



BUSINESS LAW SECTION ANNUAL MEETING
Wednesday, June 22, 2022 | 12:00 pm – 12:55 p.m.
VIA ZOOM

Chair: Carlos E. Sardi
Vice-Chair: James Murphy

Judicial Co-Chair: Hon. Karen Specie
Judicial Co-Chair: Hon. Laurel M. Isicoff

AGENDA

- I. **Introduction and Welcome** - Carlos E. Sardi
- II. **Approval of Last Meeting Minutes** - Carlos E. Sardi
See attached **Exhibit A**.
- III. **Ongoing Work and Initiatives**
 - a. Veterans Financial Literacy Project (Status Report) - J. Laurel Isicoff / Carlos E. Sardi
 - b. **“Dorothy L. Hukill Financial Literacy Act”** - Carlos E. Sardi
 - Gov. DeSantis signed into law on March 22, 2022. The new law requires a one-half credit of instruction in personal financial literacy and money management as a graduation requirement for students entering 9th grade in the 2023-24 school year and thereafter. The instruction must include the following topic areas: (1) types of bank accounts offered, opening and managing a bank account, and assessing the quality of a depository institution’s services; (2) balancing a checkbook; (3) basic principles of money management, such as spending, credit, credit scores, and managing debt, including retail and credit card debt; (4) completing a loan application; (5) receiving an inheritance and related implications; (6) basic principles of personal insurance policies; (7) computing federal income taxes; (8) local tax assessments; (9) computing interest rates by various mechanisms; (10) simple contracts; (11) contesting an incorrect billing statement; (12) types of savings and investments; and (13) state and federal laws concerning finance.
 - Great Press / Articles on BLS and the work of Fin Lit Task Force

THANK YOU ALL FOR YOUR HARD WORK TO MAKE THIS A REALITY!!!

- c. Webpage Subcommittee Report – Diane Wells
- d. Resolution for National Financial Literacy Month - Carlos E. Sardi
(Declaring April as Financial Literacy Month in Florida)
- e. Financial Literacy for New Professionals CLE - Tara Trevorow / J. Jay Brown

IV. New Business

- a. Task Force’s Future – Carlos E. Sardi

V. Adjournment

Next Meeting: Labor Day Retreat, Sept. 2-5, 2022
JW Marriott, Marco Island, Florida

EXHIBIT A

