

## ABOUT THE COUNCIL

The Professional Fiduciary Council of Florida identifies qualified individuals who are available to serve as Professional Fiduciaries (including as court-appointed Professional Guardians) for residents of Florida who have demonstrated a commitment to a high level of fiduciary service.

**INDIVIDUAL MEMBERSHIP** is available for those who serve or desire to serve as Trustee, Agent under a Power of Attorney, Health Care Surrogate, Professional Guardian, or Personal Representative. Members include Professional Fiduciaries, Professional Guardians, Certified Care Managers, Professional Money Managers, Trust Officers, CPAs, and Attorneys.

**AFFILIATE MEMBERSHIP** is available for those who provide related services to Professional Fiduciaries such as estate planning, asset management, health care services, and more.

The Council has standards and qualifications for membership; provides education, training, and reporting requirements for maintaining membership; and develops membership branding to assist the public when selecting a Professional Fiduciary. In addition, there is a “members only” group to share ideas, ask questions, and make referrals.

## FOUNDING BOARD MEMBERS

Sen. Kathleen Passidomo, Florida Senate District 28  
Rep. Ben Diamond, Florida House District 68  
Honorable Michelle T. Morley, 5th Circuit  
Ken Burke, CPA, Clerk of Court-Pinellas County  
Angela M. Adams, Esq., Law Office of Wm. Fletcher Belcher  
Gentry Byrnes, J.D., Vice President, Adelphi Financial, Inc.  
Sarah S. Butters, Esq., Ausley McMullen, P.A.  
Nicklaus J. Curley, Esq., Gunster, Yoakley, & Stewart, P.A.  
Steven E. Hitchcock, Esq., Chair-Elect, Elder Law Section  
Darby Jones, J.D., Professional Fiduciary Services  
Laird A. Lile, Esq., Laird A. Lile, PLLC  
Andrew B. Sasso, Esq., Macfarlane Ferguson & McMullen, P.A.



Professional Fiduciary Council of Florida

## OUR MISSION

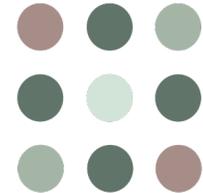
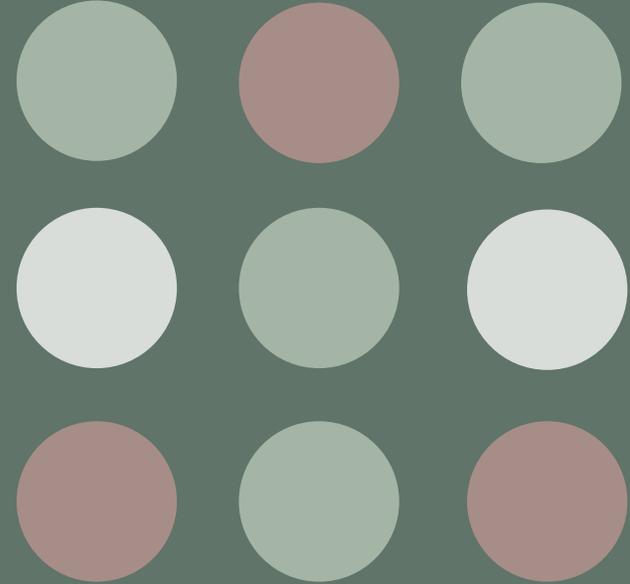
The Professional Fiduciary Council of Florida promotes excellence in fiduciary services. Our mission is:

- To maintain high standards for membership
- To provide continuing education and support
- To enhance awareness of and respect for the work of PFCF and its members
- To alert members to legislative and policy changes to enhance protection of the public
- To promote loyalty, integrity, and trust for Professional Fiduciaries
- To provide a resource for Estate Planning and Elder Law Attorneys for the judiciary and for families to identify competent individuals available to serve in the important capacities of Professional Fiduciary, Trustee, Agent under a Power of Attorney, Health Care Surrogate, Professional Guardian, Personal Representative, and more

The Professional Fiduciary Council of Florida does not intervene in specific fiduciary issues or cases and cannot receive fiduciary-related complaints.

Professional Fiduciary Council of Florida  
3637 4th St. N., #270  
St. Petersburg, Florida 33704

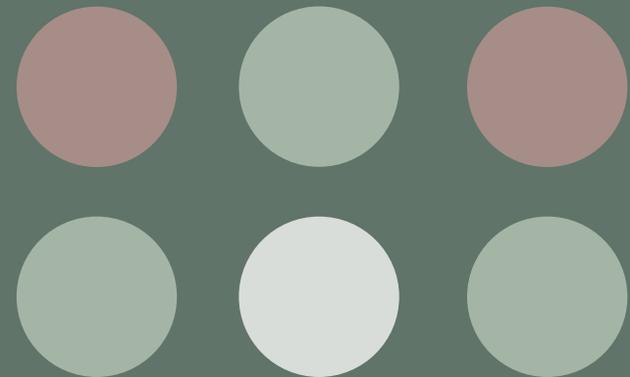
727.350.4049  
info@ProfessionalFiduciaryCouncil.org



Professional Fiduciary Council of Florida

**LOYALTY  
INTEGRITY  
TRUST**

ProfessionalFiduciaryCouncil.org



# ABOUT MEMBERSHIP

The Professional Fiduciary Council of Florida has three categories of membership. Individual membership is recommended for those who have the experience and education to meet the qualifications established by the Council. Provisional membership is recommended for individuals who serve or desire to serve as Professional Fiduciary, Trustee, Agent under a Power of Attorney, Health Care Surrogate, Professional Guardian, or Personal Representative. Members include Professional Fiduciaries, Professional Guardians, Certified Care Managers, Trust Officers, CPAs, and Attorneys who desire to provide fiduciary services.

Affiliate membership is available to those who provide supporting services and an interest in and support the activities of the Council.

Membership application packets are available at [ProfessionalFiduciaryCouncil.org](http://ProfessionalFiduciaryCouncil.org).

## Membership Categories:

- **Individual: Experienced fiduciaries who meet the Council's criteria**
  - **Education:** Bachelor's degree from an accredited institution, or commensurate experience as a fiduciary
  - **Experience:** Minimum two years of experience serving in a fiduciary capacity
  - **Must Submit:** Three professional references within the industry and proof of liability insurance may be requested.

Annual dues: \$350

- **PROVISIONAL: Fiduciaries actively working toward meeting the criteria of Individual membership. Provisional memberships are limited to two years.**

Annual Dues: \$275

- **AFFILIATE: Individuals and business entities who have an interest in and support the activities of the Council. This membership includes any discounts and benefits available to members. Some examples of affiliate members include Attorneys, CPAs, Care Managers, Academic Professionals, Professional Money Managers, and employees or representatives of Non-Profit Associations/Organizations, Bonding Companies, and more.**

Annual Dues: \$275

## MEMBERSHIP BENEFITS

- Member discount for Annual Florida Fiduciary Conference with the state's leading attorneys, advisors, legislators, medical experts, and more included
- Webinars included highlighting current issues and legislation
- Individual and Affiliate Members included in searchable statewide directory and membership listing on Council website
- Legislative monitoring and advocacy
- Increased accountability and recognition by the courts and the public

LOYALTY

INTEGRITY

TRUST

# ANNUAL FLORIDA FIDUCIARY CONFERENCE



Professional Fiduciary Council of Florida hosts the Annual Florida Fiduciary Conference in February. The conference showcases experienced speakers who provide insights and professional guidance on a broad range of fiduciary-related subjects. Topics include trust and estates administration, statutory and judicial guidelines, ethics, practice management, and more. The conference offers a wide range of unique learning opportunities for Professional Fiduciaries, Attorneys, Paralegals, CPAs, Trust Officers, Professional Guardians, Certified Trust and Financial Advisors, Professional Money Managers and Certified Care Managers. The conference is also suitable for the public or professionals serving or interested in serving in fiduciary capacities in Florida, such as an Agent under a Power of Attorney, Trustee, Personal Representative, or Health Care Surrogate.

- *"This seminar was EXCELLENT! The topics and presenters were all very good and very relevant to my practice."*
- *"The lineup of speakers was incredible. I appreciated their knowledge, sense of humor and practical scenarios/stories."*
- *"Absolutely brilliant day of much needed education!"*
- *"A great investment in professional development!"*
- *"This was one of the most positively impactful events I have attended since starting as a guardian, I have implemented several of the ideals."*

CLE and CEU credits available; CJE, CPE and CTFA eligible

For more information on the Annual Florida Fiduciary Conference or to purchase access to past conferences, please visit [ProfessionalFiduciaryCouncil.org](http://ProfessionalFiduciaryCouncil.org).

For information on conference sponsorships, please contact Darby Jones at [info@ProfessionalFiduciaryCouncil.org](mailto:info@ProfessionalFiduciaryCouncil.org).