

## 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

Southern District of Florida

Middle District of Florida

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

## Education

J.D., University of Florida

B.S., Wake Forest University

## Admissions

The Florida Bar

The State Bar of Georgia

U.S. Supreme Court

U.S. District Court

Northern District of Florida

Southern District of Florida

Middle District of Florida

## Education

M.P.A., Florida Atlantic University

J.D., Nova University

B.A., Heidelberg University

## Admissions

## About

### About Larry

Larry Alexander is the Firm's Chairman and has been a Florida Bar Board Certified specialist in Real Estate Law since 1989. As the Firm's **Real Estate** Practice Group Leader, 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. Furthermore, in his role as Chairman of the Firm, Larry has unique insight into each practice group, 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**, West Palm Beach Lawyer of the Year, Real Estate Law, 2014, 2019

**The Best Lawyers in America**, Real Estate Law, 1995-Present

**South Florida Legal Guide**, Top Lawyers, 2004-Present

**Palm Beach Illustrated**, Top Lawyers, Real Estate Law, 2018, 2019

**Florida Super Lawyers**, 2006-2009, 2011-2012

**Florida Trend**, Legal Elite, 2004

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

## Affiliations

**The Mary Alice Fortin Foundation**

Director

**Rosarian Academy Charitable Trust**

Trustee

**Sugar Cane Growers Cooperative**

The Florida Bar

U.S. Supreme Court

U.S. District Court, Southern District of Florida

## 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

## 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

## Education

J.D., University of Florida

B.S., University of Florida

## Admissions

The Florida Bar

## Education

J.D., University of Florida

B.S., University of Florida

## Admissions

The Florida Bar

U.S. Supreme Court

General Counsel

## Honors & Distinctions

The Best Lawyers in America, Real Estate Law, 2014-Present

Palm Beach Illustrated Top Lawyers, Real Estate Law, 2018, 2019

## Affiliations

### Royal Poinciana Chapel

Board of Directors, 2012-Present

President, 2017-2019

Vice President, 2016-2017

Secretary, 2014-2016

### The Preservation Foundation of Palm Beach

Treasurer, 2015-Present

### Palm Beach Day Academy

Vice President, Board of Trustees, 2019

Executive Committee, Board of Trustees, 2014-Present

### Palm Beach Chamber of Commerce

Trustee, 2018-Present

### Chamber of Commerce of the Palm Beaches

Board of Directors, 2009-2012

### University of Florida Real Estate Advisory

Board of Directors, 2013-2017

## Honors & Distinctions

Martindale-Hubbell, AV® Peer Review Rated

## Affiliations

### American Planning Association Treasure Coast Section

President, Vice President, Board of Directors 1996-2002

### American Planning Association Florida Chapter

Member 1996-Present

### American Institute of Certified Planners

Member, 2000-Present

### States Attorney's Sober House Task Force

Member, 2016-Present

### Roger Dean Stadium

Advisory Board, 1988-Present

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

Director, 2005-2010

## Honors & Distinctions

Martindale-Hubbell, AV® Peer Review  
Rated

## Education

J.D., Florida State University

Villanova University

## Admissions

The Florida Bar

## Education

J.D., University of Missouri

B.A., University of Missouri

## Admissions

The Florida Bar

The Missouri Bar

New York State Bar Association

U.S. Supreme Court

U.S. Courts of Appeals

Eleventh Circuit

Fifth Circuit

U.S. District Court

Northern District of Florida

Southern District of Florida

Middle District of Florida

## Education

J.D., Tulane University, magna cum laude

University of Richmond, cum laude

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. District Court, Southern District of  
Florida

## Education

J.D., University of Florida

Compensation Committee, Vice Chair, 2005-2010

## 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

## Treasure Coast Region Planning Council

Appointed by Governor Chiles, Member, 1993-1996

## 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.

## Honors & Distinctions

Florida Trend, Legal Elite, 2010, 2012, 2014-2019

B.A., Georgetown University

## Admissions

The Florida Bar

U.S. Supreme Court

U.S. District Court, Southern District of Florida

## Affiliations

### Claims and Litigation Management Alliance

Member, 2017-Present

### American Bar Association

Member, 2017-Present

## 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 the Firm's **Private Client Services** and **Corporate & Tax** teams and concentrates her practice in the area of estate and tax planning.

Erica earned her Master of Laws in Estate Planning (LL.M.) from the University of Miami School of Law, where she graduated at the top of her class and received the Book Award in Probate. Prior, she earned her law degree (J.D.) with *cum laude* honors from the University of Miami School of Law and

**Palm Beach Illustrated Top Lawyers**, Elder Law, 2018

## Affiliations

### The Florida Bar

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

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

### Florida Association for Women Lawyers (FAWL)

Member, 2018-Present

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

Member

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

Member

### Palm Beach County Bar Association

Member, 2000-Present

### Craig S. Barnard American Inns of Court

Member, 2018-2019

### Florida State Guardianship Association

Member, 2018

## 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.

received Book Awards in Contracts, Advanced Appellate Advocacy, and Legal Research. Erica also completed her undergraduate degree (B.A.) with Dean's List distinction in Political Science from Northwestern University.

During law school, Erica was actively involved in the Moot Court organization and was selected to represent the school in the American Bar Association's national level competition. She also clerked for the Honorable Stanford Blake in the Eleventh Judicial Circuit Court of Florida and served as a research intern for the Wrongful Convictions Legal Clinic at the Northwestern University School of Law.

## Education

LL.M., Estate Planning, University of Miami

J.D., University of Miami

B.A., Northwestern University

## Admissions

The Florida Bar

## Education

J.D., University of Florida

B.S., Florida State University

## Admissions

The Florida Bar

## Education

J.D., University of Florida

B.S.B.A., University of Florida

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

## 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

Employee Benefits (ERISA) Law, 1995–Present

Tax Law, 1999–Present

Trusts & Estates, 2007–Present

Tax Lawyer of the Year, West Palm Beach, 2014

Florida Super Lawyers, 2006-2019

### Palm Beach Illustrated

Top Lawyers, Labor & Employment Law, 2019

Top Lawyers, Tax Law and Trust and Estates, 2018

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, 2013

Martindale-Hubbell, AV® Peer Review Rated

## Affiliations

University of Florida Law Center Association

Board of Trustees, 2012-2017

The Florida Bar

Tax Section Chair, 1999-2000

The Florida Bar Tax Law Certification Committee

Chair, 1996-1997

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

## Honors & Distinctions

### University of Florida Levin College of Law

Distinguished Service Award, 2019

### South Florida Legal Guide

Top Lawyers, 2005, 2019 - Present

### Florida Super Lawyers

Business Litigation, 2006-2019

### Christian Legal Society

Laura Mall Justice Award, 2019

### The Best Lawyers in America

Lawyer of the Year, WPB, Intellectual Property Litigation, 2020  
Lawyer of the Year, WPB, Environmental Litigation, 2019  
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, 2010-Present  
Lawyer of the Year, WPB Land Use &

### The Florida Bar Tax Law Certification Committee

Committee Member, 1992-2002

### The Florida Bar Tax Section

Member, 1984-Present

### Florida Tax Institute

Operating Board Member, 2014-Present

### Palm Beach Tax Institute

Chair, 1991-1992

### Palm Beach County Fringe Benefit Council

President, 1986-1989

### Palm Beach County Estate Planning Council

Member

### Rehabilitation Center for Children and Adults

Professional Endowment Committee, Chairman, 2018

### University of Florida Law Center Association

Florida Alumni Tax Advisory Committee (FATAC) Committee Member  
2016-Present

### University of Florida Law Center Association

Florida Alumni Tax Advisory Committee (FATAC), Chair 2018-Present

### Dreyfoos School of the Arts Foundation

Board Member, 2002-2006

## 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.

Zoning, 2016

Lawyer of the Year, WPB Intellectual Property, 2013

#### **Palm Beach Illustrated Top Lawyers**

Environmental Law; Land Use & Zoning Law, 2019

Municipal Law, 2018

#### **Florida Trend**

Legal Elite, 2004, 2010-2012, 2015-2017

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

#### **Sigma Chi Fraternity**

Significant Sig Award, 2017

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

Judge Edward Rodgers Diversity Award, 2016

Sidney A. Stubbs Professionalism Award, 2014

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

Friend of FAWL Award, 2012

#### **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

#### **Price Waterhouse**

Finalist, Up and Comers Award, 1993

#### **International Rotary Foundation**

Scholar, 1984-85

### **Honors & Distinctions**

The Best Lawyers in America, Real Estate Law, 2011-Present

Palm Beach Illustrated Top Lawyers, Real Estate Law, 2018

Martindale-Hubbell, AV® Peer Review Rated

### **Education**

#### **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.

### **Honors & Distinctions**

Palm Beach Illustrated, Top Lawyers, Real Estate Law, 2019

South Florida Legal Guide, Top Up and Comer, 2013; Top Lawyers, 2015-Present

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

Martindale-Hubbell AV® Rated

### **Affiliations**

Fidelity National Title Insurance Company Commercial Real Estate Council Member

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

### **Honors & Distinctions**

Martindale-Hubbell, AV® Rated

The Best Lawyers in America, Commercial Litigation, 2009-Present

### **Affiliations**

Phi Alpha Delta Legal Fraternity Member

Palm Beach County Trial Lawyers Member

### **Insights**

#### **Disputes, Adversary Proceedings, and Probate Litigation**

*Speaker / December 9, 2019*

Your A to Z Guide CLE / National Business Institute

### **Affiliations**

Women's Foundation of Florida

Raise the Bar Committee Member, 2019

J.D., Vanderbilt University

B.A., Lehigh University

## Admissions

The Florida Bar

U.S. Supreme Court

## Honors & Distinction

Florida Super Lawyers, Rising Star, 2009-2011

Florida Trend, Legal Elite, 2017

## Education

LL.M., University of Florida

J.D., Stetson University

B.S., Florida State University

## Admissions

The Florida Bar

New Mexico Bar (Inactive)

U.S. Supreme Court

U.S. Tax Court

## 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, Trust and Estates Litigation, 2017-Present

Florida Trend, Legal Elite, Up and Comer,

Arts4All Florida Palm Beach County Steering Committee

Chair, 2019-2021

Vice-Chair, 2017-2019

Member, 2016-Present

Arts4All Florida Palm Beach County Golf Tournament Fundraising Committee

Committee Member, 2013-Present

The Florida Bar Real Property, Probate & Trust Law Section

Member, 2016-Present

Palm Beach County Bar Association Young Lawyers Section

Member, 2013-Present

American Bar Association

Member, 2018-Present

Florida Association of Women Lawyers

Member, 2017-Present

Leadership West Palm Beach

Graduate, 2017

Junior League of the Palm Beaches

Member

Pediatric Oncology Support Team, Inc.

Board of Directors, 2015-2018

Society of the Four Arts Contemporaries

Member, 2014-2016

## Honors & Distinctions

Florida Trend, Up and Comer, 2017

Daily Business Review, Most Effective Lawyers, Finalist, Intellectual Property, 2016

## Affiliations

Palm Beach County Bar Association

Land Use & Local Governmental Committee, Member

Judicial Relations Committee, Member

• Judicial Liaison Subcommittee, Chair

Young Lawyers Section, Executive Board

The Florida Bar

Eminent Domain Committee, Member, 2017 - Present

Federal Bar Association Palm Beach County Chapter

Member



2011-2013; 2017-Present

**Florida Super Lawyers**, Rising Star, 2010-2012; Super Lawyer 2013-2019

### **Palm Beach Illustrated**

Top Lawyers, Alternate Dispute Resolution, 2019

Top Lawyers, Trust and Estates, 2018, 2019

**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**, Top Lawyers, Mergers and Acquisitions Law, 2018, 2019

**Martindale-Hubbell**, AV® Peer Review Rated, 1994-Present

**Florida Super Lawyers**, 2006

**Massachusetts Super Lawyer**

**Who's Who in American Law**

## **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

## **Honors & Distinctions**

**Martindale-Hubbell**, AV® Rating

## **Association of Eminent Domain Professionals**

Member

## **Georgetown University Club of Palm Beach**

Board of Directors

## **Leadership Palm Beach County**

Engage Class, 2019

Civics & Government Day Committee, Member

Songwriters in the Round Committee, Member

## **About**

### **About Jesse**

Jesse Hap is a member of the Firm's **Real Estate** practice group. Jesse earned his Juris Doctor degree from **The University of Florida's Levin College of Law** where he was the recipient of the President's Scholarship Award and a Book Award in Legal Writing, and served as a Notes and Comments Editor for the Florida Law Review. While at the University of Florida, Jesse gained valuable experience as a legal intern at the Clerk's Office of the Fourth District Court of Appeal, and as a Summer Associate at Jones Foster.

## **Experience Highlights**

### **Commercial Litigation**

#### **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**

## Education

J.D., University of Florida

B.A., Cornell College

## 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

## 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

Southern District of Florida

Middle District of Florida

## Education

J.D., University of Florida

B.S., University of Florida

## Admissions

The Florida Bar

U.S. Supreme Court

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.

## Attorney's Fees Counsel & Expert Witness

### 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.

## Mediation

### 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.

## 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 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

Florida Supreme Court

U. S. District Court, Southern District of Florida

U.S. Court of Appeals, Eleventh Circuit

## About

### About Carlee

Carlee Rizzolo is a member of the Firm's **Litigation & Dispute Resolution** and **Private Client Services** teams. 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.

### Education

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

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

### Admissions

The Florida Bar

### Honors & Distinctions

**The Best Lawyers in America**, Commercial Litigation, 2020

**Florida Super Lawyers**, 2009, 2017-2019

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

### Education

J.D., Florida State University

B.S., Florida State University

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

### Affiliations

#### The Florida Bar

President, 2011-2012  
Chair, Search Committee to appoint next Executive Director, 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

## 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

## Education

J.D., Duke University

B.A., Emory University

## 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

LL.M., University of Florida

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

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

## Admissions

The Florida Bar

## Honors & Distinctions

South Florida Legal Guide, Top Lawyers, 2002-Present

Florida Trend, Legal Elite, 2004-2011, 2012  
Lifetime Hall of Fame Award

The Best Lawyers in America, Bet-the-

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

Historical Society, Trustee

## United States District Court Southern

Committee Member, District of Florida West Palm Beach Federal Courthouse, Committee Member, 2018-2021

## American Bar Association

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

## Economic Council of Palm Beach County

Board of Directors, 2017-Present

Chair, Governance Committee, 2019

Member, Policy Committee, 2019

Member, Executive Committee, 2019

## University of Florida

Trustee, University of Florida College of Law Board of Trustees, 2002-Present

Chair, University of Florida College of Law Board of Trustees, 2017

Chair, Council of Advisors, Bob Graham Center for Public Policy, 2016

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

Board of Directors, University of Florida Foundation, 2013-2015

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

Board of Trustees, Chair 2013-2015

Trustee, 1994-Present

## Florida's Children First

Palm Beach County Committee, 2006-2009

## Palm Beach County Literacy Coalition

Past Member, Steering Committee

## Affiliations

### The Florida Bar Tax Section

Member, 2004-Present

Company Litigation, 2007-Present

**The Best Lawyers in America**, Commercial Litigation, 1987-Present

**Florida Super Lawyers**, 2006-Present

**The Forum Club of the Palm Beaches**, Outstanding Public Service Award, 2014

**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

## Education

J.D., University of Florida

B.A., University of North Carolina, at Chapel Hill

## Admissions

The Florida Bar

U.S. Supreme Court

**United States District Court**

Middle District of Florida

Southern District of Florida

## Honors & Distinctions

**Florida Super Lawyers**, 2010-2019

**South Florida Legal Guide**, Top Lawyer, 2010-Present

**The Best Lawyers in America**, Commercial Litigation, 2015-Present

**Palm Beach Illustrated**, Top Lawyers, Eminent Domain and

**Palm Beach County Bar Association**

Member, 2004-Present

**Lourdes Noreen McKeen Foundation**

Board of Directors, 2015-Present

**Jupiter Medical Center Planned Giving**

Council Member, 2017-Present

**El Cid Historic Neighborhood Association**

Board of Directors, 2017-Present

**CAP / Chartered Advisor in Philanthropy**

Member

**Leadership West Palm Beach**, Graduate

## Honors & Distinctions

**Florida Trend**, Legal Elite, 2006, 2009, 2012-2015, 2018, 2019

**Super Lawyers**, Florida, 2006-2019

**Palm Beach County Bar Association**, You've Been Served Award, 2017

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

## Affiliations

**Palm Beach County Bar Association**

Past President, 2004-2005

Board of Directors, 1999-2006

Member, 1986-Present

Past President, North County Section, 1998-1999

Board of Directors, North County Section, Current

Member, North County Section, Current

**The Florida Bar**

Chairman, Liaison Committee

Member, Law Day Committee

Member, Trial Lawyers Section

Member, 1984-Present

**Regent Bank**

West Palm Beach Advisory Board, 2014-Present

**Craig S. Barnard American Inn of Court LIV**

Co-Chair, Mentoring Committee, 2002-2004

Member, 1999-2005

**Gulfstream Goodwill Industries** (formerly Lighthouse for the Blind of the Palm Beaches, Inc.)

Board of Directors, 1994-1997

Chairman, Board of Directors, 1997-2014

**Friends of Abused Children**

Past Vice President

Condemnation Law, 2018, 2019

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

## 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

Florida Super Lawyers, 2007, 2010-2011,  
2014-Present

The Best Lawyers in America,  
Commercial Litigation, 2013-Present

Palm Beach Illustrated, Top Lawyers,

## 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

Palm Beach County Bar Association

President, 2014-2015

Alternate Dispute Resolution, 2019

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

Young Lawyers Section, President, 2009-2010

## The Florida Bar

Probate Rules Committee, Co-Chair, 2018

Probate Rules Committee Member, 2007-2014, 2018-Present

Real Property, Probate and Trust Law Section (RPPTL), Executive  
Council, 2012-Present

## Chamber of Commerce of the Palm Beaches

Trustee, 2009-Present

Board of Directors, 2006-2009

Leadership West Palm Beach, Graduate, 2006

## University of Florida Levin College of Law

Board of Trustees, Law Center Association, 2019

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.

### \$255 Million Credit Facility

Lead U.S. Counsel for borrower in connection with a complex \$255 million multi-lender offshore loan facility.

### 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.

### 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.

#### **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**

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

Board of Trustees, 2011-Present

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

Board of Directors, 2008-Present



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

Board of Directors, 2007-2018

Executive Committee, 2011-2018

### **Washington & Lee University Alumni Association**

Director, 2009-2013

### **Angel Forum of Florida**

Past-Director, 2010-2014

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

President, 2012-2014

Board of Directors, 2007-2015

## **About**

### **About John**

John Martyn, a member of the Firm's Private Client Services 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.

## **Affiliations**

### **American Bar Association**

Member, Real Property, Probate and Trust Law Division

### **The Florida Bar**

Business Law Section

Real Property, Probate and Trust Law Section

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

Member

## **Experience Highlights**

### **Class Action Against Municipality Regarding Underground Utility Project**

Representation of a municipality in defense of putative class actions challenging the bond referendum and special assessment criteria involved in its \$90 million underground utility project.

### **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.

### **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 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.

**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.

**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.

**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.

**Successful Defense of Facial Challenge to Municipal Aesthetic Ordinances**

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.

**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.

**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.

**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.

### **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.

### **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.

### **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.

### **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.

## **Honors & Distinctions**

**South Florida Legal Guide**, Top Lawyers, 2010-Present

**The Best Lawyers in America**, Commercial Litigation, 2013-Present

**Palm Beach Illustrated**, Top Lawyers, Commercial Litigation; Business Litigation, 2018, 2019

**Florida Trend**, Legal Elite, 2011, 2018, 2019

**Florida Super Lawyers**, Rising Star, 2009; Super Lawyer 2010-2019

**Chambers USA**, Florida's Leading Lawyers in Litigation, 2010-2011

**Chambers USA**, Up and Comer, 2007-2009

**Martindale-Hubbell**, AV® Rating

## **Honors & Distinctions**

**South Florida Legal Guide**, Top Lawyers, 2007-Present

**The Best Lawyers in America**, Municipal Litigation, 2011-Present

**The Best Lawyers in America**, Municipal Law, 2011-Present

**Palm Beach Illustrated**, Top Lawyers, Municipal Law, 2018-2019

**Florida Trend**, Legal Elite, 2015

**Ralph A. Marsicano Award**, 2009

**Florida Municipal Attorneys Association Paul S. Buchman Award**, Municipal Attorney of the Year, 2006

**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

## **Affiliations**

**Florida Association for Women Lawyers Palm Beach County**  
Member, 2019 - Present

**Food Pantry of Broward County**, 2015-2016

**Make-A-Wish Foundation**, 2012-2016

## **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**

Lawyer of the Year, WPB, Trusts & Estates Litigation, 2020

Commercial Litigation, 2019-Present

Trust and Estates Litigation, 2011-Present

Florida Trend, Legal Elite, 2012

Florida Super Lawyers, 2006–2019

Palm Beach Illustrated, Top Lawyers, Trust and Estates, 2018

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

### **Trustbridge Hospice Foundation**

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**

Past-Director, 2002-2005

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

Past-Chair, Board of Directors, 1999-2000

## **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.

#### **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.

#### **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.

#### **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.

#### **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.

## **Affiliations**

### **The Kiwanis Club of West Palm Beach**

Board Member, 2015-2018

President, 2014-2015

President-Elect, 2013-2014

### **The Kiwanis Club of West Palm Beach Foundation**

Vice President, 2019

Board Member, 2014-Present

Class Scholarship Committee, Chair, 2018-Present

### **East Coast Estate Planning Council**

First Vice President, 2019 - Present

Second Vice President, 2018 - 2019

Board Member, 2016-Present

Secretary, 2017-2018

### **Palm Beach Tax Institute**

Member, 2011-Present

### **Planned Giving Council of Palm Beach County**

Board Member, 2017-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

**University of Florida Law Center Association**  
Member, 2014-Present

**Forum Club of the Palm Beaches**  
Board of Directors, 2008-2010

## **Honors & Distinctions**

**Florida Super Lawyers**, 2007–2009, 2014–2019

**Palm Beach Illustrated Top Lawyers**, Bankruptcy & Creditor Debtor Rights/ Insolvency & Reorganization Law, 2018, 2019

**Legal Aid Society**, Civil Litigation Award, 2010

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

## **Experience Highlights**

### **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.

### **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 tortuously 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.

### **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.

#### **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.

#### **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.

### **Affiliations**

#### **Home Safe, Inc.**

President, 2014-2016

Board Member, 2009-Present

#### **The Florida Bar Foundation**

Fellow, 2004-Present

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

Member, 2002-2007

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

Board of Governors, 2013-2017

Grow Program Chair, 2010-2016

o Engage Class, 2006

#### **The Florida Bar Standing Committee on Professionalism**

Committee Member 2004-2010

Chair, 2009-2010

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

Committee Member, 2010-2016

#### **The Florida Bar Rules of Judicial Administration Committee**

Committee Member, 2012-2015

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

Committee Member, 2017-Present

**Association of Eminent Domain Professionals**  
Member

## **Honors & Distinctions**

**Florida Super Lawyers**, 2006-2019

**The Best Lawyers in America**, Eminent Domain and Condemnation Law, 2007-Present

**Palm Beach Illustrated**, Top Lawyers, Eminent Domain and Condemnation Law; Land Use and Zoning Law, 2018, 2019

**Florida Trend**, Legal Elite, 2004

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

## **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  
Chair, Business Records Subcommittee, 2000-2002  
Chair, Code Improvement Subcommittee, 2002-2003

**The Florida Bar, Rules of Civil Procedure Committee**  
Member, 2004-2010

## **Affiliations**

**American Bar Association**  
Co-Chair, E-Discovery Subcommittee, 2018-Present  
Co-Chair, Data Breach and Internet Subcommittee, 2018-Present  
Member, 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 and Technology Law - Internet of Things Committee

**Palm Beach County Bar Association**  
Past-Chair, Technology Law Committee  
Member, Technology Law Committee

**The Florida Bar**  
Member, Technology Committee, 2018  
Board Member, Legal Specialization and Education Committee, 2008-2013

Vice-Chair, Legal Specialization and Education Committee, 2012  
Chair, Business Litigation Certification Committee, 2008  
Board Member, Business Litigation Certification Committee, 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

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