



Professional Fiduciary Council of Florida
Loyalty - Integrity - Trust

Fourth Annual Florida Fiduciary Conference

REGISTER NOW!!!

Friday, March 10, 2023

7:30 a.m. – 5:00 p.m.

**Feather Sound Country Club
Clearwater, Florida**

Why should you attend: This unique and important conference includes timely, practical information and education for those in the fiduciary industry in Florida.

We will cover relevant topics everyone working in these areas needs to know, including fiduciary responsibilities, relevant laws, ethics, as well as day-to-day issues and practical solutions to those issues.

This year we are offering a special "ROUNDTABLE" program for attendees to choose from various topics and experts!!!

Who should attend: Professional Fiduciaries, Trustees, Attorneys serving as Fiduciaries, Attorneys representing Professional Guardians, Judges, Corporate Fiduciaries, Professional Guardians, Paralegals, CPAs, Trust Officers, Certified Trust and Financial Advisors, Professional Money Managers, Certified Care Managers, and other Fiduciaries OR individuals named as fiduciaries looking for guidance.

Registration: **\$350.00** – Includes continental breakfast and lunch, digital course materials, exhibitor hall and lots of NETWORKING with industry experts. (**\$250.00** for Professional Fiduciary Council of Florida MEMBERS), **\$375.00** – Webcast and digital course materials

Education: 7 hours of continuing education including CLE, CEU, CTFA, and 1 hour of ethics, applied for.

**Contact the Professional Fiduciary Council at 727-350-4049 or
info@professionalfiduciarycouncil.org**

Conference Agenda



7:30-8:00

Registration, Breakfast, Exhibitors

8:00-8:15

Welcome and Opening Announcements

Darby Jones, President, Professional Fiduciary Council of Florida

8:15-9:35

Session 1

Legislative and Fiduciary Case Law Update *and* a Preview of Proposed Chapter 745

Speakers: Nick Curley, Esq. and Sancha Brennan, Esq.

This presentation will begin with a look back at recent changes to Florida law affecting professional fiduciaries, including recent and proposed changes to the probate rules and statutes and a review of the most important (or interesting) caselaw fiduciaries and practitioners need to know – including cases on professional service and legal fee awards for fiduciaries and counsel. As members of the long-standing ad hoc Guardianship Law Task Force Committee established by the Real Property, Probate and Trust Law Section of the Florida Bar, the speakers will provide a preview of c. 745, the proposed Guardianship Code and highlight some of the proposed changes, designed to improve the practice and provide protections to Florida citizens.

9:35-10:05

Session 2

Offering Fiduciary Services With or Without a Law Practice

Speaker: Shelley Perry, JD., Professional Fiduciary

Serving as a Professional Fiduciary is a rewarding, challenging and viable career. It is a service worth adding to your law firm. Ms. Perry will demystify the practical, professional, and legal steps to successfully serve as a Professional Fiduciary either individually or as part of your law practice.

10:05-10:20

Break/Exhibitors

10:20-11:10

Session 3

Health Care Surrogate or Guardian of the Person

Speakers: Theresa Barton, Professional Fiduciary and Kyle Belz, Esq.

Examination of the role of Health Care Surrogate or Guardian of the Person and the attorneys representing them. How to prepare for success, best practices, ethical issues, record keeping, legal responsibilities, and compensation. Drafting and issue spotting to avoid litigation. Discussion of the current legislation regulating DNRs, the challenges of managing death with dignity, and how to work with hospital bioethics committees.



11:10-12:00

Session 4

Confessions of an Elder Law Attorney

Speaker: Jason Waddell, Esq.

Issue spotting for long-term care planning and when to call an Elder Law attorney! Using several case studies we will explore various benefits programs, planning opportunities, and red flags that Professional Fiduciaries often miss.

12:00-12:45

Box Lunch/Exhibitors

12:45-1:35

Session 5

Oh, the Paperwork!!!! Panel Discussion with:

Elizabeth Williams, Professional Fiduciary

Gentry Byrnes, Esq. Corporate Trustee

Sancha Brennan, Esq. Guardianship Attorney

Back by popular demand! Discussion of the information & documentation that Trustees, Personal Representatives, POAs, and Guardians should maintain. Recommended best practices to keep the fiduciary out of trouble. Review of filing requirements as well as practical tips, forms, and templates for better administration and compliance.



1:35-2:25

Session 6

Managing Difficult Wards and Beneficiaries

Panel Discussion with:

Speaker: Amanda Lewis, Care Manager

Speaker: Tammy Ferrell, Trust Officer

Speaker: Julie Goddard, Professional Guardian

Practical tips and tricks from the perspective of a Care Manager, a Trust Officer, and a Professional Guardian on how to manage the day-to-day challenges for the health, well-being, privacy, and dignity of a beneficiary, client, or ward while possibly juggling addiction, dementia, bad guys, facilities, family, neighbors, and caregivers. Important perspectives for attorneys who represent them and creative use of “therapeutic lying”!



2:25-2:40

Break/Exhibitors

2:40-3:30

Session 8

Agent Under a Power of Attorney or Guardian of the Property

Speakers: Betsy Leslie, JD., Professional Fiduciary and Pamela D. Keller, Esq.

Betsy will discuss the role of an Agent under Power or Attorney, and the best practices and ethical challenges when serving. Serving as Agent under POA and as Guardian (Plenary or Property) will be briefly contrasted. Practical tips for record keeping, account titling, and investment manager selection will be covered. Pam will be discussing the role of the Guardian in relation to the discussion.

3:30-4:00

Session 9

Pick a Card.... The Curator or the Ad Litem?

Speaker: Michael Kangas, Esq.

When, why, and how to utilize curators and when, why, and how to utilize administrator ad litem. An examination of these two important and useful positions and how to position them for the best results.

4:00-5:00

“ROUNDTABLE” & Exhibitors & Drinks!

Enjoy a glass of wine or beer (2 free tickets per attendee) and begin your progressive Q and A! Attendees will rotate from table to table to discuss topics, ask questions, and network.

(Prerecorded Death with Dignity Webinar for online participants during ROUNDTABLE)



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Table Choices:

1. **The Proposed New Chapter 745** - Nick Curley & Sancha Brennan

2. **Difficult issues with incapacity hearings** - Caitlin Powell, Esq. & Kyle Belz, Esq.

3. **Magistrate Q & A** - Magistrate Sean Cadigan & Magistrate Keela Samis

4. **VA Fiduciary** - Robin Arentsen, Professional Guardian

5. **Tips and tricks for managing wards/clients** -Theresa Barton & Amanda Lewis

6. **Benefits planning, Elder Law, SNT issue spotting** -Jason Waddell, Esq., and Julie Goddard

7. **Examining committee Q & A** - Nancy Nolan Teten, LCSW, MCAP, CCFC.

8. **Fiduciary services in your law practice** - Shelley Perry, Esq., & Lea Anne Groover, Esq

9. **Marchman Act Q & A** - Stephen Timmer, CAI, LFI., Drug Interventionist

10. **The new Guardianship Data Bill** - Pamela D. Keller, Esq.

11. **Q & A with a Public Guardian** -Tamara Cribbens & Lona DiCerb

12. **Curator? Ad Litem?** - Mike Kangas, Esq.

13. **Q & A with Corporate Trustees** -Tammy Ferrell, Trust Officer and Gentry Byrnes, Esq.

14. **Managing a fiduciary office** - Elizabeth Williams, Professional Fiduciary

15. **Q & A with Professional Fiduciary Council Membership**

16. **Q & A with RPPTL Leadership**