



The Florida Bar

651 East Jefferson Street
Tallahassee, FL 32399-2300

Joshua E. Doyle
Executive Director

(850) 561-5600
www.FLORIDABAR.org

REAL PROPERTY, PROBATE AND TRUST LAW SECTION LEGISLATIVE OR POLITICAL ACTIVITY REQUEST FORM

- This form is for Section Committees to seek approval for Section legislative or political activities.
- Legislative or political activity is defined in the Standing Board Policies of The Florida Bar (SBP 9.11) as “activity by The Florida Bar or a bar group including, but not limited to, filing a comment in a federal administrative law case, taking a position on an action by an elected or appointed governmental official, appearing before a government entity, submitting comments to a regulatory entity on a regulatory matter, or any type of public commentary on an issue of significant public interest or debate.”
- Requests for legislative and political activity must be made on this form and submitted to the RPPTL Legislation Committee, with your Committee’s white paper.
- Pursuant to SBP 9.50(d), the Section must advise The Florida Bar of proposed legislative or political activity AND circulate the proposal to all Bar divisions, sections and committees that might be interested in the issue.
 - Committees must check with other interested Bar divisions, sections and committees to see if there are comments or issues.
 - If comments have been received from another interested group, the comments must be included.
 - If comments have not yet been received, the proposal may still be submitted to the Legislation Committee, with a list of the interested groups that have been notified and the dates and methods of notification.
 - If a decision needs to be expedited, the proposal must explain the need for an expedited decision and request a specific deadline for a decision by the Bar.
- The Legislation Committee will review the proposal.
 - The proposal will then need to be presented at the Division Round Table.
 - Then, published as an Information Item to the Executive Council.
 - Then, published as an Action Item to the Executive Council.

651 East Jefferson Street • Tallahassee, FL 32399-2300 • FAX: (850) 561-9405

LEGISLATIVE POSITION REQUEST FORM

GOVERNMENTAL AFFAIRS OFFICE

Date Form Received _____

GENERAL INFORMATION

Submitted by: *(name of Section Committee)* _____ Principal and Income Committee
of the Real Property, Probate and Trust Law Section

Contact: *(Name of Committee Chair(s), address and phone number)* _____ Keith B. Braun,
Comiter Singer Baseman & Braun, 3825 PGA Blvd, Ste 701, West Palm Beach, FL 33401,
(561) 626-2101
Susan Kubar, Fifth Third Wealth Advisors, 4010 W Boy Scout Blvd, Suite 280, Tampa, FL
33607, (813) 666-1764

(Name of Sub-committee Chair, if any, address and phone number, if any) _____

PROPOSED ADVOCACY

Complete #1 below if the issue is legislative OR #2 if the issue is political; AND #3 must be completed.

1. Proposed Wording of Legislative Position for Official Publication

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

2. Political Proposal

N/A

3. Reasons For Proposed Advocacy

a. Per SBP 9.50(a), does the proposal meet all three of the following requirements?
(select one) ☒ Yes ☐ No

- It is within the group's subject matter jurisdiction as described in the Section's Bylaws;
- It is beyond the scope of the Section/Bar's permissible legislative or political activity, or within the Section/Bar's permissible scope of legislative or political activity and consistent with an official Section/Bar position on that issue; and

- It does not have the potential for deep philosophical or emotional division among a substantial segment of the Bar's membership.

b. Additional Information: _____

REFERRALS TO OTHER COMMITTEES, DIVISIONS & SECTIONS/VOLUNTARY FLORIDA BAR GROUPS

Pursuant to SBP 9.50(d), the Section must provide copies of its proposed legislative or political actions to all Bar committees, divisions, sections and voluntary bar groups that may be interested in the issue. **List** all Bar committees, divisions, sections and voluntary bar **groups that this proposal has been shared with** pursuant to this requirement, **the date the proposal was shared**, and **provide all comments** received from such groups as part of your submission. The Section may submit its proposal before receiving comments, but only after the proposal has been provided to other bar divisions, sections or committees. A form for sharing proposals is available for this purpose.

The proposal has been shared with (1) the Estate and Trust Tax Committee, Trust Law Committee and IRA Committee of the Real Property Probate and Trust Law Section of the Florida Bar, (2) the Tax Section of the Florida Bar, (3) the Florida Institute of CPAs and (4) the Florida Bankers Association.

CONTACTS

Legislation Committee Appearance *(list name, address and phone #)*

Lee Weintraub, Legislation Committee Co-Chair, 1 East Broward Blvd., Suite 1800, Ft. Lauderdale, FL 33301 Telephone 954-985-4147

S. Dresden Brunner, Legislation Committee Co-Chair, 8625 Tamiami Trail North, Suite 202, Naples, FL 34108 Telephone 239-316-1400

Appearances before Legislators *(list name and phone # of those having direct contact before House/Senate committees)*

Peter M. Dunbar, Martha J. Edenfield and H. French Brown, IV

c/o Jones Walker LLP, 106 E. College Avenue, Suite 1200, Tallahassee, FL 32301

Meetings with Legislators/staff *(list name and phone # of those having direct contact with legislators)*

