

**AGENDA FOR AUGUST 27, 2026**  
**MEETING OF THE CLE COMMITTEE**  
**OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR**  
**4:00 PM – 5:00 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 May 18, 2026 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

| Sponsor                                        | Event                                                                                                            | Date                 |
|------------------------------------------------|------------------------------------------------------------------------------------------------------------------|----------------------|
| Corporations, Securities, & Financial Services | Corporate Counsel in the Age of AI: Challenges, Anxiety, and Opportunity (In Person – LDR)                       | September 4, 2026    |
| Bankruptcy/UCC                                 | From Prompt to Practice: Using AI in Bankruptcy Litigation (In Person – LDR)                                     | September 5, 2026    |
| Business Litigation                            | Business Court Roundtable (In Person – LDR)                                                                      | September 5, 2026    |
| Blockchain & Digital Assets                    | Show Me the (Digital) Money: Understanding the Regulation, Risks and Rewards of Digital Assets (In Person – LDR) | September 5, 2026    |
| Computer & Technology Law                      | The Next Wave of Risk: Cybersecurity, AI, and Quantum for the Legal Profession (In Person – LDR)                 | September 5, 2026    |
| Corporations, Securities, & Financial Services | Business Valuation and Economic Damages: Practical Insights for Business Attorneys (In Person – LDR)             | September 5, 2026    |
| Intellectual Property                          | The Professionalism Game Show (In Person – LDR)                                                                  | September 5, 2026    |
| Business Litigation                            | Legislative Update                                                                                               | October 30, 2026     |
| Bankruptcy/UCC                                 | View from the Bench                                                                                              | November 5-6, 2026   |
| Corporations, Securities, & Financial Services | Federal Securities Institute                                                                                     | February 25-26, 2027 |

3. Tentatively Scheduled CLEs

| Sponsor                                        | Event               | Date               |
|------------------------------------------------|---------------------|--------------------|
| Corporations, Securities, & Financial Services | TBD                 | September 24, 2026 |
| Bankruptcy/UCC                                 | Subchapter V Update | October 2026       |
| Bankruptcy/UCC                                 | Practical Evidence  | Spring 2027        |
| Corporations, Securities, & Financial Services | TBD                 | April 15, 2027     |

#### 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 programming, all BLS CLEs should be offered *for a fee*.**

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

\*\* Highlighted substantive committees satisfied the programming requirement under the CLE policy.

#### 5. CLE Updates for Labor Day Retreat (Ritz Carlton Naples, September 4-7, 2026)

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

| <i>TFBJ</i> Issue | Title / Author                                                              | Status                  | Deadline to Submit Draft to Editor | <i>TFBJ</i> Submission Deadline |
|-------------------|-----------------------------------------------------------------------------|-------------------------|------------------------------------|---------------------------------|
| Nov./Dec. 2026    | AI Ethics (Areeb Naseer)                                                    | Publication forthcoming | Aug. 1                             | Sept. 1                         |
| Jan./Feb. 2027    | Restrictive Covenants (Brian Barakat – Business Litigation)                 | TBD                     | Oct. 1                             | Nov. 1                          |
| Mar./Apr. 2027    | Chapter 617 legislation (Stuart Cohn & Richard Leisner – Corporations)      | TBD                     | Dec. 1                             | Jan. 1                          |
| May/June 2027     | Private Judging Act (James Murphy and Alison Leonard – Business Litigation) | TBD                     | Feb. 1                             | March 1                         |
| July/Aug. 2027    | Tax Exempt Entities and Risk Management (David Slenn – Bankruptcy/UCC)      | TBD                     | Apr. 1                             | May 1                           |
| Sept./Oct. 2027   | TBD (Kathleen DiSanto & Hon. Luis Rivera – Bankruptcy/UCC)                  | TBD                     | June 1                             | July 1                          |

| <b><i>TFBJ</i> Issue</b> | <b>Title / Author</b>                          | <b>Status</b> | <b>Deadline to Submit Draft to Editor</b> | <b><i>TFBJ</i> Submission Deadline</b> |
|--------------------------|------------------------------------------------|---------------|-------------------------------------------|----------------------------------------|
| Nov./Dec. 2027           | TBD (Pierce Schultz)                           | TBD           | Aug. 1                                    | Sept. 1                                |
| Jan./Feb. 2028           | TBD (Jocelyne Macelloni – Business Litigation) | TBD           | Oct. 1                                    | Nov. 1                                 |
| Mar./Apr. 2027           | TBD (Stephanie Lieb – Bankruptcy/UCC)          | TBD           | Dec. 1                                    | Jan. 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 MAY 18, 2026  
MEETING OF THE CLE COMMITTEE  
OF THE BUSINESS LAW SECTION OF THE FLORIDA BAR**

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

**I. WELCOME AND INTRODUCTIONS**

1. Kathleen DiSanto, Chair of the CLE Committee, called the meeting to order at 12:15 p.m.
2. Chair DiSanto read the Mission Statement of the CLE Committee, welcomed attendees, and introduced the Judicial Chair, First Vice Chair, and Second Vice Chair.
3. Chair DiSanto invited introductions.
4. Attendees

| <b>Name</b>         | <b>Committee or Task Force</b>           | <b>Position</b>   |
|---------------------|------------------------------------------|-------------------|
| Kathleen DiSanto    | CLE Committee                            | Chair             |
| Lynn Welter Sherman | CLE Committee                            | First Vice Chair  |
| Michelle Notte      | CLE Committee                            | Second Vice Chair |
| Leslie Hudock       | Chapter 617 Task Force                   | Vice Chair        |
| Marshall Kobrin     | Corporations<br>Chapter 607 Subcommittee | Second Vice Chair |
| David Slenn         | UVTA Task Force                          | Vice Chair        |
| Jake Linford        | Intellectual Property Committee          | Academic Liaison  |
| Andy Laydon         | Bankruptcy/UCC Committee                 | Chair             |
| Brian Paul          | Computer Committee                       | Member            |

**II. OLD BUSINESS**

1. Approval of Minutes of January 12, 2026, Meeting (attached as Exhibit A)
  - i. No objections being made, the minutes were approved without a vote.

2. 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 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.
3. CLE committee website
  - i. Chair DiSanto discussed the updates to the Section's website. 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 forms and documents to make the web page more user friendly. Stale information has been deleted.  
<https://flabizlaw.org/committees-task-forces/standing-committees/continuing-legal-education-committee/>

#### **I. LEADERSHIP VISIT**

1. Vice Chair Peter Valori and Chair Stephanie Lieb thanked the committee for its work on behalf of the Section.
2. Vice Chair Peter Valori reminded attendees of the CLE Committee's important role within the Section. AI will be a focus of CLE programming during the upcoming year.

#### **IV. NEW BUSINESS**

1. Review CLE Planning Event Checklist (attached as Exhibit C)
  - i. CLE Chair DiSanto reviewed the CLE Planning Checklist and requested that Committees and Task forces attempt to spread their CLE programs throughout the year to avoid saturation of the market.
  - ii. Section Chair Stephanie Lieb asked attendees to remind their committees and task forces of the limited role that Section Administrator Carly Hopkins plays and to provide her with sufficient lead time to accomplish required tasks.
  - iii. CLE Chair DiSanto advised that 60 to 70 days of marketing time is required.

## 2. Upcoming CLEs

- i. Chair DiSanto discussed upcoming CLE Programs, including the following programs from the CKE 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>   |
|-----------------------|----------------------------------------------------------------------------------------------------------------------|---------------|
| Business Litigation   | Proposals for Settlement in Florida as provided by Fla. Stat. 768.79                                                 | May 19, 2026  |
| Intellectual Property | Can Artificial Intelligence Reliably Stand in for Real Consumers in Trademark Surveys?                               | May 20, 2026  |
| Bankruptcy/UCC        | At Your Service: Avoiding the Pitfalls of Service Errors and Perfecting the Art of Excellent Certificates of Service | June 2, 2026  |
| Business Litigation   | AI for Litigators: Practical Tools Across the Case Lifecycle                                                         | June 9, 2026  |
| Presidential Showcase | Introduction to the New Florida Protected Series LLC Legislation                                                     | June 19, 2026 |

## 3. Tentatively Scheduled CLEs

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

| <b>Sponsor</b>              | <b>Event</b>                                                         | <b>Date</b>   |
|-----------------------------|----------------------------------------------------------------------|---------------|
| Computer & Technology Law   | TBD                                                                  | June 8, 2026  |
| Blockchain & Digital Assets | Proof of Intelligence and the Law: Legal Innovation in Lightchain AI | June 4, 2026  |
| Blockchain & Digital Assets | TBD                                                                  | June 11, 2026 |
| Bankruptcy/UCC              | Practical Evidence                                                   | TBD           |
| Bankruptcy/UCC              | Wealth Transfers                                                     | TBD           |

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

- i. Chair DiSanto lead 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.
- ii. A discussion was had regarding the new requirement for all members of The Florida Bar to get CLE credits for professionalism. The question was raised as to whether programs presented by Sections may satisfy the professionalism CLE requirement.

| <b>Sponsor</b>                                 | <b>Signature Programs</b> | <b>Completed CLEs</b> | <b>Upcoming CLEs</b> | <b>Tentatively Scheduled CLEs*</b> |
|------------------------------------------------|---------------------------|-----------------------|----------------------|------------------------------------|
| Bankruptcy/UCC                                 | 1                         | 2                     | 1                    | 2                                  |
| Blockchain & Digital Assets                    | 0                         | 0                     | 0                    | 2                                  |
| Business Litigation                            | 1                         | 0                     | 2                    | 0                                  |
| Computer & Technology Law                      | 0                         | 2                     | 0                    | 1                                  |
| Corporations, Securities, & Financial Services | 1                         | 3                     | 0                    | 0                                  |
| Intellectual Property                          | 1                         | 1                     | 1                    | 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.

- a. **Bankruptcy/UCC.** Kathleen DiSanto presented the report for the committee. The committee's signature event, View from the Bench was a huge success. The committee has completed 2 CLE programs, has 1 CLE ("At Your Service") scheduled, and 2 programs tentatively scheduled: David Slenn, Judge McEwen, and John Hutton will present a seminar on private wealth during the next bar year; and Doug Bates and Scott Underwood will present a CLE on evidence issues in the fall.
- b. **Block Chain/Digital Assets.** No report.
- c. **Business Litigation.** No report.
- d. **Computer Law.** Brian Paul presented the report for the committee. The committee has a webinar scheduled for June 8, and is working on an AI program featuring Mark Stein for the summer.
- e. **Corporations.** Marshall Kobrin presented the report for the committee. The committee has met is CLE requirements and is planning a CLE for the Labor Day Retreat.
- f. **Chapter 617.** Leslie Hudock presented the report for the task force
- g. **Intellectual Property.** John Cuniff presented the report for the committee. The IP Symposium was very successful and drew a large audience. Sean Combs coordinated student involvement in the CLE. The IP Symposium will be held in Tampa next year. The committee held a seminar on AI, and has additional seminars planned for this week and on June 2, 2026.

5. CLE Planning for Labor Day Retreat (Ritz Carlton Naples, September 4-7, 2026)

- i. Chair DiSanto advised that the section is attempting to pair a sponsor with each CLE to be presented at the retreat.

- ii. Chair Elect Peter Valori suggested non-credit CLE of 20 to 30 minutes during substantive committee meetings at the retreat, or a short teaser for an upcoming CLE.
- iii. Chair Elect Peter Valori advised that the retreat will be AI focused and that this focus will continue throughout the year.

6. 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:

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

- i. Judicial Chair Hon. Caryl Delano reminded that substantial effort has been made over the past 5 years to make the CLE materials on the section website more user friendly. She invited input from section members on suggested revisions to make the material more easily accessible or understandable.
- ii. Chair DiSanto advised that the next meeting of the CLE Committee will be held by Zoom after the start of the new bar year. The CLE Committee meeting schedule and zoom lines are available on the Committee's web page.
- iii. 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 programing;
- 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 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>      |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|------------------|
| Business Litigation                            | Mediation and Settlement Conferences Best Practices: How to Get Ready to Get the Best Deal Possible                  | June 25, 2026    |
| Presidential Showcase                          | Introduction to the New Florida Protected Series LLC Legislation                                                     | June 19, 2026    |
| Business Litigation                            | Following the Money: Proving Economic Damages in Litigation Disputes (In Person – Convention)                        | June 18, 2026    |
| Computer & Technology Law                      | Recent Updates in Computer, Privacy, AI and Related Law (In Person – Convention)                                     | June 17, 2026    |
| Blockchain & Digital Assets                    | Florida's AI Bill of Rights and Virtual Currency Kiosk Act Updates (In Person – Convention)                          | June 17, 2026    |
| Business Litigation                            | AI for Litigators: Practical Tools Across the Case Lifestyle                                                         | June 9, 2026     |
| Blockchain & Digital Assets                    | Florida's New Payment Stablecoin Act (and the Future of Digital Finance)                                             | June 4, 2026     |
| Bankruptcy/UCC                                 | At Your Service: Avoiding the Pitfalls of Service Errors and Perfecting the Art of Excellent Certificates of Service | June 2, 2026     |
| Intellectual Property                          | Can Artificial Intelligence Reliably Stand in for Real Consumers in Trademark Surveys?                               | May 20, 2026     |
| Business Litigation                            | Proposals for Settlement in Florida as provided by Fla. Stat. 768.79                                                 | May 19, 2026     |
| Intellectual Property                          | Ethical AI in Practice: Competence, Confidentiality, Privacy, and Cybersecurity                                      | May 6, 2026      |
| Bankruptcy/UCC                                 | Turning It Around: Creating Realistic Business Plans for Distressed Companies                                        | Apr. 30, 2026    |
| Intellectual Property                          | Intellectual Property Symposium                                                                                      | Apr. 16-17, 2026 |
| Computer & Technology Law                      | Common Security Gaps in Organizations &SMBs                                                                          | Mar. 31, 2026    |
| Corporations, Securities, & Financial Services | Federal Securities Institute                                                                                         | Feb. 26-27, 2026 |
| Corporations, Securities, & Financial Services | Litigating and How to Avoid Litigation Under the Private Securities Litigation Reform Act of 1995                    | Feb. 10, 2026    |
| Bankruptcy/UCC                                 | Creditors' Rights and Estate Planning (Winter Meeting)                                                               | Jan. 29, 2026    |
| Pro Bono                                       | Ethical and Cultural Considerations in Pro Bono Representation of Small Business Clients                             | Jan. 12, 2026    |

| <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  |

# **EXHIBIT**

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## Florida Bar Journal – Recently Published Articles

| Fla Bar Issue   | Title / Author                                                                                                                                                                                   | Sponsor                                        |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Sept./Oct. 2026 | Florida Uniform Protected Series LLC Legislation – Part III (Lou Conti & Gary Teblum)                                                                                                            | Corporations, Securities, & Financial Services |
| July/Aug. 2026  | Florida Uniform Protected Series LLC Legislation – Part II (Lou Conti & Gary Teblum)                                                                                                             | Corporations, Securities, & Financial Services |
| May/June 2026   | Florida Uniform Protected Series LLC Legislation – Part I (Lou Conti & Gary Teblum)                                                                                                              | Corporations, Securities, & Financial Services |
| Mar./Apr. 2026  | Mergers & Acquisitions (Michelle Notte and Emanuelle Subar Litvinov – Corporations)                                                                                                              | Corporations, Securities, & Financial Services |
| 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                                 |

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/)