



BUSINESS LAW SECTION
OF THE FLORIDA BAR

BACK
to the
FUTURE

Retreat Edition
2023

RITZ CARLTON, NAPLES
SEPTEMBER 1ST - 4TH



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A MESSAGE FROM THE CHAIR



Welcome to Naples and the Business Law Section Labor Day Retreat. It is an honor to serve as the Chair of the Section, and an honor to work alongside each of you. I believe that the strength of the Section comes from our wonderful members, and I thank each of you for everything you do for the Section. Your time, talents, gifts, and service make the work of the Business Law Section possible.

It is my pleasure to welcome you on behalf of the Executive Committee (Manny Farach, Stephanie Lieb, Peter Valori and Greg Yadley), as well as our fantastic immediate past Chair Doug Bates. The theme of this year's Retreat is "Back To The Future." We hope that you will use this weekend as a time to reconnect with friends and colleagues while building new connections for the future. We are excited that you are here and excited to be back at the Ritz Carlton!

Our Retreat would not be possible without the hard work of the Retreat Committee led by Retreat Chair Bob Charbonneau. Bob and his team have done a wonderful job planning our events this year. At the retreat, you will have the opportunity to experience many of the "traditional" Retreat weekend events and some new twists. We are confident that you are going to have a great time!

None of what we do would be possible without our amazing sponsors, and the hard work of the Marketing and Sponsorship Committee led by Matt Hale. We are thankful for Matt's team, and all of their efforts to help underwrite this year's event. If you have a chance, please take a moment to thank our sponsors for their investment in our Section and our Retreat.

Last, but certainly not least, thank you to all of our Section members, and especially our Section Administrator Calbrail Banner, who has worked tirelessly to make this year's Retreat a reality. This is Calbrail's first year with the section and she is off to a great start. Be sure to introduce yourself to Calbrail and to thank Calbrail for everything that she does for our Section!

Thank you for joining us on our journey this weekend. If you need anything at all during your time in Naples, please call me directly. Most importantly - have fun!

—Mark Stein, Section Chair

A MESSAGE FROM THE RETREAT CHAIR



On behalf of the Labor Day Retreat Committee, it is my privilege to welcome you to this year's Business Law Section Retreat. It has been a few years since we have been back to the Naples Ritz Carlton, a venue familiar to many of you. This is not, however, your parents' Naples Ritz Carlton. Newly renovated from top to bottom, along with a new tower and updated rooms, this familiar and well-loved Retreat venue is better than ever, in keeping with our Retreat theme of "Back to the Future." Our theme honors our past, celebrates our present, and inspires our future, including a salute to the 10th Anniversary of the BLS Fellows Program.

All of the familiar Retreat events and activities are back in our weekend of fun, family and community. Our Friday night Hospitality Suite features 80's themed arcade style games and other fun activities. Continuing the tradition begun last year, our Chair, Mark Stein, has selected a service/community outreach project so our members can continue to provide help and support to those most deserving of it in what continue to be uncertain times.

From the great CLE to Casino Night and all the other events in store, this Retreat does not happen without the generosity of our Section's Sponsors, and the extraordinary work of the Sponsorship Committee. I truly appreciate our Sponsors, and ask that you please take an opportunity this weekend to thank them for their support.

Last, but certainly not least, I would like to thank Calbrail Banner for all her hard-work dedicated to this weekend. There were a number of challenges this year, including whether the Ritz renovations would be completed in time, but Calbrail met all of them with hard work, creativity and grace - I am blessed to have had her assistance.

Thank you all for spending your holiday weekend with us. I hope you and your family enjoy your trip "Back to the Future."

—Bob Charbonneau, Retreat Chair

FRIDAY, SEPTEMBER 1ST

9:00 a.m.-
5:00 p.m.

RETREAT CHECK IN

Registration Foyer

10:00 a.m.-
1:00 p.m.

LEGISLATIVE UPDATE CLE
SPONSORED BY: YIP ASSOCIATES

Salon I

AFTERNOON MEETINGS

1:00 p.m.-
2:00 p.m.

**OPINIONS STANDARDS
COMMITTEE**

Plaza 1

1:00 p.m.-
2:00 p.m.

ANTITRUST COMMITTEE

Aqualane Shores

1:00 p.m.-
2:00 p.m.

CHAPTER S17 TASK FORCE

Plaza II

1:00 p.m.-
2:00 p.m.

UCRERA TASK FORCE

Salon I

1:00 p.m.-
2:00 p.m.

COMMUNICATIONS COMMITTEE

Plaza III

1:00 p.m.-
2:00 p.m.

FINANCIAL LITERACY TASK FORCE

Coquina Sands

1:00 p.m.-
2:00 p.m.

**HEALTH & WELLNESS
TASK FORCE**

Estuary II

1:00 p.m.-
2:00 p.m.

UVTA TASK FORCE

Salon II

1:00 p.m.-
2:00 p.m.

CHAPTER 48 TASK FORCE

Salon III

1:30 p.m.-
2:00 p.m.

BUDGET COMMITTEE

Estuary I

2:00 p.m.-
3:00 p.m.

**BLS SCHOLARS & FELLOWS
RETENTION TASK FORCE**

Salon IV

2:00 p.m.-
3:30 p.m.

CHAPTER 607 SUBCOMMITTEE

Estuary I

2:00 p.m.-
4:00 p.m.

**COMPUTER LAW &
TECHNOLOGY COMMITTEE**

Plaza III

*CLE: INSIDE INFORMATION: UNDERSTANDING
DATA PRIVACY LEGAL PROTECTIONS FOR U.S.
CONSUMERS & EMPLOYEES*

2:00 p.m.-
4:00 p.m.

PRO BONO COMMITTEE

Estuary II

3:00 p.m.-
4:00 p.m.

CLE COMMITTEE

Plaza II

3:00 p.m.-
4:00 p.m.

CIVIL RULES COMMITTEE

Aqualane Shores

3:00 p.m.-
4:00 p.m.

**IMF & MEMBERSHIP
JOINT MEETING**

Plaza I

3:30 p.m.-
5:00 p.m.

SERIES LLC TASK FORCE

Estuary I

4:00 p.m.-
5:00 p.m.

E-DISCOVERY COMMITTEE

Salon IV



4:00 p.m.-
5:30 p.m.

**BANKRUPTCY JUDICIAL
LIAISON COMMITTEE**
**CLE: DISCOVERY IN BANKRUPTCY: FROM
CONTESTED MATTERS TO ADVERSARY
PROCEEDINGS**

Salon I & II

4:00 p.m.-
5:30 p.m.

**BUILDING YOUR CAREER: FROM RESUME TO
FIRST CHAIR & BEYOND**

Salon III

EVENING ACTIVITIES

5:30 p.m.-
6:30 p.m.

**FELLOWS & SCHOLARS
WELCOME RECEPTION**

Vanderbilt II & III

6:30 p.m.-
7:30 p.m.

BLS WELCOME RECEPTION
SPONSORED BY: DAL LAGO LAW
SIGNATURE COCKTAIL SPONSOR: TRENAM

Vanderbilt II & III

7:30 p.m.-
9:30 p.m.

**WELCOME DINNER &
10TH ANNIVERSARY CELEBRATION OF
FELLOWS PROGRAM**
SPONSORED BY: BERGER SINGERMANN
*PHOTO BOOTH SPONSOR: KOZYAK TROPIN &
THROCKMORTON*

Vanderbilt I

9:30 p.m.-
11:30 p.m.

**GLOW PARTY &
HOSPITALITY SUITE**
*SPONSORED BY: JOHNSON, NEWLON &
DECORT, P.A.*

Plaza Ballroom

SATURDAY, SEPTEMBER 2ND

8:30 a.m.-
11:00 a.m.

RETREAT CHECK IN

Registration Foyer

8:30 a.m. -
9:30 a.m.

**CONTINENTAL BREAKFAST
(MEETING ATTENDEES ONLY)**
SPONSORED BY: DSK LAW

Registration Foyer

MORNING MEETINGS

- 9:00 a.m.-
11:30 a.m. **CORPORATIONS, SECURITIES, & FINANCIAL SERVICES COMMITTEE** Plaza II & III
CLE: UPDATES FROM A FORENSIC ACCOUNTANT & VALUATION PERSPECTIVE: THE SURFSIDE BUILDING COLLAPSE & OTHERS
SPONSORED BY: KAUFMAN ROSSIN
- 9:00 a.m.-
11:30 a.m. **BANKRUPTCY/UCC COMMITTEE** Salon I & II
CLE: LITIGATING CONFIRMATION ISSUES IN A SUB V CASE: FAIR AND EQUITABLE, BEST INTEREST TEST, AND FEASIBILITY
SPONSORED BY: SHUKER & DORRIS, P.A.
- 9:00 a.m.-
11:30 a.m. **BLOCKCHAIN & DIGITAL ASSETS COMMITTEE** Salon III & IV
- 11:45 a.m.-
1:15 p.m. **LUNCH/BUSINESS COURT ROUNDTABLE** Vanderbilt I
SPONSORED BY: SEQUOR LAW

AFTERNOON MEETINGS

- 1:30 p.m.-
4:00 p.m. **BUSINESS LITIGATION COMMITTEE** Plaza II & III
CLE: SHOW ME THE MONEY! AN OVERVIEW OF ECONOMIC DAMAGES CALCULATIONS
SPONSORED BY: BERKOWITZ POLLACK BRANT ADVISORS + CPAS
- 1:30 p.m.-
4:00 p.m. **IP COMMITTEE** Salon III & IV
CLE: BEYOND THE CODE: MASTERING THE ART OF SOFTWARE LICENSING STRATEGIES
- 4:00 p.m.-
5:00 p.m. **LEGISLATION COMMITTEE** Salon I & II

AFTERNOON/EVENING ACTIVITIES

11:00 a.m.-
5:00 p.m.

POOL CABANA
*SPONSORED BY: COMMERCIAL RECEIVERS
ASSOCIATION*

Adult Pool

3:30 p.m.-
5:30 p.m.

COLLEGE FOOTBALL SUITE
SPONSORED BY: DAMIAN | VALORI | CULMO

Port Royal

6:00 p.m.-
7:00 p.m.

COCKTAIL RECEPTION
SPONSORED BY: AGENTIS
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SPECIALISTS, INC.*

Vanderbilt
Courtyard

7:00 p.m.-
9:30 p.m.

DINNER & CASINO NIGHT
*SPONSORED BY: MICHAEL MOECKER &
ASSOCIATES, INC.*
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Vanderbilt
Ballroom &
Ritz Carlton
Ballroom

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LIEBERMAN REVAH PLLC*

9:30 p.m.-
11:30 p.m.

**HOSPITALITY SUITE &
KARAOKE**
SPONSORED BY: GRAY ROBINSON

Ritz Carlton
Ballroom

SUNDAY, SEPTEMBER 3RD

7:00 a.m.-
11:00 a.m.

BREAKFAST VOUCHURE
USE AT YOUR LEISURE
*SPONSORED BY: REGISTERED AGENT
SOLUTIONS, INC.*

Artisans
Restaurant

MORNING ACTIVITIES

7:00 a.m.-
9:00 a.m.

BIKE RIDE
SPONSORED BY: PHILIP A. BATES, P.A.

Meet in Lobby

8:00 a.m.-
12:00 p.m.

GOLF TOURNAMENT

Tiburon Golf Club

8:30 a.m.-
11:00 a.m.

KAYAK ADVENTURE
*SPONSORED BY: PERETZ CHESAL &
HERMANN, P.L.*

Meet in Lobby

10:00 a.m.-
12:00 p.m.

SERVICE OUTREACH PROJECT

ROOM

AFTERNNON/EVENING ACTIVITIES

11:00 a.m.-
5:00 p.m.

POOL CABANA
SPONSORED BY: UNDERWOOD MURRAY

Adult Pool

4:30 p.m.-
6:00 p.m.

**JUDGE WILLIAM VAN NORTWICK
WINE TASTING**
*SPONSORED BY: STICHTER, RIEDEL, BLAIN &
POSTLER, P.A.*

Estuary

6:00 p.m.-
6:30 p.m.

DINNER ON THE TOWN MEET UP

Hotel Lobby

7:00 p.m.-
9:00 p.m.

DINNER ON THE TOWN

Various
Restaurants

9:30 p.m.-
11:30 p.m.

WHISKEY TASTING
SPONSORED BY: SHUTTS & BOWEN

Estuary

MONDAY, SEPTEMBER 4TH

8:00 a.m.-
9:00 a.m.

CONTINENTAL BREAKFAST
(EXECUTIVE COUNCIL MEMBERS ONLY)
SPONSORED BY: CITY NATIONAL PRIVATE

Salon I & II

8:30 a.m.-
11:30 a.m.

EXECUTIVE COUNCIL MEETING

Salon I & II



CLE INFORMATION

FRIDAY, SEPTEMBER 1ST

10:00 a.m.-1:00 p.m.
LEGISLATIVE UPDATE

Sponsored By: Yip Associates

A legislative and case law update, providing coverage of the laws that have developed over the past 12 months, with a focus on the following topics: assignment of the benefit of creditor, the Secretary of State's new procedures for protecting corporate amendments and preventing identity theft, judgment liens, and recent related case law.

2:00 p.m.-4:00 p.m.
INSIDE INFORMATION: UNDERSTANDING DATA PRIVACY LEGAL PROTECTIONS FOR U.S. CONSUMERS & EMPLOYEES

An update on the latest developments in consumer and employee data privacy laws in the United States. This panel discussion explores the evolving nuances and complexities of data privacy rights and provides practical strategies for navigating consumer and employee privacy rights.

4:00 p.m.-6:00 p.m.
DISCOVERY IN BANKRUPTCY: FROM CONTESTED MATTERS TO ADVERSARY PROCEEDINGS

The program will focus on the discovery process in bankruptcy proceedings, contested matters, and adversary proceedings. Topics include the use of 2004 exams, Rule 26 proportionality factors, discovery disputes, and preserving and resolving claims of privilege.

4:00 p.m.-5:30 p.m.

BUILDING YOUR CAREER: FROM RESUME TO FIRST CHAIR & BEYOND

Panel discussion regarding career and professional development: i) beginning with finding, applying, and interviewing for the right job; ii) moving on to growing your practice and advancing your legal career; and iii) ending with moving your career beyond the traditional law firm paradigm.

SATURDAY, SEPTEMBER 2ND

9:00 a.m.-11:30 a.m.

UPDATES FROM A FORENSIC ACCOUNTANT & VALUATION PERSPECTIVE: THE SURFSIDE BUILDING COLLAPSE & OTHERS

This presentation will share valuable insights from a forensic accountant and valuation perspective, focusing on the Surfside Building Collapse and other relevant cases. This presentation aims to explore the lessons learned from a highly publicized and complex receiver matter and delve into the best practices for effectively delivering and communicating information to the courts. By understanding the role of forensic accountants and valuation experts, attorneys can provide more effective representation to their clients.

Sponsored By: Kaufman Rossin

9:00 a.m.-11:30 a.m.

LITIGATING CONFIRMATION ISSUES IN A SUB V CASE: FAIR AND EQUITABLE, BEST INTEREST TEST, AND FEASIBILITY

Sponsored By: Shuker & Dorris, P.A.

The seminar will examine the most commonly litigated confirmation issues in a Sub V Chapter 11 with a focus on the evidence needed to support or oppose confirmation.

11:45 a.m.-1:15 p.m.

BUSINESS COURT ROUNDTABLE

Sponsored By: Sequor Law

A panel discussion with business court judges from across the state concerning various matters unique to business courts and practitioners as well as business court treatment of recent rule changes.

1:30 p.m.-4:00 p.m.

SHOW ME THE MONEY! AN OVERVIEW OF ECONOMIC DAMAGES CALCULATIONS

Sponsored By: Berkowitz Pollack Brant Advisors + CPAs

Does your client expect to be "made whole" on their claim? This CLE will offer an overview of economic damages calculations, especially the value of having a financial forensics professional as part of the process!

1:30 p.m.-4:00 p.m.

BEYOND THE CODE: MASTERING THE ART OF SOFTWARE LICENSING STRATEGIES

Software is everywhere, and it is vital to every business operating in the modern world. Software as a Service, Development Agreements, Master License Agreements, Service Agreements . . . We're sure you've heard all these terms before, but what makes them different? Take a deep dive with us into the land of software licensing. Learn the strategies to simplify these agreements and negotiations to match the business context and software solutions. Understand the importance of data and privacy implications. This engaging CLE will give you the tools you need to tackle your next software licensing negotiation with ease.

RETREAT ACTIVITIES

These activities require pre-registration. If you did not sign up prior to your arrival and would like to participate, please check at the Retreat Check In Desk for any remaining availability.

SUNDAY, SEPTEMBER 3RD

7:00 a.m.-9:00 a.m.

BIKE RIDE

Sponsored By: Philip A. Bates, P.A.

Enjoy a morning bike ride to get your day of activities started

8:00 a.m.-12:00 a.m.

GOLF TOURNAMENT

Enjoy a morning on the green with friends in a round of friendly competition. ***Separate fee to play***

8:30 a.m.-11:00 a.m.

KAYAK ADVENTURE

Sponsored By: Peretz Chesal & Hermann, P.L.

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. ***Separate ticket price***

4:30 p.m.-6:00 p.m.

JUDGE WILLIAM VAN NORTWICK WINE TASTING

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

Enjoy time with friends tasting selected wines in an evening to honor the memory of Judge William Van Nortwick. ***Seperate ticket price***

7:00 p.m.-9:00 p.m.
DINNER ON THE TOWN

Catch up with friends or make some new ones while enjoying dinner at one of Naples' premier restaurants. Group reservations have been made especially for the BLS Retreat attendees. For information and to select a restaurant, please visit the Retreat Check In Desk. ***Pay Your Own Way***

9:30 p.m.-11:30 p.m.
WHISKEY TASTING

Sponsored By: Shutts & Bowen

Unwind after a long day of events. Bring a bottle to share while enjoying the company of friends.



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