

**FAMILY LAW SECTION
CONTINUING LEGAL EDUCATION COMMITTEE**

September 5, 2007
Tampa Airport Marriott
Florida Bar General Meetings
10:00 a.m. – The Sarasota Room

MEETING MINUTES

Attendees:

Chair	Carin Porras
Co-Vice Chair	Howard Raab
Co-Secretary	Odette Bendeck
	Patty Alexander
	Linda J. Braithwaite
	Eric Bruce
	Debra O. Day
	Luis. E. Insignares
	Ryan Doherty
	Lucy Espey-Francis
	Jeannie Etter
	Mary Evans
	Michael Gilden
	Carmen R. Gillett
	Peter Gladstone
	Nicole Goetz
	Caryn Green
	Sandra K. Haas
	Allyson Hughes
	Doreen Inkelees
	Charles Jamieson
	Charlotte Karlan
	Diane Kirigin
	Sheryl Moore
	Ashley Myers
	Sheila D. Norman
	Alberto Romero
	Alan Rubinstein
	Robin Scher
	Bonnie Sockel-Stone
	Eddie Stephens

I. WELCOME: INTRODUCTION OF MEMBERS AND OFFICERS

- A. The chair began the meeting at 10:00 a.m.
- B. The names of the attendees are listed above.
- C. Officers and members in attendance were introduced.
- D. Handouts: Meeting minutes for January 25, 2007 and June 27, 2007. Two additional handouts were distributed re: seminars scheduled and to be scheduled.

II. APPROVAL OF MINUTES

- A. It was moved and seconded to approve the minutes from January 25, 2007. Motion approved.
- B. It was moved and seconded to approve the minutes from June 27, 2007. Motion approved.

III. OLD BUSINESS

- A. Recent seminars:
 - 1. July 7, 2007 (*telephonic*) Seminar: Legislative Update. Comments – seminar was good and very informative.
 - 2. August 7, 2007 – Advanced Matrimonial Trial Advocacy Workshop. Tremendous amount of work went into the seminar. Approximately 86 people signed up. Attendees present at this meeting report that it was a good experience; mix of young versus more experienced lawyers was good.

Suggestions for future: Solicit testimonials from prior participants for the next brochure. Make clear how much work it is and that participants must be prepared before the workshop. Send out periodic emails making participants aware of level of preparation needed. Note in the brochure that people will be paired by ability and stress the importance of showing up prepared to avoid problems of participants lacking an appropriate partner.
 - 3. Military affairs seminar may have done better than as shown. Chair asked Debby Beck to check number of attendees.

IV. NEW BUSINESS

A. Reimbursement policy for speakers:

This issue was discussed extensively in June 2007 meeting. CLE Committee discussion then was that speakers should not be reimbursed except for board certification seminar. Executive Council was opposed to abolishing speaker's fees/reimbursements for fear of losing good speakers and sent this issue back to the CLE Committee for further discussion.

Committee believes that the Executive Council probably will not accept decision for no reimbursement. It was noted that Family Law Section is only one of two sections that reimburses speakers. Some feel this is why our Section attracts better speakers, because we fund excellent out-of-area speakers to lecture. Bar has certain maximums for each aspect of reimbursement. Discussion followed on alternatives.

Suggestions:

Program chair and Debby Beck should be giving speakers written notification of when reimbursement request is due. There has been abuse in the past with speakers requesting meal allowance even though all meals were provided. Notification to speakers should specify whether meals will be reimbursed for that seminar (e.g. advise that there will be no reimbursement because meals were/are provided).

Advise speakers in writing that reimbursement is not necessary; perhaps they would like to donate all or a portion of their expenses to the Section. Consider adding a box to check on the bottom of the reimbursement form that says "I agree to donate \$____ of my reimbursement to the section."

Be clear in notification to speakers that no reimbursement will be given without receipts.

Program chairs writing letters to speakers should open the letter with thanks to the speaker for the time and dedication, etc. The details on reimbursement request should be towards the bottom.

Within a few weeks of seminar, Chair should send speakers a letter of thanks and enclose a certificate of thanks. Debby Beck can provide the certificates.

The importance of using local speakers where possible was emphasized. It was noted, however, that out of town speaker may offer fresh perspective.

Discussed looking for sponsors where possible to provide food and beverage in return for which they may set up a booth. Debby Beck and the Sponsorship Committee are always looking for such sponsors; anyone who is aware of potential sponsors should advise them.

Motion made and seconded - Require submission of reimbursement request within two weeks, have option to donate expenses back to the Section, adopt policy of no receipt/no reimbursement; adopt policy of no meal expense if meal provided. Motion approved.

B. General annual schedule:

Chair of Section wants committee to put on 4 telephonic seminars per year.

Discussed the following general schedule and importance of trying to avoid scheduling conflicts with religious holidays:

January	Cert Review Course
February	Telephonic seminar
March	One-day seminar - 2 locations Videotape replays
April	Spring Retreat
May	Telephonic seminar or open month
June	Annual meeting
July	Telephonic seminar – Annual Legislative Update
August	Biennial Trial Advocacy Workshop Possible leadership retreat, OR One-day/ half day seminar
September	General meeting PLUS One-day seminar/2 locations videotape replays
October	Fall Retreat (sometimes may be in November)
November-	Telephonic seminar (or should this be the mechanics of certification exam telephonic seminar)???
December-	Mechanics of Certification Exam telephonic seminar (or regular telephonic seminar)

Discussion of ideal time for Mechanics of Cert. Exam followed. Consensus is that November is a better month.

Discussion of whether Mechanics of Cert. Exam seminar should be advertised and open to all; or only to those signed up for the exam. Several members in attendance said seminar was helpful even though they did not take the test. Per Debby Beck, cost is minimal to advertise

the seminar. Seminar promotes people seeking certification.

Motion made and seconded to open the Mechanics of Cert. Exam seminar to all (not just those taking test). Motion approved.

Motion made and seconded to move Mechanics of Cert. Exam seminar to November in future years – too late to move it for 2007. Motion approved.

C. Topics to consider for future seminars:

elder issues
valuations
surrogacy/adoption
hot topics
retirement issues
charging/retaining liens
unusual assets for distribution
representing parties with mental health issues
life insurance/health insurance issues

V. UPCOMING SEMINARS

A. Attempt to schedule 2007 – 2011, determine topics, and assign chairs:

October 4 and 5, 2007: Agreements seminar has good speakers set up. Materials need to get to Debby Beck along with speaker bios promptly. Chairs: **John Shutz** and **RT White**.

November 1-4, 2007: Fall Retreat at Amelia Island. Mark Chinn is great speaker.

November 14, 2007 Topic: Domestic Violence. Chair: **Doug Greenbaum**.

December 7, 2007 (*telephonic*) – Topic: Mechanics of Cert Exam. Chairs: **JJ Dahl** and **Caryn Green**.

January 24-26, 2008 Cert Review – Gladstone reports that main speakers are confirmed for basic topics. Still working on speakers for spotlight topics. Events will be somewhat more limited given budget concerns. Expects great attendance. Location is Grand Floridian. Cert dessert will occur after the main seminar.

February 20, 2008 (*telephonic*) – Topic: Mental Health. Chairs: **Holly**

Schuttler and Charlotte Karlan. Provide suggestions for speakers to chairs.

March 13-14, 2008 – Topic: Children’s Issues. Chairs: **Elisha Roy** and **Carin Porras**. Topics suggested: relocation; privilege of children’s therapist, Uniform Child Abduction Prevention Act, donor eggs/sperm, military children issues, domestication vs. UCCJEA – proper procedure, PKPA, Hague convention.

April 23-27, 2008 Spring Retreat in Santa Fe. Chair: **Patty Alexander**. Looking for a topic. Potential speaker: Judge Greenhawt. Can book rooms now.

May 21, 2008 (*telephonic seminar*) – Topic: Ethics. Chairs: **Odette Bendeck** and **Eddie Stephens**. Format and topics selected. Additional topics suggested: unbundled legal services. Seeking diversity geographically for the judges on the panel. Names suggested: Judge Fred Koberlein from Dixie County; Vernon Douglas from Columbia County.

July 2008 Legislative Update. Chairs: **RT White** and **Rosana Ferrari**.

Late July or August, 2008 – Retreat will be either in Naples or Marco Island.

Mid- September 2008 Topic: Dependency and Paternity. Chairs: **Howard Raab**, **Lucy Espey-Francis**, and **Carmen Gillett**. Date is still under discussion due to other meetings and religious holidays. **Meet by telephone in November to make decision on date.**

Late October/early November 2008 – Fall Retreat – Cruise.

November 12, 2008 (*telephonic*) - Topic: Mechanics of Cert. Review. Chair will be determined by Section Chair.

December 10, 2008 (*telephonic*) - Topic: Insurance – Life, Health and other. Chairs: **Bonnie Stone** and **Sheryl Moore**.

January 29-31, 2009 Cert review.

February 25, 2009 (*telephonic*) - Topic: Representing the disabled or cases with children of the disabled, impact on child support, SSI, SSDI, alimony, service animals. Chairs: **Charlotte Karlan**, **Lucy Espey-Francis**, **Jeannie Etter**.

March 19-20, 2009 Topic: Champagne Divorce on a Beer Budget. Co-chairs: **Doreen Inkelees** and **John Schutz**.

April 16-19, 2009 Spring Retreat in New Orleans. Section chair will determine chair.

May 20, 2009 (*telephonic*) - Topic: Tax issues, trusts and estates, Chairs: **Alberto Romero** and **Eric Bruce**.

July 15, 2009 (*telephonic*) – Topic: Legislative Update.

August 6-9 or 13-16, 2009 Trial Advocacy. Workshop, at the Ritz Carlton, Naples.

September 2009- Topic: Equitable Distribution - Chairs: **Carin Porras**, **Ryan Doherty** and **Kathy Beamer** - focus on retirement issues. Date to be determined.

October 2009 Fall retreat.

November 10, 2009 Mechanics of Cert exam.

December 9, 2009 (*telephonic*) - Topic: Attorneys fees, charging lien, fee provisions in contracts. Chairs: **Linda Braithwaite** and **Eddie Stevens**.

January 2010 Cert review.

February 24, 2010 (*telephonic*) - Topic: Unusual assets for distribution - tax loss carryovers, pre-paid college programs; frequent flier miles, embryos/sperm/eggs, and animals. Chairs: **Charlie Jamieson** and **Lewis Insignares**.

March 18-19, 2010 Topic: Support issues: child support and alimony. Chairs: **Michael Addicott** and **Charles Wilmot**.

April Spring retreat.

May 19, 2010 (*telephonic*) - Topic: Adoption Chair: **Ashley Myers**.

July 14, 2010 Legislative Update.

August 2010 Leadership retreat.

September 2010 Topic: – Non traditional families, cohabitation, grandparents issues. Chairs: **Alberto Romero, Charlie Jamieson** and **Charlotte Karlan**

October 2010 Fall retreat.

November 17, 2010 Mechanics of cert exam.

December 2010 (*telephonic*) Topic: Ethics Chairs: **Odette Bendeck, Evan Marks,** and **Jeannie Etter.**

Motion to adjourn – approved. Adjourned noon.

MINUTES ARE NOT FINAL UNTIL APPROVED BY THE COMMITTEE