

(DEADLINE TO SUBMIT MAY 10, 2019)

APPLICATION FOR FELLOWSHIP PROGRAM

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

Name:	Joseph M. Percopo	Age: 34
Firm Name:	Mateer & Harbert, P.A.	Position: Partner
Street Address:	225 E. Robinson St. Suite 600	
	City: Orlando	State: FL Zip Code: 32801
Telephone Number:	407-425-9044	Email Address: jpercopo@mateerharbert.com
Law School and Date of Graduation:	JD – FSU 2009 summa cum laude; LLM – UF 2010 (tax scholar)	LLM: Yes X No ☐
Year admitted to the Florida Bar:	2009	Years of Practice: 9
Board Certified:	Yes ☐ No X If so, what in what area?	
Other State Bar Admissions:	New York	

Race or Ethnic Heritage or Disability¹: white

Please describe the area(s) of the law in which you focus your practice: Estate Planning, Estate & Trust Administration, Asset Protection, business law and tax law.

Please list your employment history for the past 5 years: Percopo Law, P.A. (1.75 years); Of Counsel to NeJame Law (3 months); Giles & Robinson, P.A. (2.75 years); Mateer & Harbert P.A. (July 2015 to present)

How long have you been a member of the RPPTL Section of the Florida Bar? 2009

Do you have any prior experience with any RPPTL Section Committee? If so, please list: Authored an article for the RPPTL Section for the Florida Bar Journal, The Impact of Co-Ownership on Florida Homestead, May 2012

Have you ever been the subject of any disciplinary action by any Bar association? If yes, please describe in detail the nature of the disciplinary action and the outcome. Attach additional sheets if necessary. No

Please state why you are interested in being chosen as a Fellow for the RPPTL Section. (Attached additional sheets if necessary)

I have been looking for opportunities to get more involved with the Florida Bar, as I was very active during my law school career with the YLD. I believe the RPPTL Section of the Florida Bar most closely aligns with my practice, areas of expertise, and interests. Moreover, I enjoy the academic side of the law (having already authored seven published articles), not just the actual practice. I am interested in being a Fellow for the RPPTL Section because it will allow me to be involved with the Florida Bar in areas of law I truly enjoy, and allow me to satisfy my academic thirst since I am no longer in school. I look forward to working with top minds and practitioners from around the state, learning from them and becoming a better leader in our legal profession from the experience

Have you previously applied for this fellowship, if so when? Yes: 2016, 2015, 2013

Please describe your involvement in any local, state, voluntary and national level bar association, including any leadership positions you currently hold or have held in the past. Attach additional sheets if necessary. Martindale-Hubbell Peer Review Rating of AV; Orange County Bar Association ("OCBA") Leadership Law Presenter on the Topics of Estate Planning & Asset Protection Planning, and Tax Law; Estate, Trust, & Guardianship Committee of the OCBA, former chair and multiple time CLE presenter; Young Lawyers Section of the OCBA, principal organizer in central Florida's "Wills for Heroes" community service event; Solo & Small Firm Committee of the OCBA (CLE presentations); Central Florida Estate Planning Council (board member and 2014 presenter of the 5 Minute Update on topics relevant to estate planning); Estate Planning discussion group (member); Florida Bar YLD Law Student Division (created the division and was appointed the first President – worked directly with the YLD Board of Governors); authored an article for the RPPTL Section for the May 2012 Florida Bar Journal (The Impact of Co-Ownership on Florida Homestead);

Additional Authored Documents:

1. July/August 2011 Florida Bar Journal Feature article (The Check-and-Merge: A Viable Answer to Cross-entity Merger?)
2. August 2016 Orange County Bar Association Briefs (Primer: Rights of a surviving spouse in Florida)
3. Spring/Summer 2016 Florida Bar Tax Section Bulletin (Maintaining tax exempt status when partnering with a for-profit entity)
4. July 2017 Wealth Counsel (Drafting Third-party spendthrift trusts after U.S. v. Harris)
5. August 2017 Wealth Counsel (Estate of Powell: a new example of failed deathbed tax planning)
6. Fall 2018 Florida Bar Tax Section Bulletin (LLC: Disregarded Entity or S Corp tax status?)

¹ Information requested is optional
4840-9670-1481.1

Please describe any funding or support (including allowing time to fulfill your obligations as described in the Fellowship Information Sheet) that you may receive from your firm or employer, or other organization(s) that would support your activities as a Fellow.

Attach additional sheets if necessary. My firm encourages active participation in the Florida Bar Sections. Therefore, I will have no issue getting time off to attend meetings and participate meaningfully. The firm will also assist with expenses not covered by the fellowship

Please identify at least two substantive committees that you would be interested in joining as a Fellow: Asset Preservation, Estate & Trust Planning, Probate & Trust Litigation, Probate Law & Procedure, Trust law

Are you able to participate in a video interview? If so, with what program? Yes. Face-time or Skype (exp. Skype, Face-Time)

PLEASE NOTE: Fellows are required to attend a minimum of 3 RPPTL executive council meetings during the Fellowship year.

Please list the name, email address and phone number for two members of the Florida Bar (other than members of your own firm) who can provide information regarding your professional qualifications and experience:

Alexander S, Douglas, II	adouglas@shuffieldlowman.com	407-581-9800
Name	Email	Phone
David Akins	Dakins@deanmead.com	407-428-5169
Name	Email	Phone
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Name	Email	Phone
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Name	Email	Phone