

**AGENDA FOR JANUARY 12, 2026**  
**MEETING OF THE CLE COMMITTEE**  
**OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR**  
**12:15 PM – 1:15 PM**

**BLS CLE Committee Mission Statement**

The CLE Committee supports the substantive committees of the Business Law Section in their efforts to provide continuing legal education programs and articles for *The Florida Bar Journal*. The CLE Committee serves as a liaison between the substantive committees, their designated representatives, and the Business Law Section Administrator to facilitate the scheduling and marketing of CLE programs and provides editorial oversight for *Bar Journal* articles.

**I. WELCOME AND INTRODUCTIONS**

Hon. Caryl E. Delano, Judicial Chair  
Kathleen L. DiSanto, Chair  
Lynn Welter Sherman, First Vice Chair  
Michelle Notte, Second Vice Chair

Attendee Introductions

**II. OLD BUSINESS**

1. Approval of Minutes of August 18, 2025, Meeting (attached as Exhibit A)
2. CLE Policy (attached as Exhibit B)
3. CLE committee website

<https://flabizlaw.org/committees-task-forces/standing-committees/continuing-legal-education-committee/>

**III. LEADERSHIP VISIT**

#### IV. NEW BUSINESS

1. Review CLE Planning Event Checklist (attached as Exhibit C)
2. Upcoming CLEs

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Pro Bono	Ethical and Cultural Considerations in Pro Bono Representation of Small Business Clients	Jan. 12, 2026
Corporations, Securities, & Financial Services	Federal Securities Institute	Feb. 26-27, 2026
Intellectual Property	Intellectual Property Symposium	Apr. 16-17, 2026

3. Tentatively Scheduled CLEs

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Blockchain & Digital Assets	Proof of Intelligence and the Law: Legal Innovation in Lightchain AI	TBD
Bankruptcy/UCC	Practical Evidence	Apr. 2026
Bankruptcy/UCC	Wealth Transfers	June 2026

#### 4. Progress Reports of Committees and Task Forces

**REMINDER!** Each substantive committee is responsible for producing four (4) CLE programs each year. Except for health and wellness programing, all BLS CLEs should be offered *for a fee*.

Sponsor	Signature Programs	Completed CLEs	Upcoming CLEs	Tentatively Scheduled CLEs*
Bankruptcy/UCC	1	1	0	2
Blockchain & Digital Assets	0	0	0	0
Business Litigation	1	2	0	0
Computer & Technology Law	0	1	0	0
Corporations, Securities, & Financial Services	1	2	1	0
Intellectual Property	1	0	0	0

\* Tentatively Scheduled CLEs are programs for which a topic and date are reserved with the section administrator, but the course forms and other documentation have not yet been submitted.

#### 5. Florida Bar Journal Pipeline: Upcoming articles

TFBJ Issue	Title / Author	Status	Deadline to Submit Draft to Editor	TFBJ Submission Deadline
Mar./Apr. 2026	Mergers & Acquisitions (Michelle Notte and Emanuelle Subar Litvinov – Corporations)	Publication forthcoming	Dec. 1	Jan. 1
May/June 2026	Florida Uniform Protected Series LLC legislation – Part I (Lou Conti & Gary Teblum - Corporations)	TBD (KLD)	Feb. 1	March 1
July/Aug. 2026	Florida Uniform Protected Series LLC legislation – Part II (Lou Conti & Gary Teblum - Corporations)	TBD (LWS)	Apr. 1	May 1
Sept./Oct. 2026	AI Ethics (Areeb Naseer)	TBD (MN)	June 1	July 1
Nov./Dec. 2026	Restrictive Covenants (Brian Barakat – Business Litigation)	TBD	Aug. 1	Sept. 1
Jan./Feb. 2027	Capital Raising (Stuart Cohn & Richard Leisner – Corporations)	TBD	Oct. 1	Nov. 1
Mar./Apr. 2027	Private Judging Act (James Murphy and Alison Leonard – Business Litigation)	TBD	Dec. 1	Jan. 1
May/June 2027	Tax Exempt Entities and Risk Management (David Slenn – Bankruptcy/UCC)	TBD	Feb. 1	March 1
July/Aug. 2027	TBD (Kathleen DiSanto & Hon. Luis Rivera – Bankruptcy/UCC)	TBD	Apr. 1	May 1

Previous Florida Bar Journal Articles Submitted on behalf of the Business Law Section available at [https://www.floridabar.org/journal\\_article\\_section/business-law/](https://www.floridabar.org/journal_article_section/business-law/)

**V. OTHER BUSINESS/GOOD OF THE ORDER**

**VI. ATTACHMENTS**

1. Mission Statement and Officer Roles (attached as Exhibit D)
2. BLS CLE Diversity policy (attached as Exhibit E)
3. Recent CLEs (attached as Exhibit F)
4. Florida Bar Journal – Recently Published Articles (attached as Exhibit G)

# **EXHIBIT**

## **“A”**

**REPORT/MINUTES FOR AUGUST 18, 2025**  
**MEETING OF THE CONTINUING LEGAL EDUCATION**  
**COMMITTEE OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR**

**12:15 PM – 1:15 PM**  
**VIA ZOOM VIDEO CONFERENCE**

**I. WELCOME AND INTRODUCTIONS**

- a. Kathleen DiSanto, Chair of the CLE Committee, called the meeting to order at 12:15 p.m., and welcomed attendees.
- b. Chair DiSanto read the Mission Statement of the CLE Committee, welcomed attendees, and introduced the Judicial Chair, First Vice Chair, and Second Vice Chair.
- c. Hon, Caryl E. Delano, Judicial Chair, welcomed attendees and discussed the benefits of holding CLE Committee meeting by Zoom, including increased attendance and advancing the business of the Committee throughout the year.
- d. Chair DiSanto invited introductions.
- e. Attendees

<b>Name</b>	<b>Committee or Task Force</b>	<b>Position</b>
Hon. Caryl Delano	CLE Committee	Judicial Chair
Kathleen DiSanto	CLE Committee  Bankruptcy/UCC	Chair
Lynn Welter Sherman	CLE Committee	First Vice Chair
Michelle Notte	CLE Committee	Second Vice Chair
Stephanie Lieb	BLS Officer/Executive Committee	Chair
Brian Paul	Computer Law & Technology	Chair
Zohar Peleg	Computer Law & Technology	Vice Chair
Jim Murphy	Chapter 48 Task Force	Co-Chair
Katherine Van de Bogart	Business Litigation	Second Vice Chair
Hon. Darrin Gayles	Business Litigation	Federal Judicial Chair

Hon. Catherine McEwen	Business Litigation	Judicial Chair
Marshall Kobrin	Corporations, Securities & Financial Services	Second Vice Chair
	Chapter 607 Subcommittee	Second Vice Chair
Jodi DuBose	Rules of Court Committee	Chair
Leslie Hudock	Chapter 617 Task Force	Vice Chair
David Slenn	UVTA Task Force	Vice Chair
Sean Combs	Intellectual Property	Chair
John Cunniff	Intellectual Property	Vice Chair
Jake Linford	Intellectual Property	Academic Liaison
Josh Gutter		BLS Member

## II. OLD BUSINESS

**a. Approval of Minutes of June 11, 2025, Meeting (attached as Exhibit A)**

- i. No objections being made, the minutes were approved without a vote.

**b. CLE Policy (attached as Exhibit B)**

- i. Chair DiSanto presented the CLE Policy and discussed the 4 programs a year policy, including signature program updates.
- ii. Chair DiSanto discussed the profitability of webinars vs. in-person seminars, including lower cost of production.
- iii. Section Chair, Stephanie Lieb, discussed robust aftermarket sales of CLE programs exceeding live attendance as a source of revenue for the Section.
- iv. Chair DiSanto discussed that live CLE programs held at retreats and bar meetings do not count toward the 4 CLE requirement, but suggested recording encore presentations as CLE using speakers and materials from the live CLE.
- v. Chair DiSanto discussed the online Course Development Form and streamlining the CLE planning and accreditation process.

- vi. Chair DiSanto discussed marketing for CLE, including blasts in the Section Chairs weekly email newsletters, Section CLE calendar, and custom marketing strategies.

**c. CLE Committee Website**

- i. Chair DiSanto discussed the continuing updates to the Section's website, including the new CLE dropdown on the ribbon on the homepage. The CLE Committee's page includes the CLE Planning Event Checklist, CLE Policy, forms and instructions for articles to be published in The Florida Bar Journal, and other updates to make the web page more user friendly.

**III. LEADERSHIP VISIT**

- i. Section Chair Lieb thanked the CLE Committee and the substantive committees for their hard work in preparing CLEs to ensure a wonderful Labor Day Retreat.
- ii. Section Chair Lieb encouraged substantive committees to schedule their CLE webinars for the remainder of the bar year to ensure compliance with the CLE policy.

**IV. NEW BUSINESS**

**a. Review CLE Planning Event Checklist (attached as Exhibit C)**

- i. Chair DiSanto reviewed the CLE Planning Checklist.

**b. Upcoming CLEs**

- i. Chair DiSanto discussed upcoming CLE programs, including the following programs from the CLE calendar on the CLE website. The CLE website is updated as new CLE programs move through the submission and approval process.

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Bankruptcy/UCC	Monkey Business – Navigating the Shifting Terrain of Dischargeability in Subchapter V	Aug. 25, 2025
Blockchain & Digital Assets	“Smart” Due Process: Protecting Due Process Rights Against Automated Enforcement Abuses (In Person – LDR)	Aug. 29, 2025
Business Litigation	Accounting for Lawyers (In Person – LDR)	Aug. 30, 2025
Corporations, Securities, & Financial Services	Delaware’s Corporate Law Shakeup – Causes, Consequences, & Lessons for the Sunshine State (In Person – LDR)	Aug. 30, 2025
Intellectual Property	Effective Advocacy – What Works and What Doesn’t (In Person – LDR)	Aug. 30, 2025
Elec. Disc. & Digital Evidence	E-Discovery Fundamentals: A Practical Introduction for New Florida Litigators	Sept. 10, 2025
Business Litigation	2025 Legislative Update	Oct. 7, 2025

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Bankruptcy/UCC	Practical Evidence	Oct. 9, 2025
Bankruptcy/UCC	View from the Bench	Nov. 6-7, 2025
Corporations, Securities, & Financial Services	Federal Securities Institute	Feb. 26-27, 2026
Intellectual Property	Intellectual Property Symposium	Apr. 16-17, 2026

**c. Tentatively Scheduled CLEs**

- i. Chair DiSanto encouraged sections and task forces to start planning ahead and coordinating the dates for new and tentatively scheduled CLEs.
- ii. Tentatively scheduled CLE programs include:

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Blockchain & Digital Assets	Proof of Intelligence and the Law: Legal Innovation in Lightchain AI	Sept./Oct. 2025
Bankruptcy/UCC	Wealth Transfers	Feb. 2026

**d. Progress Reports of Committees and Task Forces**

- i. Chair DiSanto led the discussion for reports by committees and tasks forces. The progress of each committee towards meeting the requirements of the CLE policy is summarized in the chart below:

<b>Sponsor</b>	<b>Signature Programs</b>	<b>Completed CLEs</b>	<b>Upcoming CLEs</b>	<b>Tentatively Scheduled CLEs*</b>
Bankruptcy/UCC	1	0	2	1
Blockchain & Digital Assets	0	0	0	1
Business Litigation	1	0	0	0
Computer & Technology Law	0	0	0	0
Corporations, Securities, & Financial Services	1	0	0	0
Intellectual Property	1	0	0	0

\* Tentatively Scheduled CLEs are programs for which a topic and date are reserved with the section administrator, but the course forms and other documentation have not yet been submitted.

- ii. **Bankruptcy/UCC.** Kathleen DiSanto presented the report for the committee. The Committee currently has scheduled its View From the Bench signature event (November 6-7, 2025), Monkey Business (August 25, 2025), and Practical Evidence (October 9, 2025). Wealth Transfers is

tentatively scheduled for February, 2026, and one more seminar may be planned for Spring.

- iii. **Blockchain & Digital Assets.** No report given.
- iv. **Business Litigation.** Katherine Van de Bogart presented the report for the committee. A live CLE is planned for the Labor Day Retreat. The Committee is also planning an AI for litigators seminar and another CLE for the fall.
- v. **Computer & Technology Law.** Brian Paul presented the report for the committee. A live CLE program is planned for the Labor Day Retreat. The Committee is working on a webinar in the fall on cybersecurity essentials and other CLE for winter and spring.
- vi. **Corporations.** Marshall Kobrin presented the report for the committee. The committee has a live CLE planned entitled “Delaware Corporate Law Shakeup” for the Labor Day Retreat. The committee is planning a CLE on noncompete agreements for October, and a CLE on mergers and acquisitions due diligence for the fall.
- vii. **Intellectual Property.** Sean Combs presented the report for the committee. The committee lost its speaker for the August 19, 2025 CLE program. At the Labor Day Retreat, the committee will present a live CLE on effective advocacy. The committee will present its signature IP Symposium in April. The committee also is working on planning CLEs for November, January, and June.
- viii. **Chapter 617 Task Force.** Leslie Hudock advises that the task force will present a CLE in 2026 if amendments to Chapter 617 are passed by the Florida legislature.
- ix. **Miscellaneous.** Section Chair, Stephanie Lieb, advised that the Financial Literacy Task Force and Bankruptcy Bar Association are working on a financial literacy program for senior citizens entitled Elder \$mart\$, which will include a powerpoint.

**e. Florida Bar Journal Pipeline: Upcoming articles**

- i. Chair DiSanto discussed the schedule for upcoming BLS articles to be submitted for publication by the Section in The Florida Bar Journal, which was subsequently updated following the meeting:

<b>TFBJ Issue</b>	<b>Title / Author</b>	<b>Status</b>	<b>Deadline to Submit Draft to Editor</b>	<b>TFBJ Submission Deadline</b>
Sept./Oct. 2025	Bricks, Mortar, and Misconceptions: The Gold Mine Hidden in Commercial Real Estate (Todd Jones, Kevin Herzberg, Stephen King, Rachel Fisch, Bradley Tennant – Bankruptcy/UCC)	Submitted, Publication Forthcoming (GDC)	June 1	July 1
Nov./Dec. 2025	Instagram Model Act (Melanie Cherdack)	Submitted, Publication Forthcoming (LWS)	Aug. 1	Sept. 1
Jan./Feb. 2026	TBD (Kathleen DiSanto & Luis Rivera – Bankruptcy/UCC)	TBD (KLD)	Oct. 1	Nov. 1
Mar./Apr. 2026	Mergers & Acquisitions (Michelle Notte – Corporations)	TBD (MN)	Dec. 1	Jan. 1
May/June 2026	Florida Uniform Protected Series LLC legislation – Part I (Lou Conti & Gary Teblum - Corporations)	TBD (KLD)	Feb. 1	March 1
July/Aug. 2026	Florida Uniform Protected Series LLC legislation – Part II (Lou Conti & Gary Teblum - Corporations)	TBD (LWS)	Apr. 1	May 1
Sept./Oct. 2026	AI Ethics (Areeb Naseer)	TBD (MN)	June 1	July 1

- ii. Judicial Chair Delano reminded attendees that previous Florida Bar Journal Articles submitted on behalf of the Business Law Section are available online at [https://www.floridabar.org/journal\\_article\\_section/business-law/](https://www.floridabar.org/journal_article_section/business-law/)

**V. OTHER BUSINESS/GOOD OF THE ORDER**

- i. Section Chair Lieb reminded attendees on the important role of CLE Committee in keeping members up to date on current law and legislation.
- ii. Chair DiSanto discussed benefits of writing articles and presenting CLEs in developing a reputation as a subject matter expert and generating new business.
- iii. Chair DiSanto advised that the next meeting of the CLE Committee will be held by Zoom on October 20, 2025, at 12:15 p.m.
- iv. Chair DiSanto concluded the meeting at approximately 1:15 p.m.

# **EXHIBIT**

## **“B”**

## **BUSINESS LAW SECTION OF THE FLORIDA BAR**

### **CONTINUING LEGAL EDUCATION POLICY**

**Effective July 1, 2024**

The Business Law Section of The Florida Bar (“**BLS**”) serves its members through its substantive committees, subcommittees, and task forces, including Bankruptcy/UCC; Blockchain and Digital Assets; Business Litigation; Computer and Technology Law; Corporations, Securities, and Financial Services; Intellectual Property, eDiscovery, and Rules of Court. One of the BLS’s purposes is to provide a forum for the discussion and exchange of ideas leading to the improvement of the laws relating to the foregoing areas of legal practice. The BLS accomplishes this purpose, in part, by presenting quality continuing legal education (“**CLE**”) programs and course materials for the benefit of BLS members and The Florida Bar as a whole.

Accordingly, the BLS adopts the following Continuing Legal Education policy:

1. ***CLE Committee.*** The BLS Continuing Legal Education Committee (“**CLE Committee**”) supports the substantive committees, standing committees, subcommittees, and task forces in their efforts to provide CLE programs. The CLE Committee serves as a liaison between BLS’s substantive committees, standing committees, subcommittees, and task forces and the BLS Administrator.
2. ***CLE Committee Membership.*** The membership of the CLE Committee is as follows:

- Chair;
- First Vice-Chair;
- Second Vice-Chair;
- Judicial Chair;
- One liaison from each BLS substantive committee, standing committee, subcommittee or task force that produces CLE programming;
- Liaisons from subcommittees and task forces as determined on a case-by-case basis.

3. ***Appointment to the CLE Committee.*** As provided in the BLS Bylaws, the BLS’s Chair-Elect, with the approval and concurrence of the Executive Committee, appoints the chairs and vice chairs of the CLE Committee for the upcoming Bar year.

4. ***Liaisons to the CLE Committee.*** The Chair-Elect of each BLS substantive committee, standing committees, subcommittee or task force that produces CLE programming shall appoint a liaison—preferably the vice-chair or second vice-chair of the substantive committee—to the CLE Committee. Chairs or vice-chairs of BLS subcommittees and task forces may appoint additional liaisons to the CLE Committee.

5. ***Responsibilities of Liaisons.*** Liaisons or their designees must attend the CLE Committee meetings conducted at The Florida Bar’s Winter and Annual Meetings and the BLS’s Labor Day Retreat. The CLE Committee shall update the list of liaisons at least annually and maintain the current list on the CLE Committee’s website.

6. ***Required CLE Programming—Substantive Committees.*** In addition to annual presentations of the Legislative Update, the Judge Michael G. Williamson View from the Florida Bankruptcy Bench, the Federal Securities Institute, and the Intellectual Property Law Symposium, each substantive committee shall coordinate with the CLE Committee to produce and deliver at least four CLE programs each year. Each program shall provide a minimum of one hour of CLE credit.

7. ***Expected CLE Programming—Standing Committees, Subcommittees, and Task Forces.*** All substantive law subcommittees or task forces are expected to coordinate with the CLE Committee to produce and deliver at least one CLE program each year. Each program shall provide a minimum of one hour’s CLE credit. CLE programs may be presented online. For any subcommittee or task force that is covering a specific legislative topic, that subcommittee or task force is only expected to produce and deliver a CLE program after the legislation is signed by the Governor.

8. ***Responsibilities for Developing a CLE Program.*** Substantive committees, standing committees, subcommittees, or task forces that produce CLE programming shall designate a Program Chair and/or Steering Committee (volunteers who assist the Program Chair or other individuals) for each CLE program to be presented. The Program Chair or other designated member of the applicable substantive committee, standing committee, subcommittee, or task force shall be responsible for the following:

- Selecting program title and topics;
- Selecting and confirming speakers;
- Collecting the speakers’ course materials prior to their delivery to The Florida Bar for the purpose of quality control, to eliminate overlaps or errors, to reduce costs to BLS;
- Enforcing deadlines, *e.g.*, for the submission of written program materials;

for BLS Sponsored CLE Programs. Income from BLS Sponsored CLE Programs belongs to the BLS and all expenses are the BLS's responsibility.

13. ***Section Service Programs.*** Section Service Programs are considered a service to BLS members and not necessarily for the purpose of generating revenue in excess of the cost of producing the program. Examples include CLE programs that are presented during Substantive Committee meetings at BLS meetings and programs covering mental health and wellness topics. Section Service Programs are limited to BLS members only (or may be provided to a non-member when that non-member joins the BLS). Section Service Programs and must be presented in a single session and may not be made available for aftermarket sales of any kind. However, Section Service Programs may be recorded and offered at no charge.

- Personal attendance at live presentations.

Program Chairs or Steering Committee members may also serve as moderators, and act as discussion leaders during Q&A portions of a program. Additional information regarding the roles and responsibilities of program chairs, other individuals and steering committees can be found in The Florida Bar's Manual for Program Chairs, Steering Committee, and Speakers.

9. ***Coordination with CLE Committee.*** Shortly after selection of the theme and topics of the CLE program, the Program Chair or other designated individual shall contact the Chair of the CLE Committee to facilitate the scheduling and marketing of the CLE program with the BLS Administrator. The CLE Committee Chair (or designated vice-chair) and the BLS Administrator will assist the Program Chair, Steering Committee, or other designated individual to

- Determine the optimal date of the CLE program;
- Determine the CLE program type, i.e., Joint Sponsored CLE, Section Sponsored CLE, or Section Service Program;
- Ensure that the program complies with all board of legal specialization and education (“BLSE”) policies;
- Apply for CLE accreditation from the BLSE;
- Develop a marketing plan for the CLE program.

10. ***BLS Administrator.*** The BLS administrator facilitates the scheduling, presentation, and marketing of each CLE program.

11. ***Joint Sponsored CLE Programs.*** Joint Sponsored CLE Programs are jointly sponsored with The Florida Bar's Continuing Legal Education Committee. Joint Sponsored CLE Programs offer a full range of aftermarket sales options and must comply with CLE Committee Requirements. Attendees are required to pay for BLS Sponsored CLE Programs. Income (or loss) from a Joint Sponsored CLE Program is shared on an 80/20 split between the BLS and The Florida Bar.

12. ***Section Sponsored CLE Programs.*** Section Sponsored CLE Programs are not jointly sponsored with The Florida Bar CLE Committee. Aftermarket sales of Section Sponsored CLE Programs are limited to CDs, DVDs, and books. Section Sponsored CLE Programs are NOT available for purchase as online or downloadable products on The Florida Bar's 24/7 Online & Downloadable CLE Catalog. Attendees are required to pay

# **EXHIBIT**

## **“C”**

BUSINESS LAW SECTION OF THE FLORIDA BAR

**CONTINUING LEGAL EDUCATION COMMITTEE**

**CLE Planning Event Checklist**

Step 1 – Contact BLS Leadership and the CLE Committee

- BLS Program Administrator – Carly Hopkins [chopkins@floridabar.org](mailto:chopkins@floridabar.org)
- CLE Committee Chair – Kathleen L. DiSanto [kdisanto@bushross.com](mailto:kdisanto@bushross.com)

Step 2 – When? (Determine Optimal Date)

- Avoid similar industry events on the same day/week
- Clear date against The Florida Bar master calendar
- Optimal date is at least 70 days from initial contact with Program Administrator

Step 3 – Where? (Identify Venue, Determine Event Technology Needs)

- In-person, virtual, or hybrid?
- Virtual or Hybrid – Use InReachCE, offered in after-market library
- In-person – Identify venues, research pricing, visit potential locations

Step 4 – What? (Establish Goals and Brainstorm Event Topic)

- Review BLSE Policy 5.01
- Identify Topic – Current issues that will enhance an “attorneys’ professional competence and skills.” BLSE Policy 5.01(a)(1).
- Identify speakers
  - “An individual or group qualified by practical or academic experience.” BLSE Policy 5.01(a)(3).
  - Consider BLS Diversity Policy

Step 5 – How? (Establish Goals and Brainstorm Event Topic)

- Complete Course Development Form available on CLE Committee website.
  - [https://thefloridabar-pqvvv.formstack.com/forms/bls\\_cle\\_course\\_development](https://thefloridabar-pqvvv.formstack.com/forms/bls_cle_course_development)
  - Consider what types of CLE credit are available (e.g., technology, ethics, bias elimination)
  - Course Development Form must be completed within one week of securing date
- Upload CLE Material submissions, along with bios and headshots through links available on website. Work with section administrator and committee chair to apply for CLE Accreditation (BLSE Policy 5.02)
  - CLE Material Submissions [https://thefloridabar-pqvvv.formstack.com/forms/bls\\_cle\\_material\\_submissions](https://thefloridabar-pqvvv.formstack.com/forms/bls_cle_material_submissions)

- Bio and Headshot Submissions [https://thefloridabar-pqvvv.formstack.com/forms/cle\\_bios\\_and\\_headshots](https://thefloridabar-pqvvv.formstack.com/forms/cle_bios_and_headshots)
- Application for course accreditation due at least 30 days in advance of event

Step 6 – Who / Why? (Develop a Marketing Plan)

- Identify what Florida Bar Sections and Committees could be interested in the program
- Work with BLS Program Administrator to create marketing plan (emails, social media ,etc.)

# **EXHIBIT**

## **“D”**

## **FLORIDA BAR BUSINESS LAW SECTION- CLE COMMITTEE**

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### **Mission Statement**

The CLE Committee supports the substantive committees of the Business Law Section in their efforts to provide continuing legal education programs and articles for The Florida Bar Journal. The CLE Committee serves as a liaison between the substantive committees, their designated representatives, and the Business Law Section Administrator to facilitate the scheduling and marketing of CLE programs and provides editorial oversight for Bar Journal articles.

### **Officer Roles/ Responsibilities**

- Chair:
  - Serves as the primary point of contact for CLE Committee with third parties and coordinates communication with other BLS Committees and BLS leadership
  - Schedules officer and committee meeting as needed to supplement the meetings held during The Florida Bar and BLS conferences
  - Communicates as needed with CLE Committee members between meetings
  - Ensures that all appropriate matters come before the CLE Committee at committee meetings
  - Coordinates the CLE Committee's efforts with respect to BLS members' submissions of articles for publication in The Florida Bar Journal
  - Represents the CLE Committee and reports on its activities at all BLS Executive Council meetings, or arranges for substitute representation if the Chair is unable to attend
- Vice-Chair:
  - Assists the Chair in fulfilling his or her responsibilities
  - Encourages and coordinates the participation of substantive BLS Committees in CLE Committee meetings
  - Takes minutes of all meetings and circulates the minutes to Committee officers
  - Drafts a written report to the Executive Council summarizing the CLE Committee meetings in advance of Executive Council meetings
  - Serves as the Chair at any Committee meeting that the Chair is unable to attend
- Second Vice-Chair:
  - Assists the chair and second vice chair in fulfilling their responsibilities
  - Provides continuity for CLE Committee leadership
- Judicial Chair:
  - Supports the efforts of the Chair, Vice-Chair, and Second Vice-Chair
  - Provides continuity as new BLS members assume leadership positions in the CLE Committee

# **EXHIBIT**

## **“E”**

## **BUSINESS LAW SECTION DIVERSITY EQUITY AND INCLUSION CLE POLICY**

Adopted by The Business Law Section of The Florida Bar on June , 2022

The Business Law Section (“BLS”) supports proactive measures to ensure that individuals from all backgrounds are afforded fair opportunities to participate in CLE programs. All CLE programs sponsored or co-sponsored by the BLS will meet the objectives of the BLS Diversity Committee Strategic Plan to eliminate bias and enhance diversity.

Program organizers will invite and include prospective moderators and faculty members to create CLE panels that meet the objectives of the BLS Diversity Committee Strategic Plan. This includes, among others, moderators, and faculty members from historically underrepresented communities (e.g., racial and ethnic demographic groups/people of color, women, persons with disabilities, and LGBTQ+ individuals).

The Inclusion. Mentoring and Fellowship Committee (“IMF”) will create a subcommittee (the “DEI Subcommittee”), which shall be chaired by the Vice Chair of the IMF Committee and may include representatives from any other BLS committees, subcommittees, task forces and other entities (“BLS Entities”). The DEI Subcommittee shall monitor the BLS’s CLE programming to ensure that BLS Entities conduct CLE programs in accordance with this policy. The DEI Subcommittee will have authority to engage and assist any BLS Entities found not to be in compliance with this policy. Final decisions with respect to BLS Entities conducting CLE programs in accordance with this policy shall rest with the BLS Executive Committee. IMF shall report the DEI Subcommittee’s findings at regularly scheduled meetings of the Executive Council.

The implementation date for this Diversity Equity and Inclusion CLE Policy shall be July 1 , 2022.

# **EXHIBIT**

## **“F”**

Recent CLEs/Events:

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Corporations, Securities, & Financial Services	M&A Due Diligence: Checklists, Timeline Best Practice	Dec. 9, 2025
Computer & Technology Law	Cybersecurity Essentials for Florida Attorneys: Compliance and Protection	Nov. 12, 2025
Bankruptcy/UCC	View from the Bench	Nov. 6-7, 2025
Health and Wellness	Trauma Evaluations and Mental Health Experts: Why, How and Who?	Oct. 27, 2025
Bankruptcy/UCC	Overcoming Barriers to Taking on Bankruptcy Cases Pro Bono	Oct. 24, 2025
Corporations, Securities, & Financial Services	Drafting & Enforcement of Florida Employment Agreements: Navigating the CHOICE Act	Oct. 22, 2025
Business Litigation	2025 Legislative Update	Oct. 7, 2025
Elec. Disc. & Digital Evidence	E-Discovery Fundamentals: A Practical Introduction for New Florida Litigators	Sept. 10, 2025
Computer & Technology Law	A Financial Expert's Role in Emerging Legal Issues in the Tech Industry (In Person – LDR)	Aug. 30, 2025
Bankruptcy/UCC	Unique Tales of Sales – Strategies and Complications with Getting the Deal Done (In Person – LDR)	Aug. 30, 2025
Intellectual Property	Effective Advocacy – What Works and What Doesn't (In Person – LDR)	Aug. 30, 2025
Corporations, Securities, & Financial Services	Delaware's Corporate Law Shakeup – Causes, Consequences, & Lessons for the Sunshine State (In Person – LDR)	Aug. 30, 2025
Business Litigation	Accounting for Lawyers (In Person – LDR)	Aug. 30, 2025
Business Litigation	Corporate Counsel Roundtable: Surviving and Thriving in a Changing Landscape (In Person – LDR)	Aug. 29, 2025
Blockchain & Digital Assets	“Smart” Due Process: Protecting Due Process Rights Against Automated Enforcement Abuses (In Person – LDR)	Aug. 29, 2025
Bankruptcy/UCC	Monkey Business – Navigating the Shifting Terrain of Dischargeability in Subchapter V	Aug. 25, 2025
Bankruptcy/UCC	A Whole New World – What Business Litigators Should Know About Bankruptcy	June 10, 2025
Bankruptcy/UCC	ABCs, Receiverships & Beyond	May 15, 2025
Blockchain & Digital Assets	Basics of Digital Assets: What They Are and What They Mean	Apr. 30, 2025

<b>Sponsor</b>	<b>Event</b>	<b>Date</b>
Intellectual Property	Intellectual Property for the non-IP Practitioner – Part II – Copyrights and Trademarks	Apr. 23, 2025
Blockchain & Digital Assets	Legal Concepts for Stablecoins	Apr. 16, 2025
Intellectual Property	Intellectual Property Symposium	April 10-11, 2025
Corporations, Securities, & Financial Services	Drafting Business Purchase and Sale Agreements	Apr. 8, 2025
Health & Wellness	Mindfulness for Lawyers	Mar. 26, 2025
Corporations, Securities, & Financial Services	Operating Agreements in Florida: The Basics	Mar. 13, 2025
Bankruptcy/UCC	Insolvency Options for Florida Businesses	Mar. 12, 2025
Intellectual Property	Intellectual Property for the non-IP Practitioner – Part I – Patents and Trade Secrets	Mar. 11, 2025
Computer & Technology Law	Florida's Data Privacy Landscape 2025 Edition	Mar. 6, 2025
Corporations, Securities, & Financial Services	41st Annual Federal Securities Institute	Feb. 24-25, 2025
Business Litigation	Mediation Myths & Mysteries	Feb. 13, 2025
Business Litigation	Critical Liability Insurance Issues for Litigators	Feb. 6, 2025
Business Litigation	The Direct-Derivative Divide in Florida Corporate Law (Winter Meeting)	Jan. 23, 2025
Intellectual Property	Florida Trademark Law Update (Winter Meeting)	Jan. 23, 2025
Bankruptcy/UCC	ABCs, Receiverships & Beyond (Winter Meeting)	Jan. 23, 2025
Corporations, Securities, & Financial Services	SEC v. Coinbase – Win or Lose? (Winter Meeting)	Jan. 22, 2025
Business Litigation	Changes to the Florida Rules of Civil Procedure	Jan. 6, 2025

# **EXHIBIT**

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## Florida Bar Journal – Recently Published Articles

Fla Bar Issue	Title / Author	Sponsor
Jan./Feb. 2026	Avoiding Sticky Situations: Why Understanding the Distinction Between Direct and Derivative Claims is Essential When Litigation Intersects with Bankruptcy (Kathleen DiSanto & Hon. Luis Rivera)	Bankruptcy/UCC
Nov./Dec. 2025	Instagram Model Act (Melanie Cherdack)	Computer & Technology Law
Sept./Oct. 2025	Bricks, Mortar, and Misconceptions: The Gold Mine Hidden in Commercial Real Estate (Todd Jones, Kevin Herzberg, Stephen King, Rachel Fisch, Bradley Tennant)	Bankruptcy/UCC
May/June 2025	Oppression of the Minority Shareholder in Florida (Pierce Schultz)	Corporations, Securities, & Financial Services
Mar./Apr. 2025	A Proposed Answer to the Eleventh Circuit's Recent Certified Question About the Economic Loss Rule's Breadth (L. Vanessa Lopez)	Business Litigation
Jan./Feb. 2025	Banks Beware: Independent Liability of Garnishees to Garnishors (Jocelyne A. Macelloni and Danielle Latte)	Business Litigation
Nov./Dec. 2024	Capital Raising in Florida—It's a New Ballgame (Willard A. Blair, Stuart R. Cohn, and Russell C. Weigel III)	Corporations, Securities, & Financial Services
Sept./Oct. 2024	Putting Pandora Back in the Box: The Florida Telephone Solicitation Act (Ashley P. Hayes and Michael G. Polastek)	Computer & Technology Law
July/Aug. 2024	The Last Word: Bankruptcy Courts Have Jurisdiction to Determine Property of the Bankruptcy Estate and State Law Exemptions (Kathleen DiSanto)	Bankruptcy/UCC
May/June 2024	Protecting Interests or Hindering Real Estate Deals? Impact of a Lis Pendens When Selling Real Property in Florida (Jocelyne Macelloni)	Business Litigation
Mar./ Apr. 2024	What Every Business Lawyer Needs To Know About Captive Insurance; and Why It Matters in Today's Hardening Insurance Market (Amanda Luby)	Business Litigation

Fla Bar Issue	Title / Author	Sponsor
Nov./Dec. 2023	Florida's New "Judgment Lien Improvement Act" — Judgment Defendants Beware Because Your Creditors May Be Able to Get It Although They Can't See It! (Mark Wolfson)	Bankruptcy/UCC
Sept./Oct. 2023	Crisis Communications and Image Restoration – There's Insurance for That? (Russell A. Sibley, Jr.)	Business Litigation
July/Aug. 2023	Use of the Constructive Knowledge Standard When Evaluating "Evident Partiality" Challenges to Arbitration Awards in Florida (Patricia A. Leonard and Ella A. Shenhav)	Business Litigation

Previous Florida Bar Journal Articles Submitted on behalf of the Business Law Section available at [https://www.floridabar.org/journal\\_article\\_section/business-law/](https://www.floridabar.org/journal_article_section/business-law/)