



AT-LARGE MEMBERS JANUARY 2026 MEETING AGENDA

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AT-LARGE MEMBERS MEETING AGENDA

SUNSEEKER RESORT, PORT CHARLOTTE

Thursday, January 29, 2026, 4:00pm -5:15pm

- I. Introduction
 - A. Thank you to our Sponsor – Title Resources Group – Lee Offir
 - B. Introduction of Law Students and other Guests - Rebecca Wood and Silvia Rojas
- II. Old Business
 - A. At-Large Member Applications for Nomination and Renomination
 - B. ALMs Survey Results
 - C. ALM Committee Structure Feedback
- III. New Business
 - A. 2025-2026 At-Large Members Upcoming Meeting Schedule:
 - i. March 19, 2026 - Zoom
 - ii. April 19 – 24, 2026 – Out of State Executive Council Meeting - Budapest River Cruise
 - iii. May 27th-30th, 2026 -Executive Council Meeting and Convention – Ponte Vedra Inn and Club, Ponte Vedra, Florida
 - iv. 7/8/2026-7/12/2026 Executive Council Meeting Alyeska Resort Girdwood, Alaska
 - v. August 19, 2026 – August 22, 2026 Executive Council Meeting and Legislative and Case Law Update The Breakers, Palm Beach, Florida
 - vi. November 11, 2026 – November 14, 2026 Executive Council Meeting JW Marriott Marco Island
 - vii. February 3 - 6, 2027 Executive Council Meeting Riz-Carlton Amelia Island
 - viii. June 2, 2027 – June 5, 2027 Executive Council Meeting & Annual Convention JW Marriott Bonnet Creek Resort & Spa Orlando, Florida
 - B. Committee Reports
 - i. Undergraduate Shadowing the Law Program Committee – Chair, Richard Warner
 - ii. Guardianship Contempt Cases Committee – Co-Chairs, Robert Schwartz, Frank Pilotte
 - iii. Education and Outreach Committee – Chair, Darlene Bell-Alexander
 - iv. Website and External Communications Committee – Co-Chairs, Colleen Sachs, Silvia Rojas, Arlene Udick
 - v. Pro-Bono Coordination Committee – Chair, Jane Cornett
 - vi. Law Student Enrichment Committee – Co-Chairs Silvia Rojas, Rebecca Wood
- IV. Open Forum
- V. Adjourn



Committees

At Large Members

At Large Members

ALMs COMMITTEES

[Link to Membership](#)

EACH ALM IS TASKED WITH BECOMING A MEMBER OF AT LEAST ONE OF THESE ALMs COMMITTEES:

Law School Enrichment Committee (LSEC)

Mission Statement:

Our mission is to support the Law School Outreach (LSO) Committee and the Liaisons appointed by LSO to each law school. ALMs who are located near a Florida law school are encouraged to become members of the LSEC. The LSEC members may be asked to be speakers, mentors, attend law school networking events, provide seminar materials and any other contributions to educate and provide guidance to law school students so that they may enter the law practice with confidence.

Rebecca Wood, Co-Chair R.Wood@OldRepublicTitle.com (8th Cr.)
Silvia Rojas, Co-Chair silsage@gmail.com (11th Cr.)

Link to [Membership list](#)

For a map and list of counties in each circuit, see Documents below.

Undergraduates Shadowing the Law Committee

Mission Statement:

The mission of the ALMS 16th Circuit “Undergraduates Shadowing the Law Program” and its committee is to identify and motivate the best and brightest ***undergraduate*** students from Florida colleges and universities (in their 3rd & 4th years) to go to law school and become Florida attorneys. Each committee member will search for and identify these undergraduate students *from their own circuit* to spend a day at the committee member’s law firm to experience the law in practice, although not participating in any meetings or communications with clients. Check this link for a more detailed [Mission Statement](#)

Richard Warner, Chair richard@rewarnerlaw.com
Rebecca Wood, Vice Chair R.Wood@OldRepublicTitle.com

[Link to Membership](#)

Website and External Communications Committee

Mission Statement:

The mission statement of the Website and External Communications Committee of the At-Large Members Committee is to maintain a clear, accurate, and user-friendly At-Large Members webpage and to promote effective communication between the At-Large Members, the Section, and its members. We strive to highlight the Section’s initiatives, resources, and accomplishments, ensuring that Section members remain informed and connected.

Colleen Sachs, Co-Chair csachs@oldrepublictitle.com
Arlene Udick, Co-Chair arlene@udicklaw.com

[Link to Membership](#)

Pro-Bono Committee

Mission Statement:

To serve as a methodology to communicate, through the ALMS, to our Section Members, Pro Bono opportunities in areas of the law relevant to our Members. To connect legal aid providers with our Members in a manner that allows our Members to view legal aid opportunities and thus share their expertise with citizens in need.

[Florida Bar - Pro Bono & Legal Aid information](#)

Jane Cornett, Chair jcornett@beckerlawyers.com

Guardianship Contempt Case Program Committee

Mission Statement:

The 15th Judicial Circuit ALMS Committee ASSISTS IN LIMITED APPEARANCES IN REGARD TO GUARDIANSHIP CONTEMPT HEARINGS for unrepresented guardians who need help resolving orders to show cause. These are people who do not qualify for Legal Aid-but objectively need help resolving orders to show cause, and simply do not know what to do, nor do they have the resources to afford a private lawyer. One of the goals of the committee is to expand this program to other circuits. If you are interested in joining this committee to assist in the 15th Judicial Circuit or would like assistance in expanding it to other circuits, contact either of the co-chairs listed. Check this link for additional information: [ALMs Guardianship Contempt Case Program](#)

Robert Schwartz, Co-Chair bob@robertschwartzpa.com

Eamonn Gunther, Co-Chair eamonn@egestate.law

Education and Outreach Committee

Mission Statement:

The mission of the **ALMs Outreach and Education Committee** is to coordinate and advance initiatives that strengthen legal education, public awareness, and community support. Specifically, the committee will oversee the planning and delivery of Continuing Legal Education (CLE) opportunities for attorneys and programs that provide educational programming on various legal topics related to real property, probate, and trust law. Through these efforts, the committee seeks to promote ALM’s commitment to serving as the channel of communication between RPPTL Section leadership and the members while also enhancing professional development and expanding access to justice.

Darlene Bell-Alexander, Co-Chair, darlene@bellalexanderlaw.com;

Arlene Udick, Co-Chair, arlene@udicklaw.com

Link to [Members](#)

Documents:

[ALMs Committees Membership](#) [\[List of all ALMs and their committee memberships\]](#)

[Counties by Circuits](#) [\[Counties and Map\]](#)

 HOME

AGENDAS AND MINUTES

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EVENTS

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[!\[\]\(74d4806277d7e73349d8e8c0897931e9_img.jpg\) DIRECTORY](#)



**The Real Property Probate and Trust Law
Section of The Florida Bar**

651 East Jefferson Street,
Tallahassee, FL 32399-2300

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Report of the Website and External Communications Committee

January 2026

Colleen Sachs and Silvia Rojas, Arlene Udick, Co-Chairs

This committee is tasked with maintaining the ALMs website. The website is currently up to date with a few exceptions that require further information. It is being periodically maintained.

The committee has also been tasked to review the RPPTL website and report on webpages that need to be updated, removed or added. At this time, the committee has identified committee webpages that require updating and has listed some priority items within each committee page for review. Included with this report are three outlines (General Standing, RP and PT) indicating priority updates to committee pages and website pages indicating the names of the committees. The procedure for disseminating this information to the committee chairs/co-chairs is being explored. A brief checklist for updating the website and for use by each committee chair/co-chairs for periodic updating of their webpages has also been prepared and awaiting dissemination. A copy of that guidance checklist is including with this report.

The RPPTL home page has also been reviewed and a list of items that require updating, removal and additions has been prepared. The list is included with this report. Volunteers should be recruited to update particular portions of the webpages within the home page to keep the information current and to populate links webpages as needed. The webmaster needs to be contacted to determine whether there is a cost associated with the suggested updates.

The Information Technology Committee is currently working on revamping the entire RPPTL website to make it more user friendly. That is a long-range project which may take a year or more. It is not known at this time how this will affect the updating of the current website.

COMMITTEE UPDATES: These **General Standing** committees are copied from the RPPTL Website. Some are no longer in existence and some that are shown on the 2025-26 list need to be added to the website. The chairs/co-chairs should check on any members posted on their committee website to see if the information is current. This list is from the fall of 2025 so some updates may already have been done.

General Standing Committees	2025-2026	Requested Update	Notes*
<u>Ad Hoc Bylaws</u>	☐ Change name to “Ad Hoc Protocols” ☐ Add Mission Statement; ☐ Add a Directory button with the current Chair and Co-Chairs		
<u>Ad Hoc Civil Rules Revisions</u>	☐ Add Mission Statement; otherwise up to date		
<u>Ad Hoc TODI (Transfer on Death Instrument)</u>	☐ Remove ad hoc committee		
<u>Amicus Coordination</u>	☐ Update the Chair & Co-chairs on home page ☐ Update the Chair & Co-chairs on directory ☐ Add more current amicus briefs (last one from 2015)		
Budget	☐ Add Committee to Website with Mission Statement and Directory with current officers		
<u>CLE Coordination</u>	Up to date		
<u>Communications</u>	☐ Update Meeting Minutes – (last one in 2023) ☐ There is a separate button for only one agenda (2023). Either just name it “Agendas” or replace the “Meeting Minutes” with “Agendas & Minutes.” ☐ Last minutes posted were in 2023 – update to current minutes.		
<u>Convention Coordination</u>	☐ Up to date on officers but not much else on webpage – maybe add flyer once next convention information is available.		
<u>Disaster and Emergency Preparedness and Response</u>	☐ Daniel Sregel is missing from directory. ☐ Last Agenda posted was Feb 2025; no meetings posted		
<u>Fellows</u>	☐ Julia Jennison is missing from Directory;		

	☐ Post committee agendas. No agendas posted and the meetings posted are those of the RPPTL events only.
<u>Historian Committee</u>	☐ Add a mission statement. ☐ Replace David Brennan with Michael Stafford as Chair and Fred Jones is a new vice chair and Burt Bruton is a co-vice chair, not co-chair on the Directory.
<u>Homestead Issues Study</u>	☐ Home page – change to “2025-26 committee leaders” even if they are the same officers. ☐ This webpage seems stuck in 2024. Agendas are up to date but not the minutes. ☐ Confirm correct name of current liaisons.
<u>Information Technology</u>	☐ Seems up to date but the assistance direct links are quite old – Check for current ones.
<u>Law School Outreach</u>	☐ Minutes and Agendas as not up to date (last minutes in 2023); ☐ Directory up to date though varies from list posted on RPPTL meeting agenda due to later committee changes. ☐ Not enough information available to populate all the buttons completely.
<u>Legislation</u>	☐ Home page “Leadership” not up to date. ☐ Directory not up to date. ☐ Last Legislative positions updated only thru 2023. ☐ Resources seem stale (2009, 2014, etc.) and should be updated. ☐ Positions pending approval button is blank. ☐ Position papers populate “White Papers” button instead of “Legislative Positions” button – need to change that.
<u>Legislative Update</u>	☐ Still has the 2025 flyer on the home page. ☐ Should have a Mission Statement instead. ☐ Co-Chairs and Vice-Chairs on home page are not as shown on the RPPTL agenda list

	– need to update that. ☐ No buttons here – add a directory button at least.
<u>Liaison with: American Bar Association (ABA)</u>	Up to date
<u>Liaison with: Business Law Section</u>	Up to date
<u>Liaison with: Clerks of Circuit Court</u>	☐ Change from Laird Lile to Zachary Zuroweste
<u>Liaison with: FLEA / FLSSI</u>	Up to date
<u>Liaison with: Florida Bankers Association</u>	Up to date
<u>Liaison with: Judiciary</u>	Up to date
<u>Liaison with: Out of State Members</u>	☐ Remove Stafford – currently only 2
<u>Liaison with: TFB Board of Governors</u>	☐ Rosalyn Barnes seems to have been removed – so none shown on RPPTL agenda list
<u>Liaison with: TFB CLE Committee</u>	☐ Replace with Angela and Brenda per the RPPTL list (but its Nick Curley and Michael Hargett who are the CLE co-chairs now so not sure the RPPTL list is current or applies to this committee)
<u>Liaison with: TFB Council of Sections</u>	☐ Replace all the names
<u>Liaison with: TFB Pro Bono Committee</u>	Home page & directory up to date
<u>Long-Range Planning</u>	☐ Replace name
<u>Meetings Planning</u>	☐ Does not have a Directory button ☐ only George Meyer is shown on the home page – need to add 2 more.
<u>Membership</u>	☐ The meetings listed are those of the RPPTL events – Should show committee meetings. ☐ Under “Membership Sponsored Events” is a 2024 event and earlier events rather than the upcoming 2025 event. Consider making this “Archive of Membership Sponsored Events” ☐ Maybe add a button for Upcoming Events.
<u>Model and Uniform Acts</u>	☐ The “Meetings” button contains a document that should be under “Resources,” Or “Archives” as it is from 2019.
<u>Professionalism and Ethics</u>	☐ The Directory has incorrect designations for its officers and Sasso is no longer Chair.
<u>Publications (ActionLine)</u>	☐ Officers incorrect on home page

	☐ Last co-vice chair in Directory is incorrect.
<u>Publications (Florida Bar Journal)</u>	☐ Co-vice chairs on home page are incorrect ☐ Co-vice chairs in directory are incorrect. ☐ The submission deadlines quoted are from 2021 and the document on that page is from 2017. Last posted is from 2020.
<u>Sponsor Coordination</u>	Up to date
<u>Strategic Planning</u>	☐ No mission statement. ☐ 3 co-chairs are missing from home page ☐ 3 co-chairs are missing from directory ☐ The strategic plan posted is thru 2014 – must update.
<u>Strategic Planning Implementation</u>	☐ No mission statement. ☐ Update officers in home page & directory.

COMMITTEE UPDATES: These **Probate and Trust Division** committees are copied from the RPPTL Website. Some are no longer in existence and some that are shown on the 2025-26 list need to be added to the website. The chairs/co-chairs should check on any members posted on their committee website to see if the information is current. This list is from 2025 so some updates may already have been done.

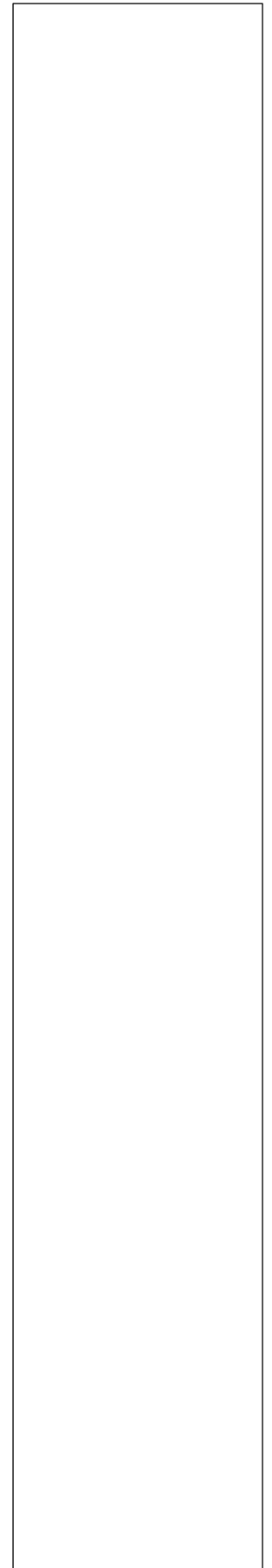
Probate & Trust Committee

Update Requested

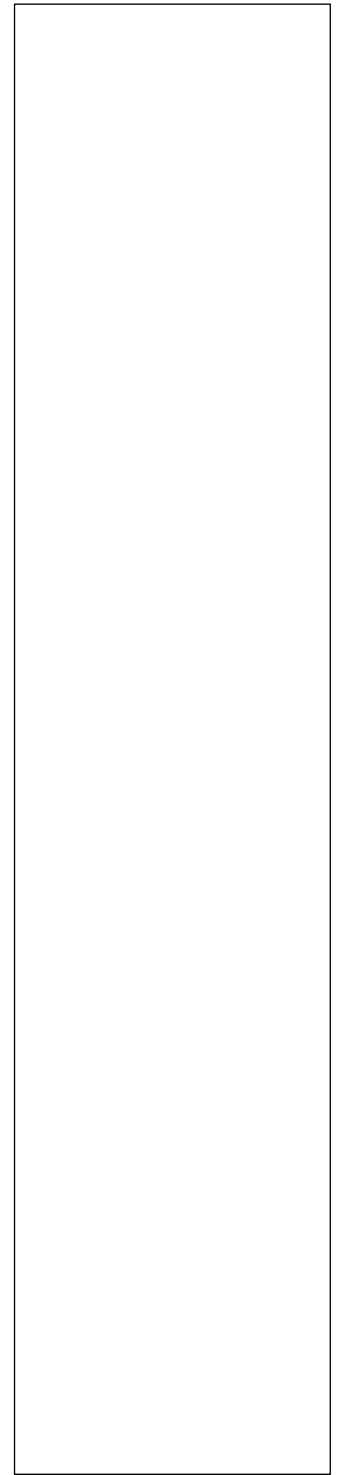
Notes

Ad Hoc Artificial Reproductive Technology (ART) Committee	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Ad Hoc Committee on Electronic Wills</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Ad Hoc Committee on Revocable Transfer on Death Deeds</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Ad Hoc Guardianship Law Revision Committee</u>	☐ Update the Mission Statement on the home page ☐ Update the documents under Committee Materials button or set up an archive button for those documents	
<u>Ad Hoc Study Committee on Due Process, Jurisdiction & Service of Process</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Ad Hoc Study Committee on Professional Fiduciary Licensing</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Asset Protection Committee</u>	☐ Update date of next meeting on home page ☐ Directory – remove Sneeringer and replace with Savioli	
<u>Attorney/Trust Officer Liaison Conference</u>	☐ The link to the 1 st button regarding the conference brochure is not working ☐ The link to the 2 nd conference brochure button should read “Conference Brochure Archives” as it is a 2023 brochure. Suggest to add each year’s brochure under that button ☐ Correct the Directory with the current officers ☐ Nothing under the “Forms” button so is that button necessary	

<u>Charitable Planning and Exempt Organizations</u>	☐ The upcoming meeting information on the home page is past its time - remove
<u>Elective Share Review Committee</u>	☐ Remove upcoming meeting from 2024 on home page
<u>Estate & Trust Tax Planning</u>	☐ Remove upcoming August 2025 meeting on home page ☐ remove next meeting under "Meetings" button as it is from 2024 ☐ If you keep minutes, those should be under "Meetings" button or change to "Minutes of Meetings" ☐ Remove the links at "Recent Developments" button – those are from 2019 and 2009 – maybe add real recent developments. ☐ The "White Paper" button – Are those current? ☐ Consider an "Archives" button for older materials
<u>Guardianship, Power of Attorney & Advance Directives</u>	☐ Update the next committee meeting on home page ☐ The "Advanced Directives & HIPPA" button has materials from 2007-2009. Maybe set up an "Archives" button for older materials
<u>IRA, Insurance & Employee Benefits</u>	☐ Update next meeting information ☐ Rachel N. Barlow is missing from the Directory as a co-vice chair.
<u>Liaison to Elder Law Section</u>	Up to date
<u>Liaison to Tax Section</u>	Up t date
<u>Liaisons with ACTEC</u>	☐ Update the liaisons on the home page – remove the two shown and add six ☐ Update the liaisons on the Directory
Liaisons with FSGA	ADD TO WEBSITE
<u>Principal and Income Committee</u>	☐ Add a mission statement ☐ Update the next meeting information on home page ☐ Update next meeting information on "Meetings" button
<u>Probate & Trust Litigation</u>	☐ Update the next meeting information on home page ☐ Update officers on home page



	☐ Great idea for an “Attendance Link” button but the form should have a place for the date. ☐ The link to “Meetings” shows the RPPTL meetings rather than the committee meetings. If you want to keep that, change button to “RPPTL Meetings” ☐ Directory missing Barry Spivey, co-vice chair
Probate and Trust Problem Study Committee	ADD TO WEBSITE
<u>Probate Law & Procedure</u>	☐ Update the upcoming meeting on home page ☐ Missing Michael Sneeringer, co-vice chair on home page ☐ Missing Sneeringer in the Directory ☐ The “probate blog” button has posts from 2020 – consider updating those and removing these unless there is a reason to keep them – or set up a Probate Blog Archives button for older ones ☐ Update Upcoming Meeting under “Meetings button ☐ “Miscellaneous” button looks like an archive – consider changing the name of the button
<u>Trust Law</u>	☐ Jolyon Acosta as co-vice chair is missing from Directory
<u>Wills, Trusts & Estates Certification Review Course</u>	☐ Remove the documents from the “Meetings” button as it is repetitious ☐ Update the next meeting information under “Meetings” button



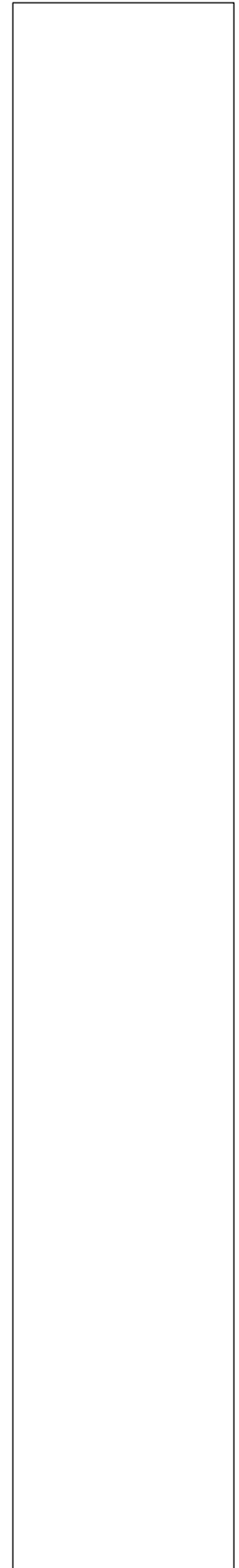
COMMITTEE UPDATES: These **Real Property Division** committees are copied from the RPPTL Website. Some are no longer in existence and some that are shown on the 2025-26 list or event brochures need to be added to the website. The chairs/co-chairs should check on any members posted on their committee website to see if the information is current. Most of this list is from the fall of 2025 so some updates may already have been done.

Real Property Committee	Requested Update	Notes
<u>Ad Hoc Hayslip</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
Ad Hoc covenants with Land	ADD TO WEBSITE	
Ad Hoc 99-year Lease	ADD TO WEBSITE	
Ad Hoc Committee on Fraudulent Filings	ADD TO WEBSITE	
Ad Hoc Committee on Redaction	ADD TO WEBSITE	
<u>Advanced Real Estate Law and Certification Review Course</u>	☐ Change name to : “Real Estate Certification Review Course” on the website ☐ Correct the Directory – Lloyd and Laura are now co-chairs ☐ Correct the documents links under “Agendas and Minutes” – the first document is “access denied” and no agendas posted since 2020	
<u>Attorney Banker Conference</u>	☐ Update the ABC to the 2026 date on the home page ☐ Update the “Conference Planning Meeting” button information ☐ Add the 2025 ABC to the documents under the “Conference Planning Meeting” button	
<u>Commercial Real Estate Committee</u>	☐ Remove the Breakers meeting on the home page regarding upcoming meetings ☐ Remove Annabella Barboza & Erin Miller as co-vice chairs on the Directory	
<u>Condominium & Planned Development Committee</u>	☐ The link to the “Rules of Participation” on the home page does not seem to work. Test it out – could be just a server problem. ☐ Update the committee officers on the Directory ☐ The legislation button was last updated in 2015 – please update	

<u>Condominium and Planned Development Law Certification Review</u>	☐ Update the names of the officers on the paragraph on the home page ☐ Update the names of the officers on the Directory ☐ Review Course registration link is dead – is another link for 2026 available?
<u>Construction Law</u>	Up to Date – lots of valuable information on site and well organized
<u>Construction Law Certification Review Course</u>	☐ Update names of officers on home page ☐ Update names of contacts on the “Meetings” button ☐ Update information under “Agendas and Minutes” ☐ “Minutes are reflected in the list of speakers and program agenda” - there is no link to those or way to view them online
<u>Construction Law Institute</u>	☐ Update from 2025 information on home page ☐ Update officers on home page ☐ Nikki Bhavsar missing from directory
<u>Development and Land Use Committee</u>	☐ Last posted agenda under “Agendas and Minutes” button was in May 2025 – add newer ones ☐ Meetings button has stale information from 2019 and older – remove and replace updated information ☐ “Presentations and CLE Information last updated in 2021 – Maybe change to “Archives of Presentations and CLE Information” if it is to be kept. ☐ There are a lot of links under “Web Resources” – someone should review them – some do not work
<u>Insurance and Surety</u>	☐ Replace Reed Grimm with Michael Cassel on home page ☐ Update officers on Directory ☐ Update subtitle under “Upcoming Meetings” button to 2025-26 ☐ Old agendas go up to 2022 – are there no newer agendas to post? ☐ Have someone check all the links under “Helpful Links” – not all of them work

<u>Liaison with FLTA</u>	☐ No mission statement posted – only names posted	
<u>Real Estate Leasing</u>	☐ Meetings button has 2020 and older meetings – maybe call it “Meetings Archive” ☐ Under “Agendas and Minutes” last posted minutes were from February 2025 – post more current minutes ☐ Legislation button last post was from 2020 ☐ Update “Standard Forms” button forms & maybe add revisions dates on the links	
<u>Real Estate Structures and Taxation</u>	REMOVE FROM WEBSITE – NOT ON CURRENT LIST	
<u>Real Property Finance & Lending</u>	☐ The committee leadership for 2025-26 is different from the list on the RPPTL Agenda. Jason & Deb are co-chairs on the agenda list ☐ Update next meeting under “Meetings” button ☐ The documents under “Meetings” button maybe belong in a separate archives button ☐ There is a 2025 agenda under Documents at the Third-Party Legal Opinions button that does not belong there. ☐ “Depths of LPS” button leads nowhere – nothing posted ☐ Remove “Past Meetings” button as this just mentions RPPTL meetings – That’s already a pull down menu on RPPTL home page ☐ Update Directory	
<u>Real Property Litigation</u>	☐ Update names of officers in Directory ☐ Under “Meeting Information & Documentation” update the information ☐ The “Agenda & Materials” button seems to be archives of old meetings – consider changing the name of the button to “Archives of Past Meetings” ☐ There is another button of “Meeting Information & Documentation” – that	

	should be deleted and the information moved to the top similar button ☐ The information and documentation under “Lis Pendens Statute” button does not belong under that button – looks like it should be an “Archive” button ☐ Remove Covid-19 button – seems outdated at this point
<u>Real Property Problems Study</u>	☐ Update leadership in home page with correct officers ☐ Add more current agenda and materials under “Meeting Agendas & Minutes” ☐ “Other Information” button maybe should be “Archives” – just old information. ☐ “CLE Materials and Certificates end at 2020 – consider removing this and adding new materials ☐ Update the Directory
<u>Residential Real Estate & Industry Liaison (RREIL) Committee</u>	☐ “New Short Sale Guidelines” are from 2012 – if no updates, take out the “New” ☐ Update materials on “Handouts and Links” – very outdated. ☐ The “Engagement Letter Template” button has 2016 information – are there no updates? ☐ The “Sea Level...” button has 2016 information – are there no updated? ☐ The link on the Dodd-Frank Warning pdf is blank – fix this ☐ The button “FR/AR 2017...” needs to be updated to latest version on the button and the webpage ☐ Remove Richard McIver from directory
<u>Title Insurance & Title Insurance Industry Liaison</u>	☐ Are the links under “Committee Topics..” button up to date?
<u>Title Issues & Standards</u>	☐ Correct names of co-vice-chairs on home page (Replace Manfredi with Karla Staker ☐ Update directory as to vice-chair
American College of Real Estate Lawyers (ACREL) Liaison	ADD TO WEBSITE
American College of Construction Lawyers (ACCL) Liaison	ADD TO WEBSITE
Florida Realtors Liaison	ADD TO WEBSITE



HOME PAGE REVIEW AND UPDATES: (1/21/26)

[The last page contains a suggestion for monitoring and updating the home page]

Home Page – default is ActionLine. That's fine.

Observations regarding the middle part of the Home page

Quick Links:

Events Calendar: Takes you to another set of links. There are 2 events that are now old news. – Health Care Decisions and Ethics and Technology. The Advanced Condominium will be old news by next week. Please delete these as they become past events. Is this something you can put a tickler for or do you need reminders?

New Decisions – those were stale & now removed – need a P&T and a RP attorney to update these. Maybe this can be announced at the next ALMs meeting.

Events – this is redundant with Events Calendar above.

Upcoming CLE just mirrors “Events Calendar”

Next Meeting – is not updated as still shows December meeting

FR/Bar Contracts - takes you to RREIL page – that's fine.

Cybersecurity – Takes you to a Florida Bar Practice Resource Center – that's fine. The other link “Cybersecurity:...[Podcast] is an error message. The link is from the Information Technology page so they should fix this problem.

Contact us – Still showing John Moran rather than Cary Wright – needs updating yearly if it is to show the current Chair.

FAQ – Has password reset information but again copies the Events Calendar which has stale information. That should be removed completely for this page. It's redundant.

Law Students – Takes you to LSO Committee webpage

Jobs – takes you to Florida Bar and gives information of listserves. The information on the link “Current Job Opportunity Postings” are from 2024 and 2021 so this link does not seem to be used or known about. Maybe should be deleted.

“News” is blank - This & Announcements should have someone in charge for content.

Maybe ALMs can appoint someone.

“Announcements” just take you to Condo webpage

FB – Link seems to be kept up to date

Twitter – remove as last entry is in 2020

Banner:**About Us:**

The only stale information I see is under Legislative Positions. It dates back to February 2023. That should be updated. If you then go to the Legislation Committee page, that button “Legislative Positions” is also updated only to February 2023 so that needs to be updated.

Executive Council:

RPPTL Strategic Plan- that needs to be updated.

Awards and Recognition – that needs to be updated. Very stale information.

Budget: The link is to the current fiscal budget of 2023-24. Should be updated.

Media:

Videos: The videos should be updated if other videos are available as, other than the 2022 break roll, the latest is from 2021 and it’s entitled “legislative case update”. It’s actually a RPPTL promotional video and is mislabeled.

Podcast: I only see one podcast on ethics – should add some more. It’s the same and only podcast under the Professionalism and Ethics committee.

CLE Events:

Upcoming CLE: The link under “Upcoming CLE is the same as the Events Calendar and suffers from the same stale information.

More CLE: Is redundant with the other links (including events calendar) and I suggest that link be removed.

Rotating banner with photos on the home page: Some of those links also need to be updated and will be if the other links mentioned before are updated.

There are a number of links (some mentioned earlier) that require volunteers to populate them periodically, some monthly, some yearly:

New Decisions

Events Calendar

News

Announcements

Awards and Recognition

Videos

Upcoming CLE

Legislative Positions

Suggestion (this is Silvia Rojas' opinion):

Just like there is an ActionLine Committee, a Website Update Committee should be set up to work directly with our webmaster to monitor the website for updates. The committee requires sufficient members to be able to monitor different parts of the Home page and to recruit Section members to populate the pages if the members of that committee are unable to do so.

The Information Technology committee is small and is focused on updating the entire website, not populating the existing one. After attending one of their meetings, the mission statement (overseeing and maintaining the website) does not seem to be in tune with what they are currently focused on. The attendance was half or less than as shown on the website for membership in that committee. It needs a lot more members to have two different areas of focus.

RPPTL Website –

Update to Webpages with the names of the committees:

- ☐ Is the committee's name current for 2025-26
- ☐ Are there any committees that are no longer active and must be removed from website (request removal to Alisa)
- ☐ Are there any new committees that need a webpage (request addition to Alisa)

Update to Committee Pages:

- ☐ Each committee page should have at least 2 using the backdoor to populate the website.
- ☐ Are names of current Chairs, Co-Chairs, Vice Chairs current (see attached list) on home page and Directory button

[Leadership Chart 2025-2026.docx](#)

- ☐ Mission Statement – add or edit
- ☐ Review home page of each committee and each button title and information/documentation/links contained therein.
- ☐ Is any information/documents/links on the home page stale
- ☐ Is there a button for Agendas and Minutes. Remove any redundant buttons for this. Agendas and Minutes (if posted) should be current and relate only to the committee agendas and minutes – any dates for upcoming committee meetings should be on the home page of the committee
- ☐ Are there any buttons that are not populated or likely not to be populated – they should be removed.

Buttons:

- ☐ Do all the buttons (except for archives, if any) have current information/documentation
- ☐ Are the materials/information contained under each button reflect the title of the button – if not, there should be another button for those materials/information.
- ☐ Do the links under each button (& homepage if any) work or do they give an error message.

RPPTL ALMs Committee Report

November 21, 2025

ALMS 16th Circuit “Undergraduates Shadowing the Law Committee”

[by Richard E. Warner - Committee Chair]

I. The current members of the ALMs 16th Circuit USLC are:

Richard E. Warner, Chair	16 Circ
Rebecca Wood, Vice Chair	8 Circ
Christine Ertl	7 Circ
Lauren E. Busey	4 Circ
Tance E. Roberts	7 Circ

II. The ALMS 16th Circuit *Undergraduates Shadowing the Law Committee* has already been active in its program to identify and motivate the best and brightest *undergraduate* students from Florida colleges and universities (in their 3rd & 4th years) to go to law school and become Florida attorneys. The committee has already had the first Shadowing Day event which occurred on July 28, 2025, at the Richard E Warner PA Law Firm in Marathon, Florida. Marquisha Abraham, a junior from the University of Florida, was the student participant in a successful “shadowing day” at the firm. The program is built around the experiences of that first event.

III. Since then the committee has been busy receiving inquiries and searching for the appropriate undergraduates for this program in their respective Circuits. The committee will hold its first brief ZOOM meeting on Thursday, December 18, 2025 at 4:30pm. The invite will go out to the Committee Members only and the ALMs Chair. This meeting will usher in the review of the governing documents of the USLC program including the Program Guidance Rules and the USLC Participant Confidentiality Agreement. These will be reviewed and discussed at the meeting for finalization and use by the Committee Members for Shadowing Days at their own law firms going forward. Also to be reviewed will be the preferred USLC Protocols for publicizing the program and the selection method for appropriate participant undergraduates. A report of that ZOOM Committee Meeting will be forwarded to the ALMs chair promptly thereafter.

Richard E. Warner 11-21-25

cc via email PDF: All Committee Members
ALMs Chair
Silvia Rojas

RPPT ALM Education & Outreach (E&O) Committee Report

January 2026

ALM Education and Outreach Mission Statement:

The mission of the **ALMs Outreach and Education Committee** is to coordinate and advance initiatives that strengthen legal education, public awareness, and community support. Specifically, the committee will oversee the planning and delivery of Continuing Legal Education (CLE) opportunities for attorneys and programs that provide educational programming on various legal topics related to real property, probate, and trust law. Through these efforts, the committee seeks to promote ALM's commitment to serving as the channel of communication between RPPTL Section leadership and the members while also enhancing professional development and expanding access to justice.

Current ALMs E&O members:

ALM	Circuit
Raul Ballaga	11
Darlene Bell-Alexander, Co-Chair	5
Sandy Boisrond	11
Christene M. Ertl	7
Amanda Hersem	6
Stephen P. Heuston	18
Fred Jones	9
Taniquea Reid	15
David Shanks	13
Robert M. Schwartz	18
Sandra G. Sheets	10
Patricia Thomas	5
Brian L. Trimyer	12
Arlene Udick, Co-Chair	5
Jorja Williams	17
Regine Williams	17

ALMs Activities since August 2025 RPPTL Meeting:

Committee Chair Member Meetings, Committee Member Meeting and email to ALMs leaders, E&O Committee and Lead ALMs about RPPTL/ALM activities (see attached PowerPoint of Activities). A PowerPoint Post -Report of Activities is also attached and includes photos taken at the University of Florida event.

The following current or recent Action Plans submitted by Circuit are attached to this report and are posted on the RPPTL ALMs website. E&O Committee members will assist and support ALMs members with communicating ALMs/RPPTL activities in each circuit.

October Activities:

- **ALM Jorja Williams** of Kelley Law Firm presented ***Introduction to the Florida Bar RPPTL Section*** the Probate Seminar “Estate Plans, Wills, and Summary Administration 2025” in West Palm Beach. The all-day seminar was hosted by Legal Aid Society of Palm Beach County and Rohan Kelley The Kelley Law Firm. Several legal aid attorneys from Public Interest Heirs’ Property Attorneys (PIHPA) were able to travel and attend the seminar after receiving grant funding from Local Initiative Support Corporation (LISC).

November Activities:

- **November 7, 2025** - Real Estate Law Conference @ University of Florida
- **November 12, 2025** - Coffee at the Courthouse
Sponsoring/Organizing ALMs: Michael R. Kangas, Principal
- **November 20, 2025** - After-Hours Cocktail Hour (Manatee County)
Sponsoring/Organizing ALMs: Kimberly A. Bald, Brian Trimyer

Upcoming December Activity:

- December 4, 2025 - **RPPTL Connect 2025**
 - *Sponsoring/Organizing ALMs: Amber Johnson*

Ongoing Activities/Projects:

- **No Place Like Home (NPLH)** – Disaster Preparedness
Sponsoring/Organizing ALMs: Colleen Sachs
- **Public Interest Heirs’ Property Attorneys (PIHPA)**
Sponsoring/Organizing ALMs: Darlene Bell-Alexander

D. Bell-Alexander and C. Sachs met with Bay Area Legal Services (BAL), members of the disaster preparedness and pro bono unit to determine any alignment with No Place Like Home Program (NPLH) and Public Interest Heirs’ Property Attorney Network (PIHPA), a network of legal aid attorneys and attorneys that support legal aids. The differences and similarities in programming and focus were discussed. BAL reported that NPLH does not currently have funding for an heir’s property project but anticipate seeking funding in the future. Additional information provided after the meeting clarified that BAL Volunteer Lawyers Program supports heirs’ property cases.

Also, during the meeting, D. Bell-Alexander and C. Sachs informed the NPLH team about Paladin, a website used by Florida Legal Aids to submit requests for Pro Bono cases. The website is newly financially supported by RPPTL ALMs and is being used by Florida legal aids. <https://app.joinpaladin.com/!/funding-florida-legal-aid/>

The following is a list of Florida legal aids that currently support heirs' property cases in some manner:

Bay Area Legal Services (Tampa/St. Petersburg)
Community Law Program
Community Legal Services (Central Florida)
Dade Legal Aid (Miami-Dade)
Jacksonville Area Legal Aid
Legal Services of Greater Miami (South Florida),
Three Rivers Legal Services (North Central Florida)
Legal Services of North Florida (North Florida Panhandle)
Legal Aid Society of Palm Beach County
Legal Aid Society of the Orange County Bar Association

D. Bell-Alexander and C. Sachs will convene again about NPLH and PIHPA.

PIHPA and RPPTL ActionLine: PIHPA attorneys submitted to The Real Property, Probate and Trust Law Section's ActionLine the first in a series of articles about the state of heirs' property law in Florida. ActionLine is a quarterly publication containing the latest news on Florida law of concern to our members and reporting on current Section activities.

Stewart Title continued their pro bono support of PIHPA attorneys with title matters related heirs' property cases.

ALMs E&O Phase One Action Plan:

Phase 1:

- Receive from ALMs Communication and Website Committee information from Lead ALMs relevant to the Outreach and Education Committee.
- Support the need for coordination for each event.
- Add events to the Outreach and Education RPPTL ALMs site by COUNTY to maintain and support regional representation.

Phase 2:

- Work with RPPTL/Florida Bar regarding an iPhone/Android App such as CVENT for RPPTL Education and Outreach events. May also include conferences, trips, etc.
 - Section Projects
 - Channel of communication between the Section leadership and the members
 - Participate on the Section's committees.

Other Possible ALMs E&O activities:

- CLE For attorneys including legal aid providers such as the partnership with Florida Legal Services Statewide Training Initiative and the Public Interest Law Section ("Expanding Pro Bono Partnerships in Florida")
- Public Interest Heirs' Property Attorney Project
- Dirt/Death Mid-Year Case Law Update
- Education for Citizens on Emergency Preparedness

Kudos:

October 2025

RPPTL Member E. Regine Francois Williams, Esq. of Francois Williams Legal was installed as the President of the Maryland Bar Foundation (MBF). The Maryland Bar Foundation is the philanthropic arm of the Maryland State Bar Association (MSBA). Each year, the MBF supports non-profits and legal partners in Maryland, who provide services to Marylanders, that align with the mission through grants. Attorney Williams will serve as the president of the MBF during its 60th anniversary. An inaugural gala was held on October 23, 2025, for the MBF. The event stood out as the highest fundraising in its history. More information about the Maryland Bar Foundation can be found on www.marylandbarfoundation.org

**Real Property Probate
& Trust Section
“RPPTL”
At Large Members
2025-2026
Education &
Outreach Committee**

- **Activities and Events Calendar
November/December 2025**
- **Questions/Issues:
Darlene@bellalexanderlaw.com**

9th Circuit
Amber Johnson, Esq.
attorneyaj@attorneyaj.com
Orange and Osceola

- **RPPTL Connect 2025**
- **Invitees:**
 - Local Voluntary Bar Associations
 - and law students from five Orlando
 - Area counties
- **Contacts:**
 - **Lawrence J. Miller, Esq.**
 - Fellow, The American College of Trust & Estate Counsel (ACTEC)
 - 2101 NW Corporate Blvd. | Suite 107 | Boca Raton, FL 33431
 - 561-998-7847 x 136 (T) | 561-998-2642 (F)
 - **Shayla Mount, Esq.**
 - Of Counsel
 - Lowndes
 - [407.418.6822](tel:407.418.6822)
 - shayla.mount@lowndes-law.com



RPPTL CONNECT 2025

SAVE THE DATE
DECEMBER 4, 2025

Learn more about The Real Property, Probate and Trust Law Section of the Florida Bar at our next Section meeting.

Attend a lunch & learn orientation to the Section, sit in on a committee meeting and meet other section members!

PARKING AND LUNCH WILL BE PROVIDED

FOUR SEASONS RESORT

101000 Dream Tree Blvd
Lake Buena Vista, FL 32836

PLEASE CONTACT MADISON GODIN -
MGODIN@FLORIDATAX.COM WITH ANY QUESTIONS

12th Circuit
Kimberly Bald, Esq.
kab@harlleebald.com
DeSoto, Manatee, Sarasota

Thursday, November 20, 2025 - After-Hours Cocktail Hour

Open to all young attorneys in Manatee County

- Also Invited: Probate judges,
- Partnerships/Associations: Manatee County Bar Association, Young Lawyer's Division
- Other RPPTL/Attorney Participants: Jeff Goethe, Natacha Selvaraj, Chad Manausa, James Lynch
- **Contacts:** ***Kimberly A. Bald, Esquire (941) 744-5537***
 Brian Trimyer, Esq. blt@harlleebald.com

13th Circuit
Michael Kangas, Esq.
mrk@estatelawflorida.com
Hillsborough

- Probate/Trust – **Coffee at the Courthouse. Also invited:** Members of the 6th Circuit
- Contact: **Michael R. Kangas, Principal**
 - BaumannKangas Estate Law
 - PO Box 399
 - Tampa, Florida 33601-0399
 - (o) 813.223.2202
 - (f) 813.223.2201
 - mrk@estatelawflorida.com
 - www.EstateLawFlorida.com

Click or scan to RSVP



Hope to see
you there!!

COFFEE AT THE COURTHOUSE

MEET THE PROBATE JUDGES,
JUDICIAL ASSISTANTS,
AND PROBATE CASE MANAGERS
OF THE 13th JUDICIAL CIRCUIT,
HILLSBOROUGH COUNTY, FLORIDA

NOVEMBER 12, 2025

9:00 AM – 10:00 AM

GEORGE EDGECOMB COURTHOUSE
800 E. TWIGGS STREET, 6TH FLOOR
TAMPA, FLORIDA 33602

16th Circuit
Richard Warner, Esq.
richard@rewarnerlaw.com
Monroe

- **ALMS 16th Circuit “Undergraduates Shadowing the Law Program”**
 - The mission is to identify and motivate the best and brightest undergraduate students from
 - Florida colleges and universities (in their 3rd & 4th years) to go to law school and become Florida attorneys. The method of the mission is for a committee member from each circuit to search for and identify college level full time 3rd and 4th year undergraduate students from their own circuit to spend a day at the committee member’s law firm to experience the law in practice, although not participating in any meetings or communications with clients. **Contact Richard Warner for more information.**

Statewide

Darlene@bellalexanderlaw.com

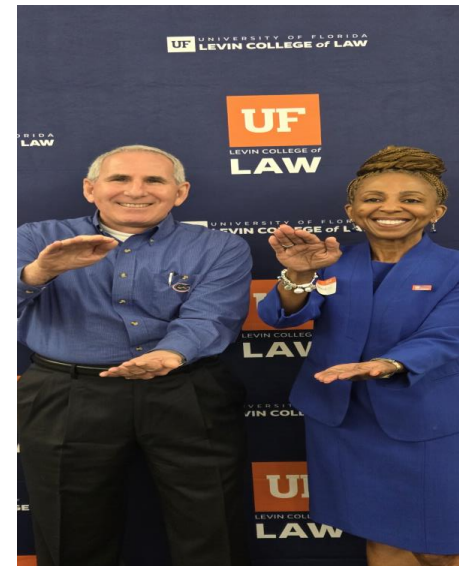
- **2025 Real Estate Law Conference presented by the Real Estate Law Association at UF Levin College of Law**

November 7, 2025

10am-3:15pm

See attached for more information and registration

2025 Real Estate Law Conference presented by the Real Estate Law Association at UF Levin College of Law November 7, 2025



ALM Organization of Division into Programmatic Committees

Education and Outreach Committee

Chair: Darlene Bell-Alexander

Guardianship Contempt Cases Committee

Co-Chairs: Robert Schwartz, Frank Pilotte

HLP Program

Chair: Richard Warner

Law Student Enrichment Committee

Co-Chairs: Silvia Rojas, Rebecca Wood

Pro-Bono Coordination Committee

Chair: Jane Cornett

Undergraduate Shadowing the Law Program Committee

Chair: Richard Warner

Website and External Communications Committee

Co-Chairs: Colleen Sachs, Arlene Udick

Report of Law School Engagement Committee (LSEC)
January 2026

Currently there are 21 members in the committee, inclusive of Rebecca Wood and Silvia Rojas, the co-chairs. The purpose of this committee is to support the LSO Committee liaisons to the law schools as speakers or as required for other events. The chair of the LSO Committee has been contacted to request that she makes all LSO Committee liaisons aware that they have this support.

Reports from the following circuits have been received and reports from the other circuits have been requested via email but as of Jan. 22nd have not been received:

4th Circuit – Robert Trudeau – JU

He has contacted the LSO liaison for JU to obtain further information on any events planned.

9th Circuit

Joe Percopo – FAMU - He is not currently aware of activities at Barry or FAMU.

Joe Tschida – FSU - He has agreed to do a presentation via zoon at FSU Law on Title Insurance for Manny's Advanced Real Property Class – Manny's class runs from Jan. 13 to April 14th.

6th Circuit – Stetson - Rebecca Bell

For Stetson University College of Law, she organized/organizing the following events for the 2025-2026 school year:

1. September, 2025- Recruited a local attorney to speak to the students about eminent domain, which was the topic they requested
2. November, 2025- Spoke to the students about my elder law/estate planning practice at a joint RPPTL and Elder Law Societies meeting.
3. February, 2026- Recruited Amanda Hersem to talk to the students about the benefits of being a RPPTL Section student member.
4. March, 2026- In the works of planning a 6th Circuit & 13th Circuit joint networking event for the students with local attorneys at the Stetson Tampa campus.

8th Circuit – UF - Rebecca Wood

Nothing active to date at UF for the spring.

11th Circuit - FIU – Silvia Rojas and Jacqueline Marzan: FIU has 4 more seminars/lectures planned to be moderated by Jacqueline Marzan and/or Silvia Rojas. These liaisons and who are also members of the LSO Committee are in the process of recruiting speakers. A celebrity estates seminar was held Wednesday, January 14th. The school supplies the lunch and the president of the FIU RPPTL Society picks the dates, places and times as are available.

St. Thomas – Raul Ballaga is working on events at St. Thomas even if he is not directly tied to the LSEC. He has reached out to the law school to schedule events but has not yet heard back.

UM – Hung Nguyen and Raul Ballaga hosted a UM RPPTL event on 9-5-25 at the Blue Martini in Brickell.

MEMORANDUM

TO: Brenda Ezell

FROM: Jane L. Cornett

DATE: January 26, 2026

RE: ALMs

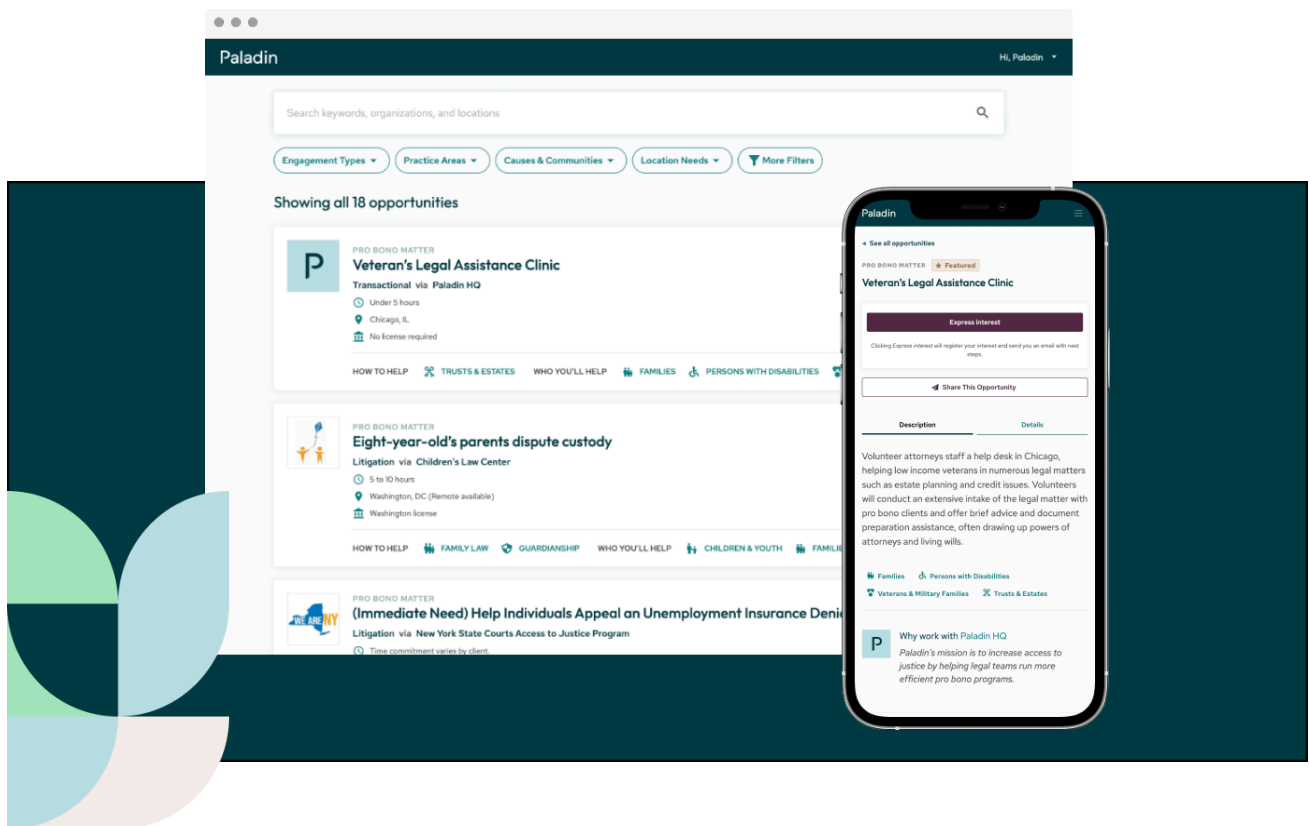
The Pro Bono Committee of ALMS had an opportunity to partner with the Construction Law Committee, Pro Bono Subcommittee, in advancing a proposal to the Executive Committee of RPPTL concerning a program called Paladin. In a most concise statement, this program offers enhanced pro bono opportunities to our Section Members at a very minimal cost.

Paladin was created by Funding Florida Legal Aid, formerly known as the Florida Bar Foundation (FFLA). Our goal in proposing that the Section affiliate with Paladin, is to offer our over 12,000 Section Members a simple, effective way to find and volunteer for pro bono matters that align with their expertise.

Paladin is free for users and Legal Aid providers and allows anyone to view legal aid opportunities and to sort those opportunities by practice areas. Legal Aid providers upload pro bono matters to a portal and there is also publication on the Paladin website. The Section does not currently have an easy and convenient way to connect Legal Aid providers with our Members, despite a clear need and clear willingness of our Members to provide pro bono services. Paladin could create a link so that Section Members could get an alert on matters that fall within the Members' practice areas. And Paladin would assist with joint outreach with RPPTL and FFLA, increasing visibility and volunteer support for general and complicated matters in areas of the state that are now underserved.

For our Members it can be challenging to identify pro bono opportunities that benefit from our expertise in Real Estate and Probate matters. Additionally, Legal Aid organizations may decline to intake specialized cases in our areas of expertise and lack a volunteer base to address these matters. Paladin offers a customized link that brings Members directly to a browsable database as well as an embeddable version of that database for integration into the RPPTL website. And membership in Paladin creates opportunities for joint outreach to Florida Legal Aid organizations.

The fee for this connection for one year is \$250 per month. Our proposal is to try Paladin for one year and with the assistance of our ALMS, monitor and evaluate the results.



September 19, 2025

Paladin for:

Real Property Probate and Trust Law Section of the Florida Bar (RPPTL)

We're excited about the opportunity to support the Real Property Probate and Trust Law Section of the Florida Bar (RPPTL) in engaging members of the section on pro bono!

Below, you'll find more information about Paladin and a proposal tailored to the goals we discussed on our recent call. Together, we believe we can help close the justice gap, particularly in housing and other real estate-related matters, that affect those who cannot afford legal services.

To align with the section's budget considerations, we've structured the proposal into three levels. This way, you can choose the option that best fits current resources while still advancing your pro bono goals. Our aim is to ensure there's a way to move forward together, even if not every feature can be included at this stage.

Thank you,

Stacy Zinken (stacy@joinpaladin.com)

Chief Experience Officer, Paladin

CONFIDENTIAL



"There's now a technology, an infrastructure,
that speaks to lawyers in a way they want to be talked to
about something they care about."

- Ben Weinberg, Pro Bono Partner, Dentons

Introduction to Paladin

Paladin launched with the mission to make pro bono as seamless as possible for lawyers and pro bono professionals. We're now the go-to platform for bar associations, legal services organizations, law firms, corporate legal teams, and law schools to streamline management of their pro bono programs and increase engagement. With Paladin, pro bono teams can quickly connect attorneys with relevant opportunities, making it simple to find and take on meaningful work. Paladin is free for legal services organizations.

RPPTL Goals and Paladin Proposed Solutions

RPPTL Challenges and Goals

RPPTL Leadership is seeking ways to provide its more than 12,000 members with a simple, effective way to find and volunteer for pro bono matters that align with their expertise. Two challenges raised were:

- **Limited Intake of Real Property Matters:** Legal aid organizations often decline to intake real property pro bono cases—particularly highly specialized ones—because they lack the necessary expertise or volunteer base to address them.
- **Difficulty Finding Relevant Opportunities:** Finding pro bono opportunities can be challenging for RPPTL members, especially when it comes to real estate-related matters. This process can be time-consuming, leading to reduced engagement or members taking on more general cases that don't fully leverage their skills.

How Paladin Can Help

Paladin's mission is to strengthen pro bono by connecting the legal community and simplifying the process of finding and volunteering for matters. By partnering with RPPTL, we can surface relevant opportunities directly to section members and collaborate with both RPPTL and FFLA to promote the increased visibility of these matters. Together, we can ensure that specialized real estate expertise reaches the communities that need it most.



Package Options

The below package options and pricing assumes that the FFLA portal continues to be up and running. If something happens that FFLA moves away from Paladin, the below pricing is no longer valid. The below pricing proposal is valid until December 1, 2025.

Package Option 1: Basic

Benefits:

- Customized link for Section leadership that brings members directly to a browsable database of real estate–related pro bono matters.
- Embeddable version of the database for integration into the RPPTL website.
- Joint outreach with RPPTL and FFLA to Florida legal aid organizations, highlighting increased visibility and volunteer support for both general and complex real estate matters.

Cost: \$250/month

Package Option 2: Enhanced

Benefits:

- All benefits included in Package 1.
- Personalized logins and dashboards for members within the selected tier.
- Leadership dashboard for RPPTL to:
 - Track pro bono opportunities offered to section members.
 - View and analyze volunteer interest by causes, communities, and practice areas.
- Ability for section leadership to send targeted pro bono opportunities to members via Paladin's email tool.

Cost:

- Up to 5,000 Users: \$1,500/month (\$3.60 per user/per year)
- Up to 12,000 Users: \$2,500/month (\$2.50 per user/per year)

Package Option 3: Comprehensive

Benefits:

- All benefits included in Packages 1 and 2.
- Weekly digest emails of pro bono opportunities, customized to each member's pro bono interests.
- Digests co-branded with RPPTL's logo for increased visibility and engagement.



Cost:

- Up to 5,000 Users: \$2,000/month (\$4.80 per user/per year)
- Up to 12,000 Users: \$3,500/month (\$3.50 per user/per year)

Referral Credit

We're confident that Paladin will make it easier for RPPTL members to find and volunteer for real estate-related matters. We hope this positive experience will inspire members to introduce Paladin to their firms, where each firm can launch its own instance that broadens access to a wide range of pro bono opportunities while still being tailored to individual attorneys. As a thank-you, Paladin will apply a one-time credit of \$3000 to RPPTL's Paladin account when a member's introduction results in their firm signing an annual contract. This referral credit applies to the Enhanced and Comprehensive packages.



**Thank you for the opportunity to work together to
increase access to justice.**

REPORT OF THE ALMS GUARDIANSHIP CONTEMPT CASE PROGRAM COMMITTEE

January 19, 2026

At our meeting last month in Orlando, I advised the ALMS present concerning the 15th Judicial Circuit ALMS Program to assist in limited appearances in regard to guardianship contempt hearings.

On December 10, 2025, I sent an email to all of the Lead At-Large Members providing more details concerning the Guardianship Contempt Case Program Committee and asking anyone who is interested in joining this committee or setting up their own committee in their own Circuit, to contact me.

Also on December 10, 2025, I received a reply from Michael R. Kangas, Esquire, Lead At-Large Member for the 13th Judicial Circuit, to set up a conference call to schedule a call back via zoom with members of our Committee, Mr. Kangas, and the two 13th Judicial Circuit probate judges to discuss the program currently in place in the 15th Judicial Circuit. We also discussed reaching out to Bay Area Legal Services to inquire about a similar agreement to that which we set up in Palm Beach. Mr. Kangas is working on setting up the zoom call with me and Frank T. Pilotte, Esquire, who has already handled a couple of the hearings.

Robert M. Schwartz, Lead ALM 15th Judicial Circuit

Real Property Probate and Trust Law Section

At Large Members

First Circuit Action Plan for 2025-2026

1. Ensure that at least one ALM from our circuit will attend ALMs and Executive Council meetings in person. We have had very good participation this past year and anticipate that continuing.
2. Add at least one other ALM to our circuit to help spread out the ability to be in contact with Section members at events in the four-county circuit.
3. Encourage the ALMs in our circuit to be active in multiple committees and to disseminate information from those committees to Section members in our circuit. Our goal is to have each ALM provide a summary of the meetings they attend. Those summaries will be distributed to our members through the circuit's listserv with a mention that more extensive summaries will be available in Actionline.
4. ALMs will be encouraged to attend local bar association meetings and make announcements about Section initiatives as needed.
5. Continue to send welcome letters to new members of the section who are based in our circuit, explaining the benefits of section membership and how they can get involved.
6. To plan and execute virtual events, both social and educational, due to the large geographic area of the circuit.
7. Plan and execute in-person events. We plan to have a breakfast presentation on the new CTA.

Colleen C. Sachs

**RPPTL ALMs
2nd CIRCUIT**

2026-2027 ACTION PLAN

MEMBERS

Jami Coleman (RP) – Lead ALM

ORGANIZATIONAL MEETING

The 2nd Circuit ALM has only one member.

ACTION PLAN

1. Continuing Initiatives

- a. Provide occasional email updates to Circuit members with relevant information about Section business and upcoming CLEs.
- b. Participate in local bar associations
 - i. Action Steps
 - 1. Published Heir Property Article in Tallahassee Bar Association Bulletin
 - 2. Attend meetings, share Section initiatives and news
- c. Attend Heir Property Workshops
 - i. Conducted and Presented (virtually) Understanding Heirs Property in Madison County on 10/29/2024
 - ii. Attended and Presented on Understanding Heirs Property in Jefferson County on 4/28/2025
 - iii. Attended and Presented on Understanding Heirs Property in Gadsden County on 9/17/2025

2. New Projects

- a. Present on Understanding Heirs Property in Marianna, Florida on January 8, 2026
- b. Present on Understanding Heirs Property in Port St. Joe on January 23, 2026.
- c. Sponsor Chili Cook-Off at Tallahassee Bar Association
- d. Continue Heir Property Presentations throughout the Panhandle, dates to be determined and coordinated.

TALLAHASSEE BAR BULLETIN



TALLAHASSEE
BAR ASSOCIATION

Quarter 4, 2025

ENHANCING THE PROFESSION • PROMOTING FELLOWSHIP • SERVING THE COMMUNITY



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THANK YOU *Presenting Partners*



PRESIDENT'S MESSAGE – FINAL REFLECTIONS

As my term as President of the Tallahassee Bar Association comes to a close, I find myself reflective and grateful. Serving in this role has been one of the highlights of my career, and it has been an honor to lead during a year marked by both progress and transition.

This year has not been without its challenges. It has been a time of uncertainty for many Americans, including our neighbors right here in Tallahassee. In moments like these, bar associations become even more critical, serving as sources of community, stability, and public service. I am proud that the TBA rose to meet that moment. We remained active, visible, and connected to our members and the community at large.

I am especially thankful for the opportunity to work alongside such an outstanding Board of Directors. Every board member gave their time, talents, and heart this year. Your dedication never wavered, and your teamwork never failed. During my tenure, three of us—Crystal Stephens, Cayelan Cwirka, and myself—welcomed new babies into our lives. It was a beautiful reminder that leadership and the goodness of life can and do unfold at the same time. It also reminded me that effective leadership is often rooted in grace, professionalism, and a quiet strength. I have been proud to witness that kind of leadership on this board and throughout our legal community.

I would be remiss if I didn't highlight one of the most meaningful initiatives of this year: our continued partnership with the Leon County Clerk's Office and Clerk Gwendolyn Marshall Knight. The Low Bono Program has not only provided critical legal access to those in need but has also reminded us of the impact we can have when institutions work together. Clerk Marshall Knight's leadership and vision have been nothing short of exemplary.

But the best part of the Tallahassee Bar Association is, without question, our members, community partners, and sponsors. Without your support, we would not be able to accomplish our mission or bring our initiatives to life. Your continued investment in this organization is what makes our work possible, meaningful, and impactful.

Finally, I want to share how truly excited I am about the future of the TBA under the leadership of our incoming President, Elizabeth "Liz" Ellis. Serving alongside Liz this past year has been a pleasure and a privilege. Her commitment to the profession makes her exactly the kind of leader we need in this next chapter. We are in even greater hands, and I cannot wait to see all that she and this exceptional board will accomplish.

It has been my honor to serve. Thank you for trusting me, for showing up, and for helping move the Tallahassee Bar Association forward. I look ahead with confidence, knowing that this organization is in excellent hands and that its best chapters are still being written.

With gratitude,

Jami Coleman

President, Tallahassee Bar Association



Navigating Heirs Property Under Florida's Chapter 64: A Court-Driven Process

By Jami Coleman



When multiple family members inherit real estate, often without a will or clear title, they typically become tenants in common. This type of jointly held property, referred to as heirs property, can present legal

challenges when one or more co-owners seek to sell or divide the land.

To address these disputes and preserve generational wealth, Florida adopted Part II of Chapter 64, Florida Statutes, known as the Uniform Partition of Heirs Property Act. The law establishes a structured, court-driven process that governs how heirs property must be partitioned through buyouts, physical division, or sale, ensuring fairness among family members.

Step 1: The Court Must First Determine Heirs Property Status

The court cannot apply these procedures unless it first determines that the property qualifies as heirs property under § 64.202(6), Fla. Stat. That determination is mandatory and must be made early in the case. The statute defines heirs property as:

- Real property held in tenancy in common;
- With no binding written agreement among all cotenants about partition;
- Where one or more cotenants acquired title from a relative (living or deceased);
- And where 20% or more of the cotenants are relatives or acquired their interests from a relative.

Once this finding is made, the court is required to apply the additional procedural safeguards laid out in the statute.

Step 2: Determining the Value

Unless all parties waive the requirement or stipulate to a value, the court must appoint a disinterested, certified appraiser to determine the fair market value of the property under § 64.206. The appraisal is filed and served on all parties, who may object and request a hearing. The court also has discretion in reviewing each party's appraisal and averaging the value of the real property. But a value must be determined before moving onto the next step.

Step 3: Court Issues Notice of Buyout Rights

Once the court determines the value, it is required to send a formal notice to all cotenants who did not request partition by sale. This notice must advise them of their statutory right to buy out the interest of the cotenant who is seeking to sell. The notice is mandatory and starts the timeline under section § 64.207 of the Florida Statutes.

After the notice is sent, cotenants have 45 days to file an election to purchase the petitioning cotenant's interest. If an election is filed within that time, the court will then set a deadline for payment that gives the electing cotenant no fewer than 60 days from the date the election period ends to complete the buyout.

After this process, it is often appropriate to ask the court to consider whether one or more cotenants should receive setoffs, credits, or reimbursement. In many families, a single cotenant may have spent significant funds over the years to maintain, preserve, or improve the property. If another cotenant has not contributed,

the investing party may be entitled to some form of financial adjustment before the final division or sale proceeds are distributed.

If the parties cannot agree on how to handle these contributions, asking the court to schedule an evidentiary hearing is a helpful step. This allows the court to hear testimony, review records, and make a fair determination on how to resolve the issue. Doing so helps protect your client's investment and moves the case toward a more equitable resolution.

Step 4: Buyout or Partition

If the buyout occurs, the court reallocates ownership and enters the necessary order. If the buyout is not completed, the court must determine whether partition in kind is feasible under § 64.209. If it is not, the court orders a partition by open-market sale under § 64.210, or by auction if necessary.

Attorney Involvement Is Crucial

Attorneys handling partition actions involving family-owned property must recognize when Chapter 64's heirs property provisions apply. These procedures are not automatic—they must be raised, facilitated, and followed through the court. Counsel should assist the court in issuing proper notices, track statutory deadlines, and ensure their clients' buyout rights are preserved and exercised in a timely manner. Understanding and advocating for these protections is essential to safeguarding clients' interests in family land and preventing avoidable loss of generational property.

Author Bio

Jami is an attorney specializing in tax, business, real estate, estate planning, and probate. She holds a J.D. from Florida State University and an LL.M. in Taxation from Georgetown. A former adjunct tax professor, she is active in pro bono work and nonprofit boards, recognized as a Florida Super Lawyers Rising Star (2017–2022) and recipient of the Tallahassee Bar Association's Distinguished Young Lawyer Award.

2026

UPCOMING TBA EVENTS

JANUARY 15

Event: Board of Directors Swearing-In Ceremony

Location: Courthouse

JANUARY 27

Event: CLE with John Lesko

FEBRUARY 11

Event: Past Presidents' Reception

FEBRUARY 24

Event: CLE Luncheon

MARCH 11

Event: Happy Hour

Location: DEEP Brewing

APRIL 15

Event: Table for 8 – with Bridge to Law School

MAY TBD

Event: Law Day with LSNF

JUNE 4

Event: Happy Hour

Location: Ology Northside

JULY 22

Event: Judicial Candidate Forum

Location: Stearns Weaver Miller

AUGUST 18

Event: CLE Luncheon

SEPTEMBER 10

Event: Happy Hour with YLS

OCTOBER 22

Event: 29th Annual Chili Cook-Off

NOVEMBER 10

Event: TBA Annual Meeting and Luncheon

DECEMBER 10

Event: Annual Bench & Bar Holiday Party

REMINDER: EVERYTHING IS STILL SUBJECT TO CHANGE

FOR MORE INFORMATION VISIT OUR WEBSITE [TALLAHASSEE BAR.ORG](https://tallahasseebar.org)

TALLAHASSEE BAR BULLETIN

Co-Editors

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Craig Richards

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Outreach Meeting
September 17, 2025, 12:00 PM – 2:00 PM (EST)
Gadsden Agriculture Center
2140 W Jefferson St,
Quincy, FL 32351-1905

- I. Welcome & Opening Remarks 12:00 – 12:05**
Eugene Pittman, KKAC, *FL Outreach Lead*
- II. Invocation 12:05-12:10**
TBD
- III. Purpose 12:10 – 12:20**
KKAC Representative
- IV. Overview of NRCS Programs 12:20 – 1:10**
Naila McCraney, *NRCS District Conservationist Gadsden County*
 - *Environmental Quality Incentive Program (EQIP)
 - *Seasonal High Tunnel
 - *Conservation Stewardship Program (CSP)

 - *Agriculture Conservation Easement Program (ACEP)
 - *Wetland Reserve Easement (WRE)
 - *Agriculture Land Easement (ALE)
- V. Break 1:10-1:15**
- V. Heirs' Property & Estate Planning 1:15 – 2:10**
Jamie Coleman, *Florida Attorney*
- VI. Recap & Q&A 2:10 – 2:15**
KKAC Representative
Eugene Pittman, KKAC, *FL Outreach Lead*



Outreach Meeting
May 06, 2025, 12:00 PM – 2:30 PM (CST)
Jackson County Agricultural Center Complex and Conference Center
2741 Penn Ave. Suite 3
Marianna, FL 32448

I. Welcome & Opening Remarks 12:00 – 12:05
Eugene Pittman, KKAC, *FL Outreach Lead*

II. Invocation 12:05-12:10
TBD

III. Purpose 12:10 – 12:20
Willard Ryland, *KKAC Chief of Operations*

IV. Overview of NRCS Programs 12:30 – 1:10
Michael Felton, *NRCS District Conservationist Jackson County*
*Environmental Quality Incentive Program (EQIP)
*Seasonal High Tunnel
*Conservation Stewardship Program (CSP)

*Agriculture Conservation Easement Program (ACEP)
*Wetland Reserve Easement (WRE)
*Agriculture Land Easement (ALE)

V. Break 1:10-1:15

V. Heirs' Property & Estate Planning 1:15 – 2:10
TBD, *Florida Attorney*

VI. Recap & Q&A 2:10 – 2:30
Willard Ryland, *KKAC, Chief of Operations*
Eugene Pittman, *KKAC, FL Outreach Lead*

1) FSA
2) Form 950
3) Tny track
work, etc.

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300 S. Spring Street, Suite 800 Little Rock AR 72201 | Ph: 501-500-3353 | Email: info@kkac.org



Outreach Meeting
January 8, 2026, 12:00-2:30 PM (CST)
Jackson County Agricultural Center
2741 Penn Ave. Suite 3
Marianna, FL 32448

- I. Welcome & Opening Remarks 12:00 – 12:05**
Eugene Pittman, KKAC, *FL Outreach Lead*
- II. Invocation 12:05-12:10**
Elder Dr. Nelson Wilson
- III. Special Guest 12:10-12:20**
Mr. Wilbur Peer, *KKAC CEO*
- IV. Jackson County Extension Director 12:20-12:35**
Doug Mayo
- V. Overview of NRCS Programs 12:35 – 1:20**
NRCS District Conservationist Jackson County Representative
 - *Environmental Quality Incentive Program (EQIP)
 - *Seasonal High Tunnel
 - *Conservation Stewardship Program (CSP)

 - *Agriculture Conservation Easement Program (ACEP)
 - *Wetland Reserve Easement (WRE)
 - *Agriculture Land Easement (ALE)
- VI. Break 1:20-1:25**
- VII. Heirs' Property & Estate Planning 1:25 – 2:20**
Jami Coleman, *Florida Attorney*
- VIII. Recap & Q&A 2:20 – 2:30**
Wilbur Peer, *KKAC Representative*
Eugene Pittman, *KKAC, FL Outreach Lead*
- IX. Closing**
Pastor Gary Reed

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**PACS Florida Expansion Outreach Meeting
January 23, 2026, 3:00 PM – 5:00 PM (EST)
Gulf County Stiles Brown Senior Citizen Building
120 Library Drive
Port St. Joe FL 32456**

- I. Welcome, Purpose & Opening Remarks 3:00 – 3:05**
Eugene Pittman, *PACS CEO*
- II. Invocation 3:05-3:10**
TBD
- III. Special Guest 3:10-3:20**
Amy Rogers, CEO: *Gulf County United Community Development Corporation, Inc*
Local non-profit assisting in hosting
- IV. Overview of NRCS Programs 3:20 – 3:50**
TBD, *NRCS District Conservationist Gulf County*
 - *Environmental Quality Incentive Program (EQIP)
 - *Seasonal High Tunnel
 - *Conservation Stewardship Program (CSP)

 - *Agriculture Conservation Easement Program (ACEP)
 - *Wetland Reserve Easement (WRE)
 - *Agriculture Land Easement (ALE)
- V. Heirs' Property & Estate Planning 3:55 – 4:55**
Jami Coleman, *Florida Attorney*
- VI. Recap & Q&A 4:55 – 5:00**
Eugene Pittman, *KKAC, FL Outreach Lead*



Last revised: 8/3/23

Heirs' Property Checklist

Before Speaking with an attorney, you and your family should ask yourselves the following questions and gather the following documents:

- Do I have a clear title to the land?
- Have I spoken with my family members that may have an interest in the land about decisions that need to be made on the land?
- A rough draft of your family tree, beginning with the person on the last deed for the property. This should show all of the names of the heirs and their spouses, how they are related and if they are living or deceased.
 - Dates and locations of death for family members who are deceased
 - Contact list for all family members who have an interest in the land (name, phone, address, email if available)
- Copies of any deeds for the property
- Copies of wills or probate documents for the original owner and deceased heirs
- Copies of written agreements among family members or with third parties regarding the property
- Copies of any legal notices relating to the property such as:
 - tax sale, foreclosure, pending or threatened lawsuits, and code violation notices
- Copies of recent tax bills and other tax records for the property
- Copies of farm or residential leases that are valid on the land
- Will or Holographic Will (if your state allows holographic wills)

Real Property Probate and Trust Law Section

Third Judicial Circuit

At Large Member Action Plan for 2025-2026

Third Judicial Circuit At Large Member:

Lead ALM – Guy W. Norris, gnorris@norrisattorneys.com

2025-26 Action Plan –

- 1) Email information items to RPPTL members in the Third Circuit
- 2) Attend local Third Circuit Bar Meetings in person and report on RPPTL activities
- 3) Seek to Increase participation of Third Circuit attorneys:
 - a) Promote RPPTL Section membership
 - b) Promote existing RPPTL Members to increase participation in Section activities.

Real Property Probate and Trust Law Section

Fourth Judicial Circuit

At Large Members

Action Plan for 2024-2025

Fourth Judicial Circuit At Large Members

Casey Arnold, Lead, carold@fishertousey.com

Jason P. Van Lenten, jvanlenten@gunster.com

Lauren E. Busey, lbusey@petparadise.com

1. Plan and execute a happy hour social event in Q4 2024 to welcome RPPTL Section Members in the Fourth Circuit and to encourage attendance at the Executive Council Meetings in February and May 2025.
2. Introduce Jacksonville University College of Law students to RPPTL Section Member benefits by participating in a panel discussion at Jacksonville University on January 28, 2025.
3. Send welcome letters to new Fourth Circuit RPPTL members.



FLORIDA BAR

REAL PROPERTY PROBATE AND TRUST LAW SECTION

AT LARGE MEMBER ACTION PLAN FOR THE FIFTH JUDICIAL CIRCUIT.

2025-2026

Submitted By: Arlene C. Udick, Esq.
P.O. Box 2094
The Villages, Florida 32158
352-217-3176
arlene@udicklaw.com

ALMs Action Plan for the Fifth Judicial Circuit
2025 - 2026

Current Fifth Circuit ALMs Members

- ❖ Darlene Bell-Alexander
- ❖ Patricia Thomas
- ❖ Arlene C. Udick, Lead ALM

1. Encourage the majority of 5th Circuit ALMs to attend the ALMs and Executive Council meetings in person. Most 5th Circuit ALMs participated for most of the 2024-2025 Bar year.
2. Encourage the ALMS in the 5th Circuit to be active in more than one committee and to share and distribute information from those committees to the general RPPTL Membership.
3. Continue to serve as the communication conduit between the RPPTL Section and the 5th Circuit General Membership.
4. Each ALM is encouraged to attend local bar association meetings in the five (5) counties that comprise the 5th Circuit and make announcements about RPPTL Section initiatives as needed.
5. Promote the RPPTL Section and recruit volunteers for the various ALM projects, donate funds for several of the fund-raising events put on by the five County Bar Associations, attend events sponsored by the various County Bars, including the Fifth Circuit Professionalism Day, to continue volunteering for projects on behalf of the Community Legal Services of Mid-Florida.
6. To continue RPPTL co-sponsorship of the Ocala/Marion County Community Foundation Estates and Trust Socials to promote RPPTL Section membership and initiatives.

7. New Member Outreach - The 5th Circuit ALMs will assist the Membership and Inclusion Committee as requested and also through supporting the events put on by that Committee.

8. The 5th Circuit ALMs meet informally to plan and execute events and an on-need basis.

GOALS

1. Attempt to communicate with the Judiciary of the 5th Judicial in conjunction with retired Judge Patricia Thomas (5th Circuit ALM) and educate the judiciary about what the RPPTL Section is about, and the programs and committee meetings available to them.
2. Develop an outreach program based on the Heirs Property Project instituted by the Community Legal Service of Midflorida.
3. Develop and institute ongoing fundraising for Community Legal Services of Mid Florida in The Villages, Florida.
4. Develop an outreach program with the Community Legal Services and the local churches and other religious organizations to make them aware of ALMs projects and initiatives such as No Place Like Home.
5. To add at least one other ALM to the 5th Circuit to more evenly distribute the ability to be in contact with the RPPTL General Membership

Real Property, Probate & Trust Law Section
Sixth Judicial Circuit ALMs
Action Plan for 2025-2026

Members:

Rebecca Bell
Jeff Eisel (Lead)
Zack Zuroweste
Darren Stotts
Amanda Hersem
Ryan Doddridge
Kenneth Thornton

Projects:

Stetson University College of Law Events:

- Provide speakers from the Circuit for the RPPTL student society panel events
- Conduct mock interviews with law students at Stetson subject to interest from Stetson students
- Speak at student RPPTL society to promote benefits of Section membership

Other Events in the Circuit:

- Annual Bench and Bar Conference at Stetson (hosted by Clearwater and St. Petersburg Bar Associations).
- Clearwater Bar Association Probate CLE program scheduled for Spring 2026
- Coordinate quarterly breakfasts/lunches at courthouses with local probate judges and probate practitioners (rotating the event locations around the circuit)
- Collaborate with 13th Circuit ALMs and other nearby Circuits to expand breakfast/lunches with Judiciary

Ongoing Projects:

- Recruit and serve as pro bono attorneys for Bay Area Legal Services projects and cases including the following projects such as No Place Like Home and forwarding list of pro bono case opportunities.
- In conjunction with Bay Area Legal Services and Community Law Program, create a clinic to clear title to homes so local community members can apply for grants for their homestead.
- Assist with the Self-Help Clinic at Pasco County Courthouses in completing of Legal Forms Program.

Liaison designation with local Bars and estate planning councils:

- Zach and Darren will serve as liaisons with the Clearwater Bar Foundation, Clearwater Bar Association, Clearwater YLD and then Pinellas Estate Planning Council.
- Jeff will serve as liaison with the St. Pete Bar Association (and specifically the Probate Section) and Barney Masterson Inn of Court
- Amanda will serve as our liaison with Stetson College.
- Rebecca and Ryan will serve as liaison with the West Pasco Bar Association, East Pasco Bar Association, FAWL of Pasco County (Rebecca) and the Gulf Coast Estate Planning Council (f/k/ a North Suncoast Estate Planning Council).

Ongoing projects:

Jeff will serve as a point of contact for the circuit and circulate announcements of interest and opportunities, including soliciting volunteers as needs are sent to Rebecca by Bay Area Legal Services and periodic circuit e-newsletters communicating current Section information.

6th Circuit ALMs organizational semi-annual meetings)

All 6th Circuit ALMs will promote and/or participate in the No Place Like Home or other legal aid society projects

All 6th Circuit ALMs will assist the Membership and Inclusion Committee, the Publications Committees, and the CLE Committee in their efforts.

All 6th Circuit ALMs will continue to consider and promote the writing of articles for The Florida Bar Journal and Action Line.

All 6th Circuit ALMs will continue to promote membership in the RPPTL section and encourage attendance at the meetings through participation in the local bar association events and related professional organizations (such as estate planning councils). Another important area of need is to respond to various requests for last minute volunteers or participation in events around the Tampa Bay Area.

**Real Property, Probate & Trust Law Section
Sixth Judicial Circuit ALMs
Action Plan for 2024-2025**

Members:

Kit Van Pelt (lead)
Rebecca Bell
Jeff Eisel
Zack Zuroweste
Darren Stotts
Amanda Hersem
Ryan Doddridge

Projects:

Stetson University College of Law Events:

- Meet and greets with Stetson students
- Provide speakers from the Circuit for the RPPTL student society panel events; (ie Title 101/Contract to Close, Big Law vs. Boutique Law, and Transactional Law vs. Litigation Law)
- Conduct mock interviews with law students at Stetson subject to interest from Stetson students
- Speak at student RPPTL society to promote benefits of Section membership
- Attend Stetson's Campus to Career Community Connections event (date TBD)

Other Events in the Circuit:

- Annual Bench and Bar Conference at Stetson (hosted by Clearwater and St. Petersburg Bar Associations).
- Reception sponsored by RPPTL for attorneys immediately following Clearwater Bar association Probate CLE program scheduled for Spring, 2025
- Coordinate quarterly breakfasts lunches at courthouses with local probate judges and probate practitioners (rotating the event locations around the circuit)

Ongoing Projects:

- Recruit and serve as pro bono attorneys for Bay Area Legal Services projects and cases including the following projects such as No Place Like Home and forwarding list of pro bono case opportunities.
- In conjunction with Bay Area Legal Services and Community Law Program, create a clinic to clear title to homes so local community members can apply for grants for their homestead.
- Assist with the Self-Help Clinic at Pasco County Courthouses in completing of Legal Forms Program.

Liaison designation with local Bars and estate planning councils:

- Kit, Zach and Darren will serve as liaisons with the Clearwater Bar Foundation, Clearwater Bar Association, Clearwater YLD and then Pinellas Estate Planning Council.
- Jeff will serve as liaison with the St. Pete Bar Association (and specifically the Probate Section) and Barney Masterson Inn of Court
- Amanda will serve as our liaison with Stetson College.
- Rebecca will serve as liaison with the West Pasco Bar Association, East Pasco Bar Association, FAWL of Pasco County and the Gulf Coast Estate Planning Council (f/k/a North Suncoast Estate Planning Council).

Ongoing projects:

Kit will serve as a point of contact for the circuit and circulate announcements of interest and opportunities, including soliciting volunteers as needs are sent to Rebecca by Bay Area Legal Services and periodic circuit e-newsletters communicating current Section information.

6th Circuit ALMs organizational semi-annual meetings (most recent meeting took place via Zoom on Sept. 20, 2022)

All 6th Circuit ALMs will promote and/or participate in the No Place Like Home or other legal aid society projects

All 6th Circuit ALMs will assist the Membership and Inclusion Committee, the Publications Committees, and the CLE Committee in their efforts.

All 6th Circuit ALMs will continue to consider and promote the writing of articles for The Florida Bar Journal and Action Line.

All 6th Circuit ALMs will continue to promote membership in the RPPTL section and encourage attendance at the meetings through participation in the local bar association events and related professional organizations (such as estate planning councils). Another important area of need is to respond to various requests for last minute volunteers or participation in events around the Tampa Bay Area.

All 6th Circuit ALMs will continue to serve as an ambassador to law students and to attend the New Attendee/Student Welcome receptions at future EC meetings.

Real Property, Probate & Trust Law Section
Seventh Judicial Circuit
Members At Large
Action Plan 2025-2026

Christene M. Ertl, Lead ALM

- I. Communication.
 - A. Continue to serve as an information source for events and activities of the Section, including, but not limited to Section Seminars and Section news.
 - B. Circulate minutes of Division Roundtable meetings and Executive Council meetings to Section members.
 - C. Continue to work with the local bar associations and groups. As the past President of the St. Augustine Inn of Court, I have worked to have the STA Inn assist with No Place Like Home in addition to getting RPPTL members as volunteers for this program.
 - D. Forward other information regarding current developments of interest to Section members.
- II. Recruitment.
 - A. Continue speaking to local attorneys to promote RPPTL involvement. I have recruited 2 new RPPTL members who want to serve as ALM for the 7th Circuit (please see application comments and statements of recommendation)
 - B. Continue to work with the local bar associations to promote Section events and activities. See note above regarding No Place Like Home and the STA Inn of Court
 - D. Make contact with local young attorneys group(s).
 - E. Work with RPPTL leadership to re-connect with members who have dropped membership.
- III. Projects.
 - A. Plan an event with the Cir. 4 (get back to planning with ALMS from 4th)
 - B. Continue to work with local legal aid to bring No Place Like Home to the 7th Circuit.
 - C. Work to recruit new, younger members in community.
 - D. Continue to work with local bar organizations.
 - E. Promote the writing of articles for Action Line and the Bar Journal to the local Section members.
 - F. Assist the any Section Committee as requested and as/when needed.

2025-26 Action Plan – 8th Circuit

1) Communicate information items to RPPTL members in the 8th

a) Maintain email list of 8th Circuit real property and probate/trust attorneys & transmit regular emails.

b) Periodically provide information for inclusion in Eighth Judicial Circuit Bar Association, (EJCBA), monthly newsletter.

2) Attend local professional association groups in person and report on RPPTL activities

a) North Florida Association Real Estate Attorneys-meetings as scheduled

b) 8th Circuit Probate Section group-monthly Zoom meetings

c) EJCBA-monthly Board meetings and monthly luncheons.

3) Student outreach

a) Support efforts of Law School Programming committee's liaison to UF

b) Coordinate with Law School Real Estate/Probate student organization to organize annual panel of judges and lawyers at a lunch sponsored by RPPTL.

c) Attend meeting of student organization at least once each year.

d) Encourage UF Law School to create a budget for 2 rooms per in-person RPPTL Executive Council meetings (for Thursday and Friday nights) to encourage student attendance.

4) Heirs Property:

a) Coordinate with UF Law School heirs property legal clinic, Three Rivers Legal Services heirs property pro bono services, Alachua County Property Appraiser's Office Heirs Property Program and workshops, communications with other heirs property points of contact: Clerks of Court, Property Appraisers, Tax Collectors, non-attorney Title Companies.

b) Organize Zoom short courses to educate attorneys on heirs property legal procedures: information gathering, title searches, litigation/probate strategies.

5) Probate Court Case Manager's Conferences: Institute program similar to Richard Warner's in the 16th Circuit to communicate and educate Probate Court Case Managers.

**REAL PROPERTY, PROBATE & TRUST LAW SECTION
NINTH JUDICIAL CIRCUIT
MEMBERS AT LARGE
2024-2025 ACTION PLAN**

I. Communicate to Local RPPTL Members--

Reach out to local members to promote Sponsor two-three RPPTL awareness Committee Summary CLE's per year (1 week to 1 month prior to Spring, Summer and Winter Meetings) for local members of the Section, as well as, members of the local Bar Association and Councils who are unable to attend RPPTL meetings in person.

1. Communicate Upcoming Section Meetings
2. Communicate local CLE's such as certification review courses and receptions
3. Post RPPTL meeting communication summarizing highlights from committee meetings
4. Communicate upcoming local RPPTL update meetings/social with co-host local organizations such as CFREAC and OCBA EGT/Property Sections

Verify Listserve email distribution list to ensure ALL local members are receiving periodic communications.

II. Judiciary Outreach

Invite Judges to Executive Council Meetings, CLE events, and Social events.

Encourage Local judiciary to begin attending at least the local RPPTL meetings in person when they are in town.

III. Law School Outreach

Coordinate with local law school administration and student organizations the following:

- i) lunchtime or evening career focused panel discussion fall and spring (i.e. Title 101, Wills 101, A Day in the Life Panel, etc.);
- ii) volunteer law school mock interview program (fall and spring);
- iii) invitation to section socials and ancillary organization networking events.

IV. New Member Outreach

Obtain list of first year RPPTL members in the 9th Circuit and reach out to new members to welcome them to the Section, invite them to upcoming 9th Circuit events and the Exec Council meeting when it is in the area.

- 1) Personally reach out to each new member to welcome them to the section and ask them if they have any questions.
- 2) Personally reach out to each new member to invite them to local social gatherings.
- 3) Personally reach out to each new member and invite them to attend EC meetings.

V. Heirs Property Project

Work with subcommittee and local legal aid society/law schools to increase local RPPTL participation and use of resources.

VI. Host Local Review Course Receptions

- 1) Real Property Cert Review Course
- 2) Construction Law Review Course
- 3) Wills and Trust Certification Review Course

VII. Community Service

- 1) Involvement with Heirs Property Initiatives with both Community Legal Services of Central Florida and FAMU College; encourage involvement by Barry Law
- 2) Additional Community Service (i.e. Food Bank Volunteering, etc.)
- 3) Work with FAMU/Barry University to hold estate planning clinics as part of heirs project extension

Real Probate & Trust Law Section
At Large Members
ACTION PLAN
2025-2026

Tenth Judicial Circuit (Polk, Highlands & Hardee Counties)
ALM (and Lead ALM) for the 10th Circuit: Sandra.sheets@gray-robinson.com

I. COMMUNICATION

- ☐ Lead At Large Member will continue to email the Minutes from the Probate and Real Estate Round Tables to all Circuit RPPTL members within two days of receipt of the Minutes.
- ☐ Lead At Large Member will continue to email to all Circuit RPPTL members all other communications promptly at the request of the Section.
- ☐ Lead At Large Member will schedule at least one meeting annually for all local At Large Members to attend to develop the action items from the Action Plan and to discuss the efforts of the Section in our Circuit (and will continue to attempt to expand representation for the Tenth Judicial Circuit—I am continuing to encourage involvement by Craig Mundy, Phil Bush, Emily Crain and those in other counties in the circuit.

II. LIAISON

- ☐ The Circuit At Large Members will facilitate at least one event with the local bar to promote the Section priorities and initiatives. The Lakeland Bar Association's annual Spring Social (sponsored by GrayRobinson, PA for RPPTL) highlights and promotes RPPTL's priorities and initiatives.
- ☐ The Circuit At Large Member(s) meet annually with the local probate and guardianship judges to foster dialogue between the Section and the local judiciary—Lead ALM organizes Polk County Estate

Planning Council annual hosting of the local probate judge and the annual Heckerling panel discussion update (giving due credit to and highlighting the value of RPPTL section meetings and CLE programs).

- ☐ The Circuit At Large Member will continue quarterly meetings with our Board of Governors representative, Victor Smith, to foster dialogue between the Section and the Board.

III. ORIENTATION

- ☐ The lead At Large Member will communicate annually with the new members of the Bar in the Tenth Circuit to promote membership and involvement in the Section (as notified of the joining of new Section members.)
- ☐ The Circuit At Large Member(s) will host at least one Meet and Greet each year for Circuit RPPTL members to foster communication and good will between the Section and its members. This is scheduled for January each year.
- ☐ The Lead ALM will continue to attend new member and law student receptions and be available for guidance and questions at all in-state RPPTL Executive Council meetings.

IV. SPECIAL PROJECTS

- ☐ Participated in Section projects as requested by the Chair of the Members At Large Committee.
- ☐ The Lead ALM has arranged to continue the inaugural event (begun Spring 2015) for the local probate judge update and social with local members of the RPPTL section.
- ☐ The Lead ALM will continue to take part in the ALMs committees ongoing and upcoming special projects.
- ☐ The Circuit At Large Members will keep current the list of all members and their connection to state legislators.

V. OTHER REQUIREMENTS

- ☐ The Lead ALM will attend at least the minimum number of Executive Council Meetings required by the Section's bylaws.
- ☐ The Lead ALM will attend at least two ALM meetings each bar year.
- ☐ The Lead ALM will continue to be active in at least one Section Committee (currently 5).


Sandra G. Sheets

12/13/2024

Date 11-30-25 caption corrected

#62302914 v2

REAL PROPERTY, PROBATE & TRUST LAW SECTION

11TH JUDICIAL CIRCUIT AT LARGE MEMBERS

ACTION PLAN 2025-2026

I. Communication

- A. The 11th Judicial Circuit ALMs will continue to communicate and function as a liaison between the Section and Section members in the 11th Judicial Circuit. This includes communicating with Section members via email, in person at voluntary bar functions, and at other events.

II. Recruitment

- A. Our ALMs will continue to be cheerleaders for the Section including working to recruit lawyers who are not members of the Section as well as law students where possible, including with people in our organizations, at voluntary bar events, at Section events, etc.

III. Projects

- A. ALMs in the 11th Judicial Circuit will participate in the newly formed ALMs committee and will support the mission of these committees and the Section as a whole.
- B. ALMs will continue to be active in local voluntary bar associations and will liaise with these groups and the Section.
- C. ALMs will be encouraged to promote the writing of articles for The Florida Bar Journal and Action Line.
- D. Our ALMs will take on whatever other projects that are assigned to our members.



November 26, 2024

Via E-Mail Communication

Wilhelmina Kightlinger, Esquire
Chief Underwriting Counsel
Stewart Title Guaranty Company
3402 West Cypress Street
Tampa, FL 3607
Wilhelmina.kightlinger@stewart.com

Re: Twelfth Judicial Circuit Plan

Dear Wilhelmina,

I am providing you the ALM Action Plan for the Twelfth Judicial Circuit. The plan sets forth the activities we started in 2024 and are continuing in 2025. As you encountered, our areas for much of late summer and in the fall were focused on the hurricanes and the reparations needed.

The ALM representatives for this Circuit have been shrinking and the two ALMs are my partner, Brian Trimyer, and myself. Thus, one of the goals for the next year is to increase the number of ALMs in our circuit. We have drafted a letter to send to each RPPTL member in our Circuit that provides the dates and locations for the RPPTL meetings known in 2025. We are encouraging the members to attend future meetings, either in person or via Zoom, to look at the benefits and responsibilities of serving as an ALM, and to encourage those attorneys who believe they can contribute to get involved in the Section and apply to be considered as an ALM.

Brian and I have been working on an article to include in the monthly Sarasota and Manatee Bar publications. The article is about getting involved in the Bar and we will have it compete so that the local bars can run it in their April or May publications; prior to the renewal of Bar dues and the time to join sections. We have sought comments from attorneys not specific to RPPTL. Scott Westheimer has agreed to contribute as to leadership in the Bar and John Patterson has already provided some insightful thoughts.. We have asked Barry Spivey and Jeff Goethe to comment on their involvement in RPPTL including how the section has helped their practices and the enjoyment of their lives. We want to emphasize why attorneys, especially at a young age, should get involved, especially in RPPTL. We hope that it also increases the participation of the attorneys in the section at meetings and in committees.

Wilhelmina Kightlinger, Esquire
November 26, 2024
Page Two

Finally, we are in the early planning stages of another seminar, similar to that which Brian and I organized for Manatee and Sarasota Counties in 2023. For the prior seminars, we had three circuit judges and four county judges on a panel for the Manatee County seminar and three circuit judges for the Sarasota County seminar. Judges Moreland and Williams, the probate judges for our circuit were part of the panels. The seminar we are currently organizing will be held in Manatee County in the early fall of 2025. We reached out to Judge Nicholas to schedule a meeting to include him, Probate Judge Diana Moreland who is also now our Chief Judge, and Judge Felix to discuss ideas for the seminar. Since the 2023 seminars were very well attended and very well received, we hope to be able to conduct a seminar every other year.

Please let me know if you have any questions.

Sincerely,



Kimberly A. Bald
kab@harlleebald.com

Attachment

cc. Brian L. Trimyer, Esquire

REAL PROPERTY, PROBATE & TRUST LAW SECTION

15TH JUDICIAL CIRCUIT AT LARGE MEMBERS

ACTION PLAN 2025-2026

At Large Members:

Robert M. Schwartz
Robert Marc Schwartz, P.A.

Bob@robertschwartzpa.com

Lead ALM

Eamonn W. Gunther
The Eamonn Law Firm

eamonn@egestate.law

Assistant Lead ALM

Jamison C. Evert
Gunster, Yoakley & Stewart P.A

jevart@gunster.com

Frank T. Pilotte
Murphy Reid LLP

fpilotte@murphyreid.com

Taniquea Reid
Law Office of Taniquea C. Reid, P.A.

TReid@TReidLaw.com

Antonio P. Romano
Comiter, Singer, Baseman & Braun LLP

aromano@comitersinger.com

Christopher A. Sajdera
Sajdera, P.A.

cas@saj-law.com

Eleanor Taft
Florida Power & Light

Eleanor.Taft@flp.com

Matthew L. Worsham
Jones Foster PA

mworsham@jonesfoster.com

I. Communication.

- A. Continue to maintain contact with Section members and work with the Palm Beach County Bar association, the South Palm Beach County Bar Association and the North County Section of the Palm Beach County Bar Association (all of which are located in our Circuit) as well as other local organization with similar interest (especially those concerning any local real property, probate or trust law committees) to promote Section initiatives and interests in our Circuit.

- B. Continue to communicate with the Legal Aid Society of Palm Beach County for ALMS member involvement with local real property and probate pro bono projects.
- C. Continue to serve as the communication conduit between the Section and the Section members in our Circuit.
- D. Communicate Section news and activities to the Section members in our Circuit on a regular basis, including:
 - 1. Circulate minutes of Division Roundtable meetings and Executive Council meetings;
 - 2. Forward notices of Section seminars and seminars sponsored by local Bar Association, Councils or Associations of interest to Section members; and
 - 3. Forward other information regarding Section activities or current developments of interest to members of the Section, including information from Section Committee List Servers.
- E. Act as liaison between Section Committees and the At Large Members, as requested.

II. Recruitment.

- A. Those ALMs who are active Probate and Trust Law practitioners will continue to appear at Trusts and Estates Section events of the Palm Beach County Bar Association, the South Palm Beach County Bar Association, and the North Palm Beach County Bar Association to promote Section membership and initiatives.
- B. Those ALMs who are active Real Property practitioners will continue to appear at Real Estate events sponsored by the local Bar Associations to promote Section membership and initiatives.
- C. Continue to reach out to Section members in this Circuit who are not yet active in Section committees.

III. Projects.

- A. Form Guardian Contempt Case Program Committee to continue working with Judge Kelly and Jerry C. Leaky, Esquire, the head of the pro bono project for the Legal Aid Society of Palm Beach County, Inc. concerning assistance in low income guardianships where there is a problem of some guardians not being able to comply with the requirements for being represented by counsel due to their financial circumstances and being in contempt for failure to file the necessary reports .
- B. Work with the voluntary Bar Associations in Palm Beach County to establish a presence

- at their events including joint events.
- C. Coordinate with the Palm Beach County Bar Association to promote and facilitate an ongoing educational program for the local probate judges and case managers together with other interested parties.
 - D. All 15th Circuit ALMs will continue to consider and promote the writing of articles for The Florida Bar Journal and Action Line.
 - E. All 15th Circuit ALMs will assist the other Committee as requested and through the lead ALMs email communications regarding upcoming CLEs.
 - F. All 15th Circuit ALMs will assist the Out of State Members' and Publications Committees as requested.
 - G. Assist with the RPPTL Section Programs.
 - H. As assigned.

**RPPTL ALMs
17TH CIRCUIT**

2024-2025 ACTION PLAN

MEMBERS

Gregg Strock (RP) – Lead ALM
Jorja Williams (PT)
Sharifa Jarrett (PT)

ORGANIZATIONAL MEETING

The 17th Circuit ALMs will hold their organizational meeting during the week of September 2, 2024, at the Loews Goral Gables Hotel in Miami, Florida, in connection with the Miami EC Meeting.

ACTION PLAN

1. Continuing Initiatives

- a. Provide occasional email updates to Circuit members with relevant information about Section business and upcoming CLEs.
- b. Participate in local bar associations
 - i. Action Steps
 - 1. Identify relevant associations
 - 2. Assign liaisons
 - 3. Attend meetings, share Section initiatives and news

2. New Projects

- a. Host a Bench and Bar Breakfast in conjunction with the Estate Planning Council of Broward County.
- b. Coordinate a panel for law students at Nova Law School to learn about practicing in PT and/or RP.

Real Probate & Trust Law Section
At Large Members
2025-2026 ACTION PLAN
Eighteenth Judicial Circuit (Brevard & Seminole Counties)

I. COMMUNICATION

- ☒ Lead At Large Member will email the Minutes from the Probate and Real Estate Round Tables to all Circuit RPPTL members within two days of receipt of the Minutes.
- ☒ Lead At Large Member will email to all Circuit RPPTL members all other communications as requested by the Section.
- ☐ Lead At Large Member will schedule at least one meeting annually for all local At Large Members to attend to develop the action items from the Action Plan and to discuss the efforts of the Section in our Circuit.

II. LIAISON

- ☒ The Circuit At Large Members will facilitate at least one event with the local bar with the purpose to promote the Section priorities and initiatives.
- ☐ The Circuit At Large Members will meet annually with the local probate and guardianship judges to foster dialogue between the Section and the local judiciary.

III. ORIENTATION

- ☒ The lead At Large Member will communicate annually with the new members of the Bar in our Circuit to promote membership and involvement in the Section (provided the list of new Bar members in our Section can be provided by the Bar.)
- ☐ The Circuit At Large Members will host at least one Meet and Greet

each year for Circuit RPPTL members to foster communication, good will, and most likely some food and appropriate adult beverages.

IV. SPECIAL PROJECTS

- ☐ Agree to participate in Section projects as requested by the Chair of the Members At Large.



Stephen P. Heuston, Esq.
Dated: 11/21/2024

**REAL PROPERTY, PROBATE & TRUST LAW SECTION
TWENTIETH JUDICIAL CIRCUIT
MEMBERS AT LARGE
ACTION PLAN 2024-2025**

Current Twentieth Circuit At Large Members

A. Stephen Kotler, skotler@kotlerpl.com, lead
Marve Ann Alaimo, malaimo@porterwright.com
Charles C. Wittington, cwhittington@qunster.com

I. Communication.

A. Maintain direct and close contact with Section members and work with the voluntary Bar associations in our Circuit, as well as other local organizations with similar interests (especially those concerning any local real property, probate or trust law committees) to promote Section initiatives and interests in our Circuit.

B. Continue to serve as the communication conduit between the Section and the Section members in our Circuit.

C. Communicate Section news and activities to the Section members in our Circuit on a regular basis. Specifically,

1. circulate minutes of Division Roundtable meetings and Executive Council meetings;
2. forward personalized notices of Section seminars and seminars sponsored by local Bar Association, Councils or Associations of interest to Section members; and
3. forward other information regarding Section activities, Executive Council meetings or current developments of interest to members of the Section.

D. Law School Initiative. New Member Welcome Initiative. Non-Renewing Member Initiative. Lead ALM to write letters and participate as requested by Project Chairs.

II. Recruitment.

A. ALMs to continue to appear at Trusts and Estates Section of Collier County Bar events to promote Section membership and initiatives. Steve Kotler is a former chair of the Collier County Bar Trusts and Estates Section and Steve Kotler and Marve Ann Alaimo have given CLE programs at CCBA TE meetings.

B. Promote Section membership and initiatives at Collier County Women's Bar Association as allowed. Marve Ann Alaimo's firm is a CCWBA sponsor and she attends monthly meetings. Steve Kotler's firm is a CCWBA sponsor and he attends monthly meetings.

C. Appear at Real Estate Section of Collier County Bar events to promote RPPTL Section membership and initiatives. Charles Wittington is on the Real Property side. He is a past chair of Collier

County Bar Real Estate Section and current Treasurer of Collier County Bar Association. Steve Kotler generally attends two or three Real Estate Section meetings a year.

D. Establish a presence in Lee and Charlotte Counties. We currently do not have an ALM from Lee County.

III. **Projects.**

A. "Summer Soiree". Sponsored social event for members of the Section, as well as, members of the local Bar Association and Estate Planning Councils whose practices could benefit from membership in the Section. Objectives are to promote the Section to current and prospective members and to reconnect with RPPTL in the circuits and encourage attendees to come to our statewide meetings. Give a short presentation regarding the Section and distribute RPPTL swag. Northern Trust supplies the venue. Securing sponsors of the event in addition to RPPTL funding provides for better event. We hope to do this in 2025.

B. Probate Trivia Night. Probate Trivia has been a successful event in Palm Beach County. We would like to add this event to our Circuit.

C. Legal Aid Service of Collier County. LASC is a new project of ALMs. Lead ALM will solicit help from 20th Circuit RPPTLians to assist with pro bono cases as requested by LASC. Lead ALM will coordinate with Fernanda Guerrero, LASC Pro-Bono Coordinator to help with cases that fall within subject matter expertise of RPPTL members. 20th Section Members have stepped up several times when called upon to help with pro bono matters.

D. Liaison designation with local Bars. Marve Ann Alaimo can serve as liaison to Collier County Women's Bar Association (CCWBA). Steve Kotler is past chair of Trusts and Estates Section of Collier County Bar Association and can serve as liaison to that Section. Charles Whittington is past chair of Real Estate Section of Collier County Bar Association and current treasurer of Collier County Bar Association and can serve as liaison to that Section as well as to the CCBA.

E. Ave Maria Outreach. ALMs will assist the Membership and Inclusion Committee and Law School Mentoring and Programming with Ave Maria Law School as requested. In the past ALMs have participated in a career lunch and learn panel where practicing attorneys speak to 2L and 3L about their practices and what practice is really like. 20th Circuit ALMs have participated in Ave's "Bar Association Networking Reception" where we manned a RPPTL table, displayed Section material and answered student questions regarding RPPTL membership and practice in real property, probate and trust law. 20th Circuit ALMs have participated in the mock employer interviews with RPPTL at Ave Maria.

F. Liaison designation with Executive Council Committees. Twentieth Circuit ALMs will endeavor to serve as liaisons to various RPPTL Division and Standing Committees.

G. Publications. All Twentieth Circuit ALMs will continue to consider and promote the writing of articles for The Florida Bar Journal and Action Line and assist with Publications Committee as requested.

H. New RPPTL Member Initiative. ALMs will assist the Membership and Inclusion Committee as requested and also through the numerous activities set forth above that promote that project.

I. CLE Committee. ALMs will assist the CLE Committee as requested and through the lead ALM's email communications regarding upcoming CLEs.

J. RPPTL Fellows Program. ALMs will reach out to members in the circuit regarding applications.

K. No Place Like Home.

L. Political Ties. ALMs will continue to participate in Political Ties Project and make political ties known to RPPTL leadership.

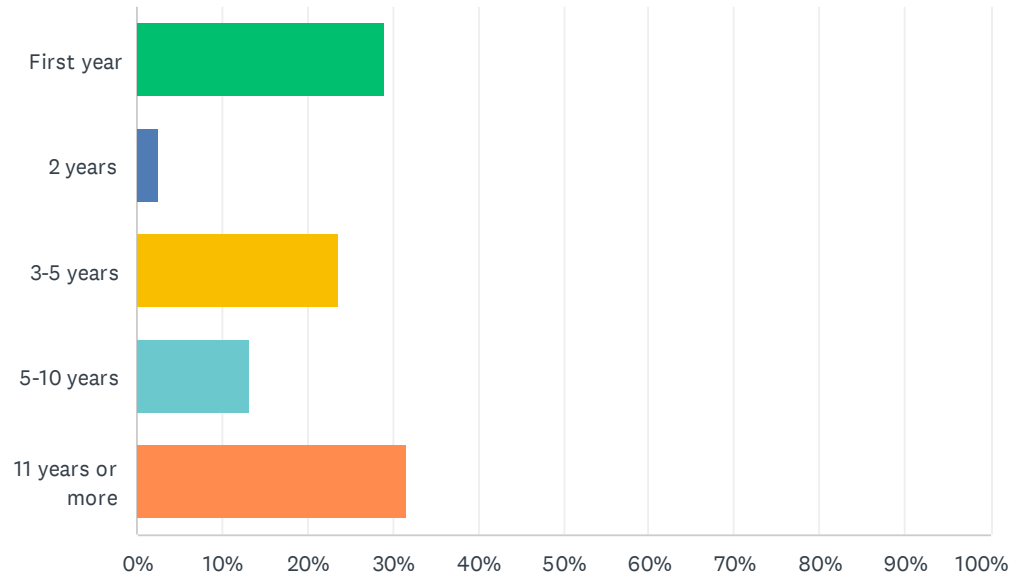
Cr.	Alphabetical order 2025-26 ALMS	Committee Assignments	Email
4	Casey Arnold✓	USLC	carnold@fishertousey.com
12	Kimberly Bald✓	Education	kab@harlleebald.com
11	Raul Ballaga✓		raul@bfallp.com
11	Carlos Batlle✓		Carlos.a.batlle@jpmorgan.com
5	Darlene Bell-Alexander✓	Education	mpreadingroom@hotmail.com
6	Rebecca C. Bell ✓	LSEC	rebecca@delzercoulter.com
12	Tara Rao Bild✓	Website	Tara.bild@hwlaw.com
13	Cullen I. Boggus✓		cboggus@gunster.com
11	Sandy Boisrond✓	Education	contact@thespectrumlaw.com
9	Wiley S. Boston II✓	LSEC& Website	Wboston@bostonpllc.com
1	J. Troupe Brewer	LSEC	tbrewer@clarkpartington.com
4	Lauren E. Busey	USLC& Website	lbusey@petparadise.com
2	Jami A. Coleman✓	Education	jami@coleman.law
19	Jane Cornett✓	Pro Bono	jcornett@beckerlawyers.com
6	Ryan Doddridge✓		support@flprobatetrustlaw.com
8	Jeff Dollinger✓	LSEC	dollinger@scwlegal.org
6	Jeffrey Eisel✓	LSEC	jeisel@baskineisel.com
7	Christene M. Ertl✓	USLC& Education	cme@fishertousey.com
15	Jamison C. Evert✓		jevert@gunster.com
8	Norm D. Fugate✓	LSEC	norm@normdfugate.com
15	Eamonn Gunther✓	Guardianship	eamonn@egestate.law
11	Mitchell A. Hipsman✓		mah@pnrlaw.com
6	Amanda Hersem✓	Education	Amanda.hersem@stewart.com
9	Amber Johnson		attorneyaj@attorneyaj.com
18	Stephen P. Heuston✓	Education	Heuston.legal@heustonlegal.com
9	Frederick W. Jones✓	Education	fwjoneslaw@gmail.com
13	Michael R. Kangas✓	LSEC	mrk@estatelawflorida.com
20	Robert K. Kirkland✓	LSEC	Robertkirkland6504@gmail.com
20	A. Stephen Kotler✓	LSEC	skotler@kotlerpl.com
20	Anthony R. McClure✓	LSEC	amcclure@porterwright.com
8	Eryn McConnell✓	LSEC&Website	emcconnell@orlando-law.com
7	David D. Naples✓		dave@dnapleslaw.com
11	Hung V. Nguyen✓	LSEC	Hung@nguyenlawfirm.net
3	Guy W. Norris✓		gnorris@norrisattorneys.com
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15	Frank T. Pilotte✓	Guardianship	fpilotte@murphyreid.com
13	John Redding✓	LSEC	john@jrtampalaw.com
15	Taniquea Reid✓	Education	treid@treidlaw.com

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15	Antonio Romano✓		aromano@comitersinger.com
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15	Robert M. Schwartz✓	Guardianship & Education	bob@robertschwartzpa.com
13	David Shanks	Education	Dshanks04@gmail.com
10	Sandra G. Sheets✓	Education	Sandra.sheets@gray-robinson.com
1	Richard Sherrill✓	USLC	rsherrill@clarkpartington.com
6	Darren M. Stotts✓		ds@persantelaw.com
17	Greg Strock✓		gstock@shutts.com
15	Elanor Taft✓		Eleanor.taft@fpl.com
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7	Richard Taylor✓	LSEC	rtaylor@delandlawyer.com
5	Patricia V. Thomas ✓	Education	trisht@tampabay.rr.com
6	Kenneth E. Thornton✓		kthorlaw@gmail.com
9	Margaret A. Thumborg✓	LSEC	mthumborg@thefund.com
12	Brian L. Trimyer✓	Education	blt@harlleebald.com
4	Robert H. Trudeau✓	LSEC	rtrudeau@pfhpa.com
9	Joseph J. Tschida✓	LSEC	itschida@wfgnationaltitle.com
5	Arlene C. Udick✓	Website and Education	arlene@udicklaw.com
4	Jason P. Van Lenten✓		jvanlenten@gunster.com
1	Lori E. Ward✓	LSEC	lward@alliantnational.com
16	Richard Warner✓	USLC	richard@rewarnerlaw.com
20	Charles C. Whittington✓	LSEC	cwhittington@gunster.com
17	Jorja M. Williams✓	Education	jorja@estatelaw.com
9	Margaret "Peggy" A. Williams✓		pwilliams@thefund.com
17	Regine Williams✓	Education	regine@francois-legal.com
9	Charles Wohlust✓	LSEC	gcw@wohlustlaw.com
8	Rebecca Wood✓	USLC & LSEC	Rwood@thefund.com
15	Matthew L. Worsham✓	Guardianship	mworsham@jonesfoster.com
6	Zackary T. Zuroweste✓	LSEC	zz@persantelaw.com

*Lauren Danilchenko is now Lauren Elizabeth Busey per Jeremy Crawford

Q1 How long have you served as a RPPTL Section At-Large Member? If there was a pause in service, include all years of service.

Answered: 38 Skipped: 0



ANSWER CHOICES	RESPONSES	
First year	28.95%	11
2 years	2.63%	1
3-5 years	23.68%	9
5-10 years	13.16%	5
11 years or more	31.58%	12
Total Respondents: 38		

Q2 Why did you apply to serve as an At-Large Member?

Answered: 38 Skipped: 0

#	RESPONSES	DATE
1	Want to be more involved in RPPTL.	8/19/2025 12:32 PM
2	To connect RPPTL members in my community in Bevard County to the RPPTL Executive Council.	8/19/2025 9:41 AM
3	It seemed like the best fit for me to serve the Section.	8/18/2025 5:03 PM
4	To have a more active role in the Section that wasn't necessarily committee specific.	8/17/2025 3:39 PM
5	To keep our local Bar Associations informed of current real property statutory and case law interpretations, and to obtain contacts and advice from other attorneys state wide.	8/16/2025 6:25 AM
6	I previously served as judicial liaison to RPPTL when I was on the bench. I want to stay involved with RPPTL	8/16/2025 6:12 AM
7	To stay involved in the executive council and participate in the developement of real property, probate and trust law and pass this information to my circuit,	8/15/2025 1:31 PM
8	To let members of the Section know how valuable membership and involvement can be.	8/15/2025 10:32 AM
9	The Third Judicial Circuit needs representation on the RPPTL Executive Council, and my 4 boys are no longer approaching and in their teenage years, so I am more flexible and available to return to service in this capacity.	8/15/2025 7:52 AM
10	To become more involved in Section activities	8/15/2025 7:49 AM
11	To get more involved in RPPTL.	8/15/2025 7:36 AM
12	To increase my involvement at the state level, be more informed, and to be able to bring that information to my local community to share with attorneys and help keep them informed.	8/15/2025 5:29 AM
13	To continue to be involved in the section and the executive council.	8/15/2025 5:12 AM
14	Really good free snacks.	8/15/2025 5:02 AM
15	Interested in being involved with RPPTL	8/14/2025 8:14 PM
16	As an entrance to the EC	8/14/2025 6:59 PM
17	to contribute further to the Section	8/14/2025 6:51 PM
18	I want to get more involved with RPPTL and also want to encourage RPPTL members in my circuit to take the time to become involved.	8/11/2025 10:07 AM
19	To become more involved in the section. I was also previously on the EC and have been working to get back on.	8/11/2025 8:42 AM
20	I've been going to RPPTL meetings for some time, and I'm ready to take the next step.	8/9/2025 2:31 PM
21	Wanted to be more involved in the section and liked the aspect that ALMS were to be involved in their circuit	8/7/2025 8:00 AM
22	I think it is important to communicate the business of the RPPTL section to its members and for RPPTL to hear from its members about projects important to our mission.	8/6/2025 10:44 AM
23	To stay connected to the Section and the local attorneys who don't participate	8/6/2025 9:37 AM
24	To be more involved with RPPTL	8/5/2025 5:38 PM
25	I recently have been given the opportunity to serve on some subcommittees and wanted to further my efforts within RPPTL.	8/5/2025 3:55 PM

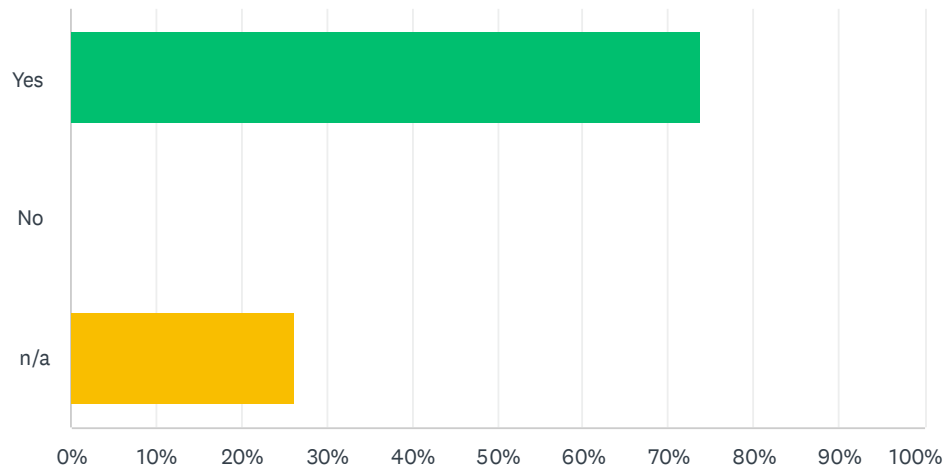
Real Property Probate & Trust Law Section 2025-2026 At-Large Members Survey

SurveyMonkey

26	Initially, to become active in the Section after being appointed to the FL Realtor-Attorney Joint Committee in 1997. Before, during and after my stints as vice chair/chair of various Section Committees, I returned to ALM status in order to actively serve the Section and our RPPTL members in my Circuit.	8/5/2025 3:33 PM
27	Like to make sure Section members in my Circuit are kept informed of the Section activities and to answer any questions about Section membership.	8/5/2025 3:19 PM
28	Recruited by Fred Jones, and I was interested in getting more involved in the RPPTL section, especially to keep up with the HOA and Condo legislation issues.	8/5/2025 3:00 PM
29	I wanted to get more connected with the Section and probate attorneys in my community.	8/5/2025 12:00 PM
30	The 19th Judicial Circuit was underrepresented for the Probate and Trust side of the ALMs.	8/5/2025 11:16 AM
31	I cycled off from being a chair of a committee.	8/5/2025 10:55 AM
32	The prior 8th Circuit ALM retired.	8/5/2025 10:51 AM
33	In order to be able to be more involved in Section activities by being a member of the EC. Being an ALM did not tie me to a specific committee and allowed me to interact with members on both sides of the aisle and to have an expanded role in RPPTL activities on our County	8/5/2025 10:49 AM
34	I wished to get involved with the executive council. I also struggled to "figure out" RPPTL, and I would like to help others in that respect.	8/5/2025 10:07 AM
35	I have been involved in the Section for many years having first served for a number of years as the Chair of the Condominium & Planned Development Committee & the Real Estate Certification Review Course Committee-I wanted to keep involved & became first a Circuit Rep & then an ALM	8/5/2025 10:06 AM
36	I have been attending Section meetings for several years and would like to get more involved in Section leadership. I thought this was a good way to start. I also live in the 10th Judicial Circuit where there is no real property ALM and I would like to try and get more people from this area involved.	8/5/2025 9:50 AM
37	to try to get more 8th circuit members active with RPPTL	8/5/2025 9:46 AM
38	Engagement with the bar is something that I enjoyed in private practice while in Texas, and our firm has emphasized its importance here in FL and so its my pleasure to be nominated and confirmed as an ALM and look forward to connecting more with the section and representing my firm and NW Florida to the state-wide section and bar.	8/5/2025 9:41 AM

Q3 Has your time serving as an At-Large Member been rewarding?

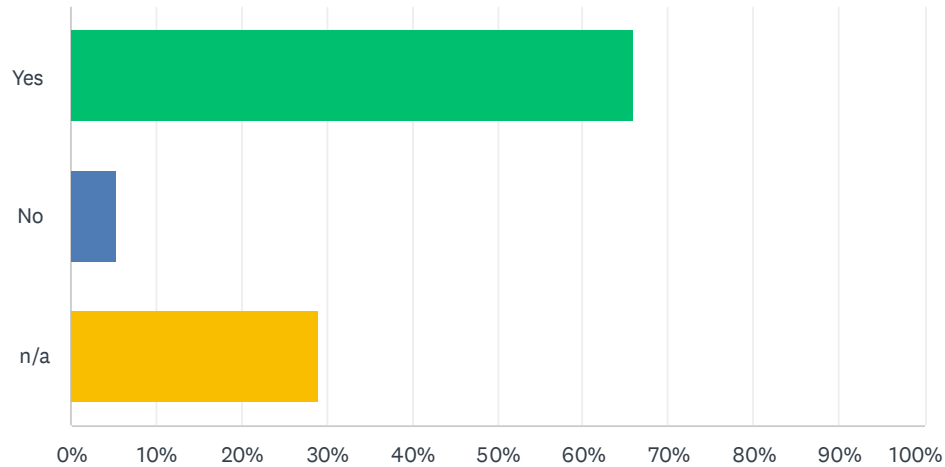
Answered: 38 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	73.68%	28
No	0.00%	0
n/a	26.32%	10
TOTAL		38

Q4 Do you feel that as an At-Large Member you have made a positive impact on the Section during your term?

Answered: 38 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	65.79%	25
No	5.26%	2
n/a	28.95%	11
TOTAL		38

Q5 Describe the positive impact you feel you have made on the Section during your term.

Answered: 31 Skipped: 7

#	RESPONSES	DATE
1	I have been able to communicate key initiatives and information from the Section to Section members at large.	8/19/2025 9:41 AM
2	My overall Section activities have included an ActionLine article the I co-authored with Rich McIver regarding foreclosure commitments. Rich and I also presented a webinar based on that article. I authored an ActionLine article regarding the new law - at the time, regarding waiving the spousal homestead devise restriction in a deed. I believe that I submitted that as part of an ALM agenda item. I have presented Seminars and webinars at FSU Law as part of Manny's Advanced Real Estate Class and also prior to Manny role at FSU. I participate in various committees to give input on legislation. I was the Chair of the subcommittee behind the MV Realty legislation. I am on a subcommittee that has revised and created new Trust Uniform Title Standards that are coming up soon for EC approval. Our ALMS activities have been presentations at Florida A & M Law and Barry Law ranging from mock interviews to a seminar on "From Contract to Closing", which John Redding and I prepared. That presentation has been used around the state. We, local ALMS, have presented an annual seminar in Central Florida usually as a Legislative Update type seminar. I, along with Alan Fields, persuaded my company, WFG, to be a Sponsor of the Section which is an honor to do. We both believe in the Section and the growth it provides for attorneys [new and old]. Today, WFG sponsored two law students for the Breakers - we are paying for the Thursday breakfast, lunch, and reception.	8/18/2025 5:03 PM
3	Through my presentations, student interactions, and networking with the local bar members.	8/17/2025 3:39 PM
4	As a member and later Chair of the Real Property Opinions Committee, with the co-association of the Business Law Section Opinions Committee, we produced the Report on Standards for Third Party Legal Opinions of Florida Counsel that serves as a guide for all Florida attorneys.	8/16/2025 6:25 AM
5	I could do better as an ALM. Our lead ALM Arlene Udick is ramping up our activities in the 5th circuit	8/16/2025 6:12 AM
6	Lecturing and course preparation	8/15/2025 1:31 PM
7	I started out as an ALM (Circuit Rep at the time) and joined one committee. I became increasingly involved in the Section very quickly and have chaired several committees, as well as participated in numerous projects.	8/15/2025 10:32 AM
8	Fully participated in the Executive Council, communicated on behalf of RPPTL with my Circuit.	8/15/2025 7:52 AM
9	I have taken on a project serving as successor attorney on two estates for a Ft. Lauderdale probate practitioner who died several years ago.	8/15/2025 7:49 AM
10	N/A	8/15/2025 7:36 AM
11	I have presented multiple CLE's, committee updates, Florida bar journal articles, and volunteered on subcommittee work. I have also represented the section as a local event sponsor and shared the benefits of being part of the section.	8/15/2025 5:29 AM
12	I have become more involved with other committees of the section, such as membership and law school liaison whose mission is more in line with ALMs then substantive committees.	8/15/2025 5:12 AM
13	Lots of new ALMS programs in the 16th Circuit such as the ALMS 16th Circ Probate Case Managers Conferences, the ALMS 16th Circ HLP Program to assist hard pressed Section attorneys, and the new ALMS "Undergraduate Student Shadowing of the Law Program." All have been successful and will continue to be. Richard E Warner 16th Circ	8/15/2025 5:02 AM
14	Being an ALM allows me to be more involved with the Executive Council than if I was only a Committee member.	8/14/2025 8:14 PM

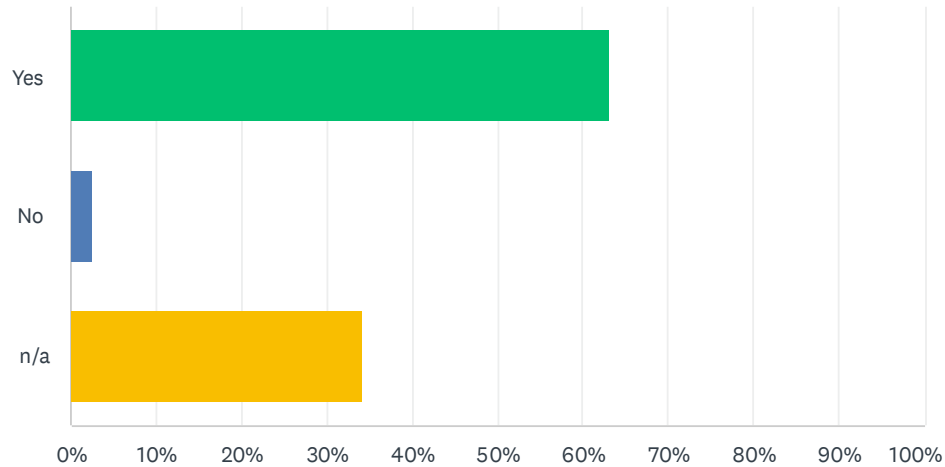
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15	Probably the most when I was lead ALM and attempted to maintain consistent communications with my circuits section members. I still think this should be the standard/requirement for all lead ALMs.	8/14/2025 6:59 PM
16	setting up mentorship program for law students (along with the LSO committee) and requesting applicants from the ALMS	8/14/2025 6:51 PM
17	I would like to get younger and newer attorneys to this practice area involved as I have found it was very helpful to me as a young attorney and at one point with my own practice. Some of my best mentors are from RPPTL and I'm very appreciative of the extended network and support.	8/11/2025 8:42 AM
18	I feel like we have delivered the RPPTL message to our circuit and encouraged social interaction after Covid	8/7/2025 8:00 AM
19	I believe communication to local members has increased participation and membership in RPPTL	8/6/2025 10:44 AM
20	Just elected	8/5/2025 5:38 PM
21	I was just appointed as an ALM and haven't had an opportunity to get involved yet, but am looking forward to helping any way I can.	8/5/2025 3:55 PM
22	Helped coordinate joint events/seminars for the Section with the local Bar Assoc, local RE atty groups, Realtor groups and RECs. Helped Section liaise and work with Barry and A&M Law school RE committee and law students, mentoring and presenting seminars.	8/5/2025 3:33 PM
23	ALMS meetings keep you informed of activities around the state and involvement in Section functions in our Circuit	8/5/2025 3:19 PM
24	I have served as a panelist several times at the law school RPPTL presentations and have presented legislative updates.	8/5/2025 3:00 PM
25	I think our judicial breakfasts have been welcomed.	8/5/2025 12:00 PM
26	I felt I was a good liaison between the Section and the legal community, including law students and judges.	8/5/2025 10:55 AM
27	Worked together with the other 2 ALMS. Coordinated the Heirs property project. Assisted in getting ALM for the 3rd Circuit.	8/5/2025 10:51 AM
28	I think I have been able to take part in decisions and discussions that have affected the law and jurisprudence in my areas of practice which have been beneficial to the Section, the Bar at large and the public. It has helped me to become a better lawyer and has helped me better serve my clients. As an EC member I have helped the Section grow and prosper and facilitated the implementation of the Section's goals which I have been able to have an influence in defining.	8/5/2025 10:49 AM
29	I have not been able to contribute as an ALM yet.	8/5/2025 10:07 AM
30	In addition to the regular ALM duties, as the lead ALM I have regularly reached out to all of the Section Members in the 15th Circuit with information and invited responses and questions. I have also encouraged Section Membership when I am dealing with a non-section Member who does Real Estate, Probate or Trust Law. I have also worked with the local Judges & Legal Aid on local projects.	8/5/2025 10:06 AM
31	Too early to tell, but its certainly my plan to be a contributing member of the Section.	8/5/2025 9:41 AM

Q6 Do you feel that as an At-Large Member you have made a positive impact in your community during your term?

Answered: 38 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	63.16%	24
No	2.63%	1
n/a	34.21%	13
TOTAL		38

Q7 Describe the positive impact you feel you have made on the community (civic, legal, etc.).

Answered: 31 Skipped: 7

#	RESPONSES	DATE
1	Same as above	8/19/2025 9:41 AM
2	See #5 above.	8/18/2025 5:03 PM
3	I am not sure I understand this question. As far as the legal community, please see my answer to question 5 supra.	8/17/2025 3:39 PM
4	Through attendance at local Bar and committee meetings, keeping those attorneys informed of the pending statutory and case law issues gleaned from participating at RPPTL committee meetings.	8/16/2025 6:25 AM
5	Tried in inform our local bar association of issues of interest	8/16/2025 6:12 AM
6	I need to develop great cyber-skills to contact circuit RPPTL members	8/15/2025 1:31 PM
7	A direct impact was when Hurricane Michael devastated much of the panhandle. I helped the community with the help of the Section. Section members ordered needed items and had them shipped to my office. I (and Val) then delivered them to the areas where they were needed most.	8/15/2025 10:32 AM
8	Fully participated in the Executive Council, communicated on behalf of RPPTL with my Circuit. Better educated lawyers results in better service to the community.	8/15/2025 7:52 AM
9	N/A	8/15/2025 7:36 AM
10	As an attorney, we're always responsible for being right. However, when there's a new law change or a case that comes out, it can upset what has been the status quo. And if an attorney is unaware of that change, they could get themselves in trouble inadvertently and potentially harm clients. So I believe the information that's shared with local attorneys helps better position them to serve the local client base in accordance with the most current laws and I feel I help facilitate that.	8/15/2025 5:29 AM
11	Involvement with Law schools and all students in South Florida, and providing young lawyers with information regarding RPPTL.	8/15/2025 5:12 AM
12	All three of the programs stated in Question 5 above have helped locally in the Florida Keys very much. REWarner 16th Circ	8/15/2025 5:02 AM
13	I always provide updates of RPPTL matters at the local meetings.	8/14/2025 8:14 PM
14	See above	8/14/2025 6:59 PM
15	Being available when asked - like with the minority local bar seminars	8/14/2025 6:51 PM
16	I just got elected into ALMS but hope to make a good impact moving forward.	8/11/2025 8:42 AM
17	I believe we have done solid work within our circuit	8/7/2025 8:00 AM
18	I've received feedback from local members that the updates we offer are important to them; also we have participated in meaningful projects beneficial to the local community including a survey of circuit court policies on various matters, Save Our Homes, and recently the Heirs Property project.	8/6/2025 10:44 AM
19	I have helped connect the judiciary with local practitioners, via the Section	8/6/2025 9:37 AM
20	Just elected	8/5/2025 5:38 PM
21	I was just appointed as an ALM and haven't had an opportunity to get involved yet, but am looking forward to helping any way I can. Although, I am active in our local bar's quarterly	8/5/2025 3:55 PM

"GAP" meetings (Guardianship and Probate) wherein our judge asks me and Tance Roberts what is new and coming down the pike in RPPTL.

22	Legal community, yes, as above indicated, as well as working to enhance our relations, as attorneys and Section members, with the RE professionals/licensees in our community and provide to them educational and contact opportunities.	8/5/2025 3:33 PM
23	Involvement in local bar committees in our practice area.	8/5/2025 3:19 PM
24	I take the information from the meetings and share it with clients and colleagues so that we can all stay updated on the evolution of various property issues, and I incorporate that information into presentations that educate community association board members and managers.	8/5/2025 3:00 PM
25	Same as 5.	8/5/2025 10:55 AM
26	Raised awareness of RPPTL within the legal community. Raised awareness of heirs property solutions within the community, generally.	8/5/2025 10:51 AM
27	See number 5. I am a resource to those in my area of practice and in the local communities in which I serve. I have helped educate those with whom I interact about the law as it is, was and should be (at least in my opinion).	8/5/2025 10:49 AM
28	N/A	8/5/2025 10:07 AM
29	Because of my regular e-mail Blasts, I frequently hear from Section Members with question or other inquiries-they have become aware that help is available from RPPTL	8/5/2025 10:06 AM
30	publishing our news in EJCBA Forum 8 and liaisioning with UF (overlaps my role in LSO)	8/5/2025 9:46 AM
31	Again too early to tell.	8/5/2025 9:41 AM

Q8 What are your top 3 goals as an At-Large Member for the 2025-2026 Bar year?

Answered: 36 Skipped: 2

#	RESPONSES	DATE
1	Become more engaged in RPPTL section.	8/19/2025 12:32 PM
2	To continue to communicate between the Section and the Section members in my community. To participate in At Large initiatives (such as No Place Like Home). To positively represent the Section in everything that I do within and outside of the Section.	8/19/2025 9:41 AM
3	1. Sponsor the Law School Outreach committee as part of WFG's App Sponsorship. 2. Continue to work with John Redding on a commercial real estate presentation like we created for the residential "Contract to Close". 3. Be more active in the local ALMs activities and in the RPPTL committees.	8/18/2025 5:03 PM
4	1. Completing the commercial real estate presentation (there has been a bit of a delay as I am closing my practice and have returned to underwriting.) 2. Revitalizing the student interactions at the local law schools (this seemed to almost stop since Phil's passing.) 3. To take a more active role in the committee.	8/17/2025 3:39 PM
5	Participate with more educational meetings with Stetson law students, and encourage those interested in probate, estate planning and real property law to attend RPPTL meetings.	8/16/2025 6:25 AM
6	Work with Arlene on project working with local churches to make presentations on legal issues	8/16/2025 6:12 AM
7	1. develop great cyber-skills to contact circuit RPPTL members 2. try to limit needless administrative inconsistency among clerks 3. make courses available to law schools and local bar asso.	8/15/2025 1:31 PM
8	1. To find another ALM for the First Circuit. We only have two, and right now there is no one in the eastern part of the circuit. 2. To work with the other ALM in the First Circuit in putting on breakfast meetings every three to six months that would include fellowship and an educational piece. 3. To welcome new Section attorneys in our area (our population is growing fast) and make them aware of the benefits of continued Section membership after their one year of free membership expires.	8/15/2025 10:32 AM
9	I have not set any goals. After I attend my first ALM meeting on my reentry into EC activity, I will be better able to more fully respond.	8/15/2025 7:52 AM
10	Become more involved in ALM projects	8/15/2025 7:49 AM
11	1. Be more involved. 2. Learn more about real estate law. 3. Have an impact on shaping real estate law.	8/15/2025 7:36 AM
12	Continue to share important information, to be available to my local attorneys to help guide them, and continued CLE/article work.	8/15/2025 5:29 AM
13	Organize events in South Florida, increase South Florida involvement in RPPTL, and motivate lost students to get involved in the section.	8/15/2025 5:12 AM
14	1. Experience more free snacks. 2. Cop as much microphone time as possible for self-promotion. 3. Help the ALMS chair as much as possible so I can get a gratis lunch when I am up in Jacksonville.	8/15/2025 5:02 AM
15	Be involved, help in the educational efforts, listen and share information.	8/14/2025 8:14 PM
16	Again, I would love to see the communications to section members within the circuit standardized. Continue the probate breakfasts in our circuit. Better coordination with 13 circuit	8/14/2025 6:59 PM
17	Recruiting mentors for the law school programs as well as speakers at law school seminars; Providing information to the ALMS as it comes thru the other committees; help the circuit reps in my location	8/14/2025 6:51 PM

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18	1. Coordinate an Heirs Property event with local legal services and voluntary bars in the panhandle. 2. Participate in an event with FSU Law related to ALMs. 3. Learn more about RPPTL and the path to leadership in the Section.	8/11/2025 10:07 AM
19	Meet other ALMS in other circuits to learn what they are doing; Bring in younger or new attorneys to the practice area be a better amabassador for RPPTL.	8/11/2025 8:42 AM
20	Meet people, get more involved in RPPTL, get more involved in the community.	8/9/2025 2:31 PM
21	continue the work within the circuit, advise on the CLE work of the section and expand the numbers in our circuit	8/7/2025 8:00 AM
22	Communication, increase participation in committee meetings and CLE presentations, participate in at least one meaningful project.	8/6/2025 10:44 AM
23	Continue connecting local attorneys; continue to keep attorneys and judges communicating; confer with colleagues	8/6/2025 9:37 AM
24	Help promote certain legislative effort Learn more about the inner workings of RPPTL Build new relationships within the RPPTL Section	8/5/2025 5:38 PM
25	(1) Get involved in some sort of local project with our bar/circuit. I brought the idea up with our local bar president to put together a fundraiser or donation for local bar members to get new furniture for the attorney lounge in our courthouse. (2) Get to know the other ALMs members in my area. Thankfully, I already know most of them. (3) Work towards giving presentations towards other local bars/judges regarding issue involving my area of practice (estates/probates) and issues coming down the pike from RPPTL.	8/5/2025 3:55 PM
26	1. Reinstate happy hours and educational opportunities for the RPPTL practitioners in our Circuit; 2. continue to introduce them to the EC, it's many active committees and the work the Section does here and state wide; and 3. provide opportunities for all Section members to be involved with any community or volunteer opportunities which the Section may endorse.	8/5/2025 3:33 PM
27	Continue to be involved in Circuit activities re RPPTL, attend local estate planning committees to talk up RPPTL and continue to learn what other Circuits are doing to help people in our Circuits.	8/5/2025 3:19 PM
28	- Stay sane - I have a tendency to overextend myself if I am not balancing my time well. - Continue involvement and develop more personal relationships. - Do a better job of budgeting my time so that I can attend more days of the statewide meetings and continue to attend the local events	8/5/2025 3:00 PM
29	I'm the lead ALM for the 11th Circuit. My goal is to continue to represent the Section locally and represent the local Section community at Section meetings.	8/5/2025 10:55 AM
30	Continue outreach within the 8th Circuit legal community. Advance the Heirs property project. Assist with possible Partition CLE.	8/5/2025 10:51 AM
31	From a personal perspective, I just want to stay healthy and continue to be able to attend meetings. Locally I would like to see us more active . We have some very active local Bar ass'ns so carving out space for our own activities is difficult. The local ALMs will continue to meet and try to further the Section goals. I will hopefully be able to recruit some new section members and get those who are members to become more active.	8/5/2025 10:49 AM
32	1. Learn what is means to be an ALM. 2. Help others figure out how to get involved with RPPTL.	8/5/2025 10:07 AM
33	Continue on the existing projects & assist in whatever come up	8/5/2025 10:06 AM
34	Meet and establish relationships with more Section members Work on ways to get more 10th Circuit Members involved Law school outreach	8/5/2025 9:50 AM
35	get at least one lawyer from EJCBA to get active with RPPTL offer a CLE to EJCBA members support UF Law students	8/5/2025 9:46 AM
36	Make connections with my peers across the state; represent my firm and NW Florida with professionalism and purpose; find a meaningful way to contribute to the Section within my first year as an ALM, through volunteer or committee work.	8/5/2025 9:41 AM

Q9 What can the Section do to help you achieve these goals?

Answered: 34 Skipped: 4

#	RESPONSES	DATE
1	Give opportunities to contribute and become more involved.	8/19/2025 12:32 PM
2	Its nice when I receive approved emails to send out to Section members in my Circuit. People in my community look to me for key information about the Section. I am known as the "Section guy" by Section members who are not on the Executive Council.	8/19/2025 9:41 AM
3	Our lead ALM moved out of State so we need to select a Lead ALM. But I am not volunteering. Maybe Fred Jones, if he wants to do it. I have not spoken with Fred about this yet.	8/18/2025 5:03 PM
4	In this, i am not entirely sure. For 2, I had planned to reach out to the Law School Outreach committee.	8/17/2025 3:39 PM
5	Coordinate these Stetson meetings with faculty and student leaders.	8/16/2025 6:25 AM
6	1. educate me 2. identify administrative inconsistancy among clerks 3. make courses available to law schools and local bar asso.	8/15/2025 1:31 PM
7	1. Any help in identifying someone to serve as an ALM is appreciated. But I believe the two current ALMs are in the best position to accomplish this. 2. We plan to ask for funding for the breakfast meetings. 3. The Section can provide a list of new Section attorneys in our circuit with addresses (either email or snail mail).	8/15/2025 10:32 AM
8	I have not set any goals. After I attend my first ALM meeting on my reentry into EC activity, I will be better able to more fully respond.	8/15/2025 7:52 AM
9	Not sure, but I plan to find out.	8/15/2025 7:36 AM
10	I thank it would be helpful if we had some more uniformed style information that can be shared when discussing the section and advertising for it. Not that we all don't have a good and positive personal experience, I just believe uniformity can be beneficial.	8/15/2025 5:29 AM
11	Provide more guidance on use of funds that would be necessary to promote local events.	8/15/2025 5:12 AM
12	The Executive Committee and Executive Council could be far better prepared and cooperative with Richard E Warner than they were on July 27, 2024, when they were a total disgrace to me and to the world. At least however, that collective disaster on their part got me out of a huge job of producing the RPPTL historical movie that they had earlier imposed upon me. So, very good things can come from bad behavior on the part of the Executive Committee and Executive Council. They dare not ask me to do anything creative ever again. REWarner 16 Circ	8/15/2025 5:02 AM
13	The Section already provides enough support	8/14/2025 8:14 PM
14	Require standardized expectations for each of the lead ALMs.	8/14/2025 6:59 PM
15	Already doing it	8/14/2025 6:51 PM
16	1. I think I already have the necessary connections to make this happen sometime after the first of the new calendar year. 2. Provide advance notice of events being coordinated by other ALMs so all of us can make arrangements to attend, if possible. 3. Perhaps have someone from current leadership speak at an ALMs meeting about the various opportunities and paths to leadership within the Section.	8/11/2025 10:07 AM
17	I would like to hopefully present or write more. I had an opportunity to present a CLE in 2024 and found it quite rewarding.	8/11/2025 8:42 AM
18	Not sure yet.	8/9/2025 2:31 PM
19	continue providing solid CLE programs	8/7/2025 8:00 AM

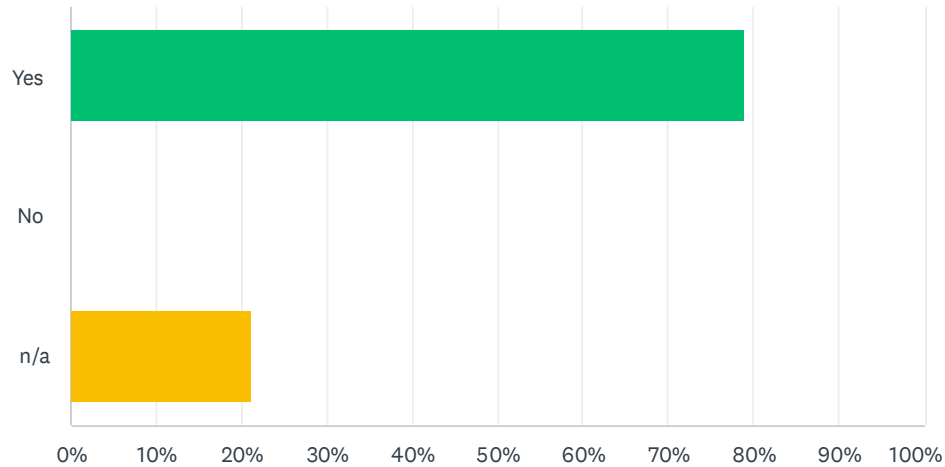
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20	Continue ongoing support of the ALMs and their work in the circuits.	8/6/2025 10:44 AM
21	I think it is up to me!	8/5/2025 5:38 PM
22	For other ALMs members to provide ideas/thoughts based on their past experiences on ways I can get involved in my local circuit. Being new to ALMs, this will allow me to better-identify opportunities to assist and further the ALMs mission.	8/5/2025 3:55 PM
23	Support the activities on the ALMs and continue to offer opportunities for community service.	8/5/2025 3:33 PM
24	I think the Section strongly supports the goals of the ALMS Committee.	8/5/2025 3:19 PM
25	The Section is very fortunate to have several members whose companies provide financial support for them to attend meetings; unfortunately, our firm is smaller and does not have a budget for transportation or lodging to make it easy to attend the RPPTL statewide meetings. I appreciate when the meetings provide Zoom links to attend.	8/5/2025 3:00 PM
26	I think the Section should issue nametags for us to wear to our local Bar meetings that advertise the Section.	8/5/2025 12:00 PM
27	Not sure yet; I tried to organize a call as the new lead and did not get much response from people....I decided to cancel the initial call.	8/5/2025 10:55 AM
28	Heirs project needs funding. Assist with getting funds from Florida Bar Foundation.	8/5/2025 10:51 AM
29	Continue to do what it does well. Education is paramount. Bettering the law and helping the public are critical activities. If the Section does these things well that will be great.	8/5/2025 10:49 AM
30	I am not really sure at this point.	8/5/2025 10:07 AM
31	Distribute information to the lead ALMs for the Section Members	8/5/2025 10:06 AM
32	Not sure yet. I think getting involved will help.	8/5/2025 9:50 AM
33	make it easier to get swag for events	8/5/2025 9:46 AM
34	Just provide a venue for making connections and oportunties to get more invovled.	8/5/2025 9:41 AM

Q10 Do you believe that the At-Large Members overall have been productive during your term?

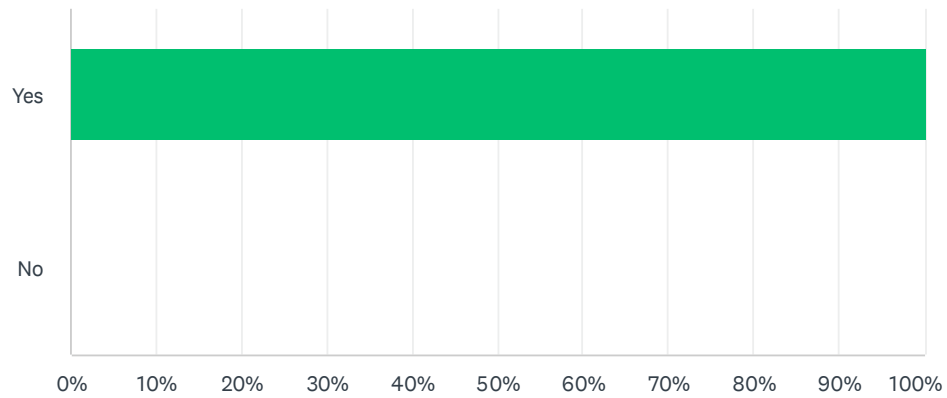
Answered: 38 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	78.95%	30
No	0.00%	0
n/a	21.05%	8
TOTAL		38

Q11 Do enjoy attending the At-Large Members' meetings?

Answered: 34 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes	100.00%	34
No	0.00%	0
TOTAL		34

Q12 What is your understanding of the expectations for your service as an At-Large Member?

Answered: 36 Skipped: 2

#	RESPONSES	DATE
1	Attend meetings, become more involved.	8/19/2025 12:32 PM
2	Attend meetings, communicate Section initiatives to Section Members in my community who do not attend Section Executive Council meetings and to participate in programs approved by the Section that need At Large Members to participate.	8/19/2025 9:41 AM
3	To reach out to the local Bar and advise them about the activities that the Section is doing that benefits them. Mostly new legislation that will impact them or their clients. And, to promote RPPTL by explaining how beneficial RPPTL is.	8/18/2025 5:03 PM
4	To communicate with the local bar members in our circuits, about the work of the Section. To work with organizations that come to the Section for assistance, that does not necessarily fit with other committees.	8/17/2025 3:39 PM
5	To keep local attorneys informed, in our respective practice areas, of current statutory and case law findings, and to encourage them to attend RPPTL meetings.	8/16/2025 6:25 AM
6	Serve as a liaison to local attorneys	8/16/2025 6:12 AM
7	Attend meeting and volunteer where I can be useful.	8/15/2025 1:31 PM
8	Attend ALMS meetings. Attend Executive Council meetings. Be involved in Section committees and projects. Communicate with Section members in the home circuit.	8/15/2025 10:32 AM
9	Participation and support of RPPTL activities, attendance at EC and ALM meetings, and communication with the Circuit Bar members.	8/15/2025 7:52 AM
10	To serve the local legal community	8/15/2025 7:49 AM
11	To promote RPPTL and help out the committees where needed.	8/15/2025 7:36 AM
12	to be a liaison from the section to the local community. This involves not only disseminating information but advertising for the section and trying to help increase participation and the membership.	8/15/2025 5:29 AM
13	Disseminate information regarding suction activities to local members of the bar.	8/15/2025 5:12 AM
14	To be the life of the party, rev up the group when they are bored to tears at ALMS meetings, and invent useful and interesting programs to help change the ALMS meetings from being stale Pro Bono Recruitment Hours to something which really helps each and every county in Florida. Our state needs this. REWarner 16th Circ	8/15/2025 5:02 AM
15	Same as 7 and 8 above.	8/14/2025 8:14 PM
16	I think this needs to be clarified and more detailed	8/14/2025 6:59 PM
17	To contribute as requested	8/14/2025 6:51 PM
18	Attend all EC meetings and all ALMs meetings, be visible in my community as a liaison for the Section.	8/11/2025 10:07 AM
19	Other than being active in the section, I know that I also need to be representative of my circuit; getting others in my circuit involved in the section; participate in ALMs projects....to name a few.	8/11/2025 8:42 AM
20	to ensure that the	8/7/2025 8:00 AM
21	Attend and participate in committee meetings, executive council meetings, and ALMs projects; communicate with local members; promote RPPTL.	8/6/2025 10:44 AM

Real Property Probate & Trust Law Section 2025-2026 At-Large Members Survey

SurveyMonkey

22	Show up and communicate	8/6/2025 9:37 AM
23	Unaware yet	8/5/2025 5:38 PM
24	Other than being physically present for meetings, my understanding is that an ALMs member is expected to filter information from RPPTL to other RPPTL members within the circuit, including judges and clerk's offices. We are also expected to serve on at least one subcommittee within RPPTL. I believe we are also expected to contact new members to RPPTL within our circuit, although I am not sure how we go about doing that (I assume there is some sort of list RPPTL receives?)	8/5/2025 3:55 PM
25	Be as involved and pro-active as possible and work with the other ALMS	8/5/2025 3:33 PM
26	Outlined above in prior answers.	8/5/2025 3:19 PM
27	We are here to communicate with the Section and relay the information that is shared to other attorneys in our area who practice in RPPTL issues. We provide that additional feedback and support those in leadership positions. We also act as ambassadors to grow the RPPTL mission in our communities.	8/5/2025 3:00 PM
28	I am looking forward to learning more about this at my first meeting.	8/5/2025 11:16 AM
29	That we need to represent the Section locally and vice versa.	8/5/2025 10:55 AM
30	Attend EC meetings. Market the RPPTL among Circuit attorneys.	8/5/2025 10:51 AM
31	The responsibilities are as outlined in the renewal application. They are clear. Each year I strive to fulfill those. As ALMs we are representatives of the Section to our constituency but we also serve as representatives of that constituency to the Section. That is a bit different than just being an "ordinary" EC member by virtue of being a committee chair or vice chair for instance.	8/5/2025 10:49 AM
32	I generally believe it is our job to be a liaison between the RPPTL section and the members in our circuit.	8/5/2025 10:07 AM
33	The at large members purpose is to help the section achieve the goal of maintaining active, productive members on the executive council, while preserving regional representation and effective communication with all section members, to promote Executive Council initiatives and assist as needed.	8/5/2025 10:06 AM
34	Being an informed member of EC to make appropriate voting decisions Outreach to the Section members and potential members in our circuit	8/5/2025 9:50 AM
35	support RPPTL Members in my circuit who are not active in RPPTL by sharing news and providing useful insights	8/5/2025 9:46 AM
36	Engagement and participation with Section and Bar activities and issues and be a representative for my corner of the state on those issues.	8/5/2025 9:41 AM

Q13 Identify a program that you believe the At-Large Members should engage.

Answered: 29 Skipped: 9

#	RESPONSES	DATE
1	I just received a call from a Section member in my community that fit the criteria for No Place Like Home program that the Section member was not aware of. I am going to work with this other Section member in my community and the Brevard County Legal Aid to assist this family.	8/19/2025 9:41 AM
2	I think that the Underwriters in the ALMs group should consider sponsoring law students i.e. paying for some of the costs such as the Thursday night reception or Friday night dinner. And, show those students around at the meetings and at the dinners. They are the future of the Section. This dovetails with my goal to sponsor the Law School Outreach committee.	8/18/2025 5:03 PM
3	For a new member, either a young lawyer or a new attendee that has never attended the meetings before it can be sort of daunting. We need to assist them with meeting others and identifying the committees of interest (this is because ALMs are both dirt and death.) I was lucky (I think, well maybe) Alan Fields (my then direct report) introduced me to people, and assisted me in identifying committees that would be a good fit for me. I have independently done this myself once I was acclimated, and continue to do so.	8/17/2025 3:39 PM
4	See 8 above.	8/16/2025 6:25 AM
5	make courses available to law schools and local bar asso.	8/15/2025 1:31 PM
6	Team with pro bono providers to get attorneys to take cases.	8/15/2025 10:32 AM
7	After I attend my first ALM meeting on my reentry into EC activity, I will be better able to more fully respond.	8/15/2025 7:52 AM
8	Not sure yet.	8/15/2025 7:36 AM
9	I e always liked the Wills for Hero's type of event. Providing basic Estate Planning documents for special groups and underrepresented groups of people that don't necessarily always have access, but have a need.	8/15/2025 5:29 AM
10	The ALMS should have taken up my generous offer to have me put on the "5th & 16th Circuit ALMS Symposium" at my amazing and large new family compound in The Villages in November. It has its own Live Music Club with stage which would have been the perfect venue for this symposium. That would have been both a fun party and enlightening CLE experience for all of the RPPTL Section members in those two circuits. I would have footed the heft costs from my own pocket. I let everyone know that. But . . . there was little or no interest from the 5th Circuit Section Members. So I have dropped the idea. That idea is dead.	8/15/2025 5:02 AM
11	Provide assistance to local Heirs Property Projects	8/14/2025 8:14 PM
12	Continue to assist the local legal aid organizations	8/14/2025 6:59 PM
13	Local assistance at the law schools to act as speakers when requested.	8/14/2025 6:51 PM
14	??? I'm still learning.	8/11/2025 10:07 AM
15	Need to think about.	8/11/2025 8:42 AM
16	Survey of all circuit court probate checklists and provide constructive feedback to the clerks organization.	8/6/2025 10:44 AM
17	I'm not sure, sorry.	8/5/2025 3:55 PM
18	I'll know it when I see it. :)	8/5/2025 3:33 PM
19	Continued connections to the law schools to give guidance to the students.	8/5/2025 3:19 PM

Real Property Probate & Trust Law Section 2025-2026 At-Large Members Survey

SurveyMonkey

20	I think the law school engagement is very important because it continues to build our brand with new and upcoming attorneys.	8/5/2025 3:00 PM
21	I am looking forward to learning more about this at my first meeting.	8/5/2025 11:16 AM
22	Not sure what makes sense. I do pro bono work on my own so I am not sure what make sense Section-wide. Maybe the organization formerly known as the Bar Foundation?	8/5/2025 10:55 AM
23	Heirs project.	8/5/2025 10:51 AM
24	The ALMs need a speakers bureau. This would be a collection of members who are willing to go out and make presentations to the public, other bar associations, schools and clubs, etc. on matters of interest to them and the Section (we have to be careful to not become lobbyist). The Florida Bar Speakers Bureau is a good place to start but we could go a step further and develop for our members "stock" programs in areas of interest which they could then deliver (a live presentation beats a Zoom one for this purpose). We could offer the members training on how to be an effective speaker. Participation would qualify for CLE and/or probono credit as applicable. The Section could help to underwrite the cost of presentation materials and training.	8/5/2025 10:49 AM
25	As a new person, I am really not sure. In general, I would guess more outreach to our membership.	8/5/2025 10:07 AM
26	The list of "current projects" is comprehensive, and ALMs should be involved. In addition, assistance to substantive law committees is generally needed.	8/5/2025 10:06 AM
27	I think the project Jeff Dollinger is working on with the inherited property is interesting.	8/5/2025 9:50 AM
28	community service of some kind at in-person EC Meetings	8/5/2025 9:46 AM
29	I'm not sure I know enough about what we do as ALMs and what existing 'programs' there are to provide a helpful comment on this.	8/5/2025 9:41 AM

Q14 Do you have anything else to add?

Answered: 26 Skipped: 12

#	RESPONSES	DATE
1	We should pat ourselves on the back for what we have accomplished and always strive to serve better where we can do a good job.	8/19/2025 9:41 AM
2	Excited about another great year with RPPTL and ALMS!	8/18/2025 5:03 PM
3	Looking forward to another year of our good work.	8/17/2025 3:39 PM
4	Not at this time.	8/16/2025 6:25 AM
5	Being an ALM is a position that provides the opportunity to shape the Section in meaningful ways and to help others. ALMs should take pride in their involvement.	8/15/2025 10:32 AM
6	Looking forward to the meeting, otherwise, no thank you.	8/15/2025 7:52 AM
7	No	8/15/2025 7:49 AM
8	I'm excited to be an ALM!	8/15/2025 7:36 AM
9	Not at this time.	8/15/2025 5:29 AM
10	We should demand in person only ALMS meetings. This "attendance while driving on I-95 using visor ZOOM" is dangerous and sluffy. If I have to come all the way from the Keys to attend at far greater cost than anyone (except maybe the iffies from Pensacola), than the rest of the ALMS who can show up in person from much shorter distances. --- We should change the gross and misleading label "At Large Members" back to "Circuit Representatives." The brilliant and prophetic Robert Schwartz has been right about that all along. The Section almost always zigs when it should zag. REWarner 16th Circ	8/15/2025 5:02 AM
11	Overall I think the ALMs do a great job. But could be improved by more defined roles and direction	8/14/2025 6:59 PM
12	Nope	8/14/2025 6:51 PM
13	I'm looking forward to a great year!	8/11/2025 10:07 AM
14	That is all for now. Thanks!	8/11/2025 8:42 AM
15	I enjoy being an ALM! Thank you for the opportunity.	8/6/2025 10:44 AM
16	I answered "n/a" to a lot of the questions above because I am brand new to this and don't have an opinion one way or the other most of those questions. Other than that, I am excited to serve and to help out however I can!	8/5/2025 3:55 PM
17	No.	8/5/2025 3:33 PM
18	No	8/5/2025 3:19 PM
19	I appreciate being part of the RPPTL community -- we really are an active group filled with diverse roots and routes, where we come from and how we get to where we are going. Thank you for giving me an opportunity to get involved. Each time I come to a meeting, I feel more connected.	8/5/2025 3:00 PM
20	No.	8/5/2025 10:55 AM
21	no.	8/5/2025 10:51 AM
22	I vote for shorter surveys	8/5/2025 10:49 AM
23	I am happy to help!	8/5/2025 10:07 AM
24	In my opinion, the title "Circuit Representative" is more representative of the functions than "At Large Member" and is more likely to encourage Section Members to reach out to us.	8/5/2025 10:06 AM

25	welcome to our new Chair!	8/5/2025 9:46 AM
26	No - I'm just excited to get more involved.	8/5/2025 9:41 AM

2025-2026 ALMs APPLICATION SUMMARY OF SUGGESTIONS

- Getting ALMs and Section members in circuit together and also a mentorship program for new Section members.
- Breakfast and learn presentations on topics of interest to Section members.
- Look for projects ALMs can do with other committees, similar to the manner ALMs and DEPR worked together on the No Place Like Home project. ALMs are situated to be boots on the ground for projects intended to reach all the circuits.
- Expand the hospitality that ALMs extend on behalf of the Section. Increase communication via the ALMs page on RPPTL, and listserv.
- Periodic emails sent to a broad spectrum of bar members in the circuit with updates and information about happenings in the Section. I don't recall seeing those messages of late and I think they are very helpful, especially in my remote area, at keeping members engaged with Section activities.
- Section could improve communications by creating a centralized ALM digital hub within the RPPTL website that houses updates, calendars, CLE links, outreach materials, and committee resources in one location, with automatic email notifications when content is updated.
- Brief, periodic video or webinar updates (e.g., quarterly 5–10 minute recordings) highlighting Section initiatives, legislative developments, and upcoming events, allowing members to quickly stay informed without relying solely on written emails.
- The RPPTL Section does an excellent job in communicating with Section Members.
- The RPPTL website is excellent and user friendly.
- The RPPTL Section could provide a uniform summary report of the Executive Council meetings to be delivered via the ALM Circuit listservs.
- Continue to connect with and liaison with JU's new law school.
- Website update will be tremendous improvement in communication.
- RPPTL Instagram account would pair well with the RPPTL Facebook page to facilitate communications regarding Section projects, pro bono opportunities and events.
- Create an iPhone/Android App to post information about RPPTL and/or ALMs events throughout the state. There is currently no easily-accessible comprehensive calendar for activities such as CLE's and conferences.
- Pairing each Lead ALM with a ALMs E&O committee member to enhance communications within ALMs.
- We should receive a list of all new members and what Section they represent. Perhaps any new member of the Section should have an ALM assigned to them to encourage them and mentor them
- Continue activation of new ALM Committees.
- Provide more info to Exec. Council regarding new ALM committees formed and an ActionLine article.

- Holding ALMs accountable.
- Create an e-newsletter template for better communication.
- Fixing listserv.
- ALM nametags with a QR Code.
- 6 Benefits of RPPTL branded cards.
- A listserv to communicate with inactive section members.
- Implementing GAP in other circuits.
- Social activity in circuit and jointly with circuit in close proximity.
- Seek different time standards for RP vs PT matters.
- Continue educational programs started by Lynwood Roberts.
- Email a list of new members in our Circuit so we know to contact them and welcome them into RPPTL and encourage them to become involved.
- Implement similar activities in the 3rd Circuit like the activities in the 8th.
- Have a Community Service Committee that would plan an event in the local community for each in-person EC Meeting.
- Liaisons Committee to ensure that every committee has an ALM Liaison to create a guide for the committee liaisons to facilitate meaningful contribution and add an agenda item to ALMs meetings so the ALM Liaisons are called upon to keep the larger group informed of the committee's work.
- Substantive seminars, especially presented online, are the most efficient way to accomplish this. Substantive articles and email updates. Law Student Enrichment committee is very positive as a way of engaging students before their careers have really started, and hopefully keeping them engaged.
- Send a sign-up sheet for the ALMS committees by email (sometimes we cannot attend an entire meeting).
- Each circuit lead ALM should send a report out after each RPPTL meeting listing the ALMS projects and upcoming events just to remind everyone the section exists and remind their circuit about what RPPTL does.
- Each circuit should send letters to its probate judges to encourage them to attend RPPTL. send them the schedule of the meetings along with a personal invitation.
- Mentor/mentee program for circuit.
- Community service projects in local community with ALMs and local law firms.
- Encouraging RPPTL visibility in trade groups like CAI.
- QR code for section members to include on their website to encourage engagement. States that meetings have become increasingly expensive.
- Doesn't know how to get info on new members.

- Promote Zoom attendance for committee members.
- Local outreach at locations where RPPTL meetings are taking place to send specific email invitations.
- Summer associate luncheon.
- Speaking at middle and high schools during Great American Teach - create a canned presentation.
- Sell a copy of title standards.
- Testimonial videos about value of RPPTL.
- Hot topics seminar before meeting and hot topics newsletter to disseminate to Section.
- Receptions for Section members.
- Continued law school involvement.
- Notify lead ALM when new section member joins. compile survey of local rules and checklists related to probate.
- Better procedures and understanding of sponsorship for events and use of funds for ALM events.
- More joint cooperation with Law School Outreach and Membership Committees.
- Renaming ALMs to original name.
- Launch an informal program to coach Board Certification candidates in preparation for the certification examination.
- Regular email reports to Bar members of Section and Executive Council activities would have more immediate impact than print publications.
- Encourage non-committee members and non-Executive Council members to attend meetings by offering CLE.
- Follow-up on the website so that the website does not have stale information.
- Encourage the ALMs to be more active in law school events as those students are the future.
- Get list of new Section members and send a welcome letter.
- Deliver periodic email updates to members providing information about upcoming RPPTL Section events, RPPTL CLE opportunities, and issues, topics or legislation that are being addressed by the Section.
- Seminar/presentation with members of our local judiciary as a way to educate attorneys and used that as a means to communicate to Section members and members of our local bar association about the RPPTL Section.
- Identify new RPPTL members in each circuit and schedule a lunch or meeting with the new members to inform them of ways to get involved with the Section and encourage their participation.
- Mentor new Section members.

- Solicit ALMs for CLE and Publications.
- Have more local, face-to-face events to build relationships vs. email communications.
- Notify inactive members of upcoming committee meetings.
- Publish column in local legal magazines.
- New member outreach.
- Calendar of events for circuit events.
- What's App Chains with local members.
- The best opportunity to improve communications with Section members is to be active in the existing and active bar organizations in our circuit. Section.
- Work with the local Bar Association to announce Section events and membership opportunities in their email distributions lists.
- Some circuits do not have many "ALMs projects" as most of those opportunities are already handled by one or more very active bar associations.
- List or bullet points, to provide to new members, with a summary of the general annual activities of the Section (things to be aware of) outside of Committee work.
- A local Circuit Newsletter distributed by the lead ALM and ALMs for that circuit.
- Quarterly local ALM update meeting (inviting circuit members), followed by food and refreshments.
- Create a database of local rules and procedures, sortable with AI.
- Promote uniformity of local procedures.
- Increase the presence of the section on social media.
- Make a database of all RPPTL white papers.
- Author a column called "Ask an ALM"- which could be in question and answer format.
- Host monthly or bi-monthly local meetings focused on either doing a project that assists individuals in need in our local community or a meeting focused on planning the ALMS project. do a project focused on helping battered women and children or those experiencing temporary homelessness.
- Actionline be made publicly accessible without requiring a login.
- Increased transparency and inclusion in Section programming (advance notice inviting members to express interest in speaking or moderating, as well as opportunities for broader board involvement in major programs).
- Determine easy way to send information to lead ALMs.
- Circuit Zoom meetings.
- Each lead ALM should circulate information regarding statewide seminars.
- Change name of ALMs committee back to "Circuit Representatives".

- Require in-person attendance at ALMs meetings.
- Focusing more on helping the judges and clerks. keeping the ALMs meetings from being "Pro Bono Recruitment Hours".
- In-person events with judges.
- Events at local law schools.
- In-person events with judges. quarterly lunch & learn highlighting recent case law.
- Likes the off EC meeting Zoom meetings to stay connected.
- Activate Paladin.
- Circulate a RPPTL ALM Newsletter to Local Bar Associations updating them on RPPTL information.
- Establish a program where ALMs interface with the Local Professionalism Panels to ensure young probate, trust, and real property professionals are aware of resources available to help encourage professionalism at a young age.
- Lead ALM send welcome letters to new members and we miss you and want you back letters to drop outs on a quarterly or semi-annual basis.
- Lead ALM distributing round table minutes close in time to EC meeting.
- EC minutes by email blast from Lead ALM close in time to EC meeting - concentrate communication on Action Items and Information Items.
- Regular Zoom meeting for Section members in each judicial circuit.
- Social events including lunches in each circuit.
- Make committee agendas available on the RPPTL app so they can be pulled up at the EC meetings for non-attendees.
- Law school outreach/project during an EC meeting in a town with a law school – i.e. coordinate a visit to FAMU or Barry Law.