of an island called Palm Beach. The current hotel was modeled after the magnificent Villa Medici in Rome and opened in 1926 after fires burned two previous wooden hotels to the ground. The Breakers is a world class resort which has implemented enhanced Health & Safety Precautions to comply with the recommendations and guidelines set by the Centers for Disease Control and Prevention (CDC), the World Health Organization (WHO) and the Florida and Palm Beach County Departments of Health. All guests will be asked to affirm they meet the conditions set forth in the Guest Health Attestation before entering the resort or facilities.

### The Breakers Palm Beach

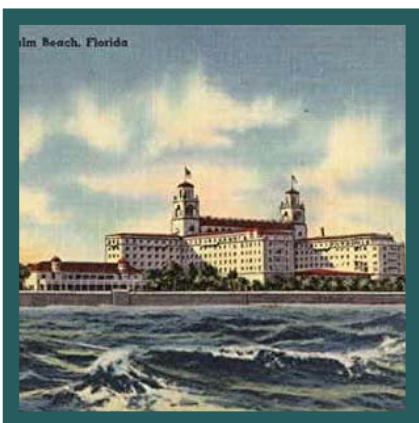
One South County Road, Palm Beach, FL 33480

**Rate: \$239.00**

**You will receive a link to reserve your room for this event with your event registration confirmation.**



## Registration



Registration for this event is online and available through The Florida Bar member portal. Due to capacity restrictions, it is important that you register early to ensure your spot for social events. Registration is required in order to receive a link to reserve a room at The Breakers. Note: Rooms at The Breakers are available on a first come, first served basis. The specific instructions to register for this event are outlined on page 8 of this brochure. The last day to register for this event is **August 6, 2020**. After this date, no event cancellations or modifications will be permitted.

**LAST DAY TO REGISTER IS AUGUST 6, 2020**

# MEETING SCHEDULE

## Monday, August 17, 2020

9:00 am - 10:30 am	Membership & Inclusion	Zoom Meeting
10:30 am - 12:00 pm	Professionalism & Ethics	Zoom Meeting
1:00 pm - 2:30 pm	Information & Technology	Zoom Meeting
2:30 pm - 4:00 pm	ActionLine	Zoom Meeting
4:00 pm - 5:30 pm	Law School Programming	Zoom Meeting

## Tuesday, August 18, 2020

9:00 am - 10:30 am	Florida Bar Journal	Zoom Meeting
10:30 am - 12:00 pm	Attorney Trust Officer	Zoom Meeting
1:00 pm - 2:30 pm	RP Certification Review Planning	Zoom Meeting
1:00 pm - 2:30 pm	Wills Trusts & Estates Certification Review Planning	Zoom Meeting
2:30 pm - 4:00 pm	Model & Uniform Acts	Zoom Meeting
2:30 pm - 4:00 pm	Disaster and Emergency Preparedness & Response	Zoom Meeting
4:00 pm - 5:30 pm	Convention Coordination	Zoom Meeting

## Thursday, August 20, 2020

6:30 am	Reptile Run/Walk Club	Meet in Hotel Lobby
8:00 am - 10:00 am	Continental Breakfast	South Loggia East
7:00 am – 6:00 pm	Registration Desk Hours	South Loggia East
8:00 am - 9:00 am	Ad Hoc E-Wills	Ponce de Leon 1
8:00 am - 9:00 am	Fellows	Ponce de Leon 4
8:00 am - 9:00 am	Insurance and Surety	Ponce de Leon 3
8:00 am - 9:00 am	Sponsor Coordination Committee	Ponce de Leon 5
8:00 am – 9:00 am	Ad Hoc Art Committee	Ponce de Leon 2
8:00 am - 9:00 am	Residential Real Estate & Industry Liaison	Mediterranean
8:00 am - 9:30 am	Principal and Income	Ponce de Leon 6
9:15 am - 10:15 am	Real Property Financing & Lending	Mediterranean
9:00 am - 10:30 am	Estate and Trust Tax Planning	Venetian
10:00 am - 11:00 pm	Title Issues & Standards	Ponce de Leon 4
10:30 am - 12:00 pm	Guardianship Task Force	Ponce de Leon 1
10:45 am - 12:15 pm	Probate Law & Procedure	Venetian
11:00 am - 12:00 pm	Construction Law	Ponce de Leon 3
11:00 am - 12:00 pm	Development and Land Use	Ponce de Leon 5
11:30 am - 1:30 pm	Box Lunch (GRAB AND GO)	Gold Room
12:15 pm - 1:15 pm	Real Estate Leasing	Ponce de Leon 5
12:15 pm - 1:15 pm	Real Property Problems Study	Mediterranean



# MEETING SCHEDULE

## Thursday, August 20, 2020

12:00 pm - 2:00 pm	<b>Joint Meeting of IRA, Insurance &amp; Employee Benefits and Charitable Organizations</b>	<i>Ponce de Leon 4</i>
12:30 pm - 2:00 pm	<b>Probate &amp; Trust Litigation</b>	<i>Venetian</i>
1:30 pm - 2:30 pm	<b>Real Property Litigation</b>	<i>Ponce De Leon 5</i>
1:30 pm - 3:00 pm	<b>Asset Protection</b>	<i>Ponce de Leon 1 - 3</i>
1:30 pm - 3:00 pm	<b>Ad Hoc Study on Professional Fiduciary Licensing</b>	<i>Ponce De Leon 6</i>
2:15 pm - 3:45 pm	<b>Guardianship &amp; Advanced Directives</b>	<i>Venetian</i>
2:30 pm - 3:30 pm	<b>Title Insurance &amp; Title Insurance Liaison</b>	<i>Ponce De Leon 4</i>
3:15 pm - 4:15 pm	<b>Commercial Real Estate</b>	<i>Mediterranean</i>
4:00 pm - 5:30 pm	<b>Trust Law</b>	<i>Venetian</i>
4:30 pm - 5:30 pm	<b>Condo &amp; Planned Development</b>	<i>Mediterranean</i>
5:30 pm - 6:30 pm	<b>Elective Share Review</b>	<i>Ponce De Leon 4</i>
5:30 pm - 6:30 pm	<b>Ad Hoc Jurisdiction and Due Process**</b>	<i>TBD</i>
5:30 pm - 6:30 pm	<b>Legislative Update Rehearsal**</b>	<i>Ponce De Leon 5</i>
5:30 pm - 6:30 pm	<b>At Large Members Meeting</b>	<i>Ponce De Leon 1 -3</i>
6:30 pm - 7:00 pm	<b>New Attendee Welcome Reception</b>	<i>Ponce De Leon Foyer</i>
7:00 pm - 8:30 pm	<b>Reception</b>	<i>Venetian &amp; Mediterranean</i>
8:30 pm - 10:30 pm	<b>Hospitality Suite</b>	<i>Beach Club</i>

## Friday, August 21, 2020

6:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
7:30 am - 4:45 pm	<b>Registration and Exhibitor Booths/ Continental Breakfast</b>	<i>Ponce Ballroom Foyer</i>
7:30 am - 10:00 am	<b>Spouse/Guest Breakfast</b>	<i>Gold Room</i>
8:00 am - 4:45 pm	<b>Legislative Update Seminar</b>	<i>Ponce Ballroom</i>
9:30 am - 12:30 pm	<b>Spouse/Guest Event: Worth Avenue Lunch</b>	<i>Meet in Hotel Lobby</i>
12:00 pm - 1:15 pm	<b>Homestead Issues Study</b>	<i>Venetian</i>
12:00 pm - 1:15 pm	<b>PAC</b>	<i>Ponce Ballroom</i>
5:00 pm - 6:00 pm	<b>Reception and Dinner</b>	<i>Ponce Ballroom</i>
6:30 pm - 10:30 pm	<b>Hospitality Suite</b>	<i>Venetian</i>
10:30 pm - 11:30 pm		<i>Mediterranean</i>

## Saturday, August 22, 2020

6:30 am - 7:30 am	<b>Reptiles Run</b>	<i>Meet in Hotel Lobby</i>
8:00 am - 9:30 am	<b>Probate Roundtable</b>	<i>Venetian</i>
8:00 am - 9:30 am	<b>Real Estate Roundtable</b>	<i>Mediterranean</i>
8:00 am - 10:00 am	<b>Spouse/Guest Breakfast</b>	<i>Gold Room</i>
9:45 am - 1:00 pm	<b>Executive Council Meeting</b>	<i>Ponce de Leon Ballroom</i>
6:00 pm - 9:00 pm	<b>Drive Shack Reception</b>	<i>Offsite</i>

Thank you to our Sponsor



## Section Members:

**\$275**

Judicial Waiver: \$50

All Others: \$350

## Legislative Update Schedule Friday, August 21, 2020

7:00 am – 8:05 am	<b>Registration and Breakfast</b>
8:05 am – 8:20 am	<b>LEGISLATIVE POTPOURRI: Overview and Random Scraps from the Legislative Sausage Factory</b> <i>Peter Dunbar</i>
8:20 am – 8:35 am	<b>The Aftermath of the 2020 Legislative Session on Community Associations: Wait, we have to follow that?</b> <i>Shawn Brown</i>
8:35 am – 8:50 am	<b>Some Highlights of the 2020 Probate Bill - CS/HB505</b> <i>Cady Huss</i>
8:50 am – 9:05 am	<b>Now Boarding in Group 1 – All Peacocks, Hedgehogs, Squirrels and Bunnies – Emotional Support Animal Protection under SB 1084</b> <i>Susan Spurgeon</i>
9:05 am – 9:30 am	<b>Virtual Estate Planning: How to Use the New E-Wills Technology in Your Practice</b> <i>Jenna Rubin</i>
9:30 am – 9:50 am	<b>The Somewhat Uniform Commercial Real Estate Receivership Act</b> <i>Jason Ellison</i>
9:50 am – 10:05 am	<b>HB505 and Standing to Recover Estate Assets</b> <i>Elizabeth Hughes</i>
10:05 am – 10:25 am	<b>Break</b>
10:25 am – 10:40 am	<b>Making Your Real Estate Transactions Easier: Correction of Obvious Errors in Deeds and Elimination of Subscribing Witnesses in Leases</b> <i>Chris Smart</i>
10:40 am – 11:05 am	<b>Get It In Writing.... Letters Every Lawyer Should Have When Accepting Fiduciary Appointments</b> <i>William Hennessey</i>
11:05 am – 11:30 am	<b>The House Will Come To Order: Ethics, Protocols and Insight into the Legislative Process</b> <i>Ben Diamond</i>
11:30 am – 11:45 am	<b>New Grantor Trust Income Tax Reimbursement Power</b> <i>Lauren Detzel</i>
11:45 am – 12:00 pm	<b>Growth Management and Local Government Governance - Myriad of Changes, but What is The Real Effect?</b> <i>Vinette Godelia</i>
12:00 pm – 1:30 pm	<b>Lunch</b>
1:30 pm – 1:50 pm	<b>Florida's Uniform Partition of Heirs Property Act: Off Ramp on the Partition Highway</b> <i>Patrick Duffey and Mike Hargett</i>
1:50 pm – 2:00 pm	<b>Small Bank Account? No Problem! New Techniques for Distribution Without Administration</b> <i>Tae Bronner</i>
2:00 pm – 2:25 pm	<b>SB 838 The Corporations Glitch Bill and Much, Much More</b> <i>Manny Farach</i>
2:25 pm – 2:45 pm	<b>Live OR Let Die? DNRs, Guardian Conflicts, Filing Fees, and Other Guardianship Law Updates</b> <i>Brandon Bellew</i>
2:45 pm – 3:05 pm	<b>Break</b>
3:05 pm – 3:20 pm	<b>Hurricane Irma Changed Everything. Rebuilding Mobile Home and RV parks, state Preemption of Permitting and Vested Rights</b> <i>David Eastman</i>
3:20 pm – 4:10 pm	<b>Estate, Trust, And Guardianship Case Law Update</b> <i>Steve Hearn</i>
4:10 pm – 5:00 pm	<b>Land: Precedents for "Normalcy," Real Property Florida Appellate Decisions – Substance and Ethics</b> <i>Michael Gelfand</i>

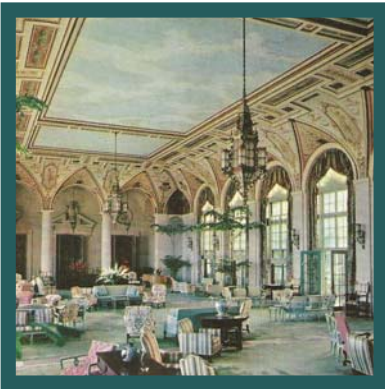
# THURSDAY, AUGUST 20, 2020



## Committee Meetings (8:00 am - 6:00 pm)

### Registration is required for meetings

Starting at 8:00 am, we will host RPPTL committee meetings.. Space is limited for each committee meeting so arrive early to help guarantee your spot. Every meeting will have conference call or Zoom meeting capabilities. The chair of each committee will circulate more details later.



## Welcome Reception (7:00 pm - 9:00 pm)

### Reception Sponsored by JP Morgan and Old Republic Title

Adults \$85, Students \$50, Children \$40

Following a long day of meetings, join us for an evening of delicious food, great drinks, and socially distanced networking. This event will be held in the Venetian Ballroom overlooking the beautiful Atlantic Ocean.



## Hospitality Suite (9:00 pm - 11:00 pm)

Registration is not required for event and all are welcome to attend.

# FRIDAY, AUGUST 21, 2020



## Legislative & Case Law Update Seminar (8:00 pm - 6:00 pm)

REGISTER THROUGH EVENTBRITE (see page 7)

### Sponsored by The Fund

We invite you to register for the 40th Annual Legislative and Case Law Update Seminar.

Link: <https://40thlegupdate.eventbrite.com>



# FRIDAY, AUGUST 21, 2020 (CONT.)



## Historical Walking Tour of Worth Avenue (9:00 am - 11:00 am)

**Registration fee is \$10 (13 and up only)**

Taking approximately 75 minutes, this fun and informative walking tour covers the colorful characters and history of Palm Beach with a focus on Worth Avenue including its architectural importance, influence on the fashion world and the development of the legendary social scene that established Palm Beach as America's first resort destination during the gilded age and the birthplace of luxury brands. Transportation provided.



## Friday Night Reception and Dinner (6:30 pm - 10:30 pm)

**Reception Sponsored by Wells Fargo Private Bank & Westcor Land Title**

**Dinner Sponsored by First American Title and Phillips**

**Adults: \$135, Children: \$60**

This Friday night event promises to be one you will not forget. The event will start with a reception with light appetizers and drinks. After the reception, you will be dazzled by the Breaker's culinary team as they serve you an unforgettable meal. During dinner, we will be honoring our 2019-20 Section Award winners. Following the dinner, you will have a chance to enjoy the music from our own Burt Bruton's band "Roadkill."



## Hospitality Suite (9:00 pm - 11:00 pm)

Registration is required for event and all are welcome to attend.





# SATURDAY, AUGUST 22, 2020



## **Division Roundtables & Executive Council Meeting**

**(8:30 am - 1:00 pm)**

**Probate Roundtable Sponsored by Stout and Guardian Trust**  
**Real Property Roundtable Sponsored by Fidelity National Title Group**

**Executive Council Meeting and Lunch Sponsored by Stewart Title and The Florida Bar Foundation**

Events are complimentary for Executive Council Members Only with pre-registration. Non-Executive Council members are \$35.



## **Reception and Golf at Drive Shack**

**(6:00 pm - 9:00 pm)**

**Adults \$55, Children \$40**

We will round out the weekend at Drive Shack. There, we will have a private area where attendees can play interactive golf and arcade games while enjoying food and beverage.





# REGISTRATION FOR EVENTS

## How to register:

- 1) Login to The Florida Bar Member Portal [www.member.floridabar.org](http://www.member.floridabar.org).
- 2) Go to the Meetings tab located on the toolbar, find "RPPTL Executive Council Meeting and Legislative & Case Law Update 2020". Direct Link: (works best if you are logged into the portal).
- 3) Go to "Register Now".
- 4) Select the quantity of each ticket type, then click Continue.
- 5) Complete attendee information form for each person in your party. Note: Default guest name is the member's name.
- 6) Select CONTINUE to select tickets. The drop down box on the top of the screen will enable you to select the person for the ticket.
- 7) After all items are added, select CONTINUE to proceed to the payment site.

## Event

## Price

Thursday Grab and Go Lunch	\$30
Thursday Welcome Reception (Adult)	\$85
Thursday Welcome Reception (Student)	\$50
Thursday Welcome Reception (Child)	\$40
Friday Spouse/Guest Breakfast	\$35
Friday Spouse/Guest Event: Tour of Worth Avenue**	\$10
Friday Reception**	\$40
Friday Dinner**	\$95
Saturday Spouse/Guest Breakfast	\$35
Saturday Probate Roundtable Breakfast*	\$35
Saturday Real Property Roundtable Breakfast*	\$35
Saturday Executive Council Box Lunch*	\$35
Reception and Golf at Drive Shack (Adult)**	\$55
Reception and Golf at Drive Shack (Child)**	\$40

\*Roundtable Roundtable Breakfast and Executive Council Box Lunch is complimentary to EC members, but registration is MANDATORY to receive this benefit.

\*\*Registration is open to Executive Council members ONLY.

## Modifying your order:

To add events to your registration, log in to your account and select modify registration. This will enable you to add items to order for this event.

## Legislative Update Seminar Registration:

Use this link to register: <https://40thlegupdate.eventbrite.com>

# RESERVATION INFORMATION

Once you have registered for the Executive Council meeting events, you will receive an e-mail with a link to make your hotel reservation at the Breakers. **NO TELEPHONE RESERVATIONS WILL BE ACCEPTED.** Please do not make a hotel reservation **UNLESS YOU FULLY ANTICIPATE THAT YOU WILL BE ATTENDING THE MEETINGS!**

Here are particulars and information that you need to know:

1. The hotel reservation link that you will receive is designed for one use only. If you send this link to others and they make their reservation before you, you will **NOT** be able to make a hotel reservation.
2. You will only be able to book one room, as has been the custom for several years. Several of you have asked whether you can book multiple rooms for your family - the answer is unfortunately no, as we only have a limited number of rooms allocated by the Breakers in our room block and all of them are needed for our Executive Council members and sponsors.
3. When you make your reservation, the Breakers will be taking an deposit of one night.
4. July 20th is the deadline for canceling or modifying your hotel reservation without penalty.
5. After July 20th, if you cancel or modify your reservation you will lose your deposit.
6. To cancel or modify a reservation, you **MUST** email Mary Ann Obos at [mobos@floridabar.org](mailto:mobos@floridabar.org). **DO NOT CALL BREAKERS OR BAR STAFF- ALL REQUESTS MUST BE IN WRITING VIA EMAIL.**
7. If the room block is full by the time you try to make your hotel reservation, **DON'T PANIC** - put your name on the waitlist, which is being monitored throughout the entire process. With this reservation procedure, we will have fewer people on the waitlist, and with cancellations and modifications, we should be able to get the vast majority, if not all, of those who are on the waitlist into a room at the Breakers.

**Note: With the uncertainty of the COVID-19 pandemic, we recognize that travel plans may be a bit more uncertain than in previous years. The RPPTL Section is committed to providing a safe environment for our attendees to gather. If you have health concerns, or, if you are unable to attend due to COVID-19 related reasons, we will grant a full refund for registration fees and attempt to work with the hotel to obtain a refund of your deposit.**

Please be patient as we work through this new process. Please do not call, or have your assistant call, Mary Ann (or Hilary) to check on the status of when the registration and hotel reservation process will open or the status of the waitlist. We will communicate promptly with those on the waitlist as rooms become available.