

RIDE THE WAVE TO  
HEALTH AND WELLNESS

# BLS BEACH BASH

RITZ-CARLTON, NAPLES  
AUGUST 30<sup>TH</sup> - SEPTEMBER 2<sup>ND</sup>  
2019



THE RITZ-CARLTON  
NAPLES





## From the 2019-2020 Section Chair

On behalf of your Executive Committee, I welcome you to the Business Law Section Annual Labor Day Retreat. We are mixing things up a bit this year with a continued focus on health and wellness. A big thanks to Russell Landy, Paige Greenlee, Amanda Fernandez, and the rest of Labor Day Retreat Committee for all of their hard work in setting up this Retreat. They work all year long to make this a fun, memorable event and deserve great praise. Thanks, as well, to Woody Pollack, Manny Farach, and Stefan Rubin for their leadership of our sponsorship efforts and an especially big thanks to all of our sponsors. Please take a few minutes to thank and get to know our sponsors this holiday weekend. We really could not put on this Retreat without them.

Thanks to all of our Executive Council members and other Section leaders. We are very thankful for their continued great work.

Thanks to Stefanie Svisco, our Florida Bar Program Administrator, for helping keep all of us on track, Tracey Eller, for supporting our website and social media efforts, and Paul Perdomo, for his great photography and making us look good.

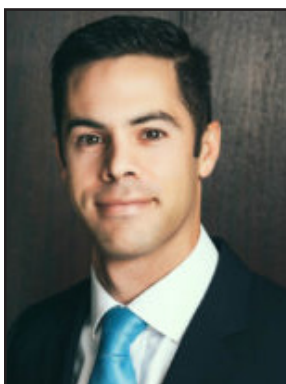
Finally, thank you. I appreciate your being here to join us and supporting our efforts, hope you have a great time, and are able to truly retreat over this Labor Day weekend. Here are a few ideas:

- Sign up for a pro bono case or, at least, commit to doing so before the end of this year!
- Go to one or more of our health and wellness focused programs.
- Attend the Judge Bill Van Nortwick wine tasting for benefit of the Florida Bar Foundation and learn more about the great work the Foundation does and how you can get involved.
- Disconnect from your phone, laptop, etc., and set a screen time reduction goal.
- For those on the younger side and our new attendees, be proactive, meet some of our more senior members and see if you can find a mentor or two in the Section. For those more senior, be proactive, meet some of our more junior members and new attendees and see if you can find a mentee or two in the Section.
- Watch the sunset.
- Sign up for dinner on the town!
- Find Paul Perdomo (the guy with the camera) and ask him to take a fun picture of you with retreat attendees.
- Take a long walk on the beach.
- Make plans to join us in Greece for the Executive Counsel Retreat (pre-trip April 25-28, main trip April 29-May 3, 2020).
- Find me, Leyza Blanco (Chair-Elect), Kacy Donlon (Treasurer), Doug Bates (Secretary), Michael Chesal (Immediate Past Chair and former Labor Day Retreat committee chair), and Greg Yadley (Section Godfather!), collectively your Executive Committee, and share your thoughts and ideas on how we can help you get the most out of the Section and make the Section the best it can be.

*- Jay*



## From the 2019 Retreat Chair



On behalf of the 2019 Labor Day Retreat Committee, it is my pleasure to welcome you to our Beach Bash where we hope that you will ride the wave to better health and wellness. The familiar stomping grounds of the Ritz Carlton Naples promises to be a perfect venue for the Business Law Section members, their families, and their guests to connect, relax, and recharge.

Part of leading a physically and mentally healthy lifestyle includes growth, and with that in mind we urge you to try new things and move outside of your comfort zone. This weekend you can partake in our kayak adventure, ride along with the Section's avid cyclists, expand your legal knowledge with our many CLE offerings, and sing the doors off of the place at our back-by-popular-demand Karaoke competition.

The Retreat Committee has also tried to move outside of its comfort zone and has added some new bells and whistles to the casino night, which families should love, and have made Sunday's brunch more comfortable and flexible. Of course, the familiar is also nice, so we look forward to some retreat mainstays like the Whiskey Tasting and the Judge William Van Nortwick Wine Tasting to raise funds for the Florida

Bar Foundation.

If this is your first time at the retreat, we hope that you will sample everything that the retreat has to offer and enjoy meeting everyone that makes up what we believe to be the most welcoming group of people around.

This event would not be possible without the support of our sponsors and our Executive Committee, and we look forward to continuing our partnership and growing our bonds over the course of the weekend.

For the Retreat Committee, this event has been a labor of love. If there is anything we can do to help you better enjoy the weekend, please let us know.

— Russell Landy

### Executive Committee

**Chair** - Jay Brown

**Chair-Elect** - Leyza Blanco

**Treasurer** - Kacy Donlon

**Secretary** - Doug Bates

**Chair of Long Range Planning** - Greg Yadley

**Immediate Past Chair** - Michael Chesal

### Retreat Committee

**Chair** - Russell Landy

**Chair-Elect** - Paige Greenlee

**Second Vice Chair** - Amanda Fernandez

Simeon Brier  
Michael Chesal  
Kacy Donlon  
Mariane Dorris  
Manny Farach

Paul Giordano  
Allison Leonard  
Brett Lieberman  
Woodrow "Woody" H. Pollack  
Adina Pollan

Jason Sherry  
April Stone  
Andrea Tromberg  
Bart R. Valdes  
Dineen Wasyluk

## Follow Us on Social Media!



Browse real time photo updates and happenings from the weekend and post your own favorite photos on our Twitter feed at @flabizlaw and our Facebook page (Business Law Section of the Florida Bar).

Use the hashtag #BLSRetreat19 to tag or search posts.



# AGENDA

## Friday, August 30, 2019

10:00 AM – 12:00 PM

**Section 542.335 Task Force**  
*Boardroom*

2:00 PM – 6:00 PM

**Catch the Wave Retreat Registration**  
*Registration Foyer*

2:00 PM – 3:00 PM

**Business Courts Task Force Logistics & Corporations Subcommittee**

*Salon IV*

**Chapter 48 Task Force**

*Estuary*

**BLS Scholars & Fellows Retention Task Force**

*Plaza I*

2:00 PM – 4:00 PM

**Digital Currency Task Force**  
*Plaza III*

3:00 PM – 5:00 PM

**Chapter 607 Subcommittee**  
*Plaza II*

3:00 PM – 4:00 PM

**UCRERA Task Force**  
*Plaza I*

**IMF & Membership Joint Meeting**

*Estuary*

**Business Courts Task Force Funding Subcommittee**

*Salon III*

**Business Courts Task Force Legislative Subcommittee**

*Salon IV*

**Amicus Committee Meeting**

*Boardroom*

4:00 PM – 5:00 PM

**Marketing, Promotions & Sponsorship Committee**  
*Plaza III*

**Communications/Social Media Committee**

*Plaza I*

4:00 PM – 6:00 PM

**Reaching the Crest – Leadership in the Bar and Its Business**  
**Law Section CLE**

Sponsored by: Kozyak Tropin & Throckmorton  
*Estuary*

**Bankruptcy Judicial Liaison Committee**

*Salon I & II*

4:00 PM – 6:00 PM

**Business Courts Task Force**  
*Artisans*

5:00 PM – 6:00 PM

**Cannabis Law Study Group**  
*Boardroom*

6:00 PM – 6:30 PM

**Come out of Your Shell First-Time Attendee Toast**

Sponsored by: Clark Partington  
*Ballroom Foyer*

6:30 PM – 7:30 PM

**Time to Coast Welcome Reception**

Sponsored by: Therrel Baisden, LLP  
*Ballroom Foyer*

7:30 PM – 8:45 PM

**Surf and Turf Welcome Dinner**

Sponsored by: Morgan & Morgan  
*Vanderbilt Ballroom*

8:45 PM – 10:00 PM

**Make Friends, Not Anemones Hospitality Suite**

Sponsored by: Damian & Valori LLP  
*Artisans*

## Saturday, August 31, 2019

6:00 AM – 9:00 AM

**Pick Your Path Bike Ride**

*Lobby*

7:00 AM – 5:00 PM

**Registration Desk**

*Registration Foyer*

8:00 AM – 9:03 AM

**Seas the Day Continental Breakfast (Section Members and Sponsors Only)**

Sponsored by: Trenam Law  
*Ballroom Foyer*

8:30 AM – 9:30 AM

**CLE Committee**

*Aqualane Shore*

**Pro Bono Committee**

*Estuary*

**E-Discovery Committee &**

**Cybersecurity and EDiscovery- Vigilance with Data**

*Port Royale*

**Opinion Standards Committee**

*Pelican Bay*

9:30 AM – 11:30 AM

**IP Committee &**

**The Art of Mediating an IP Case (and ethical quandaries that may arise)**

*Estuary*

**Bankruptcy/UCC Committee**

*Plaza Ballroom*

**Business Litigation Committee &**

**An Introduction to the Use of Advanced Analytics for Legal**

**Document Review**

*Salon I*

**Corporations, Securities, & Financial Services Committee**

*Salon II*

**Computer & Technology Committee**

*Port Royale*

11:45 AM – 1:15 PM

**Dive Right in Lunch & Business Court Roundtable**

Sponsored by: Peretz Chesal & Herrmann, P.L.

*Vanderbilt Ballroom*

1:30 PM – 2:20 PM

**Alzheimer's Disease – What We Know and What We Can Do!**

Sponsored by: Irwin Gilbert

*Salon II*

**Litigation Cases in Latin America – Constraints and Opportunities**

Sponsored by: Kaufman Rossin

*Salon IV*

2:30 PM – 3:20 PM

**A Courtroom Perspective: What is a Healthy Balance Sheet?**

**The Numbers Don't Lie!**

Sponsored by: Petrucelli, Piotrowski & Co., Inc.

*Salon II*

**Attorney Self-Care: Burnout Prevention for High Stakes**

**Professionals**

Sponsored by: Latham, Shuker, Eden & Beaudine, LLP

*Salon IV*

3:30 PM – 4:20 PM

**Ethical Use of Evolving Technologies: Tales From the Dark**

**Web**

Sponsored by: Computer Forensic Services

*Salon IV*

**The Intersection of Cannabis and Everything**

Sponsored by: Akerman

*Salon II*

4:30 PM – 6:30 PM

**Watch the Riptide College Football Suite**

Sponsored by: City National Bank

*Artisans*

5:00 PM – 5:30 PM

**Budget Committee**

*Aqualane Shore*

5:00 PM – 6:00 PM

**Legislation Committee**

*Plaza Ballroom*

6:30 PM – 7:30 PM

**Roll with the Tide Cocktail Reception**

Sponsored by: Johnson, Cassidy, Newlon, & DeCort P.A.

*Ballroom Foyer*

7:30 PM – 9:30 PM

**Bet on a Shore Thing Dinner & Casino Night**

Dinner sponsored by: Michael Moecker & Associates

Casino Night sponsored by: DSK Law

Casino Baskets sponsored by: Messana, P.A.

*Vanderbilt Ballroom*

9:30 PM – 11:00 PM

**Make a Splash Karaoke/Hospitality Suite**

Hospitality Suite sponsored by: Sequer Law

Karaoke sponsored by: Wiand Guerra King

*Artisans*

**Sunday, September 1, 2019**

8:00 AM – 9:00 AM

**Drift Away Mindful Movement & Meditation**

Sponsored by: Gunster

*Plaza III*

8:00 AM – 11:00 AM

**Paddle Out Kayak Adventure**

Sponsored by: Agentis, PLLC

*Hotel Lobby*

8:00 AM – 12:00 PM

**Play in the Sand Golf Tournament**

Sponsored by: Gunster

*Ritz Carlton Golf Resort*

7:00 AM – 3:00 PM

**On Beach Time Breakfast or Lunch**

Sponsored by: Gunster

*Terraza Restaurant*

11:00 AM – 4:00 PM

**Cowabunga Pool Cabanas**

Sponsored by: Gray Robinson

*Lap Pool*

5:30 PM – 6:30 PM

**Judge William Van Nortwick, Jr. Wine Tasting**

Sponsored by: Stichter Riedel Blain & Postler, P.A.

*Artisans*

6:30 PM – 7:00 PM

**Set Sail for Dinner on the Town**

*Hotel Bar*

7:00 PM – 9:30 PM

**Dinner on the Town**

*Various Locations*

9:30 PM – 11:00 PM

**Hang Ten Whiskey Tasting & Hospitality Suite**

Sponsored by: Shutts & Bowen

*Beach House*

**Monday, September 2, 2019**

8:00 AM – 9:00 AM

**High Tide Continental Breakfast (Section Members and Sponsors Only)**

Sponsored by: Becker

*Salon I & II*

8:30 AM – 11:30 AM

**Wipe Out Executive Council Meeting**

Sponsored by: Michael Moecker & Associates

*Salon I & II*



# CLE INFORMATION

Friday, August 30<sup>th</sup>

4:00 p.m. – 5:30 p.m.

## Reaching the Crest – Leadership in the Florida Bar and Its Business Law Section

Course #3642 • General: 1 hour

Join our panel of leaders to learn more about The Florida Bar, our Business Law Section, opportunities to become more involved, and the benefits of bar leadership.

*Sponsored by: Kozyak Tropin & Throckmorton*

*Speakers: John Stewart, Greg Yadley, Dori Foster-Morales, Paige Greenlee, Michael Tanner, William Schifino, Hon. Mindy Mora*

Saturday, August 31<sup>st</sup>

8:30 a.m. – 9:30 a.m.

## Cybersecurity and EDiscovery- Vigilance with Data

*(during E-Discovery Committee Meeting)*

Course #TBA • General: TBA

Since it's a short 30 minute presentation the focus will be the landscape of data privacy regulations and how law firms need to be vigilant with how they protect data they collect from their client during the discovery process. (or even the data they receive from the opposition) This means they need to understand some of the laws that are out there regarding data privacy. Law firms also need to be careful with the vendors they use during the eDiscovery process. Vetting third parties that have access to data will be important to safeguarding the information in the possession of the law firm. Again, since this is a short presentation this will be a fairly surface level presentation and not dive into great details.

*Speakers: TBA*

9:30 a.m. – 11:30 a.m.

## An Introduction to the Use of Advanced Analytics for Legal Document Review

*(during Business Litigation Committee Meeting)*

Course #3655 • General: 1 hour • Technology: 1 hour

Information management has become a significant business challenge, with the global volume of electronically stored information growing at a rapid pace (doubling roughly three times since 2010). Corporations regularly spend millions of dollars producing responsive electronically stored documents for litigation matters and the review process generates the bulk of e-discovery costs. Powerful advanced analytics are helping manage ever-increasing data volumes and the challenges for review that these data volumes present. This CLE will examine advanced data analytics technologies, their capabilities and how they work, and use cases that include examples of cost savings and sensitive data content targeting.

*Sponsored by: Ankura*

*Speakers: Katie Jensen, Nate Huber-Fliflet*

## The Art of Mediating an IP Case (and ethical quandaries that may arise)

*(during IP Committee Meeting)*

Course #TBA • General: TBA

Michael will discuss the art of mediating IP disputes, differences in the rules for mediation among the various federal district courts and some common ethical issues that arise in mediation. Michael is a Florida Supreme Court Certified Circuit Civil Mediator, a member of the INTA Panel of Mediators and a Florida Bar Board Certified Intellectual Property Lawyer. He is also the immediate past Chair of the Business Law Section.

*Speakers: TBA*

11:45 a.m. – 1:15 p.m.

## Business Court Roundtable

Course #3646 • General: 1 hour • Business Litigation: 1 hour

Discussion of Hot Topics & Critical Issues Regarding Florida's Business Courts With Florida Business Court Judges

*Sponsored by: Peretz Chesal & Herrmann, P.L.*

*Speakers: Hon. William Thomas (11<sup>th</sup> Cir.); Hon. Don Myers (9<sup>th</sup> Cir.); Hon. Virginia Norton (4<sup>th</sup> Cir.); Hon. Jennifer Bailey (11<sup>th</sup> Cir.); Hon. Steven Scott Stephens (13<sup>th</sup> Cir.); Hon. Daniel Traver (9<sup>th</sup> Cir.)*



1:30 p.m. – 2:20 p.m.

### **Alzheimer's Disease: What We Now Know and What We Can Do!**

Course #3644 • General: 1 hour • Mental Illness: 1 hour

Take charge of your health by learning more about this important subject.

*Sponsored by: Irwin Gilbert*

*Speaker: Karen L. Gilbert, DNP MS RN CDP*

1:30 p.m. – 2:20 p.m.

### **Litigation Cases in Latin America – Constraints and Opportunities**

Course #3665 • General: 1 hour • Business Litigation: 1 hour • International Law: 1 hour • International Litigation & Arbitration: 1 hour

The course embarks in a discussion of recent and/or high profiled legal cases that expand beyond the borders of their respective countries. We will share and update the attendees with the latest developments and colorful details that only Latin America enjoys.

Additionally, the course will provide helpful resources for financial information in Latin America.

*Sponsored by: Kaufman Rossin*

*Speakers: Jose G. Cuneo, David Garcia*

2:30 p.m. – 3:20 p.m.

### **A Courtroom Perspective: What is a Healthy Balance Sheet? The Numbers Don't Lie!**

Course #3645 • General: 1 hour • Business Litigation: 1 hour

A Balance Sheet's health is determined by its ability to pay its obligations. There is a desire to reflect lower income for tax purposes and high income for financial statements, we have the ever-present conflict. Spend an hour applying the proper levels of professional skepticism to gain a view that will guide you through a healthy Balance Sheet in and out of the courtroom.

*Sponsored by: Petrucelli, Piotrowski & Co., Inc.*

*Speaker: Joseph Petrucelli*

### **Attorney Self-Care: Burnout Prevention for High-Stakes Professionals**

Course #3671 • General: 1 hour • Mental Illness: 1 hour

U.S. News and World Report ranked attorneys as the 2nd most stressful occupation in the United States in 2019. According to *The American Lawyer*, attorneys have the highest suicide rates across all U.S. occupations. Depression, anxiety, and substance use rates are also high among attorneys, who often work long hours on high-stakes, complex legal issues with tight deadlines. As is the case for many busy professionals, self-care often seems like just another thing to add to an overwhelming checklist of things one should be doing but can't quite get around to. This presentation will offer practical self-care strategies for the busy professional.

*Sponsored by: Latham, Shuker, Eden & Beaudine, LLP*

*Speaker: Aaron L. Norton*

3:30 p.m. – 4:20 p.m.

### **Ethical Use of Evolving Technologies: Tales from the Dark Web**

Course #3664 • General: 1 hour • Technology: 1 hour

You've read the headlines. Unfortunately, the question is not if your information was access or stolen, but when. To inform the attendees of current developments in the digital underground, as well as provide realist advice for cyber protection, Mark Lanterman will be discussing recent high-profile cyber crime events, including website breaches impacts courts, law firms, and government agencies. Mark will discuss particularly dangerous types of threats that might affect individuals involving the Dark Web, the Internet of Things, phishing, and Wi-Fi attacks; additionally, Mark will demonstrate the value of leveraging digital evidence and ESI in the courtroom.

*Sponsored by: Computer Forensic Services*

*Speaker: Mark T. Lanterman*

### **The Intersection of Cannabis and Everything**

Course #3643 • General: 1 hour • Business Litigation: 1 hour

Get educated about the federal and state landscape with respect to practicing law in the Cannabis space and the challenges facing practitioners in all practice areas.

*Sponsored by: Akerman*

*Speakers: Sally Kent Peebles, Stephen H. Siegel, Jonathan S. Robbins*

# OPTIONAL ACTIVITIES

\*Some of these activities required pre-registration, but if you did not sign up prior to your arrival and would like to participate, you should check with the Retreat Registration Desk for any remaining availability.

## Saturday, August 31<sup>st</sup>

### **Make a Splash Karaoke/Hospitality Suite**

9:30 PM – 11:00 PM • Artisans

During the Hospitality Suite on Saturday night join us for your chance to show off your singing skills or make a friend get up and show us what they've got! There will be a vote at the Cabanas on Sunday to see who will take the title of "Karaoke Star" this year! All donations collected will go to The Florida Bar Foundation.

*Hospitality Suite sponsored by: Seqour Law*

*Karaoke sponsored by: Wiand Guerra King*

## Sunday, September 1<sup>st</sup>

### **Mindful Movement and Meditation Class**

8:00 AM – 9:00 AM • Plaza III

Mindfulness and Meditation are powerful tools that can help you to be more calm, present and joyful. Join certified yoga and meditation teacher Marte Singerman, Esq. for a 1 hour session to explore these incredible practices together. No prior experience is required. Please wear comfortable clothes.

*Sponsored by: Gunster*

### **Kayak Adventure\***

8:00 AM – 11:00 AM • Hotel Lobby

An adventurous paddle on the beautiful Cocohatchee River, just minutes from the resort. We'll explore the river's mangroves, aquatic plants and many species of birds and marine life. If we're lucky, we may even run into a school of dolphin. The cost is only \$55 per person (snacks included). We will meet in the hotel lobby at 8:00 AM Sunday morning and caravan to the launch site at AWE Marina at 12345 Tamiami Trail N. in Naples. Preregistration required. For more detail or questions, contact Michael Chesal.

*Sponsored by: Agentis, PLLC*

### **Play in the Sand Golf Tournament\***

8:00 AM – 12:00 PM • Ritz Carlton Golf Resort

Enjoy a morning on the green with friends in a round of friendly competition. For more information and to register please see the online signup or see Stefanie at the Registration Desk.

*Sponsored by: Gunster*

### **Judge William Van Nortwick, Jr. Wine Tasting\***

5:30 PM – 6:30 PM • Artisans

The Wine Tasting is in memory of Judge William Van Nortwick and is \$40 per person or \$75 per couple with proceeds benefiting The Florida Bar Foundation.

*Sponsored by: Stichter Riedel Blain & Postler, P.A.*

### **Dinner on the Town\***

7:00 PM – 9:30 PM • Various Locations

Catch up with friends while enjoying a private dinner setting just for the BLS at local restaurants. For information on how to sign up please see Stefanie at the Registration Desk.

### **Hang Ten Whiskey Tasting & Hospitality Suite**

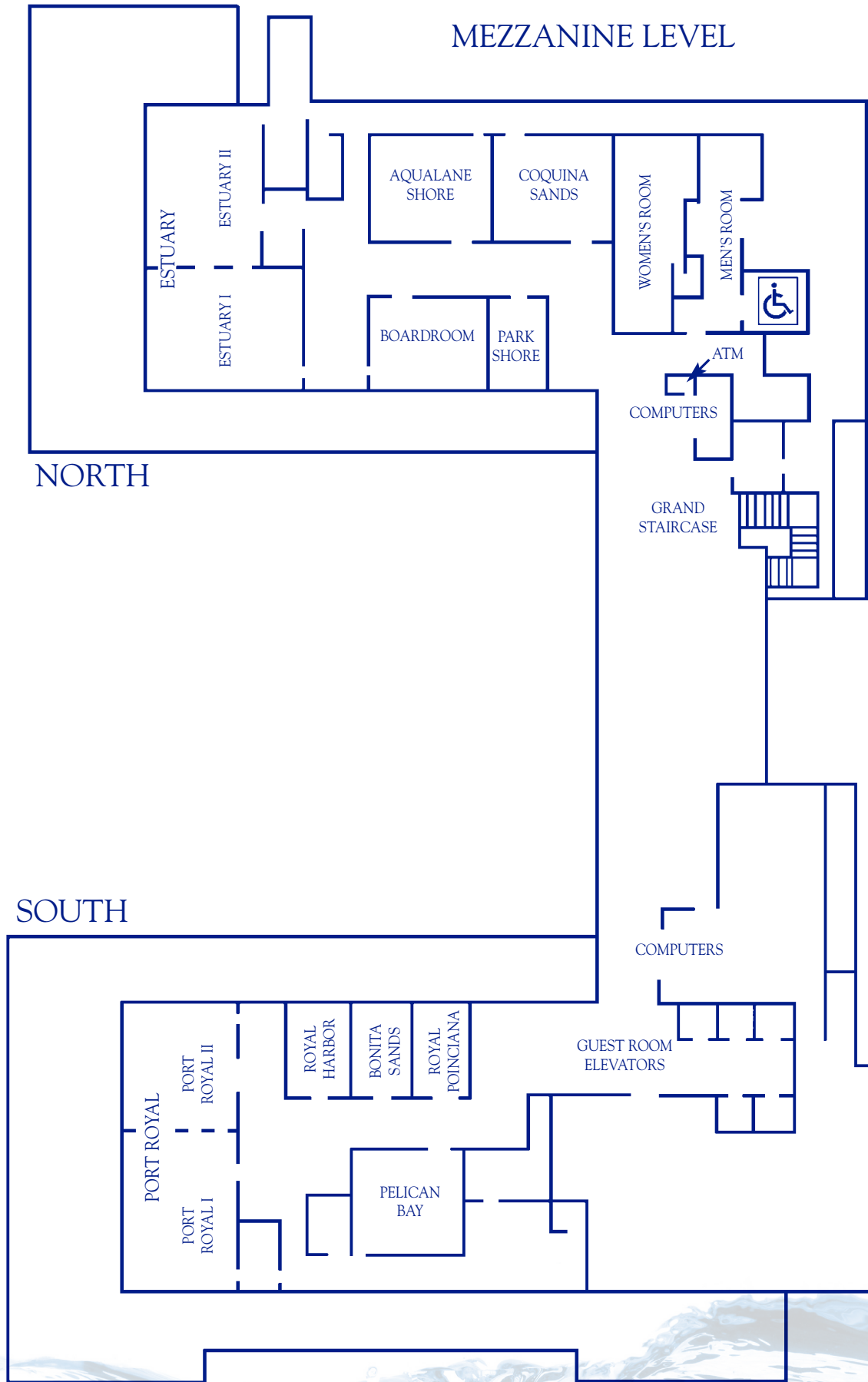
9:30 PM – 11:00 PM • Beach House

Unwind after a long day of events. Bring a bottle to share while enjoying the ambiance of the Beach House. All are welcome & a cash bar will be available.

*Sponsored by: Shutts & Bowen*



# MEZZANINE LEVEL

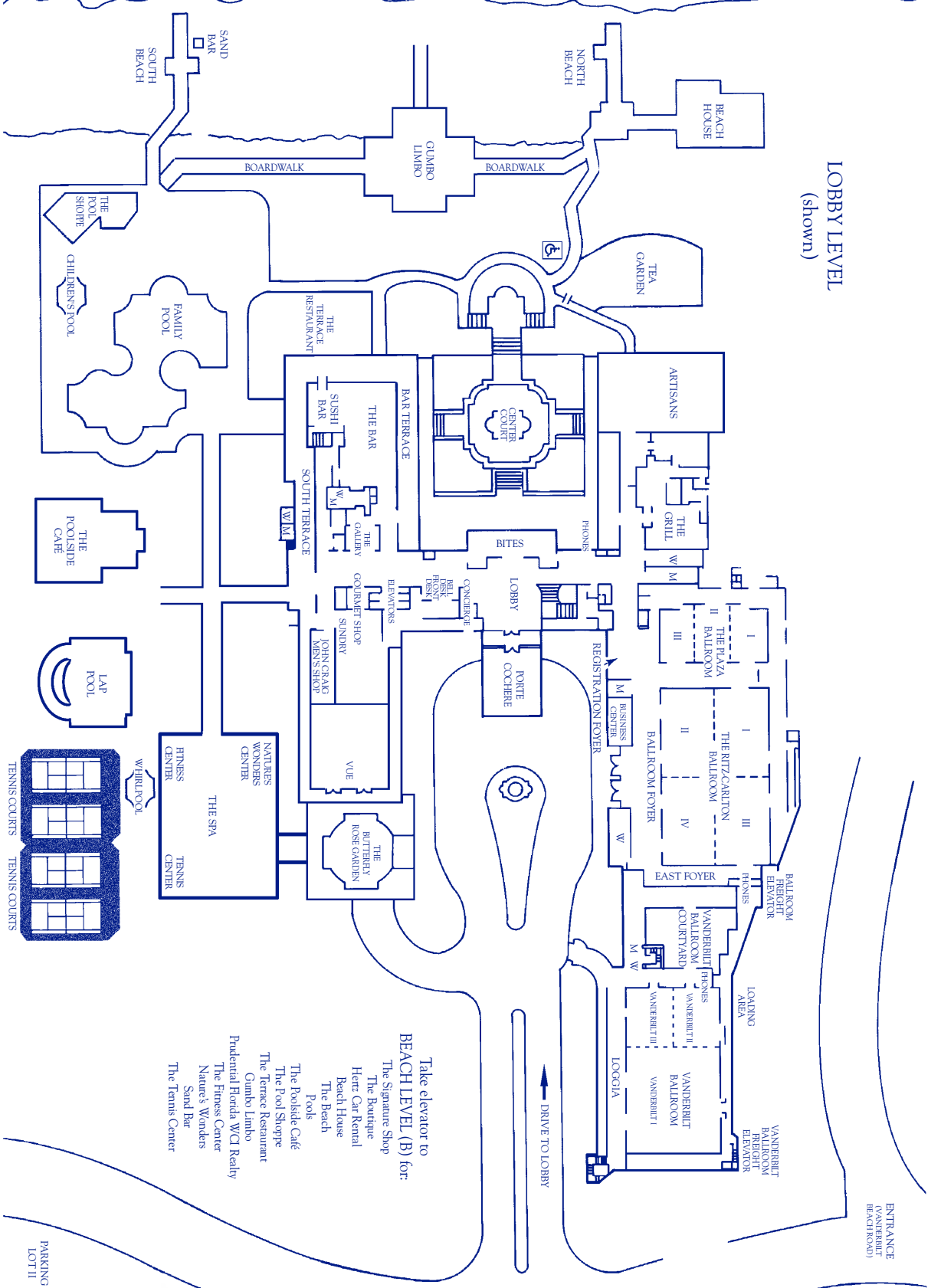


NORTH

SOUTH

Gulf of Mexico

LOBBY LEVEL  
(shown)



ENTRANCE  
(VANDERBILT  
BEACH ROAD)



PRIVATE DRIVE

DRIVE TO LOBBY

Take elevator to  
BEACH LEVEL (B) for:

- The Signature Shop
- The Boutique
- Hertz Car Rental
- Beach House
- The Beach
- Pools
- The Poolside Cafe
- The Pool Shoppes
- The Terrace Restaurant
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- The Fitness Center
- Nature's Wanders
- Sand Bar
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