



BUSINESS LAW SECTION
OF THE FLORIDA BAR

BUSINESS LAW SECTION ANNUAL MEETING 2023

AGENDA

Thursday, June 22, 2023, 3:00 p.m.

- I. Call to Order** – Douglas Bates, Chair
- II. Report of Nominating Committee and Election of Officers for 2023-2024** – Greg Yadley, Chair, Long Range Planning
- III. Other New Business**
- IV. Adjournment**



BUSINESS LAW SECTION
OF THE FLORIDA BAR

EXECUTIVE COUNCIL AGENDA

June 22, 2023
3:00pm – 5:00pm
Boca Raton Resort (Addison Ballroom East)
Boca Raton, FL

I. Call to Order – Doug Bates, Chair (Exhibit 1 – Executive Council Members)

II. Commitment to Pro Bono Service

The Section reaffirms its goal to achieve 100% participation in pro bono service by Business Law Section members and attorneys in their firms.

III. Florida Bar Foundation Endowment Trust

The Section proudly acknowledges all Executive Council members who have pledged at least \$1000 to The Florida Bar Foundation Endowment Trust to become Fellows of The Florida Bar Foundation.

IV. Recognition of Sponsors

The Section acknowledges the generous contribution of all its sponsors, including the following Diamond (\$10,000), Sapphire (\$7,500) and Emerald (\$5,000):

DIAMOND SPONSOR	SAPPHIRE SPONSORS	EMERALD SPONSORS
<i>Michael Moecker & Associates</i>	<i>Clark Partington Berger Singerman Buchanan Ingersoll & Rooney PC Eisner Amper Nelson Mullins Petrucelli, Piotrowski & Co</i>	<i>Agentis Akerman Ankura Barakat & Bossa City National Private Dal Lago Law Edelboim Lieberman Revah PLLC Johnson, Cassidy, Newlon & DeCort Kaufman Rossin Meland Budwick Pack Law Registered Agent Solutions, Inc. Sequor Law Shuker & Dorris Shutts & Bowen</i>

		<i>Truist</i> <i>Underwood Murray, P.A.</i>
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- V. Approval of Minutes from January 27, 2023, Executive Council Meeting (Exhibit 2)**
– Stephanie Lieb, Secretary
- VI. Treasurer’s Report (Exhibit 3 – Recent Financials- Supplement to Follow) – Manny Farach, Treasurer**
- VII. Recognition of Section Fellows – Valeria Angelucci, Chair of Inclusion, Mentoring & Fellowship Committee**
- VIII. Reports of Substantive Law Committees**
- A. Bankruptcy/UCC – Marianne Dorris, Chair; Kenneth Murena, Vice Chair; Adina Pollan, Second Vice Chair; Honorable Mindy Mora, Judicial Chair; Prof. Jeffrey Davis, Academic Chair
 - B. Blockchain & Digital Assets Committee – Jude Cooper, Chair; Robert Kain, First Vice Chair; Daniel Maland, Second Vice Chair; Prof. Zachary Catanzaro, Academic Chair
 - C. Business Litigation – Chris DeCort, Chair; Brian Barakat Vice Chair; Joe Van de Bogart, Second Vice Chair; Honorable Edward LaRose, Judicial Chair (State); Honorable Darrin Gayles, Judicial Chair (Federal)
 - D. Computer Law & Technology – Daniel Davis, Chair; Talia Boiangin, Vice Chair; Anessa M. Allen Santos, Second Vice Chair; Honorable Julie Sneed, Judicial Chair; Prof. Vincenc Feliu, Academic Chair
 - E. Corporations, Securities & Financial Services – Michelle Suarez, Chair; Toni Tsvetanova, Vice Chair; Valeria Angelucci, Second Vice-Chair; Prof. Stuart Cohn, Academic Chair
 - F. E-Discovery & Digital Evidence Committee- Avery Chapman, Chair; Jack Kallus, Vice Chair; Trevor Thompson, Second Vice Chair; Honorable William Matthewman, Judicial Chair; Prof. Zachary Catanzaro, Academic Chair
 - G. Intellectual Property Law –Samuel Lewis, Chair; Darren Spielman, Vice Chair; Meredith Mendez, Second Vice Chair; Honorable Mary Scriven, Judicial Chair; Prof. Jake Linford, Academic Chair
- IX. Reports of Standing Committees and Task Forces**

- A. Amicus Brief Guidelines Subcommittee – Dineen Wasylik, Chair; Honorable Edward LaRose, Judicial Chair
- B. Antitrust and Trade Regulation Subcommittee – Dee Dee Fischer, Chair; Honorable Edward LaRose, Judicial Chair
- C. Bankruptcy Judicial Liaison Committee – James Moon, Chair; Honorable Roberta Colton, Judicial Chair
- D. Budget Committee – Manny Farach, Chair
- E. Business Courts Task Force – Jon Polenberg and Honorable Gill Freeman, Co-Chairs
- F. Chapter 48 Task Force – Giacomo Bossa and Jim Murphy, Co-Chairs
- G. Chapter 517 Task Force – Will Blair, Chair; Zach Evangelista, Vice Chair; Prof. Stuart Cohn, Academic Chair
- H. Chapter 607 Sub-Committee – Philip Schwartz and Gary Teblum, Co-Chairs, Andrew Schwartz, Vice Chair
- I. Chapter 617 Task Force - Toni Tsvetanova, Chair
- J. CLE Committee- Utibe Ikpe, Chair; Luis Rivera, Vice Chair; Jacqueline Calderin, Second Vice Chair; Honorable Caryl Delano, Judicial Chair
- K. Communications Committee- Crystal Potts, Chair; Shirley Palumbo, Vice Chair; April Stone, Second Vice Chair; Honorable Paul Hyman, Judicial Chair
- L. Financial Literacy Task Force – Carlos Sardi, Chair; James Murphy, Vice Chair; Honorable Laurel Isicoff, Judicial Chair
- M. Health & Wellness Task Force – Dineen Wasylik, Chair; Kristina Feher, Vice Chair; Honorable Jacob Brown, Judicial Chair
- N. Inclusion, Mentoring & Fellowship Committee – Valeria Angelucci, Chair; Kelly Roberts, Vice-Chair; Katherine Van de Bogart, Second Vice Chair; Honorable Lori Vaughan, Judicial Chair (Federal); Honorable Virginia Norton, Judicial Chair (State)
- O. Labor Day Retreat Committee- Robert Charbonneau, Chair; Jennifer Morando, Vice Chair; Andy Layden, Second Vice Chair
- P. Legislation Committee – Peter Valori, Chair; Robert Barron, First Vice Chair; Woody Pollack, Second Vice Chair

- Q. Long Range Planning Committee – Gregory Yadley, Chair; Honorable Mindy Mora, Judicial Chair
- R. Marketing, Promotions & Sponsorships Committee- Matt Hale, Chair; Peter Maskow, Vice Chair; Michele Moss, Second Vice Chair
- S. Membership Committee- Dana Robbins, Chair; Juan Mendoza, Vice Chair; Christina Taylor, Second Vice Chair; Honorable Karen Specie, Judicial Chair
- T. Opinion Standards Committee- David Peterson and Gary Teblum, Co-Chairs
- U. Pro Bono Task Force & Pro Bono Committee- Kathleen McLeroy, Chair; Glaucia Jones, Vice Chair; Tara Trevorow, Second Vice Chair; Honorable Laurel Isicoff, Judicial Chair
- V. Restrictive Covenant Task Force – Brian Barakat, Chair; Keith Bell, Vice Chair
- W. Rules of Court – Russell Landy, Chair; Chris DeCourt, Vice Chair
- X. Scholar and Fellows Retention Task Force –Stephen Sandiford, Chair; Zach Hyman, Vice Chair; Honorable Catherine McEwen, Judicial Chair
- Y. Series LLC Task Force – Louis Conti, Chair
- Z. State & Federal Courts Judicial Liaison Committee – Giacomo Bossa, Chair; Allison Leonard, Vice Chair; Honorable Lisa Walsh, Judicial Chair (State); Honorable Wendy Berger, Judicial Chair (Federal)
- AA. Uniform Commercial Real Estate Receivership Act (UCRERA) Task Force – Amanda Fernandez, Chair; Jodi Dubose, Vice Chair
- BB. Uniform Commercial Code Article 12 Task Force - Robert Kain, Chair
- CC. Uniform Voidable Transfers Act (UVTA) Task Force – John Hutton, Chair; David Slenn, Vice Chair

X. Reports of Section Liaisons

- A. The Florida Bar Board of Governors – Jorge Piedra
- B. The Florida Bar Continuing Legal Education – Utibe Ikpe
- C. The Florida Bar Council of Sections – Manny Farach
- D. The Florida Bar Diversity & Inclusion Committee – Lynn Sherman
- E. The Florida Bar Real Property, Probate & Trust Law (RPPTL) Section – James Marx
- F. The Florida Bar Young Lawyers (YLD) Division

- G. The Florida Institute of CPAs (FICPA) – Donald Workman
- H. The Out-of-State Division of The Florida Bar – Lawrence Kunin
- I. The Working Group on Legal Opinions (WGLO) – Philip Schwartz

XI. Renewal of Metz, Husband and Daughton contract

XII. New Business

XIII. Other Reports

- A. Chair’s Report – Doug Bates
- B. Chair-Elect’s Report – Mark Stein

XIV. Good and Welfare

XV. Future Full Section Meetings

- A. Sept. 1-4, 2023 - Labor Day Retreat - Ritz Carlton, Naples, Fl.
- B. Sept. 1, 2023 - Second Annual Legislative Update Ritz Carlton, Naples, Fl.
- C. January 2024- Winter Meeting (Florida Bar), Orlando, Fl.

XVI. Future Section Events

- A. November 2, 2023 - View from the Bench - Tampa
- B. November 3, 2023 - View from the Bench – Miami
- C. November 4, 2023 – Veterans Financial Literacy Program – Miami, Tampa, Orlando, Jacksonville, and Pensacola

XVII. Adjournment

January 18, 2023

BUSINESS LAW SECTION EXECUTIVE COUNCIL
(CB849)

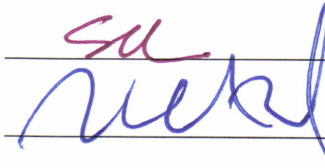
Douglas Alan Bates



Mark Evan Stein



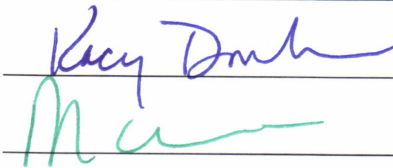
Stephanie Crane Lieb



Manuel Farach

Jorge Luis Piedra

Katherine C. Donlon



Mariane Leight Dorris

Matthew Neil Horowitz

Utibe Inyang Ikpe



Lawrence Hugh Kunin

James Marx

Maria Victoria Pecoraro-McCorkle

Philip Barry Schwartz



Lynn Welter Sherman

Cherine Smith Valbrun

Donald Alan Workman

Ralph Artigliere

Robert W. Barron

Keith Lamothe Bell, Jr.

Willard Andrew Blair



Steven Michael Blickensderfer

*Post
Chair*

Giacomo Bossa

Jacob Aaron Brown

Zachary Leo Catanzaro

Robert Paul Charbonneau

Roberta Ann Colton

Jude Christopher Cooper

Caryl Emerson Delano

Dyanne Elyce Feinberg

Amanda Lara Fernandez

Amanda Elizabeth Finley

Dianne Olivia Fischer

Gill S. Freeman

Jerry A. Funk

Darrin Phillip Gayles

Irwin Robert Gilbert

Paige Adonna Greenlee

Matthew Blake Hale

John Blair Hutton III


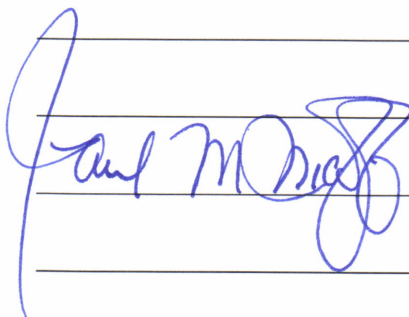
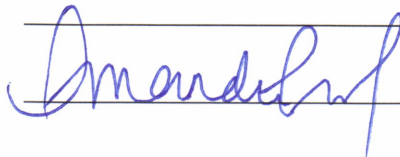
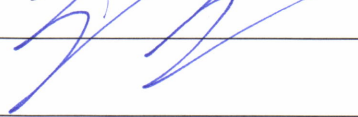
Paul George Hyman, Jr.

Zachary Paul Hyman

Laurel Myerson Isicoff

Edward Camille LaRose

Brett Drew Lieberman

Kimra Denise Major-Morris

Peter James Maskow

William Donald Matthewman

Catherine Peek McEwen

Mindy Mora

Jennifer L. Morando

Kenneth Dante Murena

James Burton Murphy, Jr.

Virginia Baker Norton

P. Olson John K. Olson

Sara M. Paris

P. Polenberg Jon Polenberg

Adina Lea Pollan

Terry Marcus Sanks

Carlos E. Sardi

Andrew Evan Schwartz

Mary S. Scriven

David Joseph Slenn

Thomas Benton Smith

Karen Kinkennon Specie

Darren J. Spielman

Michelle Karinne Suarez

Jacqueline Clementine Tadros

James B. Murphy, Jr.

John K. Olson

Jon Polenberg

Andrew Evan Schwartz

Karen Kinkennon Specie

Darren J. Spielman

Michelle Karinne Suarez

January 18, 2023

Business Law Section Executive Council (CB849)

Michael Chesal

Gary Ira Teblum

Bart Richard Valdes

Lisa Sharon Walsh

Dineen Pashoukos Wasylik

Diane Noller Wells

PostChair

RUSSELL M. BLAIN

Woodrow Pulluck

Russell M. Blain

PostChair

GREGORY C. GAOCEY

Valeria Angelucci

Michele G. Moss

Michele H. Moss

Robert Kain

PostChair

Leyza & Blanco

PostChair

Mark Wolfson

PostChair

ALAN HOWARD

PostChair

Rick Gros

11

Philip Bates


Jim Matulis

Russell Landy

Jacqueline Calderin
Kathleen DiSanto

gaffel

Juan Mendoza



Luis E. Rivera II

JASON B. BURNETT

Christina Taylor

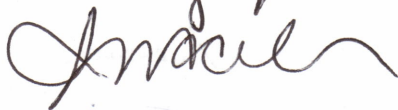
Crystal Potts

~~Crystal Potts~~

Angelique Gulla

~~Angelique Gulla~~

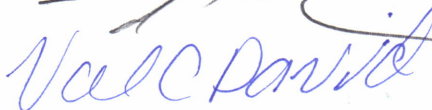
Jocelyne Macelloni



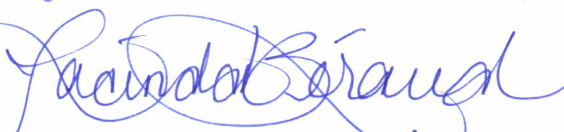
Brian Barakat



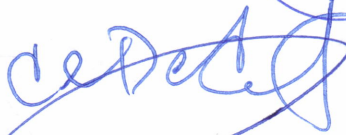
Valerie David



Jacinda Beraud



Chris DeCort



PETER F. VALONE





BUSINESS LAW SECTION
OF THE FLORIDA BAR

EXECUTIVE COUNCIL WINTER MEETING MINUTES

January 26, 2023
Orlando, Florida

I. CALL TO ORDER – Doug Bates, Chair

Douglas Bates, Chair of The Business Law Section of The Florida Bar, duly called the January 26, 2023 Winter Meeting of the Executive Council to order at approximately 4:02 p.m. The attendance list for the meeting is attached as *Exhibit A*.

II. COMMITMENT TO PRO BONO SERVICE

The Chair read the Section's commitment to pro bono service. The Section reaffirms its goal to achieve 100% participation in pro bono service by Business Law Section members and attorneys in their firms. The Chair encouraged the membership to get involved in pro bono by taking a case and/or making a pledge to the Florida Bar Foundation.

The Section proudly acknowledges the following Executive Council members who have pledged at least \$1,000 to The Florida Bar Foundation Endowment Trust to become Fellows of The Florida Bar Foundation:

Douglas Bates
Leyza Blanco
Giacomo Bossa
Hon. Jay Brown
Michael Chesal
Robert Charbonneau
Christopher DeCort
Hon. Caryl Delano
Kacy Donlon
Jodi Dubose
Manuel Farach
Hon. Gill Freeman (Ret.)
Paige Greenlee
Hon. Paul Hyman
Hon. Laurel Isicoff
Stephanie Lieb
Allison Leonard
John Macdonald

Eli Mattern
James Matulis
Kathleen McLeroy
Hon. Catherine McEwen
Hon. Mindy A. Mora
Jennifer Morando
Woodrow "Woody" Pollack
Adina Pollan
Carlos Sardi
Philip Schwartz
Detra Shaw-Wilder
Lynn Walter Sherman
Mark Stein
Michelle Suarez
Gary Teblum
Dineen Wasyluk
Donald Workman
Gregory C. Yadley

Recognition of Sponsors

The Chair acknowledged the generous contribution of all its sponsors, called out the Diamond, Sapphire, and Emerald Sponsors by name and thanked them for their contributions.

DIAMOND SPONSOR	SAPPHIRE SPONSORS	EMERALD SPONSORS
<i>Michael Moecker & Associates</i>	<i>Clark Partington Berger Singerman Buchanan Ingersoll & Rooney PC Eisner Amper Nelson Mullins Petrucelli, Piotrowski & Co</i>	<i>Agentis Akerman Ankura Barakat & Bossa City National Private Dal Lago Law Edelboim Lieberman Revah PLLC Johnson, Cassidy, Newlon & DeCort Kaufman Rossin Meland Budwick Pack Law Registered Agent Solutions, Inc. Sequor Law Shuker & Dorris Shutts & Bowen Truist Underwood Murray, P.A.</i>

III. APPROVAL OF MINUTES FROM SEPTEMBER 5, 2022 EXECUTIVE COUNCIL ANNUAL MEETING – Stephanie Lieb, Secretary

Secretary Lieb presented the Minutes from the September 5, 2022 Labor Day Retreat Meeting of the Executive Council of the Section. There being no comments from the Executive Council members, Luis Rivera moved the Minutes be approved. The motion was seconded by Brian Barakat and, upon vote taken, carried unanimously.

IV. TREASURER'S REPORT – Manny Farach, Treasurer

Treasurer Farach provided a report on the Section's financials. He requested the Florida Bar to provide monthly reports and to break out our signature events. He indicated we have a healthy fund balance and we are working to keep expenses under control as we proceed.

A motion was made by Michelle Suarez to approve the Treasurer's report. Brian Barakat seconded the motion. Upon vote taken, the motion was approved unanimously.

V. RECOGNITION OF SECTION FELLOWS – Valeria Angelucci, Chair of Inclusion, Mentoring & Fellowship Committee

Chair Angelucci recognized all of our Fellows and encouraged the membership to get to know the Fellows. She shared that the committee had just opened fellowship applications for 2024-2025. She stated the Committee appreciates everyone welcoming the 2023-2024 Fellows. Her committee had a good meeting with the membership of the Committee and shared that there will be a ten year anniversary celebration of the Fellowship Program at the Labor Day retreat as well as spotlights of the 2023-2024 Fellows on the Section's website.

VI. REPORTS OF SUBSTANTIVE LAW COMMITTEES

A. Bankruptcy/UCC – Mariane Dorris, Chair; Kenneth Murena, Vice Chair; Adina Pollan, Second Vice Chair; Honorable Mindy Mora, Judicial Chair; Prof. Jeffrey Davis, Academic Chair

Chair Dorris gave the report for the Committee. Two triple motions passed in Committee (FDUPTA and Motor Vehicles). A CLE program was presented at the Committee meeting, for which she thanked judges and panelists. She shared that the Committee has planned two CLEs upcoming as well as planning on lunch and learns throughout the year.

The Committee proposed a triple motion relating to FDUPTA. The motion was made by Chair Dorris, and seconded by Mark Wolfson. There was no further discussion. Abstentions by the members of the judiciary were noted. The motion carried, with the text below.

RESOLVED, that the Florida Bar Business Law Section (the "Section") supports proposed legislation amending § 501.207(3), (the "Amendment") of the Florida Deceptive and Unfair Trade Practices Act ("FDUTPA"). The Amendment being added to FDUTPA is based upon (i) the legislative staff analysis of the Fla. S. Judiciary Comm.; and (ii) the reasoning provided in Freeman v. Dean Witter Reynolds, Inc., 865 So. 2d 543, 550 (Fla. 2d DCA 2003), Isaiah v. JPMorgan Chase Bank, 960 F.3d 1296 (11th Cir. 2020) and Perlman v. PNC Bank, N.A., 38 F.4th 899 (11th Cir. 2022). The form of the Amendment is subject to such further changes as are deemed appropriate and approved by (i) the Bankruptcy/UCC Committee, and (ii) the Executive Committee of the Section; and it is further

RESOLVED, that the Amendment: (1) Is within the Section's subject matter jurisdiction as described in the Section's bylaws; (2) Either is beyond the scope of the bar's permissible legislative or political activity, or is within the bar's permissible scope of legislative or political activity and the proposed Section position is consistent with an official bar position on that issue; and (3) Does not have the potential for deep philosophical or emotional division among a substantial segment of the bar's membership.

The Committee proposed a second triple motion relating to motor vehicle exemptions. Luis Rivera made the presentation to the Executive Council. After the presentation, a motion was made by Luis Rivera, and seconded by John Olson. There was no discussion. Abstentions by the members of the judiciary were noted. The motion carried, with the text below.

Proposed Triple Motion for the proposed change to the Business Law Section's approved legislative position as the proposed legislation to increase the Florida motor vehicle exemption.

RESOLVED, that the Florida Bar Business Law Section (the "Section") amends its approved legislative position that supports the proposed legislation amending Subsection (1) of section 222.25, Florida Statutes to increase the motor vehicle exemption from \$1,000 to \$5,000 to also include support for the Bill (that has yet to be filed, but expected presently) to include a periodic upward adjustment akin to the automatic adjustment built into Bankruptcy Code Section 104. This amendment to the Section's approved legislative position is based on the Section (1) being advised that House Representative Gottlieb is planning to re-file a revised version of his Bill HS 265 which was vetoed by Governor DeSantis that removes the language that created an increase motor vehicle exemption amount only to those debtors that filed a bankruptcy case; and (2) the Section feeling it is appropriate to suggest and support the Bill with a plain dollar amount increase for all debtors to \$5,000 with a periodic adjustment to the Florida motor vehicle exemption to adjust for inflation as the adjust would remove the need to revisit the Florida motor vehicle exemption periodically and eliminate the need of the Section to dedicate legislative resources to these future adjustments.

The prior approved legislative position of the Section is that the Section supports the increase, but not the language that created different exemption dollar amounts for debtors who have filed a bankruptcy case and debtors who have not. The suggested text or additions to the Bill are subject to such further changes are deemed appropriate and that are approved by (i) Bankruptcy/UCC Committee; and (ii) the Executive Committee of the Section; and it is further

RESOLVED, that the Amendment:

- 1. Is within the Section's subject matter jurisdiction as described in the Section's bylaws;*
- 2. Either is beyond the scope of the bar's permissible legislative or political activity, or is within the bar's permissible scope of*

legislative or political activity and the proposed Section position is consistent with an official bar position on that issue; and

3. Does not have the potential for deep philosophical or emotional division among a substantial segment of the bar's membership.

Finally, Russ Blain presented a resolution memorializing the contributions of The Honorable Michael G. Williamson to The Florida Bar and specifically the Business Law Section as outlined in the resolution in Exhibit 4 to the agenda. A motion to approve the resolution was made by Russ Blain, with a second by John Olson. The motion carried unanimously by acclamation.

B. Blockchain & Digital Assets – Jude Cooper, Chair; Robert Kain, First Vice Chair; Daniel Maland, Second Vice Chair; Prof. Zachary Catanzaro, Academic Chair

Vice Chair Kain gave the report for the Committee, which included an update on the status of the Article 12 Task Force. The Task Force is working on completing a white paper that will explain the reason for proposing the legislation and outlining the intended changes to Florida's Uniform Commercial Code. The goal remains to have the legislation ready to be proposed for the 2024 legislative session. We will be vetting the white paper in the summer, and asking for comment from various other substantive committees, including Bankruptcy/UCC, Business Litigation, Computer, and IP.

Vice Chair Kain noted that there is a possibility that Article 12 may be proposed independently in the legislature this session and that there are rumors that versions of Article 12 are at "bill drafting" at the moment, but we have not seen the drafts to date. He said that if at some point another legislator proposes a version of Article 12, we will be ready to provide technical content and advice where necessary. Alternatively, if the proposed legislation contains provisions with which we as a committee disagree, we may be going to the Executive Council for approval of a position that will allow us to either provide content or oppose the legislation. The meeting concluded with the Committee deciding to table the issue for several weeks, with the expectation that at such time we will have more information about the existence or status of the proposed bills.

The Committee then discussed appointing members of the Committee to serve as liaisons for standing committees. So far, Jude Cooper will be the liaison for CLE and IMF, and Woody Pollack will be the liaison for Legislation. The remaining positions will be filled by volunteers from the Committee.

Daniel Maland provided a report on the two previous CLEs put on last year by the Committee. He noted that the next CLE will discuss blockchain issues in real estate transactions and that there are two additional CLEs in the works, making a total offering of 5 CLE programs.

It was reported that the Committee concluded with an extensive discussion regarding the implications of the FTX bankruptcy (these included predictions of considerably more bankruptcy filings in the crypto space; and the potential liability of Tom Brady and other "sponsors" for advertising for FTX); and the bankruptcy court's recent decision in the Celsius matter regarding who owns cryptocurrency in one class of accounts held by the debtor.

C. Business Litigation – Chris DeCort, Chair; Brian Barakat Vice Chair; Joe Van de Bogart, Second Vice Chair; Honorable Edward LaRose, Judicial Chair (State); Honorable Darrin Gayles, Judicial Chair (Federal)

Chair Chris DeCort gave the report. The Committee formed the “Direct vs. Derivative Study Group” to consider whether revisions to existing mirror language in the LLC and corporations statutes addressing what actions are direct and what actions are derivative are needed with respect to the correct standard. The Study Group will work with the Ch. 607 Drafting Subcommittee, which per Phil Schwartz, will endeavor to include any revisions in the legislation intended to be presented in the 2024 legislative session. Giacomo Bossa will chair the Study Group.

The Committee voted to disband the Study Group formed at Labor Day to review the change from PDFs to links for service of court documents. It was agreed that the transition has gone rather smoothly and no real concerns were voiced regarding the ability to obtain access to documents from the e-Portal. The Committee thanked Daniel Davis for his efforts on the Study Group.

Chair DeCort reported that Brian Barakat presented on “Hot Topics”— the proposed FTC rule banning all non-compete agreements and also provided an update on the Ch. 542 Task Force which will be drafting a comment to the FTC’s proposed rule for submission by end of comment period (February 2023), with the proposed comment being submitted for Executive Council approval and then Big Bar approval.

Chair DeCort further reported that in committee Mr. Barakat provided an update on behalf of the Settlement Agreement Study Group which has been conducting research and preparing a written opinion summary to respond to the request from Representative Beltran that the Section investigate the adoption of statutory settlement and release language to apply when parties who settle are unable to reduce their agreement to a writing. The Study Group has prepared a memorandum on its preliminary analysis in which it recommends against a statutory approach and instead proposes—if any action—the publication of a form settlement agreement. The memorandum and current draft form agreement were made available to the committee members. Further revisions to the form agreement are expected.

Second Vice Chair Joseph Van de Bogart informed the Committee that its goal is targeting up to three lunch hour CLE programs for the spring to summer, as well as a larger CLE (possibly in the spring) on practical advice for business litigators (specific topics TBD).

D. Computer Law & Technology – Daniel Davis, Chair; Talia Boiangin, Vice Chair; Anessa M. Allen Santos, Second Vice Chair; Honorable Julie Sneed, Judicial Chair; Prof. Vincenc Feliu, Academic Chair

Vice Chair Boiangin gave the report. Ms. Boiangin provided update on upcoming legislative session. Nine hot topics were covered, most of which addressed heavy cases against social media and also fines for violation of GDPR and other regulations. She also noted that Section 230 is also under attack and that several data privacy updates go into effect this year, including changes in California and Virginia this year. A live demonstration of ChatGPT was made at the Committee meeting, which was discussed in detail.

The Committee is organizing a CLE on the rapidly developing innovations in AI technology and the impact upon the legal practice.

The Committee has the following liaison positions:

1. Pro bono – Eli Mattern
2. Articles – Mike Bittner (New appointment)
3. CLE – Liz Stamoulis (Not present)
4. Judicial – Hon. Julie Sneed (No updates)
5. Academic – Prof. Vicenç Feliu

Finally, the Committee remains on standby for any upcoming data privacy legislation

E. Corporations, Securities & Financial Services – Michelle Suarez, Chair; Toni Tsvetanova, Vice Chair; Valeria Angelucci, Second Vice-Chair; Prof. Stuart Cohn, Academic Chair

Chair Suarez gave the report. The Committee meeting had just under 20 attendees between those attending in person and online via Zoom. At the Committee meeting, Lou Conti reported on the Series LLC Task Force and reported that if the proposed legislation is able to find two supporting sponsors of the bill, which had not been identified yet, it will be submitted and filed as a bill in the 2023 legislative session. Otherwise, it will be a 2024 legislative session bill.

At the Committee meeting, Toni Tsvetanova reported on the progress of the Chapter 617 Task Force (FL's Not-For Profit Corporation Statute). The 617 Task Force has divided into subgroups that have met regularly to undergo review of Ch. 617 provisions and make recommendations with respect to necessary revisions. At the Committee meeting, Will Blair reported on the Chapter 517 Task Force (FL's Securities Statute), which has also divided into subgroups that are meeting approximately once a month to address several sections of proposed revisions to the statute. The Task Force is looking to other state's securities laws and the Uniform Securities Act in developing a proposed draft legislation.

At the Committee meeting, Gary Teblum reported as co-chair of the Opinion Standards Committee and a potential Opinions Standards seminar was discussed with the hope of creating a CLE event out of this. At the Committee meeting, Phil Schwartz reported on the Chapter 607 Subcommittee which is looking at the relevant provisions of the RMBCA and the DGCL to consider ratification of defective corporate acts in evaluating whether something addressing defective acts should be added to Chapter 607. At the Committee meeting, Phil also noted that the Chapter 607 Subcommittee discussed the need to involve business litigators in the discussion when the time comes into looking at Chapter 607's language with regard to direct versus derivative actions.

At the Committee meeting, Michelle Suarez reported on a very successful Regulation D/A+ CLE that was put on in October that had over 50 registrants and called for potential CLE ideas and received great feedback on plans for 5 potential CLE ideas in the works to come out of this committee over the next 1-2 years. At the Committee meeting, Greg Yadley reported on the Securities Institute which is taking place March 2&3 in Miami, noting that those who register before February 1st, will get a discounted rate (early bird rate).

At the request of Chair Suarez, Mr. Conti proposed a new triple motion for Series LLCs, the text of which is below.

RESOLVED, that the Florida Bar Business Law Section support proposed legislation amending the Florida Revised Limited Liability Company Act (Chapter 605) to adopt the provisions of the Uniform Protected Series Act promulgated by the Uniform Law Commission, as new Sections 605.12101 through 605.12803 of the Florida Revised Limited Liability Company Act, substantially in the form of the draft legislation proposed by the Protected Series LLC Task Force of the Business Law Section with input from the Real Property Probate & Trust Law Section, dated as of January 13, 2023, that was circulated to the Corporations, Securities, and Financial Services Committee, and the Executive Council of the Florida Bar Business Law Section, and subject to such further technical and refinement changes as deemed appropriate and approved by the Protected Series LLC Task Force and the Executive Committee of the Florida Bar Business Law Section.

FURTHER RESOLVED, that the proposed legislation: (1) is within the Business Law Section's subject matter jurisdiction as described in the Section's bylaws; (2) is within the bar's permissible scope of legislative or political activity and the proposed Section position is not inconsistent with any official bar position on that issue; and (3) does not have the potential for deep philosophical or emotional division among a substantial segment of the bar's membership.

Mr. Conti made the motion to approve, which was seconded by Will Blair. Abstentions by judiciary were noted. The motion carried.

- F. E-Discovery & Digital Evidence** - Avery Chapman, Chair; Jack Kallus, Vice Chair; Trevor Thompson, Second Vice Chair; Honorable William Matthewman, Judicial Chair; Prof. Zachary Catanzaro, Academic Chair

Chair Chapman gave the report for the Committee.

Chair Chapman reported that, at the Committee meeting, representatives of the Civil Rules Task Force addressed the status of the Proposed Revisions to Rules to Incorporate State Court Rules regarding Initial Disclosures and Supplemental Discovery, noting that the Florida Supreme Court had adopted the Task Force's comment that there should be 3 tracks such that not all trials would be streamlined. At the Committee meeting, it was noted that with respect to other issues that the Task Force had raised (i.e., Sanctions; Service of Subpoenas; and Case Management), the Florida Supreme Court has not asked for comment on those other items yet but there was an expectation that the Court will be seeking comments on those other items in the future. At the Committee meeting, it was also noted that the Florida Bar Civil Rules Task Force is broken up into Sub-Committees, with an expectation of the need to have further comments back to Supreme Court by July 3rd. At the Committee meeting, Bart Valdes stated that, right now, there is nothing further on

which to provide comments but he promised to update the Committee when there are further items on which comments are needed so that the Committee can work on comments if considered advisable. At the Committee meeting, Mr. Valdes noted that the issue of Meet and Confer should prove to be a very important issue on which comments may be needed.

The Committee then addressed the following topics: First, the Florida Bar needs article submissions. Second, the Committee would like to have a seminar on case law update and mock trial at the Annual Meeting. Third, the Committee should request a new Vice Chair be appointed in light of current Vice Chair Thompson resigning. Finally, the Committee needs to appoint a new designated liaison for the legislation committee.

- G. Intellectual Property Law** - Samuel Lewis, Chair; Darren Spielman, Vice Chair; Meredith Mendez, Second Vice Chair; Honorable Mary Scriven, Judicial Chair; Prof. Jake Linford, Academic Chair

Vice Chair Spielman gave the report. He reported that the Committee is in continued preparation and planning for the 2023 IP Symposium scheduled for March 30-31, 2023, Grand Hyatt Tampa Bay. Registration now open. A Board Certification Update was provided identifying that there are 136 currently board-certified members and there are 5 scheduled to sit for the next exam. At the Committee meeting, the Committee (i) received an update from April Martindale regarding the BLS Scholars and Fellows Retention Task Force, (ii) received an update regarding the Article 12 Task Force from Robert Kain, (iii) was provided an update by Dineen Wasylik regarding the Copyright Office Small Claims program, (iv) created a new working Task Force regarding the International NICE Trademark Codes, and the desire to potentially have Florida's trademark system adopt a mirrored version, and (v) had a CLE titled "USPTO Trademark Reexamination and Expungement" by Allison R. Imber, Allen Dyer Doppelt + Gilchrist, PA, Orlando.

VII. REPORTS OF STANDING COMMITTEES AND TASK FORCES

- A. Amicus Brief Guidelines Subcommittee** – Dineen Wasylik, Chair; Honorable Edward LaRose, Judicial Chair

Chair Wasylik gave the report. She noted that there were no cases pending for which the Section had submitted amicus briefs. She advised that, with respect to SC2021-1071 WPB HOTEL PARTNERS, LLC vs POINT CONVERSIONS, LLC, the case had settled in October, a few days before its scheduled oral argument, so we will never know whether the Section's amicus brief had any bearing on the parties' decision to settle. Chair Wasylik reported that the Florida Bar is considering amending the rules for amicus participation to distinguish between voluntary and mandatory sections (BLS is voluntary because it is "funded by voluntary member dues") and tightening up the procedures for making changes to filings in cases and in rulemaking proceedings. She stated that the Subcommittee will update the Section's guidelines once any amended rules from the Florida Bar are finalized. Chair Wasylik asked any member of the Section who has a case on which they think the Business Law Section should weigh in, they should let her know as soon as possible after the briefing schedule is set for the case because the timing is very tight. She encouraged all members of the Executive Council to review the Section's current amicus brief procedures and guidelines, which are posted on the Section's website.

B. Antitrust and Trade Regulation Subcommittee – Dee Dee Fischer, Chair; Honorable Edward LaRose, Judicial Chair

Jim Murphy gave the report. Mr. Murphy reported that the Chair of the Subcommittee has left and Section is looking for a new Chair. Chair Bates agreed to set up a task force after the Executive Council meeting to evaluate and recommend whether to continue the Subcommittee, disband the Subcommittee, or combine it with another Committee, Subcommittee or Task Force.”

C. Bankruptcy Judicial Liaison Committee – James Moon, Chair; Honorable Roberta Colton, Judicial Chair

Judge Delano gave the report for Judge Colton. The meeting was very well attended with 45-50 lawyers and 10 sitting judges in attendance. The Committee unanimously approved the Michael G. Williamson resolution. At the Committee meeting, Hon. Scott Grossman led discussion on law firm financials and challenges and there was a presentation on Restructuring Support Agreements by Trish Redmond, John Hutton and Joe Luzinski, which was well received.

D. Budget Committee – Manny Farach, Chair

No report.

E. Business Courts Task Force – Jon Polenberg and Honorable Gill Freeman, Co-Chairs

No report.

F. Chapter 48 Task Force – Giacomo Bossa and Jim Murphy, Co-Chairs

Co-Chair Bossa gave the report. The Committee’s CLE was well attended, with over 100 people in attendance and with Carlos Sardi, Giacomo Bossa, Valeria Angelucci, and Jim Murphy presenting. The Committee plans to do more CLEs going forward.

G. Chapter 517 Task Force – Will Blair, Chair; Zach Evangelista, Vice Chair; Prof. Stuart Cohn, Academic Chair

Chair Blair gave the report. He shared the Task Force had a productive meeting and a dynamic group discussion, and primarily discussed Georgia’s “Invest Georgia Exemption” and whether we should take a similar approach in Florida. That exemption allows issuers to raise up to \$5 million in a 12-month period, with non-accredited investors allowed to invest no more than \$10,000, with the requirement that the funds received in the offering must be placed in escrow and with portals permitted but not mandated. The Committee will continue to assess this statute in its meetings.

H. Chapter 607 Subcommittee – Philip Schwartz and Gary Teblum, Co-Chairs, Andrew Schwartz, Vice Chair

Co-Chair Schwartz gave the report for the Subcommittee. He reported that the Subcommittee is in the process of finalizing a proposal to further update Florida’s for-profit corporate statute to address ratification of defective corporate acts, based mostly on the RMBCA provisions that were

developed several years ago, noting that the Subcommittee has been discussing the right standard to adopt in Florida and that representatives of the Subcommittee have made a presentation to the Business Litigation Committee to keep that group in the loop. It was stated that the Subcommittee hopes to have a bill addressing ratification of defective corporate acts ready for submission to and consideration at the 2024 legislative session.

I. CLE Committee - Utibe Ikpe, Chair; Luis Rivera, Vice Chair; Jacqueline Calderin, Second Vice Chair; Honorable Caryl Delano, Judicial Chair

Chair Ikpe gave the report. The Committee is continuing to urge substantive committees to come up with CLEs, and shared that the Committee is available to assist in the process of putting those CLEs together. The Committee has several resources on the Section's website, and is working on a one-page document that will be a step-by-step guide on how to coordinate a BLS CLE. Additionally, the Committee is calling on members to submit articles for submission to the Florida Bar Journal. Chair Ikpe noted that the Committee has not been getting a steady stream of submissions, and members should take advantage of this publication opportunity. It was noted that the style guide, deadlines, and other relevant information are on the CLE Committee's page on the Section's website, and the Chair stated that anyone that is interested, should reach out to her.

It was reported that during the CLE Committee meeting, Mr. Rivera updated the Committee on Governor Laird Lile's proposed amendment to Rule 6-12, which removes the Young Lawyers Division as the sole developer and administrator of the basic skills course requirement and allows any Florida Bar section or division to develop a basic skills course.

At the Committee meeting, Judge Delano reported that she had discussed the proposed rule amendment with Section Chair Douglas Bates and was advised the Section's goal is to support whatever rule or policy the Board of Governors and Supreme Court adopt.

The consensus of the CLE Committee was that Chair Ikpe propose to the Executive Council that the Section should report back to Governor Lile that the Section supports the Board of Governors and whatever final outcome is reached, and the Section stands ready, willing, and able to produce a basic skills course, with or without the assistance of the YLD.

J. Communications Committee - Crystal Potts, Chair; Shirley Palumbo, Vice Chair; April Stone, Second Vice Chair; Honorable Paul Hyman, Judicial Chair

Chair Crystal Potts gave the report. The Communications Committee had a good meeting on January 19, 2023 via Zoom. The Committee is continuing with its Better Know a Judge series, having published recorded interviews with Judge Julie Sneed in December 2022 and Judge Jay Brown in January 2023. She encouraged members to please go watch the videos to familiarize themselves with these judges. The videos are on the Section's YouTube channel and can be accessed through the BLS newsletter, the BLS website, and the BLS Facebook page.

Another project the Committee started is a Sponsor Spotlight for the Section's higher-tier sponsorships. The goal is to publish spotlights, highlighting one of the sponsors each month. It was noted that the Section published a Spotlight on Buchanan Ingersoll & Rooney in January.

Chair Potts reported that, regarding the newsletters, the Committee will be publishing two special editions this year as the Committee did in 2021. The Black History Month is to be published on February 13 and Women's History/International Women's Month is to be published on March 6. She noted that the Committee is looking for articles/content related to both themes to publish in the respective months.

Chair Potts stated that the Committee is always looking for more blog and newsletter content, noting that there has not been a steady stream of such content. She encouraged content submission. Finally, in her report, she reminded all committees, Task Force, and Subcommittee leadership to check their respective web pages on the BLS website and to let Tracey Eller know if anything needs to be updated.

K. COVID-19 Pandemic Recovery Task Force – Detra Shaw-Wilder and Bart Valdes, Co-Chairs

Co-Chair Valdes gave the report. He reported that this Task Force has run its course and it was time to dissolve the Task Force. A motion to dissolve the Task Force was made by Chair Valdes. He reiterated that the resources created by the Task Force would stay in place. The motion was seconded by Dineen Wasylik. The motion carried, whereupon the Task Force was dissolved. Chair Bates thanked the Co-Chair and the members of the Task Force for its excellent work.

L. Financial Literacy Task Force – Carlos Sardi, Chair; James Murphy, Vice Chair; Honorable Laurel Isicoff, Judicial Chair

Chair Sardi gave the report. It was reported that the Task Force briefly discussed the issues related to the implementation of the “Dorothy L. Hukill Financial Literacy Act”, which was enacted into law back in March 22, 2022. Chair Sardi noted that the Task Force had concluded that the implementation process had become somewhat politicized and thus the Task Force decided to step back and to support implementation generally but to limit the Task Force’s participation in the actual implementation.

Chair Sardi reported that the Task Force also discussed its continued efforts to have the month of April be declared in Florida as “Financial Literacy Month.” He noted that the proposed proclamation was shared with the Section’s legislative team, who will seek to kick off the roll out, handle filing it and handle getting support for it with other constituents.

At the meeting of the Task Force, Tara Trevorow gave an update on the rescheduling of the Financial Literacy for New Professionals CLE, which, unfortunately, got cancelled as a result of Hurricane Nicole last November 2022. The CLE is being done in conjunction with the Florida Institute of Certified Public Accountants (“FICPA”), and is be targeted to young professionals starting their careers in law or accounting. Standby on the new date.

At the meeting, the Task Force discussed a new initiative consisting of financial literacy programs for veterans around the state during the upcoming month of November (National Veterans and Military Families Month), and is looking to the Section’s members and the EC to provide local support to make this happen. He noted that programs are planned to be held in Miami/Ft Lauderdale, Orlando, Jacksonville, Pensacola, and Tampa/St. Petersburg areas. Template and materials are already made and are available in our webpage as a result of our pilot program last

year in Miami. As a result, the Task Force is looking for local volunteers /coordinators. Volunteers can sign up at the Task Force's webpage on the Section's website.

Lastly, at the meeting, the Task Force discussed its future role and mission. In that regard, the Task Force discussed expanding its role and expects to report back with a proposal and to seek approval from EC, if required. Chair Sardi noted that the Task Force will have an interim, follow up meeting in either February or March before the Section's annual meetings to discuss the details of the proposal.

M. Health & Wellness Task Force – Dineen Wasylik, Chair; Kristina Feher, Vice Chair; Honorable Jacob Brown, Judicial Chair

Chair Wasylik gave the report. The Task Force put on a fabulous CLE on Mental Health First Aid in October, available free to members (and membership fee for anyone else). The video for that is available for viewing on the Mental Health and Wellness page on the website. The Chair extended many thanks to Judge Isicoff for acting as moderator. The next one, February 28th at noon, is entitled "Skills and Strategies for Handling Everyday Emotions and Stress" which will review practical ways to effectively manage everyday stress and emotions so that one may find greater emotional balance, and will be moderated by Hon. Lisa Walsh. Additional CLEs are scheduled for May 2 and July 18, 2023, which will deal with recognizing and dealing with mental health issues in those around you, and handling difficult clients. Finally, the Chair extended many thanks to Dr. Kristin Jones, who has put in a lot of work to help us shape this series, and to Peter Valori for introducing us to his amazing wife's capabilities in this regard.

N. Inclusion, Mentoring & Fellowship Committee – Valeria Angelucci, Chair; Kelly Roberts, Vice-Chair; Katherine Van de Bogart, Second Vice Chair; Honorable Lori Vaughan, Judicial Chair (Federal); Honorable Virginia Norton, Judicial Chair (State)

Chair Angelucci gave the report. IMF had a good joint meeting with Membership, attended by about 20 people in person. The Committee announced that the applications for the 2023-2025 Fellowship Program are open, and also discussed this marks the 10th Anniversary of the BLS Fellows program. She reported that the Committee and the Section are hoping to celebrate the Program and the current and former fellows still active in the Section, probably at the Labor Retreat. As part of the advertising and celebration of the Fellows Program, the Committee plans to have Fellows' spotlights featured in the upcoming newsletters.

O. Labor Day Retreat Committee - Robert Charbonneau, Chair; Jennifer Morando, Vice Chair; Andy Layden, Second Vice Chair

Chair Robert Charbonneau gave the report. The Committee's retreat planning for 2023 is well underway for The Ritz Carlton in Naples. However, given the construction underway and uncertainty with timeline, the Committee is exploring a back-up venue. A decision to hold off on the service project planning was made until the venue is solidified. The Whiskey and Wine Tasting will also depend on the venue. The sponsorships levels are being modified and an "Event Concierge" is being added to improve sponsor experience.

P. Legislation Committee – Peter Valori, Chair; Robert Barron, First Vice Chair; Woody Pollack, Second Vice Chair

Chair Peter Valori gave the report. The Legislation Committee met on January 26, 2023 from 3-4pm and received a report from the Section's lobbyists regarding the current Section initiatives for the 2023 legislative session including:

- Judgment Liens
- Series LLC
- ABC
- Warehouse Liens
- Kearney fix
- Financial Literacy Awareness Resolution

Additional issues that may come up during the session as well as standing positions were also discussed including Chapter 517, FDUPTA, and data privacy. The Committee also addressed procedural matters of the Committee, the Section, and the Bar.

Q. Long Range Planning Committee – Gregory Yadley, Chair; Honorable Michael Williamson, Judicial Chair

Chair Yadley gave the report. The Committee is getting geared up for spring, and is at work with current leadership to identify the next crop of chairs and committee chairs to continue to make sure the profession is one where the Section's lawyers act professionally. This process will be undertaken between the retreat and the 2023 annual meeting. There was nothing else to report at this time.

R. Marketing, Promotions & Sponsorships Committee- Matt Hale, Chair; Peter Maskow, Vice Chair; Michele Moss, Second Vice Chair

Chair Hale gave the report. He thanked our sponsors and shared that a new sponsorship deck will be going out soon.

S. Membership Committee - Dana Robbins, Chair; Juan Mendoza, Vice Chair; Christina Taylor, Second Vice Chair; Honorable Karen Specie, Judicial Chair

Vice Chair Mendoza gave the report. The Scholars Program at the Labor Day Retreat was a success. The Section welcomed the class of the 2022 BLS Scholars, which was comprised of 16 Scholars from different law schools across the state and the feedback received from the Scholars was positive.

Membership is also working on a new initiative called the Business Law Practitioner's Project to identify and recruit members of the Florida Bar who practice business law but are either (i) not currently members of the BLS Section; or (ii) members of the BLS Section who are not active. To identify those business law practitioners, the Committee is creating a study group to identify the causes underpinning why current business law practitioners and BLS members are not involved or active in the Section and to investigate potential substantive committees that could be formed to

increase membership and participation. To facilitate the study group, the Committee plans to send around a survey, with the hope of making a presentation on the survey results at a future meeting, possibly as early as the BLS Annual Meeting.

Mr. Mendoza made a motion to authorize the Membership Committee to continue funding the scholars' registration fees for the Section's Labor Day Retreat for up to 20 scholars at \$400 per scholar. There was substantial discussion. There was no second to the motion made. Thereafter, a suggestion to table the motion was made to research (i) what we are advertising; (ii) the budget line item issue; and (iii) how many scholars we wish to have and from which schools.

Chair Bates indicated that if these items were resolved, perhaps a motion could be made and voted upon via email. Thereafter, John Olson made a motion to table this issue, and Robert Charbonneau seconded. The motion to table carried.

T. Opinion Standards Committee - David Peterson and Gary Teblum, Co-Chairs

Co-Chair Teblum gave the report. Mr. Teblum reported that the Committee met by Zoom on January 16, 2023. He noted that the meeting was inadvertently held on Martin Luther King Day and that the scheduling of the meeting on that day resulted in a relatively small turn out. Mr. Teblum reported that although there was some good discussion at the meeting, those in attendance wanted more members of the Committee involved in those discussion points before any decisions could be made. It was agreed that the Committee should look into putting on one or two 90-minute webinars to address opinions issues and agreed that efforts would be made in that regard, noting that the Section had not done any CLE on this topic for over 10 years. Mr. Teblum reported that several of those present at the meeting offered to be involved in the CLE planning and presentation. He also noted that the Committee decided that it wanted to try and schedule another Zoom meeting between the date of this January meeting and the date of the Section's annual meeting with the hope of getting more participation.

U. Pro Bono Task Force & Pro Bono Committee - Kathleen McLeroy, Chair; Glaucia Jones, Vice Chair; Tara Trevorow, Second Vice Chair; Honorable Laurel Isicoff, Judicial Chair

Judge Isicoff gave the report for Chair McLeroy, because Chair McLeroy is also Chair of the Pro Bono Committee of the Florida Bar and was attending the Chief Justice's Pro Bono Award ceremony that was taking place at the same time as the EC meeting.

Judge Isicoff reported the following:

As to the BLS Pro Bono Award: The Deadline for nominations for the BLS Pro Bono Award is January 31. The criteria and nomination form is on the BLS Website. There is currently only one nominee although there are two more nominations "in the works." At the next meeting, the Committee will identify its recommendation to the Executive Council of the BLS and will discuss logistics of selection and presentation.

As to the Pro Bono Pledge Campaign: If members haven't signed up, Judge Isicoff encouraged members to sign up now. If members have signed up, members don't have to sign up again – but members can if they want to. Information on this is on the BLS website.

BLS Pro Bono Committee membership: The Committee is currently a small but dedicated group – to carry out the Committee's mission the Committee needs more members. While voluntary, each substantive committee is supposed to have a liaison to the Pro Bono Committee. Judge Isicoff reached out before the end of the year to remind the substantive committee chairs. Liaisons are important because the Pro Bono Committee needs to know what the BLS members believe are worthy of pro bono focus that may be of particular interest to the Committees and because liaisons are able to bring back pro bono information to the substantive committees. Judge Isicoff thanked those committees who have appointed those liaisons.

Ongoing Pro Bono opportunities: The Veteran's Financial Literacy Project is looking for volunteers to get programs going in Tampa, Miami, Pensacola and Jacksonville. Opportunities are always available through the Florida Pro Bono matters portal – the link is on the Florida Bar Foundation website –local pro bono providers, or “Free Legal Answers” – florida.freelegalanswers.org.

New projects: The Committee is exploring a “Free Legal Answers” corner at the Labor Day Retreat. The Committee is hoping that there will be ideas from the Committee liaisons. The Committee is hoping to restart the business entity events that John Macdonald launched and was presented for several years in Miami and Tampa and at least once in Jacksonville.

Recognition: The Committee is reviewing who might be the BLS Pro Bono Heroes. It is looking at the top 50 hourly reporters from the Florida Bar who are BLS members. There will be special recognition for the top 16. Recognition of the top three will be made with donations to designated projects rather than using the money that we already have budgeted to buy and mail tchotchkes. The Committee would like to profile a pro bono story every quarter. Profiles of some of the Pro Bono Heroes will also be posted from time to time on the BLS website.

V. Proposed Amendments to the Fla. R. Civ. P. Task Force – Bart Valdes and Russell Landy, Co-Chairs; Honorable Ralph Artigliere, Judicial Chair

Chair Landy gave the report. The Civil Rules Task Force discussed the recent Opinion from the Florida Supreme Court rejecting the Workgroup's proposed amendments and issuing letters to various Committees of the Florida Bar to propose amended Rules with instructions. The Florida Supreme Court directed the Civil Rules Committee of the Florida Bar to revise certain proposed Rules relating to the designated track for non-jury trials, mandatory initial disclosures and supplementing discovery that the Task Force, and the BLS, advocated for in its Comment and at oral argument before the Florida Supreme Court. Mr. Landy was commended for his excellent oral argument and it was noted that the issues he argued were addressed by the Florida Supreme Court in its instructions to the Civil Rules Committee of the Florida Bar. The Task Force will work closely with the Civil Rules Committee of the Florida Bar to respond to the Florida Supreme Court's directive to provide revised proposed amended Rules by July 3, 2023.

The Task Force asked to be converted to a full committee of the BLS. Thereafter, Chair Landy made a motion to convert the Task Force to a Committee of the BLS. John Polenberg seconded. The motion carried, and hereafter the Committee shall be called the “Rules of Court Committee.”

W. Restrictive Covenant Task Force – Brian Barakat, Chair; Keith Bell, Vice Chair

Chair Barakat gave the report. He reported that the Task Force met to address concerns raised by the FTC’s proposed rule which purports to rescind all non-competes in the US. That rule is in the comment period, which ends March 20, 2023. It is speculated that this comment period will be extended another 60 days. He indicated that the Task Force resolved that it was appropriate for the Section to provide a comment, using the approach the Task Force developed as well as addressing challenges presented by the current proposed rule. Jim Murphy and Alejandra Iglesia volunteered to assist with the initial draft of the comment.

Although not being handled by the Restrictive Covenant Task Force, Mr. Barakat was asked to report on the status of the Statutory Settlements Working Group while he had the floor. Mr. Barakat reported that this Working Group last met formally in October where it agreed on a recommended form of settlement agreement in lieu of a statutory solution to this problem. Both the memo and the proposed form are available for presentation to the legislator who had promoted legislation sponsor.

X. Scholar and Fellows Retention Task Force – Stephen Sandiford, Chair; Zach Hyman, Vice Chair; Honorable Catherine McEwen, Judicial Chair

Judicial Chair McEwen gave the report. First, the Judicial Chair gave a reminder of both the Task Force’s Mission and expected deliverables.

1. To paraphrase the language of the EC Minutes of Sept. 2017 and June 2018, the Task Force’s Mission is two-fold: (i) to review and study why the Section is not getting fellows/students to continue attendance after their fellowship term and after law school and (ii) to address the challenges faced in retaining Fellows and Scholars.
2. The Task Force’s goals are to collect, study, and evaluate survey metrics in an attempt to identify why many of the Scholars and Fellows have chosen not to remain active in the Section and then to seek out ways to address those concerns. The Task Force will, therefore, survey past Scholars and Fellows to discern the reasons for attrition and then develop a “playbook” or handbook for combating attrition, with tasks assigned to designated committees and committee leadership.

The Judicial Chair noted that the Task Force discussed and ultimately finalized categories of questions as well as a shortlist of actual questions to be incorporated into the surveys to be submitted to former Scholars and Fellows. The categories include level of past participation, financial concerns, convenience in attending, perceived intangible benefit, and some open-ended questions to flesh out some of the latter categories.

She stated that the Task Force agreed to circulate the draft surveys with questions to the Task Force membership for review and sign-off, whereupon, the Task Force will arrange the surveys to be sent to former Scholars and Fellows.

Lastly, she stated that the Task Force is requesting confirmation from the Executive Council as to what, exactly, are the monetary benefits accruing to Scholars and Fellows. Regarding Scholars, the Task Force has received conflicting or at least unclear information from different sources: the website, members of the Task Force, members of the Membership Committee, and the IMF Committee. For example, the website says Scholars receive a stipend of up to \$750 to reimburse for expenses relating to the Labor Day Retreat. Others tell us that the Scholars' registration fee for the Labor Day retreat is waived. Others yet say that the \$750 stipend is the value of the waiver and not an additional monetary benefit for reimbursement of other expenses.

Y. Series LLC Task Force – Louis Conti, Chair

No further report.

Z. State & Federal Courts Judicial Liaison Committee – Giacomo Bossa, Chair; Allison Leonard, Vice Chair; Honorable Lisa Walsh, Judicial Chair (State); Honorable Wendy Berger, Judicial Chair (Federal)

Chair Bossa gave the report. He indicated that Vice Chair Leonard recently had a baby and congratulated her. No further report.

AA. Uniform Commercial Real Estate Receivership Act (UCRERA) Task Force – Amanda Fernandez, Chair; Jodi Dubose, Vice Chair

Chair Fernandez gave the report. She reported that the FLTA is still concerned with the sale order not being considered a “final” appealable order. It was suggested to FLTA that language be amended so that the sale order would provide marketable title. FLTA, however, doesn't seem to think that is enough. RPPTL is planning to push forward the white paper regardless of FLTA's position and has a triple motion geared up for RPPTL's next meeting. The Task Force will be deciding what course of action to take, if any, shortly.

BB. Uniform Voidable Transfers Act (UVTA) Task Force – John Hutton, Chair; David Slenn, Vice Chair

Chair Hutton gave the report. The UVTA Task Force met on January 23rd, and discussed the current potential for moving the legislation forward, in light of past opposition from the Tax Section and RPPTL Section. The opposition in prior years was primarily directed at the official comments, but courts have relied on the comments in non-UVTA states. The UVTA has now been passed in 22 states. The Task Force is going to ask Aimee Diaz Lyon, the Section's lobbyist, to reach out to RPPTL to see if there is a path forward at this point.

CC. Chapter 617 Task Force - Toni Tsvetanova, Chair

Toni Tsvetanova gave the report. She reported that, over the summer, the Task Force reached out to various stakeholders who might be interested in participating in the Task Force. Currently, the

Task Force has has members from the Business Law, RPPTL and Health Law sections. The Task Force also reached out to the Tax Section, but currently have no participants from that Section. Toni noted that the first meeting of the Task Force was held in early October, 2022 and that, since then, Task Force members were divided in 9 subgroups to review the provisions of Chapter 617 against comparable provisions in Chapter 607 and the Model Nonprofit Corporation Act (MNCA). The subgroups have each had several meetings and prepared memoranda outlining substantive differences between Chapter 617 and Chapter 607 and the MNCA and recommendations for revisions in light of such differences. She reported that, in January, the Task Force resumed Task Force-wide meetings to discuss such memoranda and recommendations. There have been two meetings in January, and Subgroup 1's memoranda has been reviewed and Subgroup 2's memorandum review has commenced. The Task Force plans to meet on a regular basis until all recommendations are reviewed. Meanwhile, the groups who have received input will proceed with drafting proposed revisions to Chapter 617 and circulate redlines outlining such revisions that will then again undergo Task Force-wide review.

DD. Article 12 Task Force - Robert Kain, Chair; Jaime Leggett and Michael Dunn, Vice Chairs.

Robert Kain gave the report. He noted that the UCC Article 12 Task Force is a joint study group between the Blockchain-Digital Assets Committee and the UCC-Bankruptcy Committee. Mr Kain explained that UCC Article 12 was proposed by the Uniform Law Commission (ULC) in July 2022 to provide a framework for lenders to perfect a security interest in digital assets. The ULC believed that simple changes to Article 9 (F.S. 679) are insufficient. Therefore, the ULC drafted new Article 12 and amended Article 9 to conform to Art. 12. Broadly stated, the security interest is established by a "controllable electronic record" or CER. Mr Kain reported that the Task Force has held 6 meetings in 6 months and is close to completing a White Paper mapping UCC Art. 12 to Florida's UCC. The White Paper and supporting documents are posted on BLS' website under the Task Force's webpage. Chair Kain thanked Vice Chairs Jaime Leggett and Michael Dunn and noted that Josh Lida and Adam Gilbert, BLS Scholars, were instrumental in drafting the White Paper.

VIII. REPORTS OF SECTION LIAISONS

Chair Bates indicated that soon he will be suggesting these reports should be done in written form and attached to the agenda and minutes.

A. The Florida Bar Board of Governors – Jorge Piedra

No report.

B. The Florida Bar Continuing Legal Education – Utibe Ikpe

Liaison Ikpe gave the report. There was a meeting of the Florida Bar CLE Committee in [January 2023, which included a general discussion regarding the committee's organizational structure and upcoming events. Ms. Ikpe advised the Florida Bar CLE Committee of upcoming events being hosted by the Business Law Section. The Florida Bar CLE Committee is having its next virtual meeting on January 19, 2023 (which already passed).. Ms. Ikpe will be attending as the Business Law Section liaison.

C. The Florida Bar Council of Sections – Mark Stein

Chair Mark Stein gave the report. A copy of the Council of Sections report is attached hereto as *Exhibit B*.

D. The Florida Bar Diversity & Inclusion Committee – Lynn Welter Sherman

No report.

E. The Florida Bar Real Property, Probate & Trust Law (RPPTL) Section – James Marx

Liaison Marx gave the report. He reported that RPPTL had its last quarterly meeting in December 2022 in Orlando, and since then RPPTL had appointed an Ad Hoc Task Force to work with the Series LLC Task Force, and indicated that the inclusion and cooperation from the Series LLC Task Force was well appreciated, and particularly the extensive efforts of Lou Conti and Gary Teblum. Mr. Marx also briefly discussed the recent Condo Legislation that was passed, Senate Bill S-4, and said that this will result in more protections for buildings to maintain their structural integrity, but that there is much more in the legislation which may result in many condominiums no longer being qualified for financing, either as to individual units or entire buildings, buildings needing to be terminated, and that this may result in many unit owners being displaced because of the high additional costs; and that he is available if anyone has questions relating to this or other real estate issues.

F. The Florida Bar Young Lawyers (YLD) Division – Maria McCorkle

No report.

G. The Florida Institute of CPAs (FICPA) – Donald Workman

Liaison Workman gave the report. He reported that the FICPA/Bar Liaison Committee has been meeting regularly. Attendance has been growing. Throughout the second half of last year, the Liaison Committee was working on a program entitled Financial Accounting for Young Professionals- accountants and lawyers. The work on this has been incredible. Unfortunately, the Liaison Committee experienced a hurricane interruption, so the conference scheduled for last year had to be adjourned. The plan is to reschedule for this year. The Liaison Committee is looking forward to presenting this one-hour program. Liaison Workman also noted that BLS will host with the FICPAs a joint reception. Like the seminar, the reception will be free.

He also noted that the group is very pleased with the progress of this worthwhile committee and for the improved relations with the FICPA organization.

H. The Out-of-State Division of The Florida Bar – Lawrence Kunin

No report.

I. The Working Group on Legal Opinions (WGLO) – Philip Schwartz

No report.

IX. NEW BUSINESS

No report.

X. OTHER REPORTS

A. Chair's Report – Doug Bates

The Chair expressed thanks to Calbrail Banner and Tracey Eller for all their work. Thanks to Paul Perdomo as well for his continued support of the Section's needs.

B. Chair-Elect's Report – Mark Stein

Chair Elect Stein reported that he is working on the slate for next year.

XI. GOOD AND WELFARE

Chair Bates read from the 25th anniversary Executive Council gift, and stressed the importance of our history.

XII. FUTURE FULL SECTION MEETINGS

A. Executive Council Spring Retreat: April 23-27, 2023 – Sedona, AZ

B. Annual Meeting (Florida Bar): June 21-24, 2023 – Boca Raton, FL

XIII. UPCOMING SECTION EVENTS

A. 39th Annual Federal Securities Institute: March 2-3 – Miami, FL

B. 13th Annual Intellectual Property Symposium: March 30-31 – Miami, FL

XIV. ADJOURNMENT

There being no further business, the meeting was adjourned by acclamation.

THE FLORIDA BAR
Business Law Rollup
Budget/Financial Operations
As of April 30, 2023

Description	FYTD 4.30.23	Budget FY 22-23 TOTAL	Variance
Total Fee Revenue	284,930	282,000	(2,930)
Total Registration Revenues	423,825	500,000	76,175
Total Other Event Revenue	301,619	354,000	52,381
Total Other Operating Revenue	29,868	-	(29,868)
Total Non-Operating Revenue	31,955	35,390	3,435
Total Revenue	1,072,197	1,171,390	99,193
Total Staff & Office Expense	12,487	26,100	13,613
Total Contract Services	112,022	158,625	46,603
Total Travel	50,997	73,100	22,103
Total Other Expenses	581,724	553,130	(28,594)
Total Admin. & Internal	119,307	112,247	(7,060)
Total Expenses	876,538	923,202	46,664
Net Income	195,659	248,188	52,529
Beginning Fund Balance	370,747	370,747	
Ending Fund Balance	566,406	618,935	

THE FLORIDA BAR
Business Law Rollup
Budget/Financial Operations
As of April 30, 2023

Description	Bud	FYTD	Budget	Variance
		4.30.23	FY 22-23 TOTAL	
917-9170-00917-00000-3001 Annual Fees	Gen	282,120	280,000	(2,120)
917-9170-00917-00000-3002 Affiliate Fees	Gen	2,810	2,000	(810)
Total Fee Revenue		284,930	282,000	(2,930)
Registration Revenues				
917-9170-21700-00000-3331 Registration-Ticket	Gen	19,475	-	(19,475)
917-9172-21714-00000-3301 Registration-Live	LDR	117,730	120,000	2,270
917-9172-21708-00000-3331 Registration-Ticket	OOSR	177,600	150,000	(27,600)
917-9172-21705-00000-3301 Registration-Live	IPS	32,650	52,000	19,350
917-9172-21703-00000-3301 Registration-Live	FSI	25,775	32,000	6,225
917-9171-21702-00000-3301 Registration-Live	VFTB	50,595	36,000	(14,595)
917-9171-21702-00000-3331 Registration-Ticket	VFTB	-	110,000	110,000
Total Registration Revenues		423,825	500,000	76,175
Other Event Revenue				
917-9170-21700-00000-3351 Sponsorship Rev	Gen	140,700	51,000	(89,700)
917-9170-21700-00000-3391 Section Profit Split	Gen	53,209	150,000	96,791
917-9170-21700-00000-3392 Section Differential	Gen	5,210	4,000	(1,210)
917-9172-21714-00000-3351 Sponsorship Rev	LDR	58,250	130,000	71,750
917-9172-21705-00000-3351 Sponsorships	IPS	9,750	7,000	(2,750)
917-9172-21703-00000-3351 Sponsorships	FSI	34,500	12,000	(22,500)
917-9172-21702-00000-3351 Sponsorship Rev	VFTB	-	-	-
Total Other Event Revenue		301,619	354,000	52,381
917-9170-21700-00000-3699 Other Operating Rev	Gen	29,868	-	(29,868)
Total Other Operating Revenue		29,868	-	(29,868)
Non-Operating Revenue				
917-9170-21700-00000-3899 Investment Alloc	Gen	31,955	35,390	3,435
Total Non-Operating Revenue		31,955	35,390	3,435
Total Revenue		1,072,197	1,171,390	99,193
Total Staff & Office Expense				
917-9170-21700-00000-4133 Internet Service	Gen	-	500	500
917-9170-21700-00000-4134 Web Services	Gen	9,365	18,000	8,635
917-9170-21700-00000-4135 Social Media	Gen	3,000	6,000	3,000
917-9170-21700-00000-4301 Photocopying	Gen	-	700	700
917-9172-21714-00000-4301 Photocopying	LDR	-	500	500
917-9170-21700-00000-4311 Office Supplies	Gen	122	200	78

917-9172-21714-00000-4311 Office Supplies	LDR	-	200	200
Total Staff & Office Expense		12,487	26,100	13,613
Contract Services				
917-9170-00917-00000-5051 Credit Card Fees	Gen	1,749	5,000	3,251
917-9172-21714-00000-5051 Credit Card Fees	LDR	2,397	-	(2,397)
917-9172-21705-00000-5051 Credit Card Fees	IPS	1,005	-	(1,005)
917-9172-21708-00000-5051 Credit Card Fees	OOSR	4,670	3,000	(1,670)
917-9172-21703-00000-5051 Credit Card Fees	FSI	787	600	(187)
917-9171-21702-00000-5051 Credit Card Fees	VFTB	1,484	25	(1,459)
917-9170-21700-00000-5101 Consultants	Gen	99,931	150,000	50,069
Total Contract Services		112,022	158,625	46,603
Travel				
917-9170-21700-00000-5501 Employee Travel	Gen	939	400	(539)
917-9172-21714-00000-5501 Employee Travel	LDR	3,034	1,500	(1,534)
917-9172-21708-00000-5501 Employee Travel	OOSR	1,139	9,000	7,861
917-9172-21705-00000-5501 Employee Travel	IPS	495	1,600	1,105
917-9172-21703-00000-5501 Employee Travel	FSI	587	1,500	913
917-9171-21702-00000-5501 Employee Travel	VFTB	81	1,000	919
917-9170-21700-00000-5561 Judges Travel	Gen	22,892	9,000	(13,892)
917-9172-21714-00000-5561 Judges Travel	LDR	739	15,000	14,261
917-9172-21708-00000-5561 Judges Travel	OOSR	-	12,000	12,000
917-9170-21700-00000-5571 Speaker Travel	Gen	3,187	8,000	4,813
917-9172-21705-00000-5571 Speaker Travel	IPS	2,132	3,000	868
917-9172-21703-00000-5571 Speaker Travel	FSI	1,375	3,500	2,125
917-9171-21702-00000-5571 Speaker Travel	VFTB	1,938	1,500	(438)
917-9170-21700-00000-5599 Other Travel	Gen	12,458	1,100	(11,358)
917-9172-21714-00000-5599 Other Travel	LDR	-	-	-
917-9172-21708-00000-5599 Other Travel	OOSR	-	5,000	5,000
Total Travel		50,997	73,100	22,103
Other Expenses				
917-9170-21700-00000-6001 Post 1st Class/Bulk	Gen	1,186	630	(556)
917-9172-21714-00000-6001 Post 1st Class/Bulk	LDR	-	-	-
917-9172-21708-00000-6001 Post 1st Class/Bulk	OOSR	-	-	-
917-9172-21714-00000-6231 Promot Item/Giveaway	LDR	-	5,000	5,000
917-9172-21708-00000-6231 Promot Item/Giveaway	OOSR	-	-	-
917-9170-21700-00000-6301 Mtgs TFB Ann Meeting	Gen	-	40,000	40,000
917-9170-21700-00000-6311 Mtgs General Meeting	Gen	18,802	20,000	1,198
917-9170-21700-00000-6319 Mtgs Other Functions	Gen	77,462	6,500	(70,962)
917-9172-21714-00000-6319 Mtgs Other Functions	LDR	40,048	-	(40,048)
917-9172-21708-00000-6319 Mtgs Other Functions	OOSR	4,595	30,000	25,405
917-9172-21705-00000-6319 Meetings Expense	IPS	5,750	23,500	17,750
917-9172-21703-00000-6319 Mtgs Other Functions	FSI	-	36,500	36,500
917-9171-21702-00000-6319 Mtgs Other Functions	VFTB	3,380	3,500	120
917-9172-21714-00000-6321 Mtgs Meals	LDR	207,389	190,000	(17,389)

917-9172-21708-00000-6321 Mtgs Meals	OOSR	-	-	-
917-9171-21702-00000-6325 Mtgs Hospitality	VFTB	1,843	-	(1,843)
917-9172-21714-00000-6325 Mtgs Hospitality	LDR	51,468	50,000	(1,468)
917-9172-21708-00000-6325 Mtgs Hospitality	OOSR	-	-	-
917-9172-21703-00000-6325 Mtgs Hospitality	FSI	-	-	-
917-9172-21714-00000-6341 Mtgs Equip Rental	LDR	91,938	20,000	(71,938)
917-9172-21708-00000-6341 Mtgs Equip Rental	OOSR	-	-	-
917-9172-21714-00000-6361 Mtgs Entertainment	LDR	26,002	20,000	(6,002)
917-9172-21708-00000-6361 Mtgs Entertainment	OOSR	-	-	-
917-9170-21700-00000-6399 Mtgs Other	Gen	-	15,000	15,000
917-9170-21700-00000-6401 Speaker Expense	Gen	-	5,000	5,000
917-9170-21700-00000-6451 Committee Expense	Gen	290	5,000	4,710
917-9170-21700-00000-6531 Brd/Off Special Proj	Gen	534	5,500	4,966
917-9170-21700-00000-7001 Grant/Award/Donation	Gen	25,296	15,000	(10,296)
917-9170-21700-00000-7011 Scholarship/Fellowsh	Gen	4,457	60,000	55,543
917-9170-21700-00000-7999 Other Operating Exp	Gen	119	1,000	881
917-9172-21714-00000-7999 Other Operating Exp	LDR	21,166	1,000	(20,166)
917-9172-21708-00000-7999 Other Operating Exp	OOSR	-	-	-
Total Other Expenses		581,724	553,130	(28,594)
Admin & Internal Expense				
917-9170-00917-00000-8021 Section Admin	Gen	104,444	103,247	(1,197)
917-9170-21700-00000-8101 Printing In-House	Gen	139	2,500	2,361
917-9172-21714-00000-8101 Printing In-House	LDR	8,784	-	(8,784)
917-9172-21703-00000-8101 Printing In-House	FSI	90	-	-
917-9171-21702-00000-8011 Administration CLE	VFTB	-	6,000	6,000
917-9171-21702-00000-8141 - Journal/News Service	VFTB	850	-	(850)
917-9172-21703-00000-8141 - Journal & News	FSI	850	-	(850)
917-9172-21705-00000-8141 - Journal/News Service	IPS	850	-	(850)
917-9172-21703-00000-8171 - Course Approval Fee	FSI	150	-	(150)
917-9172-21705-00000-8171 - Course Approval Fee	IPS	150	-	(150)
917-9170-21700-00000-8901 Sponsorship of Int. Grp	Gen	2,500	-	(2,500)
917-9170-21700-00000-9692 To/From Council	Gen	500	500	-
Total Admin. & Internal		119,307	112,247	(6,970)
Total Expenses		876,538	923,202	46,754
Net Income		195,659	248,188	52,439
Beginning Fund Balance		370,747	370,747	
Ending Fund Balance		566,406	618,935	

THE FLORIDA BAR
Business Law General
Budget/Financial Operations
As of April 30, 2023

Description	FYTD	Budget	Variance
	4.30.2023	FY 22-23 TOTAL	
917-9170-00917-00000-3001 Annual Fees	282,120	280,000	(2,120)
917-9170-00917-00000-3002 Affiliate Fees	2,810	2,000	(810)
Total Fee Revenue	284,930	282,000	(2,930)
917-9170-21700-00000-3331 Registration-Ticket	19,475	-	(19,475)
Total Registration Revenue	19,475	-	(19,475)
917-9170-21700-00000-3351 Sponsorship Rev	140,700	51,000	(89,700)
917-9170-21700-00000-3391 Section Profit Split	53,209	150,000	96,791
917-9170-21700-00000-3392 Section Differential	5,210	4,000	(1,210)
Other Event Revenue	199,119	205,000	5,881
917-9170-21700-00000-3699 Other Operating Rev	29,868	-	29,868
Other Operating Revenue	29,868	-	29,868
917-9170-21700-00000-3899 Investment Alloc	31,955	35,390	3,435
Non-Operating Income	31,955	35,390	3,435
Total Revenue	565,347	522,390	16,779
917-9170-21700-00000-4133 Internet Service	-	500	500
917-9170-21700-00000-4134 Web Services	9,365	18,000	8,635
917-9170-21700-00000-4135 Social Media	3,000	6,000	3,000
917-9170-21700-00000-4301 Photocopying	-	700	700
917-9170-21700-00000-4311 Office Supplies	122	200	78
Total Staff & Office Expense	12,487	25,400	12,913
917-9170-00917-00000-5051 Credit Card Fees	1,749	5,000	3,251
917-9170-21700-00000-5101 Consultants	99,931	150,000	50,069
Total Contract Services	101,679	155,000	53,321
917-9170-21700-00000-5501 Employee Travel	939	400	(539)
917-9170-21700-00000-5561 Judges Travel	22,892	9,000	(13,892)
917-9170-21700-00000-5571 Speaker Travel	3,187	8,000	4,813
917-9170-21700-00000-5599 Other Travel	12,458	1,100	(11,358)
Total Travel	39,477	18,500	(20,977)
917-9170-21700-00000-6001 Post 1st Class/Bulk	1,186	630	(556)
917-9170-21700-00000-6301 Mtgs TFB Ann Meeting	-	40,000	40,000
917-9170-21700-00000-6311 Mtgs General Meeting	18,802	20,000	1,198

917-9170-21700-00000-6319 Mtgs Other Functions	77,462	6,500	(70,962)
917-9170-21700-00000-6399 Mtgs Other	-	15,000	15,000
917-9170-21700-00000-6401 Speaker Expense	-	5,000	5,000
917-9170-21700-00000-6451 Committee Expense	290	5,000	4,710
917-9170-21700-00000-6531 Brd/Off Special Proj	534	5,500	4,966
917-9170-21700-00000-7001 Grant/Award/Donation	25,296	15,000	(10,296)
917-9170-21700-00000-7011 Scholarship/Fellowsh	4,457	60,000	55,543
917-9170-21700-00000-7999 Other Operating Exp	119	1,000	881
Total Other Expense	128,145	173,630	45,485
917-9170-00917-00000-8021 Section Admin	104,444	103,247	(1,197)
917-9170-21700-00000-8101 Printing In-House	139	2,500	2,361
917-9170-21700-00000-8901 Sponsorship of Int. Grp	2,500	-	(2,500)
Total Admin & Internal Expense	107,083	105,747	(1,336)
917-9170-21700-00000-9692 To/From Council	500	500	-
Total InterFund Transfers Out	500	500	-
Total Expense	389,370	478,777	89,407
Net Income	175,976	43,613	132,363

THE FLORIDA BAR
Business Law Labor Day Retreat
Budget/Financial Operations
As of April 30, 2023

Description	FYTD 4.30.2023	Budget FY 22-23 TOTAL	Variance
917-9172-21714-00000-3301 Registration-Live	117,730	120,000	2,270
Total Registration Revenue	117,730	120,000	2,270
917-9172-21714-00000-3351 Sponsorship Rev	58,250	130,000	71,750
Other Event Revenue	58,250	130,000	71,750
Total Revenue	175,980	250,000	74,020
917-9172-21714-00000-4301 Photocopying	-	500	500
917-9172-21714-00000-4311 Office Supplies	-	200	200
Total Staff & Office Expense	-	700	700
917-9172-21714-00000-5051 Credit Card Fees	2,397	-	(2,397)
Total Contract Services	2,397	-	(2,397)
917-9172-21714-00000-5501 Employee Travel	3,034	1,500	(1,534)
917-9172-21714-00000-5561 Judges Travel	739	15,000	14,261
917-9172-21714-00000-5599 Other Travel	-	-	-
Total Travel	3,773	16,500	12,727
917-9172-21714-00000-6001 Post 1st Class/Bulk	-	-	-
917-9172-21714-00000-6231 Promot Item/Giveaway	-	5,000	5,000
917-9172-21714-00000-6319 Mtgs Other Functions	40,048	-	(40,048)
917-9172-21714-00000-6321 Mtgs Meals	207,389	190,000	(17,389)
917-9172-21714-00000-6325 Mtgs Hospitality	51,468	50,000	(1,468)
917-9172-21714-00000-6341 Mtgs Equip Rental	91,938	20,000	(71,938)
917-9172-21714-00000-6361 Mtgs Entertainment	26,002	20,000	(6,002)
917-9172-21714-00000-7999 Other Operating Exp	21,166	1,000	(20,166)
Total Other Expense	438,011	286,000	(152,011)
917-9172-21714-00000-8101 Printing In-House	8,784	-	(8,784)
Total Admin & Internal Expense	8,784	-	(8,784)
Total Expense	452,966	303,200	(149,766)
Net Income	(276,985)	(53,200)	(223,785)

THE FLORIDA BAR
Business Out of State Retreat
Budget/Financial Operations
As of April 30, 2023

Description	FYTD	Budget	Variance
	4.30.2023	FY 22-23 TOTAL	
917-9172-21708-00000-3331 Registration-Ticket	177,600	150,000	(27,600)
Total Registration Revenue	177,600	150,000	(27,600)
Total Revenue	177,600	150,000	(27,600)
917-9172-21708-00000-4301 Photocopying	-	-	-
917-9172-21708-00000-4311 Office Supplies	-	-	-
Total Staff & Office Expense	-	-	-
917-9172-21708-00000-5051 Credit Card Fees	4,670	3,000	(1,670)
Total Contract Services	4,670	3,000	(1,670)
917-9172-21708-00000-5501 Employee Travel	1,139	9,000	7,861
917-9172-21708-00000-5561 Judges Travel	-	12,000	12,000
917-9172-21708-00000-5599 Other Travel	-	5,000	5,000
Total Travel	1,139	26,000	24,861
917-9172-21708-00000-6001 Post 1st Class/Bulk	-	-	-
917-9172-21708-00000-6231 Promot Item/Giveaway	-	-	-
917-9172-21708-00000-6319 Mtgs Other Functions	4,595	30,000	25,405
917-9172-21708-00000-6321 Mtgs Meals	-	-	-
917-9172-21708-00000-6325 Mtgs Hospitality	-	-	-
917-9172-21708-00000-6341 Mtgs Equip Rental	-	-	-
917-9172-21708-00000-6361 Mtgs Entertainment	-	-	-
917-9172-21708-00000-7999 Other Operating Exp	-	-	-
Total Other Expense	4,595	30,000	25,405
917-9172-21708-00000-8101 Printing In-House	-	-	-
Total Admin & Internal Expense	-	-	-
Total Expense	10,404	59,000	48,596
Net Income	167,196	91,000	(76,196)

THE FLORIDA BAR
Business Law IP Symposium
Budget/Financial Operations
As of April 30, 2023

Description	FYTD	Budget	Variance
	4.30.23	FY 22-23 TOTAL	
917-9172-21705-00000-3301 Registration-Live	32,650	52,000	19,350
Total Registration Revenue	32,650	52,000	19,350
917-9172-21705-00000-3351 Sponsorships	9,750	7,000	(2,750)
Other Event Revenue	9,750	7,000	(2,750)
Total Revenue	42,400	59,000	16,600
917-9172-21705-00000-5051 Credit Card Fees	1,005	-	(1,005)
Total Contract Services	1,005	-	(1,005)
917-9172-21705-00000-5501 Employee Travel	495.48	1,600	1,105
917-9172-21705-00000-5571 Speaker Travel	2,132.21	3,000	868
Total Travel	2,627.69	4,600	1,972
917-9172-21705-00000-6319 Meetings Expense	5,750.00	23,500	17,750
Total Other Expense	5,750.00	23,500	17,750
917-9172-21705-00000-8141 - Journal/News Service	850	-	(850)
917-9172-21705-00000-8171 - Course Approval Fee	150	-	(150)
Total Admin. & Internal Expenses	1,000	-	(1,000)
Total Expense	10,383	28,100	17,717
Net Income	32,017	30,900	(1,117)

Includes a refund from a prior event (12th).

THE FLORIDA BAR
Business Law Section Federal Securities Institute
Budget/Financial Operations
As of April 30, 2023

Description	FYTD	Budget	Variance
	4.30.23	FY 22-23 TOTAL	
917-9172-21703-00000-3301 Registration-Live	25,775	32,000	6,225
Total Registration Revenue	25,775	32,000	6,225
917-9172-21703-00000-3351 Sponsorships	34,500	12,000	(22,500)
Other Event Revenue	34,500	12,000	(22,500)
Total Revenue	60,275	44,000	(16,275)
917-9172-21703-00000-5051 Credit Card Fees	787	600	(187)
Total Contract Services	787	600	(187)
917-9172-21703-00000-5501 Employee Travel	587	1,500	913
917-9172-21703-00000-5571 Speaker Travel	1,375	3,500	2,125
Total Travel	1,962	5,000	3,038
917-9172-21703-00000-6319 Mtgs Other Functions	-	36,500	36,500
917-9172-21703-00000-6325 Mtgs Hospitality	-	-	-
Total Other Expense	-	36,500	36,500
917-9172-21703-00000-8101 - Printing In-House	90	0	-90
917-9172-21703-00000-8141 - Journal & News	850	0	-850
917-9172-21703-00000-8171 - Course Approval Fee	150	-	(150)
Total Admin. & Internal Expenses	1,090	0	-1090
Total Expense	3,839	42,100	38,261
Net Income	56,436	1,900	(54,536)

THE FLORIDA BAR
Business Law Section View From The Bench
Budget/Financial Operations
As of April 30, 2023

Description	FYTD	Budget	Variance
	4.30.23	FY 22-23 TOTAL	
917-9171-21702-00000-3301 Registration-Live	50,595	36,000	(14,595)
917-9171-21702-00000-3331 Registration-Ticket	-	110,000	110,000
Total Registration Revenue	50,595	146,000	95,405
917-9172-21702-00000-3351 Sponsorship Rev	-	-	-
Other Event Revenue	-	-	-
Total Revenue	50,595	146,000	95,405
917-9171-21702-00000-5051 Credit Card Fees	1,484	25	(1,459)
Total Contract Services	1,484	25	(1,459)
917-9171-21702-00000-5501 Employee Travel	81	1,000	919
917-9171-21702-00000-5571 Speaker Travel	1,938	1,500	(438)
Total Travel	2,019	2,500	481
917-9171-21702-00000-6319 Mtgs Other Functions	3,380	3,500	120
917-9171-21702-00000-6325 Mtgs Hospitality	1,843		(1,843)
Total Other Expense	5,223	3,500	(1,723)
917-9171-21702-00000-8011 Administration CLE	-	6,000	6,000
917-9171-21702-00000-8141 Journal/News Service	850	-	(850)
Total Admin & Internal Expense	850	6,000	5,150
Total Expense	9,576	12,025	2,449
Net Income	41,019	133,975	92,956