

LEGISLATIVE UPDATE

TRUST AND ESTATE SECTION COLLIER COUNTY BAR ASSOCIATION

May 7, 2015

LAIRD A. LILE

2015: One for the History Books



The Speaker and The President
Tuesday, March 3, 2015

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2015: One for the History Books



The Speaker
Tuesday, April 28, 2015

Tuesday, April 28: 1:46 pm – email received “House just adjourned *sine die*”

TRUST AND ESTATE SECTION

COLLIER COUNTY BAR ASSOCIATION

MAY 7, 2015

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2015: One for the History Books



The Senate Chamber
Afternoon of April 28, 2015
Now what?

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MAY 7, 2015

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2015: One for the History Books



The President
Wednesday, April 29, 2015

Adjourned until Call of the President

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MAY 7, 2015

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2015: One for the History Books



Florida Supreme Court
Thursday, April 30, 2015

Democratic Senators Filed Emergency Petition

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MAY 7, 2015

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2015: One for the History Books



Florida Supreme Court
Friday, May 1, 2015

Order Issued in SC15-813

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MAY 7, 2015

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2015: One for the History Books



The Speaker and The President
Wednesday, May 7, 2015

Set Special Session for June 1 to 20, 2015

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Rep. Passidomo's Initiative

- Durable Power of Attorney
- Emergency Temporary Guardians
- For Profit Corporate Guardians
- Health Care Surrogate
- Professional Guardians
- Abuse by Guardians

Guardianships

▣ CS/CS/CS/HB 5

Effective date: July 1, 2015

➤Confidentiality

Settlements for a Ward

▣ CS/HB 7

Effective date: July 1, 2015

- Chapter 39 proceedings
 - Protect children

- Chapter 393
 - Guardian advocates

- Chapter 744
 - Coordination

Developmentally Disabled

▣ CS/CS/HB 437

Effective date: July 1, 2015

RPPTL Initiative

- Attorneys fees
 - Expansion of 733.106(4)
 - Expansion of 736.1005
- Notice of Administration
- Personal Representative
- Estate Tax Apportionment

Estates and Tax Apportionment

▣ CS/CS/SB 872

Effective date: July 1, 2015 (mostly)

➤ Defines:

- “Health care”
- “Health information”

➤ Limits on Health Information

- Imposed by Principal

➤ Statutory Form

➤ Minors

Health Care Surrogates

▣ CS/CS/CS/HB 889

Effective date: October 1, 2015

Trust Accounts – Electronic Notice

▣ CS/HB 961

Initiative of Bankers

- Electronic posting
 - Electronic account
 - Website
- Recipient must authorize
 - Enumerate documents
 - Instructions
 - Security procedures
 - Notice when posted
 - Right to amend/revoke
 - Limitations period
- Statutory Notice
- Accessible for Four Years

Effective date: July 1, 2015

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COLLIER COUNTY BAR ASSOCIATION

MAY 7, 2015

LAIRD A. LILE

Digital Assets

Power of Attorney

Family Trust Companies

Notary Journals

What Could Have Been

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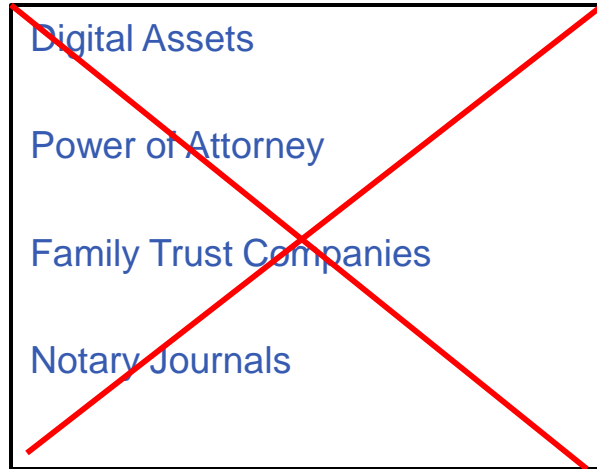
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COLLIER COUNTY BAR ASSOCIATION

MAY 7, 2015

LAIRD A. LILE

RPPTL-PAC

and

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

LEGISLATIVE AND CASE
LAW UPDATE

BE THE BREAKERS IN PALM BEACH
JULY 31, 2015

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