

THE REAL PROPERTY, PROBATE & TRUST LAW SECTION

PROBATE & TRUST DIVISION ROUND TABLE

Ballroom 1/2

Saturday, May 30, 2026

8:00 – 9:30 AM

Please note: Agenda items may be heard out of order.

I. 8:00 am – Call to Order - Sancha K. Brennan, Division Director

1. Announcements/Introductions
Thank you – Lyudmyla Kolvesnik, Fellow
2. Sponsor Recognition
 - A. Guardianship Trust – Travis Finchum
 - B. Stout – Garry Marshall
3. Congratulations – pg. 55 EC Agenda
Probate & Trust Division - Committee Appointments
4. Committee Webpages
5. No. SC2026-0673
6. No. AOSC26-12

II. Legislation Committee – 2026 Session Update – S. Dresden Brunner

III. CLE Committee – Probate & Trust Seminar Update - Niklaus J. Curley

**IV. Information/Action Items:
*Action Items:***

1. **Trust Law Committee** – ***M. Travis Hayes, Chair; Jolyon D. Acosta, Frederick “Ricky” Hearn, and Jennifer J. Robinson, Co-Vice Chairs***

- A. Report from the Subcommittee on Pretermitted Children –
Jeffrey S. Goethe**

Proposed legislation, white paper and Section position request

attached, supporting a proposed motion to:

1. **Support legislation to extend protections for children born after a parent makes a will as currently available under the Probate Code to protections for a child born after the parent creates or updates a revocable trust.**
 2. Find that such proposal is within the purview of the RPPTL Section;
 3. Authorize transmittal of the proposed legislation to The Florida Bar Board of Governors with a request for the Board's approval; and
 4. Authorize the expenditure of funds from the Section's budget necessary to effectuate the same.
- B. Report from the subcommittee reviewing the potential invalidity of spendthrift provisions – **M. Travis Hayes / Robert H. “Bo” Trudeau**

Proposed legislation, white paper and Section position request attached, supporting proposed motion to:

1. **Support revision to Section 736.0502, Florida Statutes, to clarify that a spendthrift provision is not invalid solely because a beneficiary, as trustee or otherwise, has discretion to make distributions to himself or herself based upon an ascertainable standard.**
2. Find that such proposal is within the purview of the RPPTL Section;
3. Authorize transmittal of the proposed legislation to The Florida Bar Board of Governors with a request for the Board's approval; and
4. Authorize the expenditure of funds from the Section's budget necessary to effectuate the same.

Information Items:

1. **Charitable Planning and Exempt Organizations Committee - Alyssa R. Wan, Chair, Carla DeLoach and Jeffrey Spina-Jennings, Co-Vice Chairs, and the Insurance, IRA and Employee Benefits Committee, Charles W. Callahan, III, Chair, Rachel Barlow and Rebecca Bell, Co-Vice Chairs**

Subcommittee report and proposal of Section position related to the designation of charitable organizations as beneficiaries in documents

other than testamentary instruments - **Denise Cazobon:**

Support legislation creating a process for charitable organizations listed as beneficiaries in instruments designating a beneficiary, other than a will or an instrument creating a trust, seeking information or the transfer of property to effectively and efficiently obtain such information without the need to provide any personal information for any individual employed by or serving on the board of the charitable organization or become an account owner with the holder of the property.

2. **Principal and Income Committee** – ***Jolyon D. Acosta and Keith B. Braun, Co-Chairs; and Susan Kubar, Vice-Chair***

Report from the committee, reviewing 2024 Florida Fiduciary Income and Principal Act and proposing legislative position and bill to correct glitches in the Act. – **Susan Kubar, Vice Chair**

Support legislation to correct mistaken alterations to, and to clarify, the original text as intended in the 2024 Florida Fiduciary income and Principal Act

3. **Probate and Trust Litigation Committee** – ***R. Lee McElroy, IV, Chair; Cady L. Huss, Darren M. Stotts, Barry Spivey, Co-Vice Chairs***

Report from the subcommittee reviewing the changes to 4-1.6, as proposed by the Board of Governors' Rules Committee – **R. Lee McElroy, IV / Cady L. Huss.**

4. **Probate Law Committee** – ***Theodore Kypreos, Chair; Benjamin F. Diamond, J. Grier Pressly, III, Stacey Prince-Troutman, Michael Sneeringer, Co-Vice Chairs***

Curator Glitch Bill – Tae Bronner

V. Committee and Liaison Reports (time permitting):

1. **Ad Hoc Guardianship Law Revision** – Stacy B. Rubel, Chair; David C. Brennan, Sancha K. Brennan and Nicklaus J. Curley, Co-Vice Chairs
2. **Asset Protection** — Justin Savioli, Chair; Richard R. Gans, Patrick J. Lannon, and Bo Trudeau, Co-Vice-Chairs

3. **Attorney/Trust Officer Liaison Conference** — Eamonn W. Gunther, Chair; Stacey L. Cole, Gail G. Fagan, Michael M. Rubenstein, Kimberly Bald, Sean Lebowitz, Yoshi Smith, Co-Vice Chairs
4. **Charitable Planning and Exempt Organizations** — Alyssa R. Wan, Chair; Carla DeLoach and Jeffrey Spina-Jennings, Co-Vice-Chairs
5. **Elective Share Review** — Cristina Papanikos, Chair; Lauren Y. Detzel, Jason P. Van Lenten, and Jenna Rubin, Co-Vice-Chairs
6. **Estate and Trust Tax Planning** — Andrew H. Thompson, Chair; Denise Cazobon and Joe Percopo, Co-Vice Chairs
7. **Guardianship, Power of Attorney and Advanced Directives** — Elizabeth M. Hughes, Chair; Stephanie L. Cook, Marve Ann Alaimo, and Jeff Eisel Co- Vice Chairs
8. **IRA, Insurance and Employee Benefits** — Charles W. Callahan, III, Chair; Rebecca C. Bell and Rachel N. Barlow, Co-Vice-Chairs
9. **Liaisons with ACTEC** — Elaine M. Bucher, Tami F. Conetta, Jerome L. Wolf, Charles I. Nash, L. Howard Payne, and Diana S.C. Zeydel
10. **Liaisons with Elder Law Section** — Travis D. Finchum and Marjorie E. Wolasky
11. **Liaison with the FSGA** – Stephanie Cook
12. **Liaisons with Tax Section** — William Lane, Brian M. Malec, and Brian C. Sparks
13. **Liaison with Professional Fiduciary Council** — Darby Jones
14. **OPPG Delegate** — Nicklaus J. Curley
15. **Principal and Income** — Jolyon D. Acosta and Keith B. Braun, Co-Chairs; Susan Kubar, Vice-Chair
16. **Probate and Trust Litigation** — R. Lee McElroy, IV, Chair; Cady L. Huss, Darren M. Stotts, and Barry Spivey, Co-Vice Chairs
17. **Probate and Trust Problem Study Committee** - Sean W. Kelley, Chair; Shelly Wald Harris and David Akins, Co-Vice Chairs
18. **Probate Law and Procedure** — Theodore S. Kypreos, Chair; Benjamin F. Diamond, Stacey Prince-Troutman, J. Grier Pressley, III, and Michael Sneeringer, Co-Vice Chairs

19. **Trust Law** — M. Travis Hayes, Chair; Jennifer J. Robinson, Frederick “Ricky” Hearn, and Jolyon Acosta, Co-Vice Chairs

a. Spendthrift – proposal and white paper are attached

20. **Wills, Trusts and Estates Certification Review Course** — J. Allison Archbold, Chair; J. Eric Virgil and Alyse Reiser, Co-Vice Chairs

VI. [Adjourn.](#)

GENERAL INFORMATION

PT Division Director: Sancha Brennan - sancha@zkslaw.com
Legislation: Dresden Brunner - dbrunner@harrisonllp.com
CLE: Nick Curley - ncurley@gunster.com

Updating RPPTL Website Committee Pages: Alisa Savoy – webmaster@rpptl.org
Silvia Rojas

Publication Deadlines:

Florida Bar Journal:

January 1
March 1
May 1
July 1
September 1
November 1

Submit proposals to: Allison Archbold: jaa@archbold.law

ActionLine:

Spring 1/15
Summer 4/15
Fall 7/15
Winter 10/15

Submit proposals to: Erin Finlen erin@estatelaw.com and Michelle Hinden
mhinden@nihadkhanlaw.com

Committee Attendance:

Simple & Free

- **Google Forms + Google Sheets**
 - Create a form with fields such as Name, Email, Time In, Time Out (if needed).
 - Responses automatically feed into a spreadsheet.
 - Free, easy to share via link or QR code.
 - Bonus: can automatically timestamp when someone signs in.

✦ Slightly More Polished

- **Microsoft Forms** (if you have Office 365)
 - Similar to Google Forms but integrates directly with Excel Online.
 - Clean look and mobile-friendly.
- **Jotform** (free tier available)

- Ready-made “Sign-In Sheet” templates.
 - Can capture actual signatures, not just typed names.
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UP NEXT:

9:45 - 12:00 noon EXECUTIVE COUNCIL MEETING – Ballroom 1/2

12:00 – 1:00 pm 2026 Out of State Meeting Info – ALASKA - Venetian Ballroom

1:00 Golf Scramble – Ocean Course

6:00 – 10:00 pm Seaside Sendoff – The Lodge Lawn

June 17-20

Florida Bar Convention

Signia by Hilton Orlando Bonnet Creek, Orlando

July 8-12

RPPTL Executive Council Out of State Meeting

Alyeska Resort, Girdwood, Alaska

July 30-August 1

Attorney Trust Officer Conference

The Breakers, Palm Beach

August 19-22

RPPTL Executive Council & Committee Meetings and Legislative Update

The Breakers, Palm Beach

Four Seasons Orlando

Orlando, Florida