MARCH 2024



11

The SideBar Newsletter of the Martin County Bar Association

IN THIS ISSUE PRESIDENT'S MESSAGE: MCBA PRESIDENT, R. WAYNE RICHTER

anne i

MARCH SPEAKER VICTOR ASHE Former Ambassador to Poland

In This Issue

President's Message (Pg. 3) Annual Sponsors Page (Pg. 4) President Speaker Series (Pg.5.6) Annual Banquet (Pg. 7) Employment Law (Pg. 10) Wills, Trusts & Probate (Pg. 12) MCBA Tennis Tournament (Pg. 13) Elder Law (Pg. 14, 15) Race to the Courthouse 5K (Pg. 18) Judicial Relations Committee (Pg. 19) Trivia Night (Pg. 20) MCBA Scholarship (Pg. 21) Sobel Cup Golf Tournament (Pg. 25, 26) Real Estate\ Commercial Lit (Pg. 24, 25) Legal Resources (Pg. 26) Florida Bar Help Line (Pg. 27) Online Resources (Pg. 28) Links, Jobs & Legislation (Pg. 30) March Calendar (Pg.31)

MCBA 2023 - 2024 Executive Board:

President: R. Wayne Richter

Vice President: Brandon V. Woodward

> Secretary: Jeanette M. Lugo

> > Treasurer: Gene Zweben

Immediate Past President: Jeffrey Friedman

> Executive Director: Lynne Poirier

THE SIDE BAR NEWSLETTER

Published monthly, excluding June & July, by the Martin County Bar Association as a service to its membership.

If you have an article, opinion, news or other information for publication in the *SideBar*, please call (772) 220-8018 or email information to: **martincountybar@gmail.com**

The due date for all advertisements, articles and announcements is the 1st of the month preceding publication.

E-mail: martincountybar@gmail.com Website: <u>www.martincountybar.com</u> Voicemail Line: (772) 220-8018

Any article appearing herein may be reproduced provided credit is given both to The SideBar and the author of the article. Views and conclusions expressed in articles and ads herein are those of the authors or advertisers and not necessarily those of the officers, directors, or staff of the Martin County Bar Association. Further, the Martin County Bar Association and staff do not endorse any product or service advertised. All advertising is subject to approval. We regret any errors or omissions and such, if applicable, will be noted in future issues.

Past Presidents of the Martin County Bar Association

William R. Scott - 1955 - 1958 Evans Crarv. Jr. - 1958 – 1959 Hon. Pfeiffer Trowbridge -(Subsequently Elected to Bench) 1960 Thomas H. Thurlow - 1960 – 1961 William A. Oughterson - 1963 – 1964 William F. Crary - 1965 - 1966 Robert F. McRoberts, Jr. - 1966 - 1967 Thomas H. Thurlow, Jr. - 1967 – 1968 Larry E. Buchanan - 1971 – 1972 C. Norris Tilton - 1972 - 1973 Richard J. Dungey - 1979 - 1980 Hon, F. Shields McManus - 1981 - 1982 William Dale Anderson - 1982 – 1983 John H. Fenniman - 1983 - 1984 Weslev R. Harvin - 1984 - 1985 James L. S. Bowdish - 1985 - 1986 W. Thomas Wackeen - 1986 - 1987 Thomas E. Warner - 1987 - 1988 Douglas Sands - 1988 - 1989 Vicki Junod - 1989 – 1990 (First Female MCBA President) George F. Bovie, III - 1990 - 1991 Stephen C. Page - 1991 – 1992 Jane L. Cornett - 1992 – 1993 Walter G. Woods - 1993 - 1994 Richard Kibbey - 1994 – 1995 Lee David - 1995 - 1996 William F. "Rick" Crary, II - 1996 - 1997 Frederick G. Sundheim - 1997 – 1998 Hon. William L. Roby - 1998 – 1999 Hon, Barbara W, Bronis - 1999 - 2000 Sheila D. Biehl - 2000 - 2001 Deborah B. Beard - 2001 - 2002 Jack M. Sobel - 2002 - 2003 Hon. Darren Steele - 2003 - 2004 Edwin E. "Ted" Mortell -2004 - 2005 Richard H. Levenstein - 2005 – 2006 Portia B. Scott - 2006 - 2007 Hon. Alan Orantes Forst - 2007 – 2008 Linda L. Weiksnar - 2008 - 2009 Scott W. Konopka - 2009 - 2010 Preethi Sekharan - 2010 - 2011 Shaun T. Plymale - 2011 – 2012 Gregory S. Weiss - 2012 - 2013 George W. Bush, Jr. - 2013 - 2014 Hon. Jennifer Alcorta Waters - 2014 - 2015 Chad H. Hastings - 2015 - 2016 Mark Miller - 2016 - 2017 Elizabeth R. Hunter - 2017 - 2018 Barbara A. Kreitz-Cook - 2018 - 2019 Jason D. Berger - 2019 - 2020 Barbara Kibbey Wagner - 2020 - 2021 Adam Schwartz - 2021 - 2022 Jeffrey Friedman - 2022 - 2023

Message From the President

Martin County Bar President - R. Wayne Richter, Esq.

Dear Members & Friends,

In 1979, Bell Systems launched an advertising campaign titled "Reach Out and Touch Someone". Do you remember the jingle? "Reach out. Reach out and touch someone. Reach out and just say, hi!" I generally like to keep these messages lighthearted, but I wanted to address an issue regarding professionalism. I have noticed that as lawyers we are all connected (electronically), but we seemingly have no connection (to each other). Every one of us has a cell phone but we seem to no longer talk. The vast majority of communication between lawyers involves exchanging emails. I keep a list of my open cases on my desk. As I am writing this article, I'm looking at that list and I wonder how many cases might be able to be resolved if we spoke with one another, yet I often cannot get a return phone call from opposing counsel. We are all under time constraints and undoubtedly pulled in different directions, but we owe it to each other, and to our clients, to speak to one another. The Florida Bar Creed of Professionalism states, in part, that: "I will be diligent and punctual in communicating with others ... ". I suppose I am old-fashioned in this regard, but I still like to go to opposing counsel's office to sit down and talk about our cases face-to-face. I find that it has a humanizing effect on each lawyer, and we can see where each person is coming from regarding their position on a case, and where there is common ground. I also find that speaking to opposing counsel often takes some of the animus out of the adversarial nature of our profession. So, what I'm encouraging you to do is to reach out and touch someone! Make the call and take the call.

We had a fantastic CLE luncheon at our February meeting. We were joined by Wisconsin Circuit Judge Jennifer Dorow. Judge Dorow told the horrific story of presiding over the Darrell Brooks trial to the nearly 100 members in attendance. The Darrell Brooks trial was aired on Court TV. Darrell Brooks was found guilty of six counts of firstdegree murder and subsequently sentenced to six consecutive life sentences for killing six individuals when he plowed through the Waukesha, Wisconsin Christmas Parade in November of 2021. Be sure to contact MCBA Executive Director, Lynne Poirier (martincountybar@ gmail.com), to sign up for Trivia Night on March 6th. Form your own team (no more than 8 members) or we'll pair you up with other members to put your knowledge of general trivia to the test. Join us for cocktails at 5:30 and the games begin at 6:00 at Monarch Country Club in Palm City. This is a casual



event and should be great fun.

Check out the rest of the Sidebar to learn more about other upcoming events. This year is all about engagement, and my hope is that you find some event that interests you. If you are interested in tennis, the MCBA Tennis Tournament will be held on March 9 at Willoughby Golf Club in Stuart. To register or be a sponsor, go to the MCBA website at: martincountybar.com.

The penultimate speaker in our President's Speaker Series will be the Honorable Victor Ashe. Mr. Ashe, former U.S. Ambassador to Poland (2004-2009), will be our guest at the April 19 CLE luncheon. As I am writing this article news broke earlier today that Alexei Navalny, a Russian lawyer, and opposition leader, has died while imprisoned in Russia. Ambassador Ashe will share his thoughts on the current climate and dynamics at play in Eastern Europe. Ambassador Ashe was the longest serving mayor of Knoxville, Tennessee and also served in both houses of the Tennessee legislature. Mr. Ashe earned his B.A. from Yale University and his J.D. from the University of Tennessee.

I look forward to seeing you at these upcoming events!

Sincerely,

R. Wayne Richte

R. Wayne Richter 2023-2024 MCBA President



Annual Sponsors—Thank You!





President's Speaker Series Presents:

VICTOR ASHE Former Ambassador to Poland



FRIDAY, MARCH 22 11:30 a.m. to 1:00 p.m. Monarch Country Club, Palm City

Victor Ashe, II, who served the United States as the 25th Ambassador to Poland (2004-2009),

joins us to discuss the role of Poland, Ukraine and Eastern Europe in current world affairs.

He will also discuss a lawsuit that he co-filed against his alma mater, Yale University,

regarding the manner in which it selects members to its Board of Trustees.

Mr. Ashe was the longest serving Mayor of Knoxville, Tennessee (1988-2003). He also spent

six years as a Tennessee state representative and nine years as a state senator.

Mr. Ashe has been appointed by former U.S. Presidents Ronald Reagan, George H. W. Bush,

Bill Clinton, George W. Bush and Barack Obama to federal positions.

Mr. Ashe graduated from Yale University with a Bachelor of Arts and graduated from the

University of Tennessee College of Law.

THIS LUNCHEON IS FREE FOR MEMBERS.

RSVP by emailing: MARTINCOUNTYBAR@GMAIL.COM (include in the subject line: March Lunch)

Annual Sponsors: Kindly RSVP so we can have an accurate headcount for meals, seating and staffing.



The Martin County Bar Association

presents



Save The Dates

Friday, March 22

Victor Ashe American former diplomat and politician who served as United States Ambassador to Poland



Friday, April 19 Round table with the Judges

Friday, May 10

Steve Weagle, WPTV News Channel 5 Hurricane Prep: Protect your home and practice.



Support our President's Speaker Series so we can continue bringing quality programming to the Martin County Bar Association. Contact Lynne at <u>martincountybar@gmail.com</u>



You're Invited to our Annual Banquet Honoring Immediate Past President R. Wayne Richter and our Incoming and Outgoing Board

Theme: The Kentucky Derby: "The Run for the Roses" Attire: Kentucky Derby Chic/Black-Tie Optional Signature Drink: Mint Julep

Saturday, May 4, 2024

6:00 p.m. to 10:00 p.m. Piper's Landing Yacht and Country Club, Palm City

Prizes for best man's and best lady's hat contest!

Watch the 150th running of the Kentucky Derby during our Cocktail Hour followed by Dinner, Dancing & Casino Games

> Tickets on Sale Now! \$150.00 per person

To reserve a table of 10, please send your 10 names along with payment to:

MCBA P.O. Box 2197 Stuart 34995

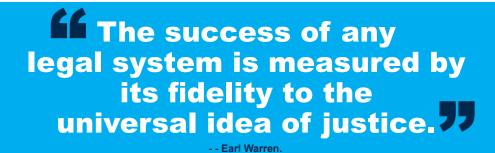
Or, click below to pay by credit card.

Deadline to purchase tickets is April 12. Price increases by \$10.00 after this date



Contact Shelby Appell for your Custom Design **Derby Attire**.





We salute the MARTIN COUNTY BAR ASSOCIATION



AVIATION & RAILROAD DISASTERS • BOATING & WATERCRAFT INJURIES • VEHICLE ACCIDENTS • COMMERCIAL DISPUTES CONSTRUCTION DEFECTS • DEFECTIVE DESIGN • INTELLECTUAL PROPERTIES • MASS TORTS • MEDICAL MALPRACTICE PREMISES LIABILITY • PROFESSIONAL LIABILITY • TRUCKING ACCIDENTS • UNSAFE PRODUCTS • WILL AND TRUST DISPUTES

WEST PALM BEACH / TALLAHASSEE 🔷 800.780.8607 🔷 WWW.SEARCYLAW.COM

You love what you do. We know the feeling.

Let's talk about your passion.

Visit us at tdbank.com/smallbusiness or call 1-855-278-8988.

Unexpectedly engaged. Unexpectedly Human.



W. Jay Hunston, Jr.



Mediator/Arbitrator/ Special Master

Since 2001, limiting his practice to all forms of effective dispute resolution, including, mediation, arbitration, special master, and private judging services.

- J.D. Stetson Univ. College of Law
- Fla. Bar Bd. Cert. Civil Trial Lawyer, 1983 2003
- Fla. Cert. Circuit Civil, Appellate & Family Mediator
- Member, AAA Roster of Neutrals for Commercial and Construction Arbitration & Mediation
- Qualified Fla. Arbitrator
- Statewide Per Diem Rate Available Upon Request
- Hourly Rates Available (No Charge for Travel Time Within 15th, 19th & 17th Circuits)

P.O. Box 508, Stuart, FL 34995 (772) 223-5503; (800) 771-7780 - Office (772) 223-4092 - Fax Email; wjh@hunstonadr.us Website Online Calendar: www.hunstonadr.us

Employment Law

Chair – David Miklas, Esq. (representing employers only)

Pop Quiz: Which of the following are allowed:

a) clocking out employees while they continue working.

b) deducting break time from workers' schedules whether or not they took the breaks.

c) deleting portions of shifts from the pay records because they were not scheduled.d) adjusting timecards to reduce workers' hours worked to match hours scheduled.

Anyone say A or B?

I am confident a lot of people think C and/or D are allowed, right?

Well, all four are illegal (for non-exempt employees), as they violate the Fair Labor Standards Act ("FLSA.") The Department of Labor just nailed an employer (Checkers franchise) for doing the above things. This cost the employer \$27k.



Employers should know that permitting managers to alter time records to reduce labor costs will expose the employer to legal liability.



Solo and Small Firm CLE Lunch

Our Solo and Small Firm Committee recently hosted a sold-out CLE Lunch at Berry Fresh. The program included a discussion on Next Gen Marketing: Ethical Considerations for a New Era. Special thank you to our Solo Chair Amy Dow, and to our presenters George Clause and Deb Nolan. Great information was provided in just 1- hour!





March 2024

The SideBar



250 Paid Attorney Referral Fees

Trust Sending Your Referrals to Florida Bar Certified Civil Trial Lawyers*



To refer a case call **772-888-9085** or submit online at **koganinjurylaw.com/referrals**



Board Certified Workers' Compensation Attorney

Offices in Stuart and West Palm Beach

THE LAW OFFICES OF

Based upon my 29 years' experience, I am qualified to represent injured workers in navigating the complexities of the workers' compensation law to ensure they receive everything that is owed to them.

Call 772.247.0228 or 561.228.7998 www.friedmanworkerscomp.com

Zwebe

LAW GROUP

Serving the Treasure Coast for Over 25 Years



Estate Planning and Family Law

850 NW Federal Hwy Stuart, FL 34994



jason@jasonbergerlaw.com Phone: 772-403-5880 Fax: 772-403-5884

Law Office of Jason D. Berger Working to do right by you and your family!



We Go The Extra Mile For You!

Gene R. Zweben, Esq. Personal Injury Lawyer

Car Accidents - Slip & Fall - Personal Injury

Zweben Law Group is dedicated to helping those who have suffered injury or death as a result of another's negligence. Contact us today to begin the referral process and earn your 25% referral fee*.

772-223-5454

532 Colorado Avenue Stuart, Florida 34994 zwebenlawgroup.com

*Consistent with Florida Bar rules.

MARCH 2024

Wills, Trusts and Estates

Chair – Matthew Worsham, Esq.

The Wills, Trusts, and Estates Committee is holding a Zoom roundtable on February 13, 2024, at 12:00 p.m. to discuss issues facing the estate planning bar of Martin County. Please email me if you are interested in attending (mworsham@jonesfoster.com).

DON'T FORGET TO MENTION THE (TAX) EXEMPTION

The January 2024 Wills, Trusts, and Estates article discussed the potential (likely) sunset of the increased estate, gift, and generationtransfer (GST) tax skipping exemptions provided in the Tax Cuts and Jobs Act of 2017. The exclusions/exemptions are scheduled to go from over \$13 million per person down to \$5.49 million per person. The House of Representatives, Senate, and the next President must come to an agreement to maintain the current levels of exemption. I am not a betting man, but the odds seem good on the exemption sunsetting.

We owe our clients a duty to provide competent and skillful representation. Is this duty breached by failing to advise clients of potential planning opportunities that would utilize the soon-to-expire exemption? I do not know and would not want to find out by defending against a malpractice lawsuit that involves a former client's estate owing significant, and likely avoidable, estate and/or GST taxes.

Although relatively few have clients with more than \$13 million (or \$26 million for married couples) in assets, Martin County has a larger-than-average number of people who have

more than \$5.5 million (or \$11 million for married couples). If you perform planning for clients who fall between these numbers before December 31. 2025, take extra care to explain the consequences of not taking full advantage of the expiring



exemption amounts — paper that file.

As we rapidly approach December 31, 2025, be sure to prepare your clients for the likely drop in the estate tax exemption to avoid a potentially frivolous malpractice lawsuit. I hope this article was interesting and applicable to your practice. Please contact me at mworsham@jonesfoster.com for inclusion on the Committee's emails and/or to share any potential speakers, topics, or articles



2301 SE Monterey Road Stuart, FL 34996 772.223.6760

fa.ml.com/kowalski_tuttle

Joanne Zarro

President 215 SW Federal Hwy Suite 101 Stuart, FL 34994 **C** (772) 284-0725

Joanne@zarromortgagegroup.com

www.ZarroMortgageGroup.com | NMLS #231911

Kowalski, Tuttle, McKee & Associates

Experience the Seaside difference today.



Mark T Ciotti | SVP, Client Advisor mciotti@seasidebank.com | 772-600-3764

2022 Seaside Bank and Trust. All Rights Reserved. Seaside Bank and Trust is a division of United Community Bank. | seasidebank.com



Merrill Lynch, Pierce, Fenner & Smith Incorporated (also referred to as "MLPE&S" or "Merrill") makes available certain investment products sponsored, managed, distributed or provided by companies that are affiliates of Bank of America Corporation ("BofA Corp."). MLPF&S is a registered broker-dealer, registered investment adviser, Member SIPC and a wholly owned subsidiary of BofA Corp.

© 2023 Bank of America Corporation. All rights reserved. | MAP5272720 Vault-BA1MKB | MLWM-242-AD | 470944PM-0123

MARCH 9, 2024 WILLOUGHBY GOLF AND COUNTRY CLUB

For sponsorship opportunities, contact chad hastings chastings@lesserlawfirm.com or 561-301-1999



LESSER LESSER LANDY & SMITH PLLC ATTORNEYS AT LAW -Personal Injury Law Since 1927-





3001 PGA Boulevard | Suite 305 | Palm Beach Gardens, Florida 33410 Telephone (561) 686-3307 | Facsimile (561) 686-5442 | www.nasonyeager.com

PALM BEACH GARDENS . BOCA RATON



Elder Law Attorney Corner

Paying for Nursing Home Care? Medicaid Allows a Person Eligibility... Even when they have Assets!

> Gregory G. Glenn, Esq. Gregory Glenn, P.A. Elder Law Attorney



In February's edition I covered income criteria to qualify for Florida long-term care Medicaid benefits. This article was supposed to be published in the December issue of the Sidebar prior to the February edition. However, I unfortunately missed the publication deadline. So here is the edition related to Asset eligibility criteria.

Many believe one must be broke to qualify for Medicaid. Not true! <u>Did you know a spouse of an</u> individual applying for Florida Medicaid nursing home benefits can have up to \$154,100.00 of liquid countable assets in 2024 and the ill spouse will still qualify for Medicaid. Medicaid laws permit an individual applying for Medicaid to continue to own assets and qualify for long-term care benefits. Now a Medicaid applicant can only have up to \$2,000.00 of Medicaid "countable assets" in his or her name. But there are planning options available to shift assets in order to obtain eligibility. Read on......

The objective of Medicaid asset preservation planning is to try to ensure my client maintains the highest quality of life possible and maintains his or her independence and dignity. This is accomplished by shifting assets and income to create eligibility while allowing the applicant access to those assets and income to pay for quality of life comforts and care above and beyond the benefits Medicaid provides.

I will cover examples of assets Medicaid does not count for eligibility purposes later in this article. This article only provides space to cover the Medicaid <u>Asset</u> eligibility criteria. There are also <u>medical</u> <u>need and income eligibility criteria</u> that are beyond the scope of this short article. Those topics will be covered in a later issue of the Elder Law Attorney Corner.

The foundation of Medicaid law is located in Federal Statute and Regulations promulgated by the Social Security Act. Each state also has its own laws related to Medicaid eligibility that track Federal Social Security Supplemental Security Income (SSI) law to various extents, depending on the state. See **42 U.S.C. 1396, et seq.** and **42 U.S.C. 1382, et seq.** for a general broad overview of the law regarding Medicaid and SSI benefits. If a person qualifies for \$1.00 of SSI, that person automatically qualifies for Florida Medicaid. Now, Florida Medicaid law does track SSI laws, however, Florida's eligibility criteria differs somewhat from SSI law (more lenient in some aspects). The State of Florida's Medicaid eligibility laws can are located in <u>Part III of Section 409 Florida</u> <u>Statute</u> and <u>F.A.C. 65A-1.709 to 1.713</u> and <u>F.A.C.</u> <u>59G</u>. Florida follows Social Security's Supplemental Security Income (SSI) eligibility criteria.

Medicaid eligibility criteria for assets looks at the assets of the applicant, and if married, the spouse as well. Medicaid exempts certain assets when determining financial eligibility. Examples of some exemptions include: 1) Equity value in the primary home of an applicant (up to \$713,000.00 in 2024), 2) personal tangible property is presumed valued at \$2,000.00 (Household furnishings and clothes), 3) one automobile and all automobiles over 7 years old that are not "collectibles" or considered luxury vehicles, 4) prepaid funeral plans up to \$2,500.00 (Unlimited if plan is irrevocable), 5) burial plot for immediate family, 6) life insurance cash value up to \$2,500.00, 7) Term life insurance, 8) Assets placed in certain types of special needs trusts, 9) Business or property investments that generates fair market value income are exempt as an asset, 10) purchase of Medicaid compliant annuities, and 11) purchases of Medicaid exempt assets with Medicaid "countable assets". These are just a few examples. There are many planning techniques designed to stretch an applicant's assets while sheltering those assets from being counted as an asset for Medicaid eligibility purposes.

More good news for married couples. There are instances where a well spouse who is living in the community can retain Medicaid countable assets above Continued On Next Page...

March 2024

Continued From Previous Page.. the \$153,100.00 threshold for 2024 and the ill spouse still qualifies for benefits. The planning strategy is referred to as "spousal refusal".

How it is implemented is important related to timing of the planning strategies, when the application is submitted, and dates documents are signed. This is a sophisticated planning technique that requires the elder law attorney to have extensive knowledge of Medicaid laws.

You may have heard about a 5 year look-back by Medicaid for "gifts" or "transfers for less than fair market value" made by an applicant or his or her spouse. Yes, that is true. The look-back is 5 years from the date of application for Medicaid. <u>There is a</u> <u>penalty for gifting of assets</u>. The penalty divisor for Florida long-term care Medicaid programs in 2024 is 1 month of eligibility for every \$10,209.00 of assets gifted away. There are limited strategies available to address undoing of previous gifting depending on the then-current circumstances when the gifts were made and the extent to which gifted funds have already been "given back" or whether the gift itself can even be returned properly at all. Dealing with gifting issues require a complete understanding of Medicaid laws dealing with gifting issues. <u>One</u> <u>positive note on gifting is that there is NO PENALTY</u> for "gifting" to a spouse or certain disabled persons. One final note on gifting. There is a gift planning <u>strategy to reduce countable assets to withing</u> <u>eligibility parameters.</u> However, both topics require extensive discussion that is beyond the scope of what this short article can cover.

In closing, an elder law practice that includes offering of Medicaid Planning requires extensive knowledge of a complex set of Federal and State Medicaid and SSI laws that are inter-related in many aspects. It requires a high level of competencies in Federal and state Social Security and Medicaid related laws.

I will cover more aspects of Medicaid eligibility in future articles. Next up will be Income eligibility standards..... Stay tuned. Greg.



Gregory G. Glenn started his practiced with a focus on serving the elderly and disabled back in 1995. He is a nationally Certified Elder Law Attorney by the National Elder Law Foundation. **His elder law practice today focuses on Medicaid planning, estate planning for the over 55 and disabled, special needs trust planning for the disabled, incapacity planning, and probate.** Prior to law school he worked as an accountant for Coopers & Lybrand, CPA's assisting clients with cash management as well as tax preparation and planning. He has offices in Stuart and Boynton Beach. Phone: 561-347-1071 - Website: <u>www.Bocaelderlaw.com</u>







Medical Malpractice Nursing Home Abuse Trucking Litigation

Insurance Bad Faith Serious Personal Injury Product Liability

WLAW OFFICES OF R. WAYNE RICHTER, P.A.

EXCLUSIVELY DEDICATED TO CRIMINAL DEFENSE

AGGRESSIVE * **D**EDICATED *Experienced Trial Attorney

> **RATED AV PREEMINENT** BY MARTINDALE HUBBEL

OFFICES IN PALM CITY & WEST PALM BEACH

Telephone: 772-291-2765 EMAIL: WAYNE@RICHTERLAWPA.COM WEBSITE: WWW.RICHTERLAWPA.COM

YOUR LOCAL ELDER AND SPECIAL NEEDS LAW ATTORNEY

Legal software that lets you work from anywhere

It's time to switch to Clio



Discover how Clio can help you transform your law firm. Plus, claim your 10% discount at **clio.com/martinbar** or by scanning the code.







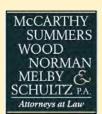


Nicola J. Melby Certified Elder Law Attorney By the National Elder Law Foundation and The Florida Bar njm@mccarthysummers.com

2400 SE Federal Highway, 4th Floor Stuart, FL 34994 Tel (772) 286-1700 • Fax (772) 283-1803 Www.McCarthySummers.com

Integrity. Dedication. Solutions.

Special Needs Trusts Medicaid Planning and Applications Long Term Care Planning Estate Planning Wills & Trusts Probate and Guardianship



Elder Law

BE A HERO TO YOUR CLIENTS REFER YOUR PERSONAL INJURY CASES TO THE LAW OFFICES OF CRAIG GOLDENFARB

Our employees love where they work! That is why we were awarded the #1 Overall "Top Workplace" award by the SunSentinel for the small employer category for 2018, and why we have ranked in the top 3 for four years in a row.

Happy employees produce extraordinary results for clients. This is one of the many reasons that your 25% referral fee is safe with us.

With our team of highly skilled personal injury litigators supported by sixty legal, administrative, and operations staff, you can trust that your referral will be competently handled.

Be a hero to your clients. Refer that personal injury case to the Law Offices of Craig Goldenfarb, P.A.





Leading Our Port Saint Lucie Office Marisa E. Zarzeski ASSOCIATE ATTORNEY



Craig M. Goldenfarb, Esq. FOUNDER / ATTORNEY



Rafael J. Roca, Esq. BOARD CERTIFIED CIVIL TRIAL ATTORNEY



Spencer T. Kuvin, Esq. LITIGATION DIRECTOR



Aaron D. Neifeld, Esq. ASSOCIATE LITIGATION ATTORNEY



Jorge L. Maxion, Esq. CIVIL TRIAL ATTORNEY



PRE-SUIT ATTORNEY



Jeffrey D. Kirby, Esq. PRE-SUIT ATTORNEY



Donald W. Vollender, Esq. Michael A. Wasserman, Esq. CIVIL TRIAL ATTORNEY

To refer us a case, call 561-270-5044. You may also email intakelead@800goldlaw.com with all the case details. We'll let you know right away if we can help.







5K Race to the Courthouse By Gene Zweben, Race Chair

We are looking forward to another great event this year! The Race will be held on Saturday, April 20, 2024, so there is plenty of time to get out there and start training! We are still looking for sponsors and committee members. For more information, please contact Gene Zweben at gene@ zwebenlawgroup.com or 772-223-5454.









Martin County Bar Association

Максн 2024

The SideBar

Judicial Relations Committee

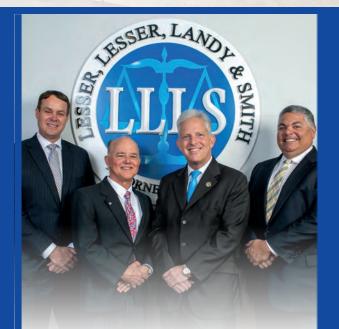
The Judicial Relations Committee invites you to its monthly lunch meetings. Lunches are held from 11:45 to 1:00 at Treasure Coast Legal, 100 SW Albany Avenue, Suite 310, and are free!



RSVP required by emailing chair Julie Treacy at <u>JTREACY@TREASURECOASTLEGAL.COM</u>

SAVE THE DATES AND JOIN US!

March 19 - Judge Brett Waronicki April 16 - Judge William Roby May 21 - Judge Leatha Mullins



PROUD SUPPORTERS OF THE MARTIN COUNTY BAR ASSOCIATION



-Personal Injury Law Since 1927-WWW.LESSERLAWFIRM.COM • 772.283.6839

Lesser Lesser Landy& Smithpllc

ATTORNEYS AT LAW



CONTACT: BRANDON WOODWARD PHONE: 772-497-6544 EMAIL: BRANDON @WKFKLAW.COM







5:30 COCKTAILS - 6:00 GAME TIME

Join as a team or sign up as a solo player and you'll be paired with a group.

(teams of up to 8 people per table)

Join the fun! Test your Skills on General Trivia!

REGISTRATION INCLUDES:

Beer, wine, appetizers and a reserved seat to play, *plus* you could win a prize!

MCBA members: \$35.00 Annual Sponsors welcome: \$50.00 Judges: Complimentary

R.S.V.P.

Let us know you can play! Email your **RSVP** to:

MARTINCOUNTYBAR@GMAIL.COM (include in the subject line: Trivia) Then, pay by credit card online @ www.martincountybar.com Or, mail your check to P.O. Box 2197, Stuart 34995.



MCBA GOLF TOURNAMENT



ANNUAL SOBEL CUP FRIDAY, MAY 31, 2024

MONARCH COUNTRY CLUB 1:00 P.M. SHOTGUN START

SPACE IS LIMITED AND OPEN TO THE PUBLIC.

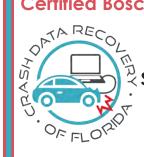
FIRST COME, FIRST SERVED.

TO REGISTER & FOR DETAILS GO TO:

MARTINCOUNTYBAR.COM

Proceeds benefit the MCBA Scholarship Program

Bill Biglin Certified Bosch CDR Tool Technician



1-833-546-4440 Service@CDRFlorida.com www.cdrflorida.com



- Impact Windows
- French Doors
- Sliding Glass Doors
- Accordion Shutters

Call For A Free Estimate 772-408-0200



PGT

Visit One of1740 NW Federal Hwy, StuartOur Showrooms6400 SE Federal Hwy, Stuart



2024 SOBEL CUP TO BENEFIT THE MARTIN COUNTY BAR ASSOCIATION'S SCHOLARSHIP FUND

SPONSORSHIP OPPORTUNITIES NOW AVAILABLE

FRIDAY, MAY 31, 2024 1:00 P.M. START TIME

MONARCH COUNTRY CLUB

TITLE SPONSOR EXCLUSIVE - \$1,500



SCORECARD SPONSOR EXCLUSIVE \$500.00

ENTRY FEE FOR 1 GOLFER LOGO ON ALL SCORECARDS QUARTER PAGE PRINT AD IN THE SIDEBAR

CART SPONSOR EXCLUSIVE - \$750

ENTRY 2 GOLFERS LOGO OF DYST BINGESLATING TO BETTU NATE T SIGNAGE AT EVENT HALF PAGE AD IN THE SIDEBAR

> BEVERAGE CART SPONSOR EXCLUSIVE - \$750

LOGO ON BEVERAGE CART ENTREE OF 2 GADERS LOGO OF OF DIALATING TO THE TOURNAMENT HALF PAGE PRINT AD IN THE SIDEBAR COCKTAIL SPONSOR \$350.00

ENTRY FEE FOR 1 GOLFER LOGO ON ALL ADVERTISING BUSINESS CARD PRINT AD IN THE SIDEBAR

> HOLE SPONSOR \$250.00

SIGNAGE AT TEE BOX LISTING ON ADVERTISING

PROCEEDS BENEFIT THE MCBA SCHOLARSHIP FUND TO BECOME A SPONSOR, CONTACT: MARTINCOUNTYBAR@ GMAIL.COM

Real Estate and Commercial Litigation Update

Florida Real Property and Business Litigation Report

Manuel Farach



Taveras v. Bank of America, N.A., Case No. 22-11355 (11th Cir. 2024). A federal court examines the following factors when deciding whether to abstain under the *Colorado River* Doctrine: whether one of the courts has assumed jurisdiction over property, the inconvenience of the federal forum, the potential for piecemeal litigation, the order in which the fora obtained jurisdiction, whether state or federal law will be

applied, the adequacy of the state court to protect the parties' rights, and the vexatious or reactive nature of either the state or federal litigation.

In Re: Amendments To Florida Rules of Civil Procedure - Forms 1.996(A) and 1.996(B), Case No. SC2022-1275 (Fla. 2024).

The Florida Supreme Court amends foreclosure judgment forms to permit the correct statutory judgment rate, to include language regarding the Protecting Tenants at Foreclosure Act, and to clarify jurisdiction when there are unclaimed funds.

Promenade Charters V.I., Ltd. v. Caribbean Insurers Marine Limited, Case No. 3D22-1324 (Fla. 3d DCA 2024).

A contract must require payments to be made in Florida in order to use Florida Statute section 48.193(1) (a)(7) (breach of a contract required to be performed in Florida) as the basis for long-arm jurisdiction.

Tesla, Inc. v. Monserratt, Case No. 4D2023-2075 (Fla. 4th DCA 2024).

Once a corporation establishes a person is a highlevel officer and produces the declaration under Florida Rule of Civil Procedure 1.280(h), a trial court is required to issue a protective order unless the party seeking the deposition demonstrates exhaustion of other discovery, that such discovery was inadequate, and that the proposed deponent has unique and personal knowledge of discoverable information.

Fleetwing v. Corporation Ricketts, Case No. 6D23-948 (Fla. 6th DCA 2024).

A party seeking general damages for breach of a

settlement agreement must file a separate suit unless the general damages were specified in the settlement agreement.

Pro-Karting Experience, Inc. v. 34th Street, LLC, Case No. 2D22-2577 (Fla. 2d DCA 2024).

An order which requires the payment of money but does not contain "for which let execution issue" language and which contemplates further judicial labor is not a final order capable of being appealed and must instead be reviewed by writ of certiorari.

Dejanovic v. Block, Case No. 3D22-1941 (Fla. 3d DCA 2024).

An order which resolves only part of a civil lawsuit and requires a party to make interim payment even though there remain unresolved and intertwined factual matters is remediable by writ of certiorari.

John Knox Village of Central Florida, Inc. v. Estate of Alma Jane Lawrence, Case No. 5D22-1867 (Fla. 5th DCA 2024).

The Fifth District re-affirms its previous holding that a trial court does not need to make affirmative findings under Florida Statute section 768.72(1) in order to allow pleading for punitive damages.

Kirkpatrick Trust v. Lakeview Loan Services, LLC, Case No. 5D23-0152 (Fla. 5th DCA 2024)

Hearing and ruling upon an unscheduled motion during a case management conference violates the objecting party's due process rights.

Wallace v. Nationstar Mortgage, LLC, Case No. 2D23-926 (Fla. 2d DCA 2024).

Business records from a third party company are admissible under Florida Statute section 90.803(6)(a) so long as there is a business relationship between the proponent of the records and the third party and the proponent can verify the accuracy of the records.

Parque Towers Developers, LLC v. Pilac Management, Ltd., Case Nos. 3D21-1365, 3D21-1366, 3D21-1367, 3D21-1368, & 3D21-1369 (Fla. 3d DCA 2024).

A developer cannot be held responsible under breach of contract for failure to timely deliver completed

Continued From Previous Page..

condominium units when the pre-construction condominium sales contract states "[s]eller estimates it will substantially complete construction of the Unit, in the manner specified in this Agreement, by December 31, 2017, subject to extensions resulting from 'Force Majeure' (the 'Outside Date')."

Irwin v. Signal Safe, Inc., Case No. 3D22-2121 (Fla. 3d DCA 2024).

Florida Constitution Article X, Section 13 and Florida Statute section 768.28(1) provide that absent scienter, state employees are insulated from personal liability for torts committed within the scope of employment but suits against the State may continue within sovereign immunity limits.

Rushmore Loan Management Services, LLC v. Kavoll, Case Nos. 4D2022-3446 & 4D2023-1234 (Fla. 4th DCA 2024).

A party objecting to the opposing party's substantial compliance with a condition precedent must establish how they were prejudiced by the lack of complete compliance.

Paquin v. Campbell, Case No. 5D22-2859 (Fla. 5th DCA 2024).

Non-signatories may be bound to arbitrate under agreements they did not sign under theories of incorporation by reference, assumption, agency, veil piercing/alter ego, and estoppel.

Wilde Cypress Branch v. Hamilton, Case No. 6D23-1412 (Fla. 6th DCA 2024).

Florida Statutes section 403.412(9)(a) precludes a "local government regulation, ordinance, code, rule, comprehensive plan, charter, or any other provision of law" from "recogniz[ing] or grant[ing] any legal rights to a plant, an animal, a body of water, or any other part of the natural environment that is not a person or political subdivision."

Shrewsbury v. Childers, Case No. 1D2023-0750 (Fla. 1st DCA 2024).

A lessee under a 99-year land lessee who contests whether he, as a lessee, sufficiently "owns" real property to be assessed ad valorem taxes must still contest the tax valuation within sixty days as set forth in Florida Statute section 194.171(2) and may not merely rely on his claim he is not an owner.

Driscoll v. Knellinger, Case No. 2D23-459 (Fla. 2d DCA 2024).

Actions taken in the corporate context and before

any litigation commences are not protected by the litigation privilege.

Palanchian v. Windstone Property Owners Association, Inc., Case No. 4D2022-2939 (Fla. 4th DCA 2024).

A community association cannot be compelled to comply with a settlement agreement to which it was not a party, which does not run with the land, and which was not clearly intended to impact third parties.

U.S. Bancorp v. Taharra Assets 5545, Inc., Case No. 4D2022-311(Fla. 4th DCA 2024).

The property owner at the time a lis pendens is filed is an indispensable party to the foreclosure action and remains so even if the owner later transfers their interest.

Phoenix Management Services, Inc. v. Waterchase Homeowners' Association, Inc., Case No. 4D2023-174 (Fla. 4th DCA 2024).

A dispute over business records, including one where a management company refuses to turn documents over to a community association, typically does not arise to the level of permitting punitive damages.

CRARY BUCHANAN

Serving the Treasure Coast since 1927 and providing legal services to clients in construction, business, employment, estate planning, family, litigation, personal injury, and real estate law.

> Visit our <u>website</u> <u>WWW.CRARYBUCHANAN.COM</u> or call us at (772) 287-2600



Legal Resources / CLE

Christine Moreno, Legal Resources Committee Chair

FREE LEGAL RESEARCH: All members are reminded that our Martin County Public Library has free legal research available which is accessible at all branches of the Martin County Public Library System. If you forget to bring your USB for copying the research results, then one might be obtained for a nominal charge from the librarian, or you can always email your research results to yourself or print the results for a minor charge per page (although copying to USB is usually better).



CLE MATERIALS: Visit our Website or the Clerk's website for available FL CLE programs. Our current offerings include:

2022 Florida Survey of Law2023 Florida Survey of Law2023 Wills, Trust & Estates Certification Review Course2023 Advanced Real Estate Certification Review Course

Our materials generally include a disc for pdf course materials

Currently corporate sponsors are enlisting to provide specialty FL CLE courses to our members, so check back to our MCBA website or Clerk's website for updates on CLE course offerings.

ADMINISTRATIVE RESOURCES: Discounts are available for many administrative resource materials. Please inquire if you are interested in any such services. Also, our Florida Bar offers free CLE courses as well as administrative materials at the FloridaBar.Org website under the heading "Legal Fuel". One valuable & FREE resource is the current "NOTA" online trust accounting program. I am still awaiting information on the security and encryption aspects of NOTA, since it is an on-line platform, but it looks promising.

Call (772) 485-6767 if you are interested in joining our Legal Resource Committee. See you at our upcoming Bar Luncheon,

CYBER ATTACKS ARE COMING...



Law Office Space Available US-1 @ Monterey

Month - to - month, 1-month deposit required.

Excellent referral opportunities.

Other amenities available.



CLOUD CHOICE TECHNOLOGIES CAN PROTECT YOUR BUSINESS USING THE LATEST CYBER DEFENSES! <u>www.CloudChoiceTech.com</u> Please contact: Victoria Blount (772) 497-6544 victoria@wkfklaw.com





Stronger finances make stronger practices.

Custom financial services for law firms.

Sarah Baker I Vice President 772-221-7050

 First Citizens Bank

GAL	LLC
LEG	ONS,
TLY	SOLUTI
RFECT	FICE
	OF

SHAUN KELLY Legal Assistant

Providing assistance for vacations, leaves, overflow, work and special projects for over 40 years

> 772.349.5519 Shaun@perfectlyLegalOS.com www.perfectlylegalos.com

NEED HELP?

If you are feeling isolated, worried about your practice, your family, your employees, reach out - to a friend, a spouse, a colleague OR call the Florida Bar Helpline at 833-FL1-WELL

The Florida Bar Helpline

Bar members will be able to dial the helpline (833-351-9355 or "833-FL1-WELL") and speak with a mental-health professional who can provide crisis intervention and a referral for up to three free visits with a locally based, licensed mental-health professional.

ONLINE RESOURCES OFFERED BY THE MCBA

Notice: Your clients and the public at large can now access online courses directly through the MCBA website. They are fast, convenient, and inexpensive - available 24 hours a day, 7 days a week. All instructions are included online and programs can be started/stopped, picking up where you left off, as many times as you like. Help the MCBA promote this community service while generating income to support local initiatives!

Florida Online Traffic School Courses:

- Basic Driver Improvement 4-hour course (Traffic Ticket TCAC)
- First-time Driver 4-hour course
- Advanced Driver Improvement 12-hour course (ADI / Judge-ordered class)
- Florida Mature Driver Program 6-hour course

All traffic courses are approved by the Florida Department of Highway Safety & Motor Vehicles and sponsored by the American Safety Council.

Parent Education and Family Stabilization Online Course:

This 4-hour course is required by Florida law for concerned parties seeking to obtain a final judgment of dissolution of marriage in Florida when minor children are involved. The course is approved by the Department of Children & Families and provided by a division of the University of Continuing Education.

The courses are provided via the American Safety Council which is the leading source for online driver education, workplace safety training, continuing education, online business and security solutions, and more!



Florida Free Legal Answers Program

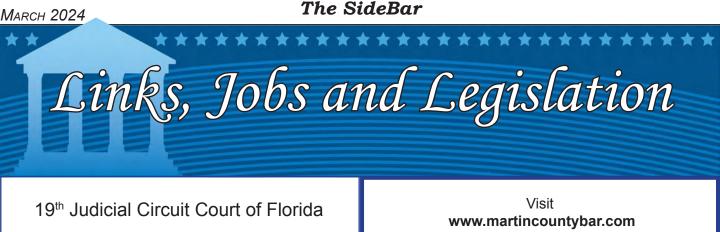
Did you know that The Florida Bar provides free virtual legal information through its cooperative effort with the American Bar Association to low-income Floridians via the Florida Free Legal Answers Program?

Members of the public can go to: https://florida.freelegalanswers.org/ to sign up and answer a few questions to see if they qualify to use the service.

Florida lawyers may enroll to join the effort by visiting clicking on "Volunteer Attorney Registration" and agreeing to the attorney agreement.

MARCH 2024





Court administration, judicial assignments, programs, job opportunities and other resources: www.circuit19.org Emergency Hotline / Info: 772.742.9229 for resources, links, events and member contact & practice area information.



Florida Bar Appointments / Vacancies For applications and complete details, visit: www.floridabar.org

19th Circuit Appointments / Vacancies

For applications and complete details, visit: http://www.circuit19.org/careers.html

Track Legal Legislation

For more detailed information on specific legislation being tracked by the Bar, visit the Legislation Committee's webpage on the Bar website at this link: http://www.floridabar.org/cmdocs/bd160.nsf/WDOCS



Martin County Ordinances

All Martin County ordinances may be found on the County website: https://www.martin.fl.us Click on Departments, County Attorney, County Code & Ordinances. See ordinance list on right side of web page (ex: Ordinances 800-849).



City of Stuart Ordinances

All City of Stuart ordinances may be found on the City website: www.cityofstuart.us

Click on link at the bottom of the page.

2024

March

Martin County Bar Association



March 6, 2024 – Trivia Night March 6, 2024 – Paralegal CLE March 9, 2024 – MCBA Tennis Tournament – Willoughby Golf & CC March 19, 2024 – Judicial Relations Committee Lunch March 22, 2024 – President's Lunch Series April 10, 2024 – Race to the Courthouse April 19 - President's Speaker Series - Round Table Discussion with the Judges April 25 - Elder Law CLE/Luncheon May 31, 2024 – Sobel Cup Golf Tournament



Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					ء Employee Appreciation Day	2
3	4	5	6 Trivia Night Paralegal CLE Meeting	7	8	9 MCBA Tennis Tournament
10 Daylight Savings	11	12	13	14	15	16
17 St. Patrick's Day	18	19 Committee Judicial Relations Lunch	20 Spring Equinox	21	22 President's Lunch Series	23
24	25	26	27	28	29	30
31 Easter Sunday						



Martin County Bar Association PO Box 2197 Stuart, FL 34995-2197

Please join us for MCBA's CLE Monthly Meeting, Friday, March 22, 2024

- When:
 Friday March 22, 2024

 11:30 a.m. networking; 12:00 p.m. lunch
- Where: Monarch Country Club 1801 SW Monarch Club Drive, Palm City
- Speaker: Former US Ambassador, Victor Ashe
- CLE: General 1.0 International Law 1.0 International Litigation and Arbitration 1.0

RSVP to: martincountybar@gmail.com No later than Friday, March 15, 2024

PLEASE BE SURE TO RSVP TO EXPEDITE ACCESS AT THE GATE

There is no charge for paid MCBA members.