

## Education

J.D., University of Florida

B.S., Mercer University

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. District Court, Northern District of Florida

U.S. District Court, Southern District of Florida

U.S. District Court, Middle District of Florida

U.S. Court of Appeals for the District of Columbia Circuit

## Honors & Distinctions

**The Best Lawyers in America**

Real Estate Law, 2014-Present

**Palm Beach Illustrated**

Top Lawyers, Real Estate Law, 2018-Present

**Martindale-Hubbell**, AV® Peer Review Rated

**The Florida Bar**

Board Certified Specialist, Real Estate, 2011-Present

## Education

J.D., University of Florida Levin College of Law, graduated with High Honors  
Order of the Coif

B.S., Wake Forest University, *cum laude*

## Admissions

The Florida Bar

The State Bar of Georgia

## About

### About Larry

Larry Alexander has been a Florida Bar Board Certified specialist in Real Estate Law since 1989. As the Firm's **Real Estate** Practice Group Chair, Larry concentrates his practice in the areas of real estate acquisitions, dispositions, development, and financing. His significant experience in a broad range of matters results in a high level of efficiency when developing strategies on behalf of his clients. Larry has unique insight into each practice group having served as Chairman of the firm from 2006 to 2024, enabling him to provide clients with comprehensive solutions to support their commercial goals.

Larry represents sophisticated developers, purchasers, sellers, and lenders. He serves as a trusted adviser to owners of undeveloped land, residential developments, shopping centers, office buildings, condominiums, and agricultural properties. Larry has extensive experience advising purchasers and sellers of commercial properties and large-scale residential development projects. Additionally, Larry represents country clubs, charitable foundations, and property owners associations.

## Honors & Distinctions

**The Best Lawyers in America**

Real Estate Law, 1995-Present

Lawyer of the Year, West Palm Beach, Real Estate Law, 2014, 2019

**South Florida Legal Guide**

Top Lawyers, 2004–2022

**Palm Beach Illustrated**

Top Lawyers, Real Estate Law, 2018-Present

**Florida Super Lawyers**

2006-2009, 2011-2012

**Florida Trend**

Legal Elite, 2004

**Martindale-Hubbell**

AV® Peer Review Rated

## Affiliations

The Mary Alice Fortin Foundation



## Honors & Distinctions

### Best Lawyers in America

Land Use and Zoning Law, 2022-Present

Municipal Law, 2022-Present

### Palm Beach Illustrated

Top Lawyers, Land Use and Zoning Law,  
2022-Present

Martindale-Hubbell, AV® Peer Review Rated

## Affiliations

### The Florida Bar

City, County and Local Government Law  
Section, Member, 1986-Present

Environmental & Land Use Law Section,  
Member, 1986-Present

### Palm Beach County Bar Association

Member, 1993-Present

North County Section, Member, 1996-  
Present

### American Planning Association Florida Chapter

Member 1996-Present

### American Institute of Certified Planners

Member, 2000-Present

### Palm Beach County League of Cities

Member

### State Attorney Addiction Recovery Task Force

Member, 2016-Present

### Roger Dean Stadium

Advisory Board, 1988-Present

### American Planning Association Treasure Coast Section

President / Vice President / Board of  
Directors 1996-2002

### Third Federal Savings and Loan Association of Cleveland MLTC and TFS Corporation

Director, 2005-2010

Compensation Committee, Vice-Chair, 2005-  
2010

Director & Secretary

### William H. Pitt Foundation

Secretary

### Rosarian Academy Charitable Trust

Trustee

### Sugar Cane Growers Cooperative

General Counsel

## Experience Highlights

### Commercial Real Estate

Representation of local, regional and national developers, equity investors and entrepreneurs in their acquisition, development, financing, leasing and sale of retail, office, medical, industrial, and residential projects throughout Florida and the Southeastern United States.

### Corporate Transactions

Handling of corporate transactions for developers, equity investors and entrepreneurs, including company formations, joint venture agreements, mergers and acquisitions.

### Secured Financing

Representation of local, regional, and national lenders in connection with mortgage loan and other secured financing transactions.

### High-End Residential Real Estate

Representation of high-end residential purchasers and sellers.

## Affiliations

### Palm Beach Day Academy

Board of Trustees, Vice President, 2019-Present

Executive Committee, Board of Trustees, 2014-Present

### Royal Poinciana Chapel

Board of Directors, 2012-2022

President, 2017-2019

Vice President, 2016-2017

Secretary, 2014-2016

### The Preservation Foundation of Palm Beach

Treasurer, 2015-2021

### Chamber of Commerce of the Palm Beaches

Board of Directors, 2009-2012



Treasure Coast Region Planning Council  
Appointed by Governor Chiles, Member,  
1993-1996

Leadership Palm Beach County  
Graduate, 1998

## Education

M.P.A., Florida Atlantic University

J.D., Nova University

B.A., Heidelberg University

## Admissions

The Florida Bar  
U.S. Supreme Court  
U.S. District Court, Southern District of  
Florida

## Honors & Distinctions

The Best Lawyers in America  
Elder Law, 2024  
Trusts and Estates, 2024

Florida Super Lawyers  
Elder Law, 2023

The Florida Bar  
Elder Law Section, Member of the Year, 2020

Palm Beach Illustrated  
Top Lawyers, Elder Law, 2018, 2021-Present

Florida Trend  
Legal Elite, 2010, 2012, 2014-2022

## Education

J.D., Nova Southeastern Shepard Broad Law  
Center

B.S., Florida State University

## Admissions

The Florida Bar  
U.S. Supreme Court  
U.S. District Court, Southern District of  
Florida

University of Florida Real Estate Advisory  
Board of Directors, 2013-2017

## Experience Highlights

*The following representative cases involve the representation of municipalities, condemning authorities, individuals, property owners, and developers.*

### Land Use & Zoning

#### Statewide Zoning for Multinational E-commerce Company

Retained by a global internet commerce corporation to represent in regards to the interpretation and application of zoning codes associated with the location of Warehouse/distribution facilities in multiple cities and counties in Florida.

#### Residential Subdivision & Mixed-Use Development Zoning

Represented a local developer to obtain Martin County zoning approvals for the residential and the mixed-use development projects.

#### Martin County Land Holdings and 6,000 Acre Development of Regional Impact (DRI)

Advised Fortune 500 company on planning issues associated with the development of its vast landholdings in southern Martin County and Hutchinson Island.

#### Land Use & Zoning in Large-Scale Palm Beach County Development of Regional Impact (DRI) Projects

Served as Regional Planner responsible for the review of numerous DRIs in Palm Beach County, including the expansion of Palm Beach International Airport, the Gardens Mall, Motorola, the Palm Beach Park of Commerce, PGA National, and the Vista Center.

#### Implementation of Redevelopment Master Plans for Community Redevelopment Agencies

Continuing representation of three community redevelopment agencies in the implementation of their redevelopment master plans. This continuing representation requires the review of planning documents and the creation of zoning regulations to facilitate the development of mixed use districts, and to encourage infill residential development, and incentives for economic development.

#### Comprehensive Planning Land Development Regulations and Zoning Codes for Municipality

Provided counsel to planning and zoning staff and consultants on several ambitious amendments of the Town of Jupiter's Comprehensive Plan and Land Development Regulations for Abacoa, Indiantown Road, U.S. Highway One/Intracoastal Waterway, and the Scripps Florida Bio-Science Overlay Zoning Plans. Developed in conjunction with the Town's planners, a form-based mixed-use code and two Development Order for the Abacoa DRI,



## Education

LL.M., University of Florida

J.D., Ohio Northern University

B.A., Olivet College, *cum laude*

## Admissions

The Florida Bar

U.S. Tax Court

## Honors & Distinctions

### Florida Super Lawyers

Rising Star, Estate & Trust Litigation, 2023-Present

### Palm Beach Illustrated

Top Lawyers, Trusts and Estates, 2023-Present

## Education

J.D., University of Miami School of Law, *cum laude*

B.A., Florida Atlantic University

## Admissions

The Florida Bar

U.S. District Court for the Southern District of Florida

U.S. District Court for the Middle District of Florida

U.S. District Court of Appeals for the Eleventh Circuit

## Education

J.D., Vanderbilt University Law School

B.A., University of California, Los Angeles, *magna cum laude*

## Admissions

The Florida Bar

and mixed-use land development regulations for the Jupiter Inlet Village.

### Municipal Review of Utility Sale

Document review on behalf of the City of Clewiston, who as part of a municipal consortium of cities, approved the proposed sale of the City of Vero Beach's electric utility to Florida Power & Light.

### Eminent Domain – Condemnation Authorities

#### South Florida Port District Condemnation

Representation of the Port of Palm Beach District in the Skypass condemnation, a project to unite Port property east and west of U.S. Highway One, permitting safer and faster rail and road connections to the Port.

#### Eminent Domain Proceedings in FDOT Expansion Project

Representation of the Town of Jupiter, a defendant in multiple eminent domain proceedings, as the result of FDOT-initiated taking of properties for the expansion of the Indiantown Road bridge and improvements to U.S. Highway One and Coastal Way.

#### Representation of the Palm Beach County School District Condemnation Matter

Representation of the Palm Beach County School District, the Port of Palm Beach District, and the Westgate/Belvedere Homes Community Redevelopment Agency in matters relating to the condemnation of properties for public usage.

### Inverse Condemnation

#### Successful Defense Against Zoning and Inverse Condemnation Claims by Car Dealership

Defense of the Town of Jupiter in regard to the Town's Indiantown Road Overlay Zoning District which prohibits, among uses, auto dealerships. All told, two property owners challenged the Town in six different cases in federal and state courts and administrative law proceedings. The Town prevailed in all of these cases.

#### Successful Defense of Municipality in DRI Zoning and Land Use Dispute

Representation of the Town of Jupiter in a 52-count Complaint in federal court by developer involving constitutional challenges of takings, equal protection and due process seeking damages, a consistency action, and zoning claims of arbitrary and capriciousness. The Town prevailed on a Summary Judgment, subsequently affirmed by the 11<sup>th</sup> Circuit Court of appeals.

#### Defense of Municipality in Landowner Taking Claim

Representation of the Town of Jupiter in state court against a landowner's claim of a temporary taking of a 12-acre spoil island in the Jupiter River due to the Town's refusal to timely issue a clearing permit for the island. A trial court held in favor of the Town; however, the Fourth District reversed and



## Honors & Distinctions

### Best Lawyers in America

Real Estate Law, 1999-Present

### Palm Beach Illustrated

Top Lawyers, 2021-Present

### South Florida Legal Guide

Top Lawyers, Real Estate, 2022

### Martindale-Hubbell, AV® Peer Review Rated

### Legal Aid Society of Palm Beach County

Pro Bono Award, 2013

### St. Luke's School

Athletic Hall of Fame, New Canaan, CT

## Affiliations

### The Florida Bar

Member

### The Benjamin School

Past Member, Board of Trustees

## Education

J.D., Ohio Northern University Claude W.

Pettit College of Law

B.A., Muskingum University

## Admissions

The Florida Bar

U.S. Supreme Court

## Honors & Distinctions

### The Best Lawyers in America

Real Estate Law, 2015-Present

Lawyer of the Year, West Palm Beach, Real Estate, 2020

### Palm Beach Illustrated

Top Lawyers, 2020

### Legal Aid Society of Palm Beach County

Pro Bono Award, 2013

### Martindale-Hubbell, AV® Peer Review Rated

remanded the case for further determination as to elements of the taking claim. On remand, the Circuit Court found a taking; however, on appeal, the 4<sup>th</sup> District Court of Appeal reversed the trial court's order finding a temporary taking and remanded the case for entry of a final judgment in favor of the Town.

### Successful Representation of Landowner Against Water Control District

Representation of large landowner in dispute against water control district concerning the existence of an easement over client's property for recreation trails and canal maintenance. Obtained summary judgment in favor of client, in which the court concluded that a Special Act of the Florida Legislature could not be applied retroactively against landowner, preventing the water control district and municipality from acquiring an easement over client's property.

### Planning & Zoning | State Circuit Court Cases and Administrative Proceedings

#### Municipality Prevailed in Adult Entertainment Business Closure

Successful representation of the Village of North Palm Beach in a two-count complaint seeking injunctive and declaratory relief prohibiting the operation of an adult entertainment business. A counterclaim was filed seeking a declaratory judgment declaring the Village's adult entertainment regulation unconstitutional. The trial court held that reasonable avenues for communication for adult entertainment were available under the Village' regulations. The court entered a Final Judgment upholding the constitutionality of the Village's regulations and requiring the business to immediately cease operation as an adult dancing business within the Village. The Fourth District Court of Appeal affirmed the trial court's Final Judgment.

#### Municipality Prevails in Zoning Challenge

Representation of Palm Beach County following a zoning approval for a mini-warehouse facility, after which an adjacent property owner challenged the approval as being inconsistent with the County's Comprehensive Plan. The County prevailed at trial and on appeal to the Fourth District Court of Appeal.

#### County Prevails in District Court Appeal over Zoning Challenge

Representation of Palm Beach County in property owner appeal in the Circuit Court following denial of rezoning from residential to commercial. The Court reversed the County Commission's denial of the rezoning. The County appealed and the Fourth District Court of Appeal reversed the Circuit Court. An appeal of the Fourth District Court of Appeal's opinion was taken to the Florida Supreme Court and the County prevailed.

#### District Court Affirms Town Council Authority to Rehear Appeal

Representation of a Town Council in a matter involving a resident's permitting request. The Town Council considered a resident's appeal of a determination by the Town's Community Development Director that the



Affiliations

The Florida Bar  
Member, RPPTL

Palm Beach County Chamber of Commerce  
Past Member

Education

J.D., Stetson University College of Law  
  
B.A., Auburn University

Admissions

The Florida Bar  
U.S. Supreme Court

Honors & Distinctions

The Best Lawyers in America  
Real Estate Law, 2022-Present

South Florida Legal Guide  
Top Lawyers, Real Estate, 2015-2022  
Top Up and Comer, 2013

Palm Beach Illustrated  
Top Lawyers, Real Estate Law, 2019, 2022-Present

Florida Super Lawyers  
Rising Star, 2009, 2010, 2013, 2014

Martindale-Hubbell AV® Rated

Education

J.D., University of Florida  
  
B.S., University of Florida

Admissions

The Florida Bar  
U.S. Supreme Court

Honors & Distinctions

The Best Lawyers in America  
Ones to Watch, Commercial Litigation, 2024

resident’s construction of a boat canopy was a major amendment to the Planned Unit Development which included a marina. The Town Council initially disagreed with the Director’s decision, which meant that a building permit had to be issued for construction of the boat canopy. Upon being presented with further information, the Council elected to conduct a rehearing. Before a date for the rehearing was set, and a Final Order was entered by the Council, the property owner filed suit alleging in his Writ of Prohibition that the Town was prohibited from reconsidering its decision. The Trial Court determined the Council had the authority to rehear the appeal and the Fourth District Court of Appeal affirmed.

Experience Highlights

Veteran’s Spouse Deemed Eligible for Government Benefits

Representation of a veteran’s widow to obtain government benefits. Eligibility for Medicaid and a VA Widows Pension were established, allowing the individual to supplement her living expenses with government benefit funds received from both Medicaid and the VA at an assisted living facility while protecting and preserving assets.

Assets Preserved, Medicaid Benefits Obtained for Long-Term Care

Representation of an elderly individual to obtain Medicaid. Nursing home expenses totaled \$8,000 per month, however, factors involving a disabled child allowed for protection and preservation of assets without creating ineligibility or penalties.

Estate Planning Tools Utilized to Avoid Interstate Probate

Representation of a married couple seeking to avoid probate in multiple states with multi-property ownership and substantial liquid assets. A revocable living trust was created to allow them control of their monies during their lifetime but upon death, a transfer of assets to a trust eliminated multiple probate proceedings in different states.

Asset Transfer Allows Couple Eligibility for Medicaid Benefits

Representation of a married couple paying \$9,000 per month for nursing home care. Assets were protected between the husband and wife in order to establish Medicaid eligibility.

VA Benefits Obtained for Disabled Veteran

Representation of a disabled veteran living at home alone, unable to afford the required daily assistance with activities of daily living, including medication management and bathing. Strategies were employed to establish eligibility for monthly VA benefits to cover home care/health aid expenses.

Affiliations



Ones to Watch, Real Estate Litigation, 2024

## Education

J.D., University of Florida Levin College of Law, *magna cum laude*

B.S., Psychology, University of Florida, *cum laude*

## Admissions

The Florida Bar  
U.S. District Court, Middle District of Florida  
U.S. District Court, Southern District of Florida

## Education

J.D., University of Florida Levin College of Law, *cum laude*

B.A., University of Florida, *cum laude*

## Admissions

The Florida Bar  
U.S. District Court, Southern District of Florida

## Honors & Distinctions

### Best Lawyers in America

Ones to Watch, Litigation - Construction, 2022

### Palm Beach Illustrated

Top Lawyers, Construction Law, 2022-Present

### Florida Pro Bono Coordinators Association

Silver Pro Bono Award presented by The Supreme Court of Florida

## Affiliations

### The Florida Bar

Member, Labor and Employment Section  
Member, Real Property Probate and Trust Law Section

### American Bar Association

### The Florida Bar

Editor of The Advocate, a Florida Bar Elder Law Section Publication, 2018-Present

Chair, Elder Law Section Publication Committee, 2020-Present

Co-Chair, Elder Law Section Publication Committee, 2018-2020

Past-Chair, 15th Judicial Circuit Grievance Committee E

Former Annual Update and Review Course Instructor, Elder Law Section  
Member, Elder Law Section, 2004-Present

Member, Real Estate, Probate & Trust Law Section, 2004-Present

### Florida Association for Women Lawyers, Palm Beach County

Co-Chair, Board Certification Committee, 2020-2021

Member, 2018-Present

### Palm Beach County Bar Association

Member, 2000-Present

### National Academy of Elder Law Attorneys (NAELA)

Member

### Academy of Florida Elder Law Attorneys (AFELA)

Member

### Craig S. Barnard American Inns of Court

Member, 2018-Present

## Experience Highlights

### Multi-Generational Family Corporation Dispute and Reorganization

Representation of a large, multi-generational family corporation in a family dispute, resulting in redemption of family shareholders and establishing a tax-free reorganization to shift the disputing family members into separate organizations.

### Estate Tax Return Audits

Representation of numerous estates in connection with audits of their estate tax returns and settlement of complex issues regarding partnerships, limited liability companies, and applicable discounts.

### Sale of Physician Groups to Publicly Traded Companies

Representation of numerous physician groups in the sale of their practices to publicly traded companies and hospitals.

### Corporate Contracts for Medical Groups

Representation of numerous medical groups in connection with employment, outsourcing, and vendor contracts with hospitals and medical personnel, including radiologists, pathologists, and emergency room physicians.



Member, 2017-Present

### **Palm Beach County Fair Housing/Equal Employment Board**

Vice-Chair, 2023-Present

Member, At-Large, 2023

### **Associated General Contractors of America East Coast Chapter**

Member, 2022-Present

### **United Way of Palm Beach County**

Campaign Cabinet Industry Lead, 2022-Present

### **Claims and Litigation Management Alliance**

Member, 2017-2022

## **Education**

LL.M., Securities & Financial Regulation, Georgetown University

J.D., New York Law School

B.A., University of Florida

## **Admissions**

The Florida Bar

U.S. Supreme Court

U.S. District Court, Southern District of Florida

U.S. District Court, Middle District of Florida

## **About**

### **About Erica**

Erica Haft is a member of both the Private Wealth, Wills, Trusts & Estates team and Corporate & Tax team at Jones Foster, and concentrates her practice on tax-oriented estate planning, estate and trust administration, and transactional corporate law.

Erica works with clients to create customized estate plans to minimize federal gift taxes, estate taxes, and generation-skipping transfer (GST) taxes. Erica's

### **Manufacturing Firm Allocation of Purchase Price to Intellectual Property**

Representation of a large, out-of-state family manufacturing firm acquired by a publicly traded corporation involving allocation of purchase price to goodwill and intellectual property.

### **Estate Tax Planning to Protect Retirement Funds**

Representation of numerous clients with large retirement plan accumulations; plan for the distribution of retirement assets to minimize taxes and increase creditor protection for their children and grandchildren.

### **Acquisition of a \$15 Million Car Dealership**

Representation in the acquisition of a \$15 million South Florida car dealership that involved complex tax allocation and real estate issues.

### **Estate Tax Consequences for Beneficiaries of Non-U.S. Citizen**

Representation of beneficiaries of a non-U.S. citizen's domestic estate involving cross-border tax consequences, including foreign trust issues.

## **Honors & Distinctions**

### **The Best Lawyers in America**

Corporate Law, 2023-Present

Trusts & Estates, 2007-Present

Tax Law, 1999-Present

Employee Benefits (ERISA) Law, 1995-Present

Lawyer of the Year, West Palm Beach, Tax, 2014

### **Florida Super Lawyers**

Business/Corporate, 2006-Present

### **Palm Beach Illustrated**

Top Lawyers, Business/Corporate, 2023-Present

Top Lawyers, Tax Law, 2018, 2020-Present

Top Lawyers, Trust & Estates, 2018, 2021-2022

Top Lawyers, Labor & Employment Law, 2019

### **The Florida Bar Tax Section**

Gerald T. Hart Outstanding Florida Tax Attorney of the Year, 2016-2017

### **South Florida Legal Guide**

Top Lawyers, 2010, 2015, 2016, 2017

### **Florida Trend**

Legal Elite, Tax Law, 2013, 2022

### **Martindale-Hubbell, AV® Peer Review Rated**

### **Distinguished Alumni Award Recipient**

Olivet College, 2022



experience with corporate law allows her to provide strategic solutions for a client's business succession goals. She also has experience structuring purchases anonymously to maintain a client's privacy when acquiring assets.

Erica devotes a significant portion of her practice to corporate law transactions such as mergers and acquisitions, corporate sales, and corporate restructuring. She also handles corporate governance matters such as state relocation and internal affairs.

## Education

LL.M., Estate Planning, University of Miami

J.D., University of Miami, *cum laude*

B.A., Northwestern University

## Admissions

The Florida Bar

## Honors & Distinctions

### The Best Lawyers in America

Lawyer of the Year, WPB, Intellectual Property Litigation, 2020, 2024

Lawyer of the Year, WPB, Real Estate Litigation, 2021

Lawyer of the Year, WPB, Environmental Litigation, 2019

Lawyer of the Year, WPB, Land Use & Zoning, 2016

Lawyer of the Year, WPB, Intellectual Property, 2013

Commercial Litigation, 2003-Present

Real Estate Litigation, 2011-Present

Land Use & Zoning Litigation, 2011-Present

Environmental Litigation, 2011-Present

Intellectual Property Litigation, 2011-Present

Bet-the-Company Litigation, 2010-Present

### Florida Super Lawyers

The Top 100: Florida, 2023

The Top 100: Miami, 2021-Present

Business Litigation, 2006-Present

## Affiliations

### Florida Tax Institute

Operating Board Member, 2014-Present

Past Chair, Operating Board

### The Florida Bar Tax Section

Member, Executive Council, Present

Chair, Employee Benefits Subcommittee of the Taxation of Business Organizations/Individuals Committee, Present

Co-Chair, Law College Scholarship Committee, Present

LL.M. Liaison to the University of Florida, Present

Member, Long Range Planning Committee, Present

Chair, 1999-2000

Chair, Tax Law Certification Committee, 1999-2000

Member, Tax Law Certification Committee, 1992-2002

Member, 1984-Present

### Palm Beach Tax Institute

Past President

### East Coast Estate Planning Council

Member, 2019-Present

### University of Florida Law Center Association

Florida Alumni Tax Advisory Committee, Chair 2018-Present

Florida Alumni Tax Advisory Committee, Member, 2016-Present

Board of Trustees, 2012-2017

### Rehabilitation Center for Children and Adults

Professional Endowment Committee, Chairman, 2018-Present

### Dreyfoos School of the Arts Foundation

Board Member, 2002-2006

### Palm Beach County Fringe Benefit Council

President, 1986-1989

## About

### About Alex

Alex Brams is a member of Jones Foster's Complex Litigation & Dispute Resolution and Private Wealth, Wills, Trusts & Estates practice groups. He focuses his practice on the areas of probate, trust, guardianship, and fiduciary litigation, as well as commercial litigation, throughout Florida's state and federal courts. Alex represents fiduciaries and individuals in all probate, trust, and guardianship settings, including will and trust contests, breach of trust actions, personal representative and trustee removal and accounting actions, will and trust reformation and modification proceedings, contested guardianships, exploitation and tortious



## South Florida Legal Guide

Top Lawyers, 2005, 2019-2022

## Palm Beach Illustrated

Top Lawyers, Business Litigation, 2022-

Present

Top Lawyers, Environmental Law, 2019-2022

Top Lawyers, Bet-the-Company Litigation,

2021, 2023

Top Lawyers, Land Use & Zoning Law, 2019,

2020

Top Lawyers, Municipal Law, 2018

## Florida Trend

Legal Elite NOTABLES - Managing Partner,

2023

"People to Know" in the Palm Beaches,

September 2023 issue

Legal Elite, Commercial Litigation, 2004,

2010-2012, 2015-2017, 2022

## Martindale-Hubbell, AV® Rating

## Palm Beach County Bar Association

Judge Edward Rodgers Diversity Award, 2016

Sidney A. Stubbs Professionalism Award,

2014

## University of Florida Levin College of Law

Distinguished Service Award, 2019

## Christian Legal Society

Laura Mall Justice Award, 2019

## Florida Association for Women Lawyers

Friend of FAWL Award, 2012

## Sigma Chi Fraternity

Significant Sig Award, 2017

## Palm Beach Atlantic University

American Free Enterprise Day Companion

Medal, 2003

## Florida Bar Association's Young Lawyers Section

Most Productive Young Lawyer, 1995

## Center for Family Services

Palm Beach County, Shooting for the Stars

Award Legal, 1995

interference litigation. Alex also represents personal representatives, trustees, court-appointed administrators, beneficiaries, and creditors in all facets of probate, trust, and guardianship administration.

Alex earned his J.D. from the University of Miami School of Law, attending as the recipient of a Dean's Merit Scholarship and graduating *cum laude*. Prior to earning his law degree, Alex served as a student research assistant, focusing on constitutional law and federal appeals, and interned for The Honorable Judge Joseph Marx of The Fifteenth Judicial Circuit Court of Florida.

## Affiliations

### The Florida Bar

Member, Real Property Probate and Trust Law Section, 2022-Present

### Palm Beach County Bar Association

Member, Probate/Guardianship Practice Committee, 2022-Present

Member, Estate/Probate CLE Committee, Member, 2022-Present

Board Member, Young Lawyers Section, 2023-Present

- Member, Adopt-a-School Committee, 2023-Present

Member, Young Lawyers Section, 2022-Present

### Chamber of Commerce of the Palm Beaches

Leadership West Palm Beach, Class of 2024

### Armory Art Center

Member, Advisory Board, 2023-Present

Member, Governance Committee, 2023-Present

## About

### About John

John Campo is a member of Jones Foster's Real Estate team.

John earned his Juris Doctor from Vanderbilt University Law School where he served as Managing Editor of the Vanderbilt Journal of Entertainment and Technology Law. A member of the international legal honor society, Phi Delta Phi, he was also a Dean's Scholar. During his law school studies, John gained valuable experience working as a Real Estate Specialist for a Los Angeles-based AmLaw 100 firm and as a Summer Associate at Jones Foster.

## Honors & Distinctions

### Palm Beach Illustrated

Top Lawyers, Real Estate Law, 2023-Present

## Affiliations



### Price Waterhouse

Finalist, Up and Comers Award, 1993

### International Rotary Foundation

Scholar, 1984-85

## Education

J.D., University of Florida

B.S.B.A., University of Florida, *cum laude*

M.B.A., University of Edinburgh, Scotland

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. Court of Appeals, Eleventh Circuit

U.S. District Court, Northern District of Florida

U.S. District Court, Southern District of Florida

U.S. District Court, Middle District of Florida

## Court Appointments

### Arbitrator

### Mediator

Franchise disputes

Trade secret disputes

Real estate disputes

Commercial landlord tenant disputes

Commercial development disputes-ACLF

### Court Appointed Receiver

Commercial Real Estate Development

Corporate Dissolution

Law Firm Litigation

### Court Appointed Trustee

Law Firm Dissolution

### Court Appointed Special Master

Trade Secret Disputes

Discovery Disputes

### Statutory Investigator

Newly appointed by circuit court in a corporate derivative case

### Palm Beach County Bar Association

Member, Young Lawyers Section, 2021 - Present

### Palm Beach County Literacy Coalition

Member, Literacy Links Golf Tournament Committee, 2022-Present

Volunteer, Adult Essay Initiative, 2022 - Present

### Chamber of Commerce of the Palm Beaches

Graduate, Leadership West Palm Beach, Class of 2023

## Experience Highlights

### Regional Developer Shopping Center Expansion

Representation of a regional developer in the acquisition, financing and redevelopment of a Publix-anchored shopping center located in suburban Palm Beach County, together with the separate acquisition of an adjacent vacant parcel and onto which the shopping center was ultimately expanded.

### Acquisition and Financing of Miami Beach Waterfront Retail Shopping Center

Representation of a regional developer in connection with the closing of the acquisition and purchase money financing of a waterfront retail shopping center consisting of approximately 234,000 square feet of leasable area in North Miami Beach.

### Commercial Planned Unit Development in Vero Beach

Representation of a real estate developer in connection with the acquisition, construction financing, subdivision, and lease-up of a three lot commercial planned unit development in Vero Beach, Florida.

### Simultaneous Sale of Two Separate Publix-Anchored Shopping Centers

Representation of a local investor in the simultaneous sale of two separate Publix-anchored shopping centers totaling nearly 200,000 square feet of leasable retail space.

### Acquisition of Premiere Retail Shopping Center in Orlando

Representation of a developer in connection with the purchase of a 300,000+ square foot premiere retail shopping center in Orlando, including the assumption of the existing securitized mortgage loan.

## Affiliations

### Fidelity National Title Insurance Company Commercial Real Estate

Council Member

### The Florida Bar Real Property, Probate and Trust Law Section

Member

### Chamber of Commerce of the Palm Beaches



## Honors & Distinctions

### The Best Lawyers in America

Real Estate Law, 2011-Present

### Palm Beach Illustrated

Top Lawyers, Real Estate Law, 2018, 2023

### Martindale-Hubbell, AV® Peer Review Rated

## Education

J.D., Vanderbilt University

B.A., Lehigh University

## Admissions

The Florida Bar

U.S. Supreme Court

## Education

J.D., Nova Southeastern University, Shepard  
Broad Law Center

B.A., Florida State University

## Admissions

The Florida Bar

U.S. District Court, Southern District of  
Florida

## Honors & Distinctions

### The Best Lawyers in America

Commercial Litigation, 2022-Present

### Florida Super Lawyers

Business Litigation, 2006-Present

### Florida Trend

Legal Elite, Commercial Litigation, 2006,  
2009, 2012-2015, 2018, 2019, 2022

### Palm Beach Illustrated

Top Lawyers, Commercial Litigation, 2022-  
Present

Palm Beach County Bar Association

Trustee, 2022-Present

## About

### About Travis

Travis Foels is a Jones Foster Shareholder and member of the firm's **Complex Litigation & Dispute Resolution** practice group. He represents businesses, individuals, and municipalities in civil litigation with an emphasis on commercial litigation, real estate litigation, product liability premises liability, and personal injury matters.

Travis is actively involved with the Palm Beach County Bar Association and The Florida Bar. He also serves on the Law Alumni Council for the University of Florida Levin College of Law and is a volunteer and committee member for the Literacy Coalition of Palm Beach County. In addition, Travis was recognized on the *Best Lawyers: Ones to Watch in America* 2024 list for commercial litigation and real estate litigation. The *Ones to Watch* award is given to attorneys who demonstrate outstanding professional excellence early in their careers.

Travis graduated *magna cum laude* from the University of Florida Levin College of Law and was awarded membership in the prestigious Order of the Coif. While earning his law degree, Travis served as a teaching assistant for Trial Practice, Legal Writing, and Appellate Advocacy, and as an articles editor for the *Florida Law Review*. Travis received the Gertrude Brick Law Review Award for the best Note of his law review class and was also the recipient of book awards in Appellate Advocacy, Legal Research, Electronic Discovery, Land Use Planning and Control, and Medical Malpractice.

## Experience Highlights

### Defense of Municipality in Antitrust Lawsuit

Successful defense of municipality in antitrust lawsuit resulting in a voluntary dismissal of all claims.

### Summary Judgment for Butane Canister Distributor in Product Liability Action

Obtained summary judgment for a butane canister distributor in a product liability lawsuit involving a portable butane stove explosion and severe burn injuries.

### Defense of Municipality in FLSA Dispute

Defeated two attempts at conditional certification of a collective action in FLSA lawsuit leading to a favorable settlement for municipal client in an amount less than 5% of initial demand.

### Defense of CEO in Breach of Contract Dispute

Defended company CEO against claims including breach of contract and unjust enrichment.



You've Been Served Award, 2017

**Martindale-Hubbell, AV® Peer Review Rated**

## Education

J.D., University of Florida

B.A., University of Florida

## Admissions

The Florida Bar

U.S. District Court, Middle District of Florida

U.S. District Court, Southern District of Florida

## Honors & Distinctions

### The Best Lawyers in America

Lawyer of the Year, West Palm Beach,

Litigation - Trusts & Estates, 2023

Trust and Estates Litigation, 2017-Present

### Florida Super Lawyers

The Top 100: Miami, 2023

Estate & Trust Litigation, 2013–Present

Rising Star, 2010-2012

### Florida Trend

Legal Elite, 2017, 2018

Up and Comer, 2011-2013

### Palm Beach Illustrated

Top Lawyers, Trusts & Estates, 2018-Present

Top Lawyers, Alternate Dispute Resolution, 2019-2021, 2023

**Martindale-Hubbell AV® Peer Review Rated**

## Education

J.D., University of Florida

B.S., University of Florida

## Admissions

The Florida Bar

## Honors & Distinctions

Palm Beach Illustrated

### Representation of Commercial Landlord in Lease Dispute

Obtained favorable settlement for commercial landlord in lease dispute with tenant.

### Dismissal of Administrative Complaint Against Equestrian League

Obtained dismissal of complaint against equestrian league before national governing body for equestrian sport.

### Dismissal of Trade Secret Misappropriation Claim

Obtained dismissal with prejudice of trade secret misappropriation claim brought against energy drink startup.

### Representation of Underground Utility Locating Company

Represented underground utility locating company in multiple matters with claims totaling millions of dollars in personal injury and property damage.

### Summary Judgment in Breach of Contract Arbitration

Successfully obtained summary judgment for national dental care provider in arbitration of breach of contract lawsuit.

### Dismissal of Defamation and Tortious Interference Lawsuit

Successfully obtained dismissal of lawsuit brought by former director of cancer research against cancer research and treatment center, including claims of defamation and tortious interference.

### Summary Judgment in Medical Malpractice Lawsuit

Obtained summary judgment for physician and medical practice which was per curiam affirmed by Florida's Fifth District Court of Appeal, *Savelli v. Hubsher, et al.*, 2021 WL 218703 (Fla. 5th DCA Jan. 19, 2021).

### Crisis Standards of Care Analysis

Counseled cancer research and treatment center during COVID-19 on crisis standards of care and formulation of guidelines to avoid liability exposure.

### Medical Marijuana Risk Analysis

Analyzed current political and regulatory climate and advised insurance company client on risks associated with insuring businesses involved in the medical marijuana industry.

*\*Some matters handled prior to joining Jones Foster.*

## Affiliations

### The Florida Bar

Member, Florida Bar Journal/News Editorial Board, 2023-Present

Member, Real Property Probate and Trust Law Section, 2022-Present

Member, Business Law Section, 2023-Present

### Palm Beach County Bar Association

Member, Business Litigation CLE Committee, 2023-Present



Top Lawyers, Corporate Governance and Compliance Law, 2021-Present  
Top Lawyers, Business/Corporate, 2020-2021, 2023  
Top Lawyers, Venture Capital Law, 2021  
Top Lawyers, Mergers & Acquisitions Law, 2018-2020

**Martindale-Hubbell AV® Peer Review Rated**

**Who's Who in American Law** , 1996-2012

**Florida Super Lawyers**, 2006

**Outstanding Lawyers of America**, 2002-2005

**Massachusetts Super Lawyers**, 2004

**U.S. Attorney General's Honors Scholar** , 1983

## Education

J.D., Washington & Lee University

B.A., Washington & Lee University

## Admissions

The Florida Bar  
Massachusetts Bar Association  
The District of Columbia Bar  
Virginia State Bar  
U.S. Supreme Court

## Education

J.D., University of Florida Levin College of Law

B.A., Florida Atlantic University

## Admissions

The Florida Bar  
U.S. District Court, Southern District of Florida

## Honors & Distinctions

Co-Chair, Business Litigation Session, 2024 Bench Bar Conference  
Member, Young Lawyers Section, 2021-Present

### **Palm Beach North Chamber of Commerce**

Member, Young Professionals, 2023-Present

### **University of Florida Levin College of Law**

Member, Law Alumni Council, 2021-Present

### **Literacy Coalition of Palm Beach County**

Member, Literacy Links Golf Tournament Committee, 2022-Present  
Volunteer, Read with Me program, 2022-Present

### **Education Foundation of Palm Beach County**

Member, Young Professionals Group, 2024-Present

## About

### **About Lainey**

Lainey W. Francisco is a member of the Complex Litigation & Dispute Resolution and Land Use & Governmental practice groups. She represents clients in matters involving commercial litigation, governmental litigation, municipal law, land use and zoning.

Lainey is actively involved in industry organizations including the Palm Beach County Bar Association, the Federal Bar Association, the Florida Association for Women Lawyers, and she currently serves as Treasurer of the St. Lucie County Bar Association.

Lainey graduated *cum laude* with a Juris Doctor from the University of Florida Levin College of Law, where she served as a Managing Editor of the *Florida Law Review* and Vice President of the Law College Council. She was elected by her peers to serve as Law School Senator for the UF Student Government and was selected to be a member of Florida Blue Key. Lainey was also recognized with Book Awards for Florida Rules of Judicial Administration and Criminal Procedure: Police Practices.

While attending law school, Lainey gained valuable experience as a Jones Foster Summer Associate, as a judicial extern for U.S. Magistrate Judge Bruce E. Reinhart of the United States District Court for the Southern District of Florida, and as a Certified Legal Intern for the 19th Judicial Circuit State Attorney's Office.

## Honors & Distinctions

### **Palm Beach Illustrated**

Top Lawyers, Municipal Law, 2023-Present

## Affiliations



Martindale-Hubbell, AV® Rating

## Education

J.D., University of Florida

B.A., Cornell College

## Admissions

The Florida Bar

## Honors & Distinctions

The Best Lawyers in America

Ones to Watch, Real Estate Law, 2024

## Education

J.D., University of Florida, *magna cum laude*

B.S., Nova Southeastern University, Legal  
Studies with Distinction

## Admissions

The Florida Bar

## Honors & Distinctions

Martindale-Hubbell, AV® Rating

## Education

J.D., Florida State University

B.S., Florida State University

## Admissions

The Florida Bar

U.S. Supreme Court

## Honors & Distinctions

Florida Super Lawyers

Business Litigation, 2010-Present

The Top 50: Women (Florida), 2021

The Top 100: Miami, 2021

Rising Star, 2009

The Best Lawyers in America

Commercial Litigation, 2013-Present

Palm Beach County Bar Association

Co-Chair, Federal Session, 2024 Bench Bar Conference

Member, Young Lawyers Section, 2022-Present

St. Lucie County Bar Association

Treasurer, 2023-Present

Member, Young Lawyers Section, 2022-Present

Federal Bar Association Palm Beach County Chapter

Co-Chair, Civil Service and Outreach Committee, 2023-Present

Member, 2023-Present

Florida Association for Women Lawyers

Member, Palm Beach County Chapter, 2022-Present

Rupert J. Smith Law Library of St. Lucie County Florida

Board of Trustees, 2023-Present

Wild Gamette Charity Event

Committee Member, 2022

## Experience Highlights

Construction Company Noncompete Dispute

Representation of the seller of a construction company in a noncompete lawsuit involving a multimillion-dollar sale of the business, resulting in a favorable walk-away settlement.

Successful Defense of General Contractor and Subcontractor in  
Discrimination Action

Representation of both the general contractor and subcontractor in claims brought by several employees asserting race and national origin discrimination. Favorable global settlement for less than 10% of initial demand.

Defense of Municipality in FLSA Dispute

Lead counsel in collective action brought by approximately 60 employees against a municipal client, resulting in a favorable settlement for the client in an amount less than 5% of initial demand.

Defense of Florida Subdivision

Representation of public owner in marine construction contract dispute involving allegations of delay, design defects, and breach of contract which resulted in a favorable settlement for the client.

Representation of Design Professionals in Construction Defect Litigation

Representation of design professionals in numerous complex litigation matters involving claims of negligence regarding the construction of high-rise condominiums.

Successful Defense of Employer in Dispute Over Post-Termination  
Commissions



### **Palm Beach Illustrated**

Top Lawyers, Appellate Practice, 2023

Top Lawyers, Municipal Law, 2023

Top Lawyers, Bet-the-Company Litigation, 2022

Top Lawyers, Commercial Litigation, 2018-Present

Top Lawyers, Business Litigation, 2018, 2019, 2021-2022

### **Florida Trend**

Legal Elite Notable - Women Leaders in Law, 2023

Legal Elite, Commercial Litigation, 2011, 2018-2022

### **South Florida Legal Guide**

Top Lawyers, 2010-2022

### **Chambers USA**

Florida's Leading Lawyers in Litigation, 2010-2011

Up and Comer, 2007-2009

### **Martindale-Hubbell AV® Rating**

## **Education**

J.D., Tulane University, *summa cum laude*

M.A., University of Florida

A.B., Duke University, *cum laude*

## **Admissions**

The Florida Bar

U.S. Court of Appeals, Eleventh Circuit

U.S. District Court, Northern District of Florida

U.S. District Court, Southern District of Florida

U.S. District Court, Middle District of Florida

U.S. Supreme Court

## **Education**

J.D., University of Florida

B.S., University of Florida

Summary judgment in favor of the employer and against the employee who brought claims for post-termination commissions pursuant to an alleged oral agreement.

### **Successful Defense of Employer in Overtime Claim**

Successfully defended overtime claim against an employer by way of employee's voluntary dismissal.

### **Employment Policy Drafting and Formulation**

Representation of numerous corporate clients in the formulation and adoption of written employment policies and handbooks in accordance with state and federal employment laws, including FLSA, FMLA, ADA, and newly-enacted laws such as the FFCRA.

### **Employment Law Compliance Training**

Customization, presentation, and on-site training for management-level employees to ensure compliance with state and federal employment laws.

### **Successful Dismissal of Whistleblower Complaint in School Principal Investigation Case**

Dismissal of Complaint with prejudice in the matter of *Pinkos v. The School Board of Palm Beach County*, whereby the Plaintiff brought claims under Florida's Public Whistleblower's Act.

### **Successful Recovery in Investor Fraud Case**

Recovered \$15 million in the representation of an investor defrauded by the general partner.

### **Negotiation of Executive Employment Agreements & Separation Agreements**

- Representation of global conglomerate in the termination of executive-level employees, including the negotiations of separation and release agreements.

- Representation of publicly-traded company in an executive employment agreement and compensation package.

### **Corporate Investigations**

Hired to conduct neutral third-party investigations into employee claims of a hostile work environment.

### **Disability Discrimination and Retaliation Lawsuit\***

Defeated summary judgment attempt by Fortune 500 company on federal and state discrimination and retaliation claims in federal court.

### **Defense of Businesses in Website Accessibility Claims**

Representation of businesses in website accessibility cases where a plaintiff alleges that aspects of website functionality are not ADA compliant.

### **Representation of Investor in Securities Law Violation Suit**

Lead counsel in representation of investor against broker-dealer in



## Admissions

The Florida Bar  
U.S. Supreme Court  
Florida Supreme Court  
U.S. Court of Appeals, Eleventh Circuit  
U.S. District Court, Southern District of Florida

## Honors & Distinctions

### The Best Lawyers in America

Lawyer of the Year, West Palm Beach,  
Personal Injury Litigation - Defendants, 2023  
Personal Injury Litigation - Defendants, 2022-Present  
Personal Injury Litigation - Plaintiffs, 2022-Present  
Commercial Litigation, 2020-Present

### Florida Super Lawyers

PI General: Defense, 2009, 2017-Present

### Palm Beach Illustrated

Top Lawyers, Commercial Litigation, 2023-Present  
Top Lawyers, Personal Injury Litigation, 2023-Present  
Top Lawyers, Product Liability Litigation, 2023-Present

### Florida Trend

Legal Elite, Commercial Litigation, 2022

### Martindale-Hubbell

AV® Peer Review Rated

## Education

J.D., Florida State University College of Law  
B.S., Florida State University

## Admissions

The Florida Bar  
U.S. Supreme Court  
U.S. District Court, Southern District of Florida  
U.S. District Court, Middle District of Florida  
U.S. Court of Appeals, Eleventh Circuit

fraud/churning case, which resulted in a \$850,000 settlement.

### Securities Law Violations by Wall Street Firms\*

Helped investigate and prosecute some of the largest Wall Street firms for securities law violations during the 2008 financial crisis.

\* *Matters handled prior to joining Jones Foster.*

## Honors & Distinctions

### Palm Beach Illustrated

Top Lawyers, Tax Law, 2023-Present  
Top Lawyers, Trusts and Estates, 2023-Present

## Affiliations

### The Florida Bar

Member, RPPTL Section  
Member, Tax Section

### Palm Beach County Bar Association

Member, Young Lawyers Section

### East Coast Estate Planning Council

Board of Directors, 2023-Present  
Member, 2020-Present

### Palm Beach Tax Institute

Member, 2020-Present

### Jewish Federation of Palm Beach County

Business and Professionals Division Cabinet, 2021-Present  
Working Women's Task Force, 2021-Present

### Women's Foundation of Florida

Member, Raise the Bar Committee, 2023-Present

### Kravis Center for the Performing Arts

Young Friends Executive Committee, 2022-Present

### The Norton Museum of Art

Young Friends of the Norton, 2022-Present

### Historical Society of Palm Beach County

Young Friends of HSPBC, 2023-Present

### Northwestern University

Alumni Mentor, Legal, Chicago Field Studies Program, 2022-Present

## Experience Highlights

### Commercial Litigation



## Honors & Distinctions

### The Best Lawyers in America

Ones to Watch, Trusts and Estates  
Litigation, 2023-Present

Ones to Watch, Trusts and Estates, 2023-  
Present

Ones to Watch, Commercial Litigation, 2023-  
Present

### Florida Super Lawyers

Rising Star, Estate & Trust Litigation, 2021-  
Present

### Palm Beach Illustrated

Top Lawyers, Trusts and Estates, 2023-  
Present

### South Florida Legal Guide

Up and Comers, 2022

## Education

J.D., University of Florida Levin College of  
Law

B.S., University of Florida

## Admissions

The Florida Bar

U.S. District Court, Southern District of  
Florida

## Education

J.D., University of Florida Levin College of  
Law, *magna cum laude*

B.A., University of Florida

## Admissions

The Florida Bar

U.S. Court of Appeals, Eleventh Circuit  
U.S. District Court, Southern District of  
Florida

U.S. District Court, Middle District of Florida

## Education

J.D., Duke University

## High Tech Start-Up and Automation Conglomerate Data Transmission Dispute

Representation of telecommunications start-up and principals against international automation conglomerate in a multibillion-dollar claim involving multiple technology issues related to data transmission.

## Trade Secrets Multimillion-Dollar Claim

Representation of multiple power generation start-ups and various personnel involving a multimillion-dollar claim of alleged misappropriation of trade secrets, including issues associated with the national transmission grid.

## Injunctive Relief in Trade Secrets Matter

Successfully obtained temporary injunctive relief for a staffing agency in misappropriation of trade secrets matter.

## Defense of Former Officers of a Florida Utility Company

Representation of former officers of a Florida utility company in action for breach of fiduciary duties, tortious interference, misappropriation/theft of trade secrets, unfair competition, and commercial bribery.

## High-Tech Start-Up Billion Dollar Dispute

Representation of principals of a high-tech start-up company in a billion-dollar dispute over alleged theft of trade secrets and breaches of fiduciary duties.

## Multimillion-Dollar Dispute Over Royalties of Dietary Supplement

Representation of developers of dietary supplements in federal court and before the American Arbitration Association in a multimillion-dollar dispute over royalties against international dietary supplement retailer.

## Trademark Infringement Actions

Handled multiple trademark infringement actions relative to the marine industry and the eyewear industry.

## Local Counsel Prevailed in Jury Trial Before Southern District Court

Representation of a national manufacturer of electric motors in IP matters concerning unpaid royalties, patent infringement, and the misappropriation of trade secrets by an internationally recognized furniture brand.

## Local Counsel in National IP Litigation Case

Representation of medical products manufacturing company in a patent infringement case involving medical device technology. Case proceeded in the Southern District Court before a global settlement was reached.

## Local Counsel in Securities Fraud Lawsuit

Representation of publicly held company providing specialty contracting services to the telecommunications and infrastructure industry in putative class action under federal securities laws.



B.A., Emory University, *cum laude*

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. Court of Appeals, Eleventh Circuit

U.S. District Court, Southern District of Florida

U.S. District Court, Middle District of Florida

## Education

J.D., Nova Southeastern University Shepard Broad College of Law, *cum laude*

B.A., University of Florida

## Admissions

The Florida Bar

## Education

J.D., University of Florida Levin College of Law, *cum laude*

B.A., University of Florida, *cum laude*

## Admissions

The Florida Bar

## Honors & Distinctions

The Best Lawyers in America

Corporate Law, 2024

Trusts and Estates, 2024

Palm Beach Illustrated

Top Lawyers, Tax Law, 2022-Present

Top Lawyers, Trusts and Estates, 2023-Present

## Education

LL.M., University of Florida

J.D., University of Florida, *magna cum laude*

B.A., B.B.A., Stetson University, *summa cum laude*

## Expert Witness

- Expert on the subject of legal duty of care.
- Expert regarding attorneys fees in the context of prevailing party determination (litigation, arbitration, "fees for fees".)
- Expert in the determination of legal fees as primary damages.
- Expert in the determination of legal fees as sanctions.

## Fees Counsel

### Fees Counsel Representing Municipality in Extended Litigation

Representation of municipality in *Sears v. City of Palm Beach Gardens* in extended litigation associated with substantial claim to prevailing party attorney fees arising from underlying land use dispute.

Attorney's fee expert accepted by courts in multiple state and federal matters.

## Mediation and Arbitration

### Mediation of Multi-Agency Dispute

Handled environmental and land use dispute involving ERM permitting. Multiple environmental agencies, a large residential condominium complex, and a marina facility were parties in the matter.

### Resolution of Multiple Lawsuits through Consolidated Mediation

Resolution of 4 separate lawsuits through consolidated mediation with prominent landowner & developer, government body, and a condominium complex, involving issues of land use, property rights, and condominium rights.

### Dissolution of Medical Practice

Successfully mediated dissolution of medical practice with complex valuation issues and culminating in a buyout.

### Arbitrator

Chair of Arbitration Panel in multiday arbitration regarding real estate, long-term lease, and multiuse facility.

## Governmental & Municipal

### Municipality Dispute Regarding Scope of a Service Territory

Representation of municipality in a dispute over the scope of a service territory for the delivery of potable water service.

### Permit Challenge Regarding Surficial Wells

Representation of municipality challenging permits and installation of surficial wells.

### Municipality Dispute with Public Environmental Control District

Representation of municipality in a multimillion-dollar case against a public environmental control district over the installation of certain utility



## Admissions

The Florida Bar

## Honors & Distinctions

### The Best Lawyers in America

Ones to Watch, Trusts and Estates  
Litigation, 2024

## Education

J.D., University of Florida Levin College of  
Law, *cum laude*

B.A., Quinnipiac University, *cum laude*

## Admissions

The Florida Bar

## Honors & Distinctions

### The Best Lawyers in America

Bet-the-Company Litigation, 2007-2021  
Commercial Litigation, 1987-2021  
Bet-the-Company Litigator of the Year, 2009,  
2010

### Florida Super Lawyers

Business Litigation, 2006-Present

### Daily Business Review

Professional Excellence Award,  
Distinguished Leader, 2020

### Palm Beach Illustrated

Top Lawyers, Bet-the-Company Litigation,  
2023

### Florida Trend

Legal Elite Lifetime Hall of Fame Award, 2012-  
Present  
Legal Elite, Commercial Litigation, 2004-2011

### South Florida Legal Guide

Top Lawyers, 2002-2022

### The Forum Club of the Palm Beaches

Outstanding Public Service Award, 2014

Chambers USA

services.

### Municipality Dispute Regarding Provision of Potable Water

Representation of municipality in a dispute over the application and construction of a long-term bulk sale agreement for the provision of potable water.

### Real Estate, Land Use & Zoning

#### Real Estate Developer Land Use & Zoning Dispute Resolution

Representation of real estate developer in numerous disputes with governmental bodies, including approval denials, permit denials, resulting appeals, and negotiated resolutions to the foregoing.

#### Real Estate Developer Multi-Layered Land Use Negotiations

Representation of real estate developer in multi-layered negotiating strategies with various governmental bodies associated with particular land use approvals.

### Eminent Domain Disputes

Representation of landowners in numerous eminent domain disputes with various governmental bodies.

### Contested Orders of Taking

Representation of private landowner in successfully contested orders of taking.

### Successful Resolution of Development Rights Disputes

Successful representation of real estate developer in development rights issues, including governmental acquisition interference, challenges to building moratoriums, and government approval denials.

### Administrative and Regulatory Challenges

*Litigation experience includes federal and state law claims and administrative law challenges, as well as the resolution of regulatory disputes involving environmental agencies at all levels:*

United States Environmental Protection Agency

Florida Department of Environmental Protection

South Florida Water Management District

Palm Beach County Department of Environmental Resources Management

Dade and Broward County Environmental Review Agencies

Florida Ethics Commission

U.S. EPA - Federal Debarment Proceedings – alleged Clean Water Act  
Violations

State of Florida Department of Labor

State of Florida Department of Community Affairs

Palm Beach County Health Department

State of Florida Department of Environmental Protection



America's Leading Business Lawyers

Martindale-Hubbell, AV® Peer Review Rated

## Education

J.D., University of Florida

B.S., Florida State University

## Admissions

The Florida Bar

U.S. Supreme Court

## Honors & Distinctions

The Best Lawyers in America

Commercial Litigation, 2015-Present

Florida Super Lawyers

Business Litigation, 2010-Present

Palm Beach Illustrated

Top Lawyers, Business Litigation, 2023-Present

Top Lawyers, Eminent Domain and  
Condemnation Law, 2018-Present

South Florida Legal Guide

Top Lawyers, 2010-2022

Martindale-Hubbell AV® Peer Review Rated

## Education

J.D., Florida State University

B.S., Georgetown University

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. Court of Appeals, Eleventh Circuit

U.S. District Court, Northern District of  
Florida

U.S. District Court, Southern District of  
Florida

U.S. District Court, Middle District of Florida

## Honors & Distinctions

## Affiliations

### The Florida Bar

President, 2011-2012

Chair, Executive Director Search Committee, 2017

Board of Governors, 2004-2012

Past Director, The Florida Bar Foundation

Past Vice-Chair, Budget Committee, Board of Governors

Past Vice-Chair, Disciplinary Procedures Committee

Past Member, Special Committee on Florida Constitutional Amendment  
Process

Past Member, Special Committee on Judicial Independence, Founding  
Committee Judicial Independence Standing Annual Florida Bar Convention,  
Boca Raton, 2008

Past Vice-Chair for Legislation, 2008

### Palm Beach County Bar Association

President, 2000-2001

Past Chair, Bar Revitalization (increased bar participation, diversity, and  
opened the election)

Past Chair, Environmental and Land Use Law Committee

Past Chair, Professionalism Council, 2009

Past President, Young Lawyers Division

### Florida Supreme Court

Judicial Management Council, Court Workgroup on Improved Resolution of  
Civil Cases, 2019-Present

### Eleventh Circuit Court of Appeals

Trustee, Historical Society

### United States District Court Southern District of Florida

Member, West Palm Beach Federal Courthouse Committee, 2018-2021

### American Bar Association

Past Member, House of Delegates, National Conference of Bar Presidents

### Florida Supreme Court Historical Society

Trustee, 2014-Present

### Economic Council of Palm Beach County

Board of Directors, 2017-Present

Member At Large, Executive Committee, 2024-Present

Member, Executive Committee, 2019-2023

Chair, Political Action Committee, 2023-Present

Chair, Policy Committee, 2021-2022

Chair, Governance Committee, 2019

### University of Florida

Board of Trustees, University of Florida Law Center Association, 2002-  
Present



### **The Best Lawyers in America**

Eminent Domain and Condemnation Law,  
2007-Present

### **Florida Super Lawyers**

General Litigation, 2006-2022

### **Palm Beach Illustrated**

Top Lawyers, Eminent Domain and  
Condemnation Law, 2018-Present  
Top Lawyers, Land Use & Zoning Law, 2018-  
2020

### **Florida Trend**

Legal Elite, 2004

### **Martindale-Hubbell AV® Peer Review Rated**

## **Education**

J.D., University of Florida

B.A., University of Florida

## **Admissions**

The Florida Bar

U.S. Supreme Court

U.S. District Court, Southern District of  
Florida

U.S. District Court, Middle District of Florida

U.S. Courts of Appeals, Eleventh Circuit

## **Honors & Distinctions**

### **The Best Lawyers in America**

Commercial Litigation, 2013-Present

### **Florida Super Lawyers**

Business Litigation, 2007, 2010-2011, 2014-  
Present

### **Palm Beach Illustrated**

Top Lawyers, Business Litigation, 2022  
Top Lawyers, Commercial Litigation, 2021-  
Present  
Top Lawyers, Alternate Dispute Resolution,  
2019, 2023

### **Florida Trend**

"People to Know" in the Palm Beaches,  
September 2023 issue

Chair, Board of Trustees, University of Florida Law Center Association,  
2016-2017

Vice-Chair, Board of Trustees, University of Florida Law Center  
Association, 2015-2016

Member, Council of Advisors, Bob Graham Center for Public Service, 2016-  
Present

Member, University of Florida College of Medicine Leadership Council, 2018-  
Present

Member, Board of Directors, University of Florida Foundation, 2004-2016

Chair, Board of Directors, University of Florida Foundation, 2014-2016

Vice Chair, Board of Directors, University of Florida Foundation, 2012-2014

Dean's Search Committee, 2013

President, University of Florida National Alumni Association, 1998-1999

President, University of Florida College of Law Alumni Council, 1989-1991

### **Palm Beach Atlantic University**

Trustee, 1994-Present

Chair, Board of Trustees, 2013-2015

### **Florida's Children First**

Palm Beach County Committee, 2006-2009

### **Palm Beach County Literacy Coalition**

Past Member, Steering Committee

### **Leadership Palm Beach County**

Graduate, 1994

## **About**

### **About Spencer**

Spencer Keyser, a Jones Foster Shareholder and member of the firm's Complex Litigation & Dispute Resolution practice group, focuses his practice in the areas of complex civil litigation, commercial litigation, and personal injury. Spencer has extensive litigation experience representing clients in both state and federal courts as well as state administrative and regulatory proceedings.

Spencer is an active member of the Palm Beach County Bar Association and was named a Best Lawyers in America "Ones to Watch" honoree for 2021 and 2022.

Spencer graduated from Nova Southeastern University Shepard Broad College of Law where he was a member of the Nova Trial Association and recipient of the merit-based Goodwin Scholarship. While earning his law degree, Spencer served as a judicial law clerk for the Fifteenth Judicial Circuit of Florida and performed a clerkship at a preeminent Florida civil defense law firm.

## **Honors & Distinctions**



Martindale-Hubbell, AV® Peer Review Rated

## Education

J.D., Albany Law School

B.S., Michigan State University

## Admissions

The Florida Bar

New York State Bar

U.S. Supreme Court

U.S. District Court, Southern District of Florida

## Education

LL.M., Estate Planning, University of Miami School of Law

J.D., University of Michigan Law School

B.A., Hobart College

## Admissions

The Florida Bar

U.S. District Court, Southern District of Florida

U.S. Bankruptcy Court, Southern District of Florida

## The Best Lawyers in America

Ones to Watch, Commercial Litigation, 2023-Present

Ones to Watch, Product Liability Litigation - Defendants, 2024

Ones to Watch, Personal Injury Litigation - Defendants, 2021-Present

## Florida Super Lawyers

Rising Star, Business Litigation, 2023-Present

## Affiliations

### The Florida Bar

Member, Young Lawyers Section, 2014-Present

### Palm Beach County Bar Association

Co-Chair, 2024 Bench Bar Conference

Member, Civil Rules Committee, 2022-Present

Member, Law Related Education Committee, 2022-Present

Board Member, Young Lawyers Section, 2023-Present

Member, Young Lawyers Section, 2014-Present

## Affiliations

### Palm Beach County Bar Association

President, 2004-2005

Board of Directors, 1999-2006

Member, 1986-Present

North County Section, Board of Directors, 1994-2004

North County Section, President, 1998-1999

North County Section, Member, Current

### The Florida Bar

Member, 1984-Present

Liaison Committee, Former Chairman

Law Day Committee, Former Member

Trial Lawyers Section, Former Member

### Regent Bank

West Palm Beach Advisory Board, 2014-2017

### Speak Up For Kids

Co-Founder, Winterfest, 1996-Present

### Lighthouse for the Blind of the Palm Beaches, Inc.

Board of Directors, Chair Emeritus, 2021-Present

Board of Directors, Chair, 1997-2014

Board of Directors, Member, 1994-1997

### Gulfstream Goodwill Industries

Board of Directors, Chair

Board of Directors, 2007-2014



**Craig S. Barnard American Inn of Court**  
Mentoring Committee, Co-Chair, 2002-2004  
Member, 1999-2005

**Friends of Abused Children**  
Past Vice President

## **Experience Highlights**

### **Invalidated Purported Last Will and Testament Due to Undue Influence**

Representation of testator's children at trial and in appellate proceedings, whereby the purported last will and testament was successfully invalidated on grounds of testator's incapacity and undue influence exerted by testator's surviving spouse.

### **Corporately Held Real Estate Ownership Dispute**

Representation of successor trustee in appellate proceedings before the Fourth District Court of Appeal and the Florida Supreme Court in trust litigation concerning the ownership of \$1.5 million of corporately held real estate.

### **Breach of Trust Litigation Concerning Administration of Trust**

Representation of corporate trustee in breach of trust litigation concerning the administration of trust in excess of \$100 million in assets.

### **Interim Trustee for Trusts Totaling \$30 Million in Assets**

Appointed as special fiduciary to serve as interim trustee for 9 separate trusts totaling \$30 million in assets.

### **Successful Defense Against Objections to Petition of Discharge**

Successful defense of personal representative against objections to their petition for discharge, final accounting, and plan of distribution, including obtaining a judgment of fees and costs in excess of \$250,000.

### **Will Contest Involving Ademption**

Representation of guardian in a will contest involving ademption of a specific devise.

### **Contested Guardianship Incapacity Proceedings**

Representation in numerous contested guardianship proceedings concerning issues of incapacity and the appointment of guardians.

### **Successful Defense of Multi-Million Creditor Claim**

Successful defense of personal representative against a multi-million creditor claim.

### **Successful Defense of Claims of Breach of Trust and Fiduciary Duty**

Successful defense of testator's daughter and attorney in fact at trial and in appellate proceedings against claims of breach of trust and breach of fiduciary duty associated with the administration of the testator's multi-million dollar revocable trust.



### **Successful Defense of Validity of Last Will and Testament**

Representation of personal representative in successfully defending the validity of the decedent's Last Will and Testament against claims of undue influence and lack of testamentary capacity.

### **Affiliations**

#### **American College of Trust and Estate Counsel**

Fellow, 2023-Present

#### **The Florida Bar**

Chair, Florida Probate Rules Committee, 2018

Member, Florida Probate Rules Committee, 2007-2014, 2018-2021

Real Property, Probate and Trust Law Section (RPPTL)

- Executive Council, 2012-Present

- Chair, Probate Law and Procedure Committee, 2022-Present

Member, Elder Law Section

#### **Palm Beach County Bar Association**

President, 2014-2015

President, Young Lawyers Section, 2009-2010

#### **Chamber of Commerce of the Palm Beaches**

Trustee, 2009-2021

Board of Directors, 2006-2009

Graduate, Leadership West Palm Beach, 2006

#### **University of Florida Levin College of Law**

Board of Trustees, Law Center Association, 2019-Present

President, Law Alumni Council, 2017-2018

### **Experience Highlights**

#### **Multi-Billion Dollar Sale of Global Commodities Company**

Negotiated and structured the sale of a globally recognized commodities company with an original transaction value of approximately \$2 Billion.

#### **\$250+ Million Credit Facility**

Lead U.S. Counsel for borrower in connection with a complex \$250+ million multi-lender offshore loan facility.

#### **Private Equity Firm Portfolio Acquisitions & Sales**

Representation of a private equity investment firm in a \$214 million sale of portfolio companies to a publicly-traded corporation. Previously represented client in initial acquisitions.

#### **Imaging Clinics Sold to Publicly Traded Healthcare Corporation in Cross-Border M&A**

Seller representation in an international M&A valued in excess of \$39 million involving six separately held physician-owned South Florida freestanding,



fixed-site outpatient diagnostic imaging clinics sold to a publicly traded Canadian healthcare corporation.

#### **Sale of U.S. Company to Canadian Private Equity Firm**

Representation of a multi-office family-owned regional pump business in its sale to a Canadian-based private equity firm.

#### **Cross-border Restructuring and Sale of Canadian Company**

Served as Special Corporate Counsel in connection with cross-border restructuring and sale of the largest Canadian-based provider of sales and data collection solutions.

#### **Corporate Transactions for Nonprofit, Global Multimedia Company**

Representation of a globally recognized nonprofit multimedia company in connection with several corporate transactions and creditors rights' matters.

#### **Sale of Interest in Hedge Fund**

Represented former general partner in \$15 million multi-tiered sale of majority membership interest in nationally-recognized hedge fund.

#### **National Security Company Acquisition by Private Equity Firm**

Representation of a nationally prominent security firm in its acquisition by a U.S. based private equity firm.

#### **Natural Health Company Acquisition by Global Enterprise**

Representation of a privately held natural supplements and products company in its acquisition by an overseas international leader in the health and nutrition industry.

#### **Sale of Multi-Office Home Healthcare Company to Private Equity Firm**

Representation of principals in the sale of a home healthcare services company with multiple locations to a Chicago-based private equity firm. Handled the initial acquisition of the company in addition to the subsequent sale.

#### **Corporate Sponsorship of National Car Racing Series**

Representation of Grain & Barrel Spirits brand, Dixie Vodka, in a multi-year sponsorship and licensing deal with NASCAR.

#### **Worldwide Spirits Supply and Distribution Deal**

Representation of established global beverage platform in the negotiation of an exclusive worldwide supply and distribution agreement with an award-winning regional craft spirit company, further expanding their core brand offerings.

#### **Spirits Company Acquisitions and Licensing Deals**

Representation of an emerging wine and spirits company in numerous acquisitions and in licensing negotiations with a national media production company.

#### **Corporate Transactions for Spirits Distributor**



Representation of two leading regional beverage wholesalers/distributor in general legal corporate matters.

#### **Acquisition of Multinational Furniture Care Corporation**

Representation of a multinational corporation in the acquisition of one of the largest U.S. furniture care product and warranty businesses.

#### **Private Equity and Venture Capital Portfolio Investments and Dispositions**

Representation of numerous private equity and venture capital clients in connection with diverse portfolio investments and dispositions.

#### **Creditor Representation in the Reorganization of U.S. Computer Company**

Representation of the second largest creditor and major supplier in the reorganization of one of the largest U.S. computer companies.

#### **Contested Acquisition of Major New England Resort Complex**

Representation of a New York-based private equity company in the contested acquisition of the largest resort complex on Cape Cod.

#### **Multinational Aerospace Company**

Representation of a multinational aerospace company in connection with the U.S. reorganization of several domestic and international air carriers.

#### **Reorganization of 165-Unit Fast Food Restaurant Chain**

Representation of the indenture trustee for subordinated bondholders in the reorganization of a 165-unit chain of fast food restaurants.

#### **Restructuring of Steel Company**

Representation of a Boston-based insurance company in connection with loans and corporate governance matters related to the restructuring of a U.S.-based steel company.

*\*Some matters handled prior to joining Jones Foster*

### **Affiliations**

#### **The Florida Bar**

Member, Senior Lawyers Committee, 2022-Present

#### **Palm Beach Civic Association**

Board of Directors, 2008-Present

Member, Public Safety Committee

Member, Port of Palm Beach Committee

#### **Palm Beach Day Academy**

Trustee Emeritus, 2020-Present

Board of Trustees, 2011-2020

Capital Campaign Steering Committee, 2010-2012

#### **Boys & Girls Clubs of Palm Beach County**

Board of Directors, 2007-2018

Executive Committee, 2011-2018



**Angel Forum of Florida**  
Past-Director, 2010-2014

**Palm Beach Chamber of Commerce**  
President, 2012-2014  
Board of Directors, 2007-2015

**Washington & Lee University Alumni Association**  
Director, 2009-2013

## **Experience Highlights**

### **Significant Recovery for Real Property Owner in Inverse Condemnation Lawsuit**

Representation of a real property owner in an inverse condemnation lawsuit for the taking of submerged land by Palm Beach County without permission or compensation that resulted in reduced ability to develop the property. A seven-day jury trial resulted in an award of \$425,700 – a valuation approximately 27 times higher than the County's valuation of \$15,700.

### **Successful Representation in Residential Jointly Owned Partition Lawsuit**

Brokered successful buyout of a portion of jointly owned residential property.

### **Landlord-Tenant Representations**

Successful representation of Landlords and Tenants in commercial and residential eviction lawsuit.

### **Obtained Emergency Injunction**

Prevailed in obtaining an emergency injunction preventing an HOA from interfering with private property owner's access to and from property after private property owner lost only alternate access point.

### **Summary Judgment in Former Employee's Commission Claim**

Obtained summary judgment for employer whose former employee sought commission in perpetuity for the life of client accounts.

### **Successful Representation of Mobile Homeowner**

Procured a Court order directing the Florida Department of Highway Safety and Motor Vehicles to issue title to a mobile home for client who did not obtain valid title at the time of purchase.

### **Dismissal of Derivative Lawsuit**

Successfully obtained dismissal of a derivative lawsuit brought by 32 plaintiffs against members of the board of corporate entity.

### **Successful Enforcement of Employee Noncompete Clause**

Successfully enforced noncompetition provision of two former employees for the relevant geographic market after former employees went to work for employer's competitor.



## Affiliations

### Palm Beach County Bar Association

Member, Civil Rules Committee, 2023-Present

Member, Young Lawyers Section

### Palm Beach County Sport Commission

Member, Hall of Fame Committee, 2023-Present

## About

### About John

John Martyn, a member of Jones Foster's **Private Wealth, Wills, Trusts & Estates** and **Real Estate** teams, concentrates his practice in the areas of estate planning, estate and trust administration, wills, and real estate. As a Jupiter native with decades of experience in his areas of focus, Jack has built authentic relationships with clients and colleagues alike, serving as a trusted counselor and preeminent legal advisor.

## About

### About Carlee

Carlee Mattison is a member of Jones Foster's **Real Estate** team and focuses her practice in the areas of acquisitions, dispositions, and commercial leasing.

Carlee's additional experience includes probate and trust litigation, as well as fiduciary litigation. She has served as trusted counsel to individuals, families, trustees, personal representatives, and beneficiaries in trust and estate administration matters.

Carlee earned her Juris Doctor degree and graduated *magna cum laude* from The University of Florida Levin College of Law, where she was named to the Order of the Coif. She was the recipient of Book Awards in Criminal Law and Family Law, received the DT Smith Outstanding Associate Editor Award from the Florida Law Review, and was a member of the Phi Delta Phi Legal Honor Society. While at the University of Florida, Carlee gained valuable experience as a Research Assistant to two law school professors, and as a Summer Associate at Jones Foster.

## Affiliations

### The Florida Bar

Member, RPPTL Section, 2019-Present

### Palm Beach County Bar Association

Member, Young Lawyers Section, 2019-Present

### Florida Association for Women Lawyers Palm Beach County

Member, 2019-Present



Food Pantry of Broward County, 2015-2016

Make-A-Wish Foundation, 2012-2016

## Affiliations

### American Bar Association

Real Property, Probate and Trust Law Division, Member

### The Florida Bar

Business Law Section, Member

Real Property, Probate and Trust Law Section, Member

### Palm Beach County Bar Association

Member

## Experience Highlights

### Defendants' Liaison Counsel in Zantac Products Liability Multidistrict Litigation

Local counsel for drug manufacturer, Sanofi, and appointed by Judge Robin Rosenberg, U.S. District Court for the Southern District of Florida, as defendants' liaison counsel in Zantac products liability MDL involving claims that the active ingredient, ranitidine, contains low levels of NDMA, a cancer-causing chemical. Summary judgment was granted in favor of the brand-name drugmakers, dismissing all claims by the more than 2,450 plaintiffs and 150,000 additional claimants.

### Defense of \$65 Million Claim Against Financial Services Chairman & CEO

Representation of publicly held financial services corporation and its chairman and chief executive officer in defense of \$65 million claim brought by minority shareholders of wholly owned subsidiary alleging breach of fiduciary duty, breach of contract, fraud and civil theft in two-week hearing before AAA arbitration panel.

### Successful Defense of \$50 Million Claim Against Laboratories

Secured early dismissal of RICO and fraud claims brought by the largest for-profit managed health care company in the world, seeking in excess of \$50 million, on behalf of a half dozen laboratory defendants as well as their general partners and officers.

### Successful Defense of National Law Firm in Legal Malpractice Claim

Obtained directed verdict, affirmed on appeal, on behalf of national law firm sued for damages in excess of \$20 million for alleged legal malpractice in drafting limited partnership documents.

### Local Counsel in Securities Fraud Lawsuit

Representation of publicly held company providing specialty contracting services to the telecommunications and infrastructure industry in putative class action under federal securities laws.



### **Insurance Brokerage TCPA Class Action Defense**

Representation of insurance brokerage in defense of consumer class action alleging violation of Telephone Consumer Protection Act ("TCPA") by sending unsolicited facsimile advertisements. Negotiated settlement and oversaw class administration.

### **Printing Manufacturer TCPA Class Action Defense**

Representation of nationwide print services company in defense of consumer class action alleging violation of the Telephone Consumer Protection Act ("TCPA") by sending 2,500 facsimile advertisements. Negotiated class action settlement and class administration.

### **Palm Beach County State-of-the-Art Scientific Research Institute**

Served as counsel to The Scripps Research Institute in establishing Scripps Florida, a new state-of-the-art scientific research institute, in Palm Beach County, Florida against a variety of legal challenges from environmental and non-profit organizations.

### **Real Estate Broker Recovery of Commission**

Representation of real estate broker suing to recover commission due on sale of \$10.6 million home at buyer's full asking price pursuant to exclusive listing agreement. Negotiated favorable settlement after early mediation.

### **Municipality Prevails in U.S. Court of Appeals in Case of First Impression**

Representation of the Town of Palm Beach in a matter of first impression in the area of land use and constitutional law. A longtime resident argued that the Town's architectural review commission violated his constitutionally protected First Amendment right to freedom of expression and his Fourteenth Amendment rights to due process and equal protection when it denied his application to demolish his traditional-style home and construct a new international/modern-style home on the oceanfront lot. The commission denied the application because the proposed mansion was "excessively dissimilar" from other nearby homes in accordance with various architectural design criteria. The Southern District of Florida granted summary judgment in the Town's favor and the U.S. Court of Appeals for the Eleventh Circuit affirmed in June 2021. The federal appellate court held that although the resident may have intended to communicate a message through his proposed home, there was no great likelihood that a reasonable viewer would understand it to convey some sort of message where the residence was set back from the street and obscured by dense landscaping there was no evidence that residential architecture has been historically used or understood to convey a message. The court also rejected the resident's attempt to void the Town's architectural review ordinance. The resident petitioned the U.S. Supreme Court for review, but the court ultimately declined to hear the appeal in March 2022.

### **Successful Defense of Class Certification Involving Underground Utility Project**

Lead Counsel in the representation of a municipality in defense of putative class actions challenging the bond referendum and special assessment



criteria involved in the Town of Palm Beach's \$90 million underground utility project. Trial court's order denying class certification after evidentiary hearing was affirmed on appeal.

#### **Successful Defense of Injunctive Relief**

Resident of oceanfront municipality composed several large paintings, described by Plaintiff as "satires" or "lampoons", criticizing town officials on the exterior walls of his home following the town's denial of his variance application. Following an evidentiary preliminary injunction hearing, the federal court preliminarily denied resident's attempt to stop the town from enforcing its ordinance regulating exterior wall colors and found no constitutional violation and suit was voluntarily dismissed with prejudice.

#### **Municipality Sued Over Adoption of Waterfront Setback Line**

Representation of the Town of Jupiter Island in pending challenge to the Town's adoption of a revised waterfront setback line as set forth in its supplemental land development regulations. Challenge asserts Town failed to meet statutory notice requirements and asserts ordinance of this type was subject to heightened notice under Florida law.

#### **Florida's Public Records Act & Public Records Requests**

Defense of more than 3 dozen lawsuits brought against municipality under Florida's Public Records Act resulting in numerous non-jury trials. Advise municipality on response to more than 2,000 public records requests.

#### **Interpretation of Perpetual Parking Easement**

Representation of property owner in suit relating to interpretation and application of perpetual parking easement negotiated as part of sale of several West Palm Beach office buildings for approximately \$70 million. Dispute concerned expenses attributed to a multi-million dollar parking garage constructed after the easement was negotiated.

#### **Constitutionality of Proposed Ballot Initiative**

A property-use agreement between municipality and owners of historic 60-year-old playhouse limited playhouse's use as theater of performing or visual arts and for lectures or other special events. Political action committee sought to amend municipality's charter to incorporate portions of the agreement's covenants. For municipality, obtained declaration that proposed amendment was unconstitutional as in conflict with state comprehensive planning law and did not have to be put to a vote. Defended declaration through appeal to the Fourth District and Florida Supreme Court decision declining jurisdiction.

#### **Successful Defense of Motion to Disqualify Attorney for Alleged Conflict of Interest**

Successful defense of attorney against claim that attorney's representation of Plaintiff years prior in wholly unrelated matter created a disqualifying conflict of interest.

#### **Successful Defense of Florida-Based Law Firm in Federal Court**



Successful defense of motion for sanctions in Federal Court against South Florida law firm following disqualification.

#### **Breakup of Law Firm Valued in Excess of \$7 Million**

Representation of minority owner of law firm with over 200 employees and offices in Florida and New York. Dispute on key decisions requiring super majority vote under operating agreement resulted in New York operation being formed as a new entity by minority shareholder.

#### **Appointment of Independent Forensic Examiner**

Client moved to appoint an independent forensic examiner to inspect and copy computer storage devices in dispute over medical practice breakup. Following an evidentiary hearing, the court granted client's motion.

#### **National Builder Subsidiary Violates Florida Not-for-Profit Corporation Act When Operating South Florida Luxury Country Club**

Representation of South Florida country club and golf course in suit against a Fortune 500 company, one of the nation's leading builders of luxury homes, and its subsidiary entity that controlled and operated the club prior to turnover to its equity members. Suit alleged the builder's entities improperly profited from operating surpluses and membership payments of the luxury community's nonprofit club. Received favorable summary judgment, finding that the builder's subsidiary violated Florida's Not-for-Profit Corporation Act by retaining in excess of \$4 million in operating surpluses.

#### **Successful Defense of Surgeon Against Claims of Tortious Interference**

Representation of surgeon against claims up to \$16 million by anesthesiologist that surgeon and hospital conspired to tortiously interfere with anesthesiologist's business relationship, resulting in complete defense judgment including award of more than \$100,000 in attorneys' fees and costs.

### **Affiliations**

#### **Federal Bar Association, Palm Beach County Chapter**

Board Member, 2020-2022

President, 2019-2020

Vice President / President-Elect, 2018-2019

Secretary, 2017-2018

Treasurer, 2016-2017

#### **United States District Court Southern District of Florida**

West Palm Beach Federal Courthouse Committee, Member, 2018-Present

Federal Magistrate Judge Merit Selection Panel, Dec 2016- May 2017

*- Appointed by Chief U.S. District Judge K. Michael Moore*

#### **The Florida Bar**

Business Litigation Certification Committee, Immediate Past Chair, 2022-2023



Business Litigation Certification Committee, Chair, 2021-2022  
Business Litigation Certification Committee, Member, 2018-Present  
Federal Court Practice Committee, Vice Chair, 2023-Present  
Co-Chair, Federal Judicial Roundtable & Reception, 2023 Florida Bar Convention  
Federal Court Practice Committee, Member, 2019-Present  
Professional Ethics Committee, Member, 2007-2011  
Business Law Section, Member, Current

**15th Judicial Circuit Grievance Committee "A"**

Chair, 2017-2018  
Member, 2015-2018

**15th Judicial Circuit**

Local Professional Panel, Member, 2024-2026  
*- Appointed by Chief Judge Glenn Kelley*

**Palm Beach County Bar Association**

Committee for Diversity & Inclusion, 2022-Present  
Diversity Internship Program (DIP), Co-Chair, 2022-Present  
Professionalism Committee, Co-Chair, 2015-2016  
Professionalism Committee, Chair, 2014-2015  
Judicial Relations Committee, Chair, 2013-2014  
Annual Bench Bar Conference 2013, Co-Chair (approx. 800 attendees)

**Chamber of Commerce of the Palm Beaches**

Board of Directors, 2018-2021

**Forum Club of the Palm Beaches**

Director, 2011-2014  
Member, 2009-2014

**Duke University Alumni Association**

Vice President, 2015-2017  
Director, 2012-2018

**Leadership Palm Beach County**

Youth Leadership Committee, Co-Chair, 2014-2016  
Youth Leadership Committee, Member, 2008-2016  
Graduate, 2008

**Honors & Distinctions**

**The Best Lawyers in America**

Municipal Litigation, 2011-Present  
Municipal Law, 2011-Present

**Palm Beach Illustrated**

Top Lawyers, Municipal Law, 2018-2019, 2022-Present



Top Lawyers, Administrative/Regulatory Law, 2022

#### **South Florida Legal Guide**

Top Lawyers, Governmental, 2007-2022

#### **Florida Trend**

Legal Elite, 2015

#### **The Florida Bar**

City, County and Local Government Law Section

Ralph A. Marsicano Award, 2009

#### **Florida Municipal Attorneys Association**

Paul S. Buchman Award

Municipal Attorney of the Year, 2006

#### **Alpert Jewish Family Service of Palm Beach County**

Honored at the "Never Again" Holocaust Survivors Benefit, 2020

#### **Palm Beach Fellowship of Christians & Jews**

First recipient of the annual John C. Randolph Award, 2004

#### **Martindale-Hubbell, AV® Rating**

### **Affiliations**

#### **Palm Beach Fellowship of Christians and Jews**

Chairman, 1993-2003, 2006-Present

#### **Florida Municipal Attorneys Association**

President, 2001-2002

#### **Rehabilitation Center for Children and Adults**

President & BOD, 1987-1990

#### **Royal Poinciana Chapel**

Past President, 1994-1996, 2006-2007

#### **Zoological Society of the Palm Beaches**

Past President

### **Experience Highlights**

- Represented an 88-year-old man with terminal cancer who sued for the return of funds that were stolen by his attorney. Following a non-jury trial, the court found in favor of the client on all counts, ordered that all disputed funds be returned, and reserved jurisdiction to award attorneys' fees, pre-judgment interest, and costs.
- Obtained summary judgment for a butane canister distributor in a product liability lawsuit involving a portable butane stove explosion and



severe burn injuries.

- Following a four-day trial, a jury awarded \$1.22 million to the personal representative of a decedent's estate. The case involved promissory notes between the decedent and his ex-spouse and life insurance policy proceeds that were paid to the ex-spouse in excess of the debt owed. Following trial, the court entered a final judgment for the full amount requested by the client at trial.
- Multimillion-dollar catastrophic damage cases involving physical and psychological injuries, burns, amputations, paralysis, traumatic brain injuries, and death.
- High-stakes litigation experience in complex product liability matters across product industry sectors.
- First-party and third-party claims involving home, auto, commercial, and business liability insurance, including COVID-19 business interruption and extra expense matters.
- Claims of injury due to mold exposure and indoor air quality deficiencies.
- "Slayer Statute" cases involving claims to inherit a decedent's estate by a person responsible for the death.
- Nursing home negligence claims involving injury and death.
- Defamation (libel and slander) and tortious interference with business relationships.
- *Johnson v. Davis* claims involving fraudulent nondisclosure of residential defects.
- Equine litigation involving horse ownership and conversion and matters relating to the promotion and operation of equine events.
- Losses due to crop, nursery, and tree damage.

## Affiliations

### American Board of Trial Advocates (ABOTA)

Past President, Palm Beach Chapter, 2023-2024

President, Palm Beach Chapter, 2022-2023

President-Elect, Palm Beach Chapter, 2021-2022

Vice President, Palm Beach Chapter, 2021

Board of Directors, Palm Beach Chapter, 2021-Present

Member, Remote Jury Trials Committee, Palm Beach Chapter, 2020-



Present

## **Presidential Estates HOA**

Board Member, 2020-Present

## **About**

### **About Zack**

Zack Rothman, a Jones Foster Shareholder and member of the **Complex Litigation** and **Private Wealth** teams, represents clients in litigation involving estates, trusts, guardianships and fiduciary disputes, as well as commercial litigation matters. He also counsels personal representatives, trustees, court-appointed administrators, beneficiaries and creditors in all facets of probate, trust and guardianship administration.

Zack holds leadership positions in state and local bar associations, serving as a member of The Florida Bar's Probate Rules Committee, Code & Rules of Evidence Committee, Abuse Neglect & Exploitation Committee, and the Undue Influence Codification Subcommittee, as well as the Palm Beach County Bar Association's Probate/Guardianship Committee and the Estate/Probate CLE Committee. He is a graduate of the **Florida Fellows Institute** of The American College of Trust and Estate Counsel and has been recognized by *Florida Super Lawyers* as a Rising Star.

Zack earned an undergraduate degree from the University of Florida and his J.D. from the University of Florida Levin College of Law. While earning his law degree, he was honored for outstanding achievement with book awards in the areas of Elder Law and Electronic Discovery and served as a judicial law clerk for the Fifteenth Judicial Circuit of Florida.

## **Experience Highlights**

### **Trial Victory in Lawsuit for Return of Funds Misappropriated by Attorney**

Represented an 88-year-old man with terminal cancer who sued for the return of funds that were stolen by his attorney. Following a non-jury trial, the court found in favor of the client on all counts, ordered that all disputed funds be returned, and reserved jurisdiction to award attorneys' fees, pre-judgment interest, and costs.

### **Jury Award of Over \$1.2 Million in Probate Lawsuit**

Following a four-day trial, a jury awarded \$1.22 million to the personal representative of a decedent's estate. The case involved promissory notes between the decedent and his ex-spouse and life insurance policy proceeds that were paid to the ex-spouse in excess of the debt owed. Following trial, the court entered a final judgment for the full amount requested by the client at trial.

### **Victory for Decedent's Estate at Trial**

Represented the personal representative in a dispute in which the decedent's stepdaughter objected to the plan of distribution and sought



damages exceeding \$1 million against the estate. Following a trial, the court denied the stepdaughter's objections, awarded no damages, and ruled that the estate is entitled to recover its attorneys' fees and expenses from the stepdaughter.

#### **Successful Defense of Summary Judgment Motion Against Trustees**

Represented the trustees of family trusts where a beneficiary sued the trustees for breach of fiduciary duty, trust accountings, damages, and removal. The beneficiary's summary judgment motion was denied as to all relief requested.

#### **Creditor Claims Against Estate Stricken**

Represented a personal representative in connection with having hundreds of thousands of dollars of creditor claims stricken and denied.

#### **Favorable Resolution Secured in Wrongful Death Allocation Proceedings**

Represented a father, one of two survivors of his deceased daughter. After the daughter's tragic death, the mother brought a wrongful death action as a personal representative of the daughter's estate and obtained a substantial settlement. The mother sought to allocate the entirety of the settlement proceeds to herself and none to the father. The matter was litigated and resolved by a mediated settlement agreement favorable to the father.

#### **Validity of Decedent's Will and Trust Upheld**

Represented a caretaker named as the sole beneficiary of a decedent's estate and trust. After his death, the decedent's family sought to invalidate the will and the trust. The matter was resolved in favor of the caretaker and the validity of the will and trust were upheld.

#### **Successful Action Against Trustee of Sons' Trusts**

Represented a trustee's sons, the beneficiaries of the trusts, in an action against the trustee for breach of fiduciary duty, damages, and removal. The action resulted in judgments that the trustee breached her fiduciary duties and would be removed, and awarded damages to the sons, including their attorney's fees and expenses.

#### **Summary Judgment for Decedent's Mother in Federal Court**

A decedent who was rendered a quadriplegic in a work-related accident prior to his death was awarded annuity contracts from worker's compensation claims and named his mother as the beneficiary. Days prior to his death, the decedent's ex-wife attempted to have the decedent change the beneficiary of the annuities to herself. The matter was litigated and resolved by entry of summary judgment finding that the decedent's mother was the sole and rightful beneficiary and awarding the mother her attorneys' fees and expenses.

#### **Successful Representation of Guardian in Contested Appeal**

Represented the guardian in an appeal concerning whether a guardian, upon the death of the ward, may retain guardianship assets to pay



guardianship expenses. The appellate court ruled in favor of the guardian, authorizing the guardian to retain assets after the ward's death to pay expenses, and awarded the guardian's appellate attorneys' fees and costs

#### **Administration of Estate as Court-Appointed Administrator Ad Litem**

Appointed as Administrator Ad Litem of a complex, highly contested estate and successfully performed administration of the estate for the benefit of the beneficiaries.

#### **Administration of Trust as Trustee**

Served as trustee of a grandchild's trust and successfully performed its administration, which included numerous estate, gift, and generation-skipping tax issues.

*Some matters handled prior to Jones Foster.*

### **Affiliations**

#### **The Florida Bar**

Probate Rules Committee

- Secretary, 2022-Present
- Member, 2020-Present
- Co-Chair, Style Subcommittee, 2022-Present

Abuse Neglect & Exploitation Committee, Member, 2019-Present

Undue Influence Codification Subcommittee, 2019-Present

Code & Rules of Evidence Committee

- Education Subcommittee, 2022-Present
- Liaison to Florida Probate Rules Committee, 2021-Present
- Member, 2018-present

Elder Law Section, Member

Trial Lawyers Section, Member

Real Property Probate Trust Law Section, Member

#### **Palm Beach County Bar Association**

Probate/Guardianship Practice Committee, Member, 2020-present

Estate/Probate CLE Committee, Member, 2020-present

Co-Chair and Moderator, Probate and Guardianship Session, 2023 Bench Bar Conference

Co-Chair and Moderator, Probate and Guardianship Session, 2024 Bench Bar Conference

#### **Florida Fellows Institute of the American College of Trust and Estate Counsel**

Graduate, 2022

#### **Police Athletic League of West Palm Beach**

Board Member, 2018-2021

### **About**



## About Hanna

Hanna Rubin is a member of Jones Foster's Complex Litigation & Dispute Resolution team. Hanna represents businesses, individuals, and municipalities in matters involving commercial litigation and governmental litigation.

Hanna is involved in industry and non-profit organizations, serving in leadership roles as the National Delegate for the Federal Bar Association Palm Beach County Chapter and as an Advisory Board Member for Camp Kesem's Nova Southeastern University chapter. She is an active member of the Florida Association of Women Lawyers Palm Beach County Chapter and the Palm Beach County Bar Association's Young Lawyers Section.

Hanna graduated *magna cum laude* with a Juris Doctor from the University of Florida Levin College of Law where she served as a *Florida Law Review* Articles Editor and received a *Florida Law Review* Judicial Panel appointment. Hanna was recognized with Book Awards in constitutional law, legal writing, legal research, and social justice lawyering, received the merit-based Governor's Scholarship, and was named to the Order of the Coif. She was a member of the Immigration Law Association and an Advisory Board Member for Camp Kesem at the University of Florida.

While at the University of Florida, Hanna gained valuable experience as a judicial intern for the Honorable Bruce E. Reinhart, Magistrate Judge, Southern District of Florida, and as a Summer Associate at Jones Foster.

## Affiliations

### Palm Beach County Bar Association

Co-Chair, Federal Session, 2023 Bench Bar Conference  
Member, Young Lawyers Section, 2021-Present  
Member, North County Section, 2021-Present

### Federal Bar Association, Palm Beach County Chapter

Secretary, 2023-Present  
National Delegate, 2022-2023  
Member, 2020-Present

### Florida Association of Women Lawyers

Chair, Grant Writing Committee, 2023-2024  
Mentee, Mentorship Program, 2022-Present  
Member, Palm Beach County Chapter, 2021-Present

### Kesem

Member, National Alumni Leadership Board, 2023-Present  
Member, Mission Delivery Committee, 2023-Present  
Member, Advisory Board, NSU Chapter, 2021-Present  
Member, Advisory Board, University of Florida chapter, 2019-2021



Order of the Coif  
Member, 2022-Present

## Experience Highlights

### Successful Defense of Publicly Traded Company in Defective Product Dispute

Representation of a publicly traded company in the oil and gas industry in jury trial and appellate proceedings against international shipping company in a multimillion-dollar claim relating to the supply of allegedly defective products and services.

### \$70 Million Trust Contest

Representation of surviving spouse in \$70 million trust contest against children of first marriage, which resulted in client receiving over 90% of the trust residue.

### Multiple Charitable Organization Defense of \$100 Million Estate Proceeding

Representation of seven charitable organizations in a \$100 million estate proceeding in defending a claim which would have resulted in the charities receiving no residuary distributions. The claim was settled, resulting in the charities receiving an amount in excess of \$30 million, almost 95% of the residue.

### Undue Influence and Return of Funds in Will Dispute

Representation of two siblings as personal representatives of their father's \$25 million estate. Successfully defended an attack of the decedent's will by his surviving spouse, resulting in a judgment finding the surviving spouse guilty of undue influence and ordering the return of funds misappropriated by her during the final months of the decedent's life.

### \$7 Million in Damages Awarded for Improper Sale of Annuity Contracts

Representation of trustees in successfully prosecuting a claim against a brokerage firm for the improper sale of \$30 million in annuity contracts to an elderly couple, receiving a jury award of over \$7 million in compensatory and punitive damages.

### Successful Defense of Claims of Breach of Trust and Fiduciary Duty

Successful defense of testator's daughter and attorney in fact at trial and in appellate proceedings against claims of breach of trust and breach of fiduciary duty associated with the administration of the testator's multi-million dollar revocable trust.

### Successful Defense of Validity of Last Will and Testament

Representation of personal representative in successfully defending the validity of the decedent's Last Will and Testament against claims of undue influence and lack of testamentary capacity.

## Honors & Distinctions

The Best Lawyers in America



Commercial Litigation, 2019-Present

Trust and Estates Litigation, 2011–Present

Lawyer of the Year, West Palm Beach, Trusts & Estates Litigation, 2020

#### **Florida Super Lawyers**

Estate & Trust Litigation, 2006–Present

#### **Palm Beach Illustrated**

Top Lawyers, Trust & Estates, 2018, 2021-Present

#### **Florida Trend**

Legal Elite, 2012

**Martindale-Hubbell AV® Peer Review Rated**

### **Affiliations**

#### **American College of Trial Lawyers**

Attorney-Client Relationship Committee, Chair, 2017-Present

#### **Palm Beach County Bar Association**

Circuit Civil Practice Committee, Member, 2006, 2017-Present

Estate & Probate CLE Committee, Member, 2010, 2017-Present

Probate & Guardianship Practice Committee, Past Member

#### **Legal Aid Society of Palm Beach County**

Board Member, 2020-Present

#### **Trustbridge Hospice Foundation**

Board of Directors, 2021-2023

Planned Giving Committee, Chair, 2016-Present

#### **Alzheimer's Community Care**

Board of Directors, 2018-Present

#### **The Florida Bar**

Civil Procedure Rules Committee, Past Chair

Probate Rules Committee, Past Chair

Probate & Trust Litigation Committee, Past Member

#### **U.S. District Court for the Southern District of Florida**

Ad Hoc Committee on Rules and Procedures Committee, Member, 2004-2012

#### **Center for Children in Crisis**

Director, 2002-2005

#### **Chamber of Commerce of the Palm Beaches**

Board of Directors, Chair, 1999-2000

#### **Leadership Palm Beach County**

Graduate, 1992



## About

### About Rachel

Rachel Sears is a member of both the **Corporate & Tax** and **Private Wealth Wills, Trusts & Estates** practice groups. She concentrates her practice in the areas of estate planning, trust and estate administration, and corporate law.

Rachel works with clients on estate planning matters, including wills, trusts, powers of attorney, and advance healthcare directives. In addition, she provides counsel to personal representatives, trustees, and beneficiaries in probate and trust administration, guiding them through the legal and personal challenges that can be involved in administering an estate.

Rachel also advises clients on corporate transactions, including transfers of business interests, LLC creation, mergers and acquisitions, and corporate restructuring, and handles the drafting of comprehensive legal documents to ensure that her clients' interests are protected at every stage of the transaction process.

Rachel earned her Juris Doctor degree from Nova Southeastern University Shepard Broad College of Law, where she graduated *cum laude*. While at Nova Southeastern University, she was the Executive Editor for the *Nova Law Review*; a pupil of the Craig S. Barnard American Inn of Court; the Director of Operations for the Real Property, Probate and Trust Law Society; and an active member of the Phi Alpha Delta Law Fraternity. Rachel gained valuable experience as a judicial intern for both U.S. Circuit Judges David A. Haimes and Keathan B. Frink at the Seventeenth Judicial Circuit of Florida, as a Research Assistant for a law professor, and as a Summer Associate and Law Clerk at Jones Foster.

## Affiliations

### The Florida Bar

Member, Young Lawyers Division, 2022-Present

Member, Real Property Probate and Trust Law Section, 2022-Present

Member, Business Law Section, 2024-Present

### Palm Beach County Bar Association

Member, Young Lawyers Section, 2022-Present

### American Bar Association

Member, Young Lawyers Division, 2023-Present

Member, Real Property, Trust and Estate Law Section, 2023-Present

### East Coast Estate Planning Council

Member, 2023-Present

### Palm Beach Tax Institute



Member, 2023-Present

#### **Young Friends of the Historical Society Palm Beach County**

Member, 2023-Present

## **About**

### **About Melanie**

Melanie Skenian is a member of the Complex Litigation & Dispute Resolution practice group, and focuses her practice in the areas of probate litigation and trust litigation.

Melanie graduated *cum laude* with a Juris Doctor from the University of Florida Levin College of Law. She received a CALI Book Award for Federal Income Taxation and was awarded the Fredric G. Levin Ethos of Excellence Scholarship. During her studies, she served as a research assistant and was an active member and coach of the Florida Moot Court Team. Melanie gained valuable experience as an intern for Judge Michael G. Williamson of the United States Middle District Bankruptcy Court.

## **Affiliations**

### **The Florida Bar**

Member, Real Property, Probate & Trust Law Section, 2022-Present

### **Palm Beach County Bar Association**

Member, Young Lawyers Section, 2022-Present

### **Palm Beach Chamber of Commerce**

Member, Palm Beach Young Professionals, 2023-Present

### **Florida Association for Women Lawyers**

Member, Palm Beach County Chapter, 2023-Present

## **Experience Highlights**

### **Transfer of Closely Held Corporation**

Representation of family-owned business in the redemption of the sole shareholder's stock in exchange for a secured promissory note, passing ownership and control of the business from the mother to her children, and providing a stream of payments to supplement the mother's retirement.

### **Transfer of Business with Secured Note**

Counseling of a closely held engineering firm through the redemption of its founding shareholder's stock for cash and a secured promissory note, effectively passing ownership and control of the business to the other shareholders.

### **Establishment of Supplemental Needs Trust**

Representation of trustee in obtaining a judicial modification of an irrevocable trust to establish a supplemental needs trust.



**Acceleration of Inheritance to Beneficiaries**

Representation of the surviving spouse trustee in obtaining a judicial termination of an irrevocable trust to accelerate the inheritance to multi-generational family members and numerous charity beneficiaries.

**Removal of Corporate Trustee Requirement**

Representation of trust beneficiary in obtaining a judicial modification of an irrevocable trust to remove the trust's corporate trustee requirement, obtaining consent of the resigning trustee and all qualified beneficiaries.

**Nonjudicial Termination of Uneconomic Trusts**

Representation of trustees in obtaining nonjudicial termination of uneconomic trusts, and distribution of assets to beneficiaries.

**Second Marriage Estate Planning**

Preparation of an estate plan for spouses in second marriage, providing for each other in addition to their respective children.

**Preservation of Homestead Property Tax Exemption**

Successful preservation of homestead property tax exemption at the end of a QPRT's initial term of years, through the execution of a 99-year lease, with a transfer of the property to an LLC subject to the lease.

**Private Foundation Dispute Over Control**

Representation of a court-appointed Temporary Trustee during litigation over control of a private foundation. Determined the amount of undistributed income, the distributees, and distribution amounts, and obtained court approval of same.

**Treasury Regulation Compliance**

Performed extensive review of a private foundation's scholarship program to determine compliance with the relevant Treasury Regulations.

**Charitable Trust Instruments**

Preparation of amended and restated trust instruments governing both private foundations and public charities organized as trusts.

**High Net Worth Trust Change of Situs**

Representation of out-of-state high net worth trusts as to their change of situs to Florida.

**S Corporation Creation**

Formation of an S corporation and preparation of a management agreement for consultant to provide a salary with no self-employment taxes on distributions to the shareholder.

**Merger of Multiple S Corporations**

Structuring and execution of a merger of law firm owners' S corporations in connection with implementation of a future redemption of the senior attorney's stock, funding the senior attorney's retirement and passing control to the remaining shareholders.



## Affiliations

### The Florida Bar

Member, Tax Section, 2012-Present

- Assistant Director, Education, 2022-Present

- Legislative & Regulations Committee, 2020-Present

Member, Real Property Probate and Trust Law Section, 2012-Present

### East Coast Estate Planning Council

President, 2020-2021

First Vice President, 2019-2020

Second Vice President, 2018-2019

Board Member, 2016-2022

Secretary, 2017-2018

Member, 2011-Present

### Palm Beach Tax Institute

Member, 2011-Present

### Planned Giving Council of Palm Beach County

Member, 2016-Present

Board Member, 2017-2020

### The Kiwanis Club of West Palm Beach Foundation

Class Scholarship Committee, Chair, 2018-Present

President, 2021-2023

Vice President, 2019-2020

Board Member, 2014-Present

### Memorial Presbyterian Church, West Palm Beach

Session Member, 2021-Present

### The Kiwanis Club of West Palm Beach

Board Member, 2015-2018

President, 2014-2015

President-Elect, 2013-2014

### Florida Fellows Institute of the American College of Trust and Estate Counsel

Graduate, 2017

### Chamber of Commerce of the Palm Beaches

Leadership West Palm Beach, Graduate, 2016

## About

### About Melissa

Melissa Steen is a member of the Complex Litigation & Dispute Resolution and Private Wealth, Wills, Trusts & Estates practice groups. She represents clients in litigation involving trusts and estates, guardianship, and fiduciary disputes, as well as commercial litigation matters.



Melissa is involved in several legal organizations, including the Florida Association for Women Lawyers Palm Beach County chapter, where she is a member of its FAWL in Love With GAL Committee; The Florida Bar's Real Property, Probate and Trust Law Section; and the Palm Beach County Bar Association's Young Lawyers Section. She has been selected by her peers for inclusion in the peer-reviewed publication *The Best Lawyers in America*, where she was recognized on the *Best Lawyers: Ones to Watch in America* list for trusts and estates litigation.

Melissa earned her Juris Doctor degree and graduated *cum laude* from the University of Florida Levin College of Law where she served as a notes advisor for the *Florida Law Review*, a student research assistant in the area of criminal law, and a teaching assistant in the areas of legal writing and appellate advocacy. She was an active member of the Legal Honor Society of Phi Delta Phi and the Law Association for Women. During her undergraduate studies, she was a founding member of the Mock Trial Team, and she gained valuable experience as an intern for the Honorable James Rooney of the Supreme Court in the 9<sup>th</sup> Judicial District of New York.

## **Affiliations**

### **Palm Beach County Bar Association**

Member, Young Lawyers Section, 2022-Present

### **The Florida Bar**

Member, Real Property, Probate and Trust Law, 2022-Present

### **Florida Association for Women Lawyers**

Member, FAWL in Love With GAL Committee, 2023-Present

Member, Palm Beach County Chapter, 2022-Present

## **Affiliations**

### **American College of Trial Lawyers Florida Chapter**

Chair, 2007

### **American College of Trial Lawyers**

Member, 1983-Present

### **American Bar Foundation**

Life Fellow

### **The Florida Bar**

Board of Governors, 1980-1983

### **Palm Beach County Bar Association**

President, 1978

Member, 1968-Present

### **Palm Beach County Meals on Wheels**

Founding Board Member, 2010-2011



Chair, 2012-2013  
Member, 2010-Present

**St. Mark's Episcopal Church**

Senior Warden, 1976, 1981, 1982-1991  
Member, 1968-Present

**The Economic Council of Palm Beach County**

Chair, 2001  
Member, 1996-2015

**Palm Beach County Criminal Justice Commission**

Chair, 1996

**Gulfstream Council Boys Scouts of America**

President, 1994-1995

**Kiwanis Club of West Palm Beach**

President, 1979-1980

**University of Florida Law Center Association**

Trustee Emeritus  
Member, 2014-Present

**Forum Club of the Palm Beaches**

Board of Directors, 2008-2010

**Leadership Palm Beach County**

Graduate, 1985

## **Experience Highlights**

**Significant Recovery for Real Property Owner in Inverse Condemnation Lawsuit**

Representation of a real property owner in an inverse condemnation lawsuit for the taking of submerged land by Palm Beach County without permission or compensation that resulted in reduced ability to develop the property. A seven-day jury trial resulted in an award of \$425,700 – a valuation approximately 27 times higher than the County's valuation of \$15,700.

**\$1 Million Settlement in DOT Condemnation Case**

Represented Indian River County service station in condemnation case against DOT due to substantial business impact by taking. Settlement was reached prior to trial in the amount of \$1 million.

**Condemnation Case Involving Taking of Commercial Property by County**

Representation of business owner in taking of land by Palm Beach County for road widening. Damages caused by taking in excess of \$400k.

**Successful Defense of Claim to Enforce Letter of Intent as a Binding Contract**



Representation of seller in dispute with developer related to a previously executed letter of intent to convey a 93 acre parcel of land for \$10.5 million. The developer sought to enforce the letter of intent as a binding contract to sell the property after negotiations did not result in a final agreement. The state trial court granted final summary judgment in favor of the seller and the appellate court affirmed.

#### **Successful Defense of Developer's Claim for Specific Performance Regarding Purchase of Property**

Representation of trust in dispute with developer who sought to specifically enforce the terms of a purchase and sale agreement of 8 acres of land for \$5 million against the trust. The developer also claimed that one trustee tortiously interfered with the agreement. The federal district court granted final summary judgment on all counts in favor of the trust and trustee shortly before trial. The developer appealed the summary judgment ruling to the 11th Circuit Court of Appeals. After oral argument, the appellate court affirmed the lower court ruling on all issues in a published opinion.

#### **Defense of Former Officers of a Florida Utility Company**

Representation of former officers of a Florida utility company in action for breach of fiduciary duties, tortious interference, misappropriation/theft of trade secrets, unfair competition, and commercial bribery.

#### **High-Tech Start-Up Billion Dollar Dispute**

Representation of principals of high-tech start-up company in billion dollar dispute over alleged theft of trade secrets and breaches of fiduciary duties.

#### **Representation of High Tech Start-Up Against Automation Conglomerate**

Representation of telecommunications start-up and principals against international automation conglomerate in a multibillion-dollar claim involving multiple technology issues related to data transmission.

#### **Multi-Million Dollar Dispute Over Royalties of Dietary Supplement**

Representation of developers of dietary supplements in federal court and before the American Arbitration Association in a multi-million dollar dispute over royalties against international dietary supplement retailer.

#### **National Law Firm Legal Malpractice Claim**

Representation of a national law firm in legal malpractice claim regarding an international exchange of corporate shares.

#### **Complete Defense Verdict for Attorney Accused of Misfeasance**

Representation of attorney in dispute with partnership claiming that the attorney refused to repay a loan lent to finance trust litigation. After a five day trial, the jury returned a complete defense verdict for the attorney and the appellate court affirmed.

### **Affiliations**



### **The Florida Bar**

Eminent Domain Committee, Member, 2017-Present  
Civil Procedure Rules Committee, Member, 2010-2016  
Rules of Judicial Administration Committee, Member, 2012-2015  
Standing Committee on Professionalism, Chair, 2009-2010  
Standing Committee on Professionalism, Member, 2004-2010

### **The Florida Bar Foundation**

Fellow, 2004-Present

### **Federal Bar Association**

Member, 2008-Present

### **Association of Eminent Domain Professionals**

Member

### **Forum Club of the Palm Beaches**

Member, 2009-Present

### **HomeSafe**

President-Elect, 2022-Present  
Member at Large, 2020-2022  
President, 2014-2016  
Board Member, 2009-2020

### **Leadership Palm Beach County**

Board of Governors, 2013-2017  
Grow Program Chair, 2010-2016  
Engage Class, Graduate, 2006

### **Craig S. Barnard American Inns of Court Emeritus**

Member, 2002-2007

## **Experience Highlights**

### **Significant Recovery for Real Property Owner in Inverse Condemnation Lawsuit**

Representation of a real property owner in an inverse condemnation lawsuit for the taking of submerged land by Palm Beach County without permission or compensation that resulted in reduced ability to develop the property. A seven-day jury trial resulted in an award of \$425,700 – a valuation approximately 27 times higher than the County's valuation of \$15,700.

**Read more >**

### **Private Utility Awarded \$110 Million in Landmark Eminent Domain Case**

Representation of private utility in taking by Charlotte County of land, water, and sewer. Litigation resulted in successful resolution on 2<sup>nd</sup> day of trial, with initial offer of \$47 million increased to a \$110 million award for



client, one of the largest in the State of Florida's history.

#### **\$2 Million Settlement in DOT Condemnation Case**

Representation of shopping center in condemnation case against DOT for taking due to State Road 7 road widening. Matter appealed and remanded back to non-jury trial to determine if there was a taking. Successfully concluded with a \$2 million settlement for client.

#### **CRA Condemnation Results in Successful Settlement and Legislative Action**

Notable condemnation case involving the taking of a boardwalk in Daytona Beach. Settlement reached after appeal, with resulting actions taken by the State of Florida legislature disallowing future condemnation of private property for community redevelopment.

#### **Settlement in DOT Condemnation Case Following Denial of Compensation**

Represented internationally branded hotel in Palm Beach County against DOT who denied impact to business for lost parking, offering no compensation for business damages. Settlement reached on 2<sup>nd</sup> day of trial in the amount of \$100k.

#### **Substantial Settlement in DOT Condemnation Case**

Represented shopping center in condemnation case against FDOT for a taking resulting from road widening on Military Trail. Settlement was made prior to trial with substantial recovery for client.

#### **\$1 Million Settlement in DOT Condemnation Case**

Represented Indian River County service station in condemnation case against DOT due to substantial business impact by taking. Settlement was reached prior to trial in the amount of \$1 million.

#### **Settlement in DOT Condemnation Case 3x Initial Offer**

Represented nursery in condemnation case against DOT for taking as the result of State Road 80 widening. Original settlement offered was \$300k; final settlement for client was \$970k.

#### **\$800k Settlement for Small Business in DOT Condemnation Case**

Representation of a Broward County auto repair shop in condemnation case against FDOT for taking as the result of State Road 7 road widening. \$800k settlement in mediation.

#### **Inverse Condemnation Dispute Concerning Construction of Breakwaters on Private Property**

Representation of developer in inverse condemnation action against a Florida county concerning the unauthorized construction of breakwaters



on developer's privately-owned submerged land.

## **Affiliations**

### **The Florida Bar, Eminent Domain Committee**

Member, 1976-Present

Chair, 1987-1988

### **The Florida Bar, Eminent Domain CLE Manual Steering Committee**

Member, 1977-Present

Chair, 2003-2008

### **The Florida Bar, Code and Rules of Evidence Committee**

Member, 1998-2004

Vice Chair, 2003-2004

Business Records Subcommittee, Chair, 2000-2002

Code Improvement Subcommittee, Chair, 2002-2003

### **The Florida Bar, Rules of Civil Procedure Committee**

Member, 2004-2010

## **Affiliations**

### **American Bar Association**

E-Discovery Subcommittee, Co-Chair, 2018-Present

Data Security Subcommittee, Co-Chair, 2018-Present

Privacy and Data Security Committee, Member

Ethics and Professionalism Committee, Member

Pre-Trial Practice and Discovery Committee, Member

Email and Social Media Committee, Member

Science & Technology Law Section, Internet of Things Committee, Member

### **Palm Beach County Bar Association**

Technology Committee, Past Chair

Technology Committee, Past Member

### **The Florida Bar**

Cybersecurity and Privacy Law Committee, Member, 2024-Present

Business Law Section, Member

Trial Lawyers Section, Member

Technology Committee, Member, 2018

Legal Specialization and Education Committee, Board Member, 2008-2013

Legal Specialization and Education Committee, Vice-Chair, 2012

Business Litigation Certification Committee, Chair, 2008

Business Litigation Certification Committee, Board Member, 2003-2008

### **The Sedona Conference**

Electronic Document Retention and Production Working Group Member,  
Working Group 1

Data Security and Privacy Liability Working Group Member, Working Group



## About

### About Matthew

Matthew Worsham is a member of Jones Foster's Complex Litigation & Dispute Resolution and Private Wealth, Wills, Trusts & Estates practice groups and focuses his practice in the areas of probate, guardianship, and trust litigation and trust and estate administration. He represents individual beneficiaries, heirs, fiduciaries, and corporate fiduciaries in probate, guardianship, and trust-related matters, including will and trust contests, trustee/personal representative removal actions, accounting actions, will and trust reformation and modification matters, and elective share cases. Matthew's previous experience includes commercial and employment litigation matters.

Matthew is actively involved in several legal organizations, including the Martin County Bar Association, where he serves as chair of the Wills, Trusts & Estates/Probate Committee. He is also a member of The Florida Bar's RPPTL Section and Trial Lawyers Section.

Matthew graduated with a Juris Doctor from the University of Michigan Law School and holds an LL.M. in Estate Planning from the University of Miami School of Law.

## Affiliations

### The Florida Bar

Member, Real Property, Probate & Trust Law Section (RPPTL)

Member, Trial Lawyers Section

### Martin County Bar Association

Chair, Wills, Trusts & Estates/Probate Committee, 2023-Present

Past Co-Chair, Young Lawyers Division

