



happy new year

# REVIEW

## Charitable Giving Can Lower Estate Tax Burden

Under the Tax Cuts and Jobs Act, in 2026, the basic exclusion amount will drop to less than half of the current amount, so plan widely

BY MICHAEL R HUCKLE, ESQ.

Under the current tax laws, it is easy to forget that the imposition of an estate tax could drastically reduce the amount you plan to leave for the next generation or even future generations.

Currently, the basic exclusion amount is just over \$12 million per person. This would mean a married couple who have not done any lifetime gifting would need an estate that exceeds \$24 million before there is any estate tax applied.

However, this will change soon. Under the Tax Cuts and Jobs Act (TCJA), in 2026, this basic exclusion amount will drop to less than half of the current amount to around \$5 million. So, for the same couple mentioned above their estate would need to be just over \$10 million for estate tax to start being applied and with the top end of the estate tax being 40 percent, this could severely impact a large number of people looking to give their money to those they care about instead of paying it to the government.

**One of the most popular ways in which to lower an individual's estate and still benefit a particular purpose is through charitable giving.** There are two main ways in which charitable giving is accomplished. The first,

and more commonly used is the intestate gift. An intestate gift is given to the charity or charities of your choice after you have passed away. This method is simple and easy to accomplish.

However, the downside to an outright charitable gift is that there is very little control over how this gift is used by the charity after it is received.

**The second way in which a charitable gift can be accomplished is through the establishment of a family foundation.** A family foundation can be established during your lifetime, or at the time of your death, and can be a good option for individuals who wish to:

- Create a legacy focused on their philanthropic interests;
- Control how charitable funds are invested over time;
- Participate in the management of charitable projects;
- Teach children and grandchildren how to manage wealth more efficiently and effectively; and
- Contribute to organizations that helped share their charitable interests.



Michael R. Huckle  
Estate Planning, Tax Law

While there are a number of things to consider when establishing a Family Foundation, they are great tools for those individuals who want to have a say in how their money is used to benefit others.

If you are interested in establishing a family foundation or just wondering how to go about making an intestate gift, please feel free to give Attorney Michael Huckle a call at 941.748.0100.

### Inside This Newsletter



**BLA LOCK  
WALTERS**  
ATTORNEYS AT LAW

WE MAKE A DIFFERENCE

Our Attorneys	2-3
Is your corporate shield an aegis or a target?	4
Two recent ordinance amendments revise local land use regulations	5
What's going to happen to your vacation home?	6-7
Who inherits my assets if I have no will?	8
Should employers implement a jury trial waiver?	9
About Us	10-16
Behind the Suit: Matthew Lapointe	14
Staff Spotlight: Jenny Ordóñez	15
Making a Difference	17-19



## Our Attorneys



**Mark P. Barnebey**

Land Use, Mediation; Florida Board Certified in City, County & Local Government Law



**Anthony D. Bartirome**

Estate Planning, Tax Law



**Anne W. Chapman**

Labor & Employment Law



**Mark Clare**

Business, Health Care



**Yazen Dides**

Business, Health Care, Tax Law



**Taylor E. Falkner**

Land Use, Local Government



**Dana Carlson Gentry**

Florida Board Certified in Wills, Trusts & Estates



**Ryan T. Harris**

Finance, Real Estate Law



**Michael R. Huckle**

Estate Planning, Tax Law



**Charles F. Johnson, III**

Business Litigation



**Matthew J. Lapointe**

Business, Health Care Law



**Mary Fabre LeVine**

Appellate Practice, Business Litigation



**Melanie Luten**

Business, Leasing, Real Estate Law



**Jenna Kyle Meltzer**

Estate Planning



**Fred E. Moore**

Florida Board Certified in Business Litigation



(941) 748-0100 (941) 745-2093 (fax)  
www.blalockwalters.com

**BRADENTON**

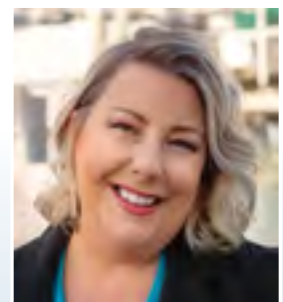
802 11th Street West, Bradenton, Florida 34205

**SARASOTA**

2 North Tamiami Trail, Suite 400, Sarasota, Florida 34236

### Address Change?

To update your contact information or add a co-worker or friend to this newsletter mailing list, please contact Marketing Director Jill McGarry at 941.748.0100 or email [jmcgarry@blalockwalters.com](mailto:jmcgarry@blalockwalters.com)



**Jill McGarry**  
Marketing Director





## Making a Difference



**Stephen G. Perry**

Finance, Leasing,  
Real Estate Law



**Matthew R. Plummer**

Managing Partner, Finance,  
Leasing, Real Estate Law



**Marisa J. Powers**

Business Litigation,  
Land Use and  
Local Government Law



**Samantha A. Regala**

Business & Corporate Law



**William C. Robinson, Jr.**

Florida Board Certified  
in Real Estate Law



**Jodi M. Ruberg**

Business, Health Care Law



**Scott E. Rudacille**

Land Use, Real Estate Law;  
Florida Board Certified in City,  
County & Local Government Law



**Jenifer S. Schembri**

Business, Estate Planning;  
Florida Board Certified  
in Tax Law



**Timothy S. Shaw**

Finance, Leasing,  
Real Estate Law



**Matthew A. Staggs**

Business, Leasing,  
Real Estate Law



**Robert S. Stroud**

Business, Real Estate Law;  
Florida Board Certified in  
Health Care Law



**Jonathan T. Tortorici**

Business Litigation



**Amanda C. Tullidge**

Finance, Leasing  
Real Estate Law



**Daniel P. VanEtten**

Business Litigation



**Clifford L. Walters, III**

Business, Estate Planning,  
Land Use and Leasing,  
Real Estate Law



**TAX DISCLAIMER :** Our firm provides the information in this newsletter for general guidance only, and it does not constitute the provision of legal advice, tax advice, accounting services, investment advice, or professional consulting of any kind. The information provided herein should not be used as a substitute for consultation with professional tax, accounting, legal, or other competent advisers. Before making any decision or taking any action, you should consult a professional adviser who has been provided with all pertinent facts relevant to your particular situation. Tax articles in this newsletter are not intended to be used, and cannot be used by any taxpayer, for the purpose of avoiding accuracy-related penalties that may be imposed on the taxpayer.

To ensure compliance with Treasury Department regulations, we advise you that, unless otherwise expressly indicated, any tax advice contained in this communication was not intended or written to be used, and cannot be used, for the purpose of (i) avoiding tax-related penalties under the Internal Revenue Code or applicable state or local tax law provisions or (ii)

promoting, marketing or recommending to another party any tax-related matters addressed herein. This publication is not intended as legal advice, which may often turn on specific facts. Readers should seek legal advice before acting with regard to the subjects mentioned herein. Citations omitted due to space limitations but available upon request.

The information in this newsletter is not intended as legal advice, but rather as a service to our clients, friends and other Internet users. If you have questions about any of the information contained in the newsletter, please contact an attorney for a consult. Please keep in mind that contacting us by itself does not establish an attorney-client relationship. Therefore, you should not convey any confidential information to us until a formal attorney-client relationship has been established after our thorough conflict of interest procedures have been completed. We welcome your inquiries, but please keep the above information in mind, as well as the fact that electronic mail on the Internet is not secure in most instances. Accordingly, you should not send confidential or sensitive information in e-mail messages. Thank you for your interest in Blalock Walters.

# Is Your Corporate Shield an Aegis Or a Target?

A skilled corporate or estate planning attorney can help to insulate you personally from the risk of a lawsuit related to your corporate entity's business dealings.

BY DANIEL P. VAN ETTEN, ESQ.

Are you starting your first business? Maybe you're a seasoned capitalist starting a new venture? Perhaps you're looking to start a new non-profit to fill an unmet need in the community?

**In each case, one of the first pieces of advice you are likely to receive is to form an entity, such as a corporation or a limited liability company, to protect yourself from lawsuits filed against your company.**

The reason for forming an entity to protect personal assets from a lawsuit against your entity is what is known as the corporate shield doctrine. This doctrine stands for the general rule that an entity's officers, directors, managers and members are not personally responsible for the acts of the entity. For instance, that person is likely protected if their entity defaults on a business contract.

Unfortunately, most people misconstrue this doctrine and mistakenly believe it means that they are fully protected so long as they are acting on behalf of their entity. For instance, I have heard individuals say, "go ahead and sue, my company doesn't have any assets, and I'll just have it declare bankruptcy."

**The corporate shield doctrine does not apply when an individual intentionally or negligently commits a tortious act. Whether that tortious act was done on behalf of the entity is immaterial as it relates to personal liability.** In such an instance, both the entity and the individual personally are likely to be sued. This often comes as a shock to the owner of the entity.

So what are some examples of tortious acts that may personally expose entities' officers, directors, managers and members to personal liability? When that individual:

- Signs a real estate contract disclosure statement in which they intentionally or negligently omit information that legally should have been disclosed;
- Personally negligently performs a job or project; or,
- Helps their entity engage in fraudulent or deceptive business practices.

These are merely three common examples of instances in which the corporate shield doctrine may be pierced and the person individually sued.

Does this mean that you should not form an entity? Absolutely not!

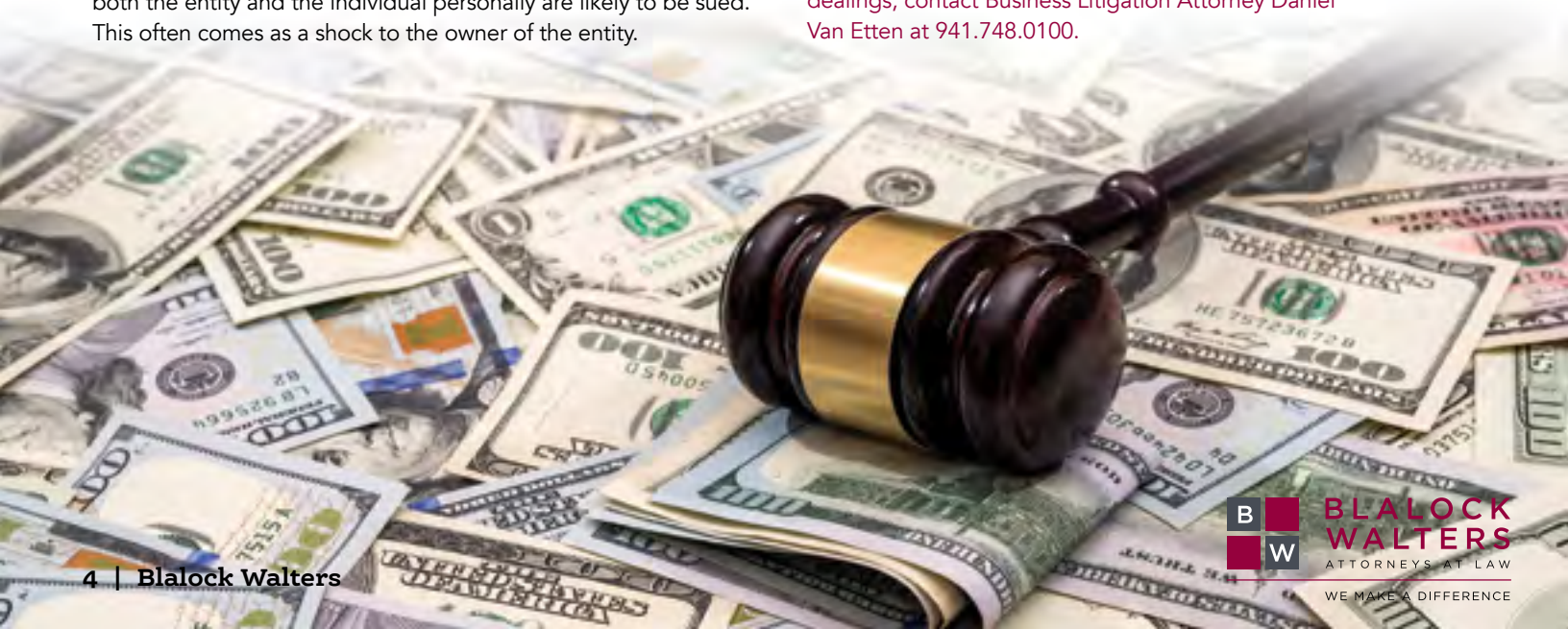
What this does mean is that you must be strategic in how you personally interact with your entity and its business dealings.

It also means that you should take prudent steps to ensure that your personal assets are protected from an adverse judgment. A skilled corporate or estate planning attorney can help to insulate you personally from the risk of a lawsuit related to your entity's business dealings.

For more information about insulating you personally from the risk of a lawsuit related to your corporate entity's business dealings, contact Business Litigation Attorney Daniel Van Etten at 941.748.0100.



Daniel P. Van Etten  
Business Litigation





■ ■ ■ LAND USE AND LOCAL GOVERNMENT LAW

# Two Recent Ordinance Amendments Revise Local Land Use Regulations

BY TAYLOR E. FALKNER, ESQ.

The Manatee County Board of County Commissioners voted November 2, 2022 to approve two ordinances that amended the language of the Manatee County Land Development Code (LDC).

**The first ordinance, No. 22-67, amends the LDC as it relates to half dwelling units and an associated reduction of the required multi-family parking ratio.** Similar to surrounding jurisdictions, the Manatee Board of County Commissioners have voted to implement half dwelling units, which are defined as a multi-family residential unit, 750 square feet or less in size.

Half dwelling units may be utilized for calculating multi-family residential density if the project is located in the Urban Service Area. Furthermore, such projects are only required to provide one parking space per half dwelling unit. However, it should be noted that an administrative parking reduction is not allowed for half dwelling units as it is for other sections of the code.

This amendment is noteworthy as it allows for increased density on multi-family projects located within the Urban Service Area, along with a reduction in the parking ratio when a developer utilizes half dwelling units.

In addition to half dwelling units, **the Board of County Commissioners also approved Ordinance No. 22-87, which amends the LDC related to accessory dwelling units.** Accessory dwelling units were first approved in Manatee County in 2021, and are only permitted in certain zoning districts and on land with an existing dwelling unit.

Ordinance No. 22-87 specifically adds minimum criteria for accessory dwelling units on Planned Development parcels. As such, accessory dwelling units may only be allowed on parcels zoned Planned Development if one of the following is met:

1. If expressly approved in the zoning ordinance and the site plan approving the Planned Development Project;
2. If expressly approved as an amendment to an existing Planned Development zoning ordinance and the applicable site plan; or
3. If the lot is no longer included in the site plan approving the Planned Development project, and the lot is developed for a single-family use.

The maximum square footage allowed for an accessory dwelling unit in the Residential Single Family, Planned Development and Village zoning districts is 750 square feet or 80 per cent of the primary structure (air-conditioned, under roof square footage only), whichever is less. The underlined portion of this provision is what the County most recently approved with Ordinance No. 22-87. However, this provision is very restrictive, and the County should consider further amending this section to simply allow accessory dwelling units that are a maximum of 80 percent of the primary structure.

As Manatee County continues to grow and evolve, so will its land use regulations. Whether you are a developer looking to invest in Manatee County or a long-time resident, it is important to stay up to date on the Land Development Code as the county continues to change.

If you have questions related to accessory dwelling units, half dwelling units, or closely related guest houses or other land use topics, feel free to call on land use attorneys Taylor Falkner, Mark Barnebey or Scott Rudacille at 941.748.0100.



Taylor E. Falkner  
Land Use, Local Government

*Whether you are a developer looking to invest in Manatee County or a long-time resident, it is important to stay up-to-date on the Land Development Code as the county continues to change.*

# What Is Going To Happen To Your Vacation Home?

Planning makes all the difference. Leaving the vacation property to each of your children in equal shares, without addressing all of the complexities of co-ownership, maintenance costs and the potential for serious disputes among the owners is not a plan.

BY MATTHEW J. LAPOINTE, ESQ.

Somebody recently asked me what was one of my fondest childhood memories. I immediately thought back to my childhood summers at my family's cottage on Narragansett Bay in Rhode Island. Many families have vacation homes -- the cabin in the North Carolina mountains or the beach house on Anna Maria Island. Whether you inherited it, bought it or built it with your own hands, your vacation home provides a great escape and builds lasting memories.

**Most people who own a vacation home have high hopes that it will be an asset that future generations will continue to enjoy.**

Parents see their children grow up enjoying the vacation home and building lifetime memories. It is only natural for them to assume that their children will eventually take over and keep the home in the family for the grandchildren and later generations. Often, owners of a vacation home do not give it much thought other than to arrange their affairs such that each child will inherit an equal share in the vacation property. But as the original owners age, problems often arise. Adult children move away and find that they cannot use the home as much as they'd like to. The financial burden of maintenance and real estate taxes may be too much for some children, even if the home itself is owned free and clear. After the original owners pass away, one child may favor selling the vacation home while another may want to keep it. One child may want to rent it, while the others may want to keep it exclusive to the family.

Despite these obstacles, with advance planning and free and open discussions between the generations, it is possible to keep the vacation home in the family for future generations to enjoy for years to come.

**The original owners of the vacation home** (which I will refer to as the parents) **should create a limited liability company (LLC) and transfer the vacation property to the LLC.** Initially, the LLC will be owned by the parents. Over time, the parents can make gifts of LLC interests to their children or they can arrange for the LLC interests to transfer upon their death. Either way, the LLC operating agreement is the key to a successful vacation home transfer plan.

The LLC operating agreement must contain provisions dealing with the following:

- Management of the property
- Ownership restrictions
- Maintenance and financial contributions
- Fair use by the owners
- An exit strategy

The parents, with the help of an attorney, should discuss these issues with their adult children and include them in the drafting

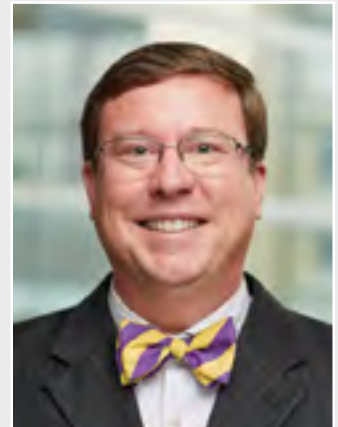
of the LLC operating agreement. The operating agreement will serve as the co-ownership agreement, imposing a fair structure on future generations with the goal of keeping the vacation home in the family for generations to come.

LLCs can be manager-managed or member-managed. A manager-managed LLC vests all authority to manage the LLCs property in a single manager or a board of managers. A member-managed LLC is more democratic, with each member having an equal say in management decisions.

The parents should discuss these options with their adult children and determine whether family dynamics would favor electing a single manager from among the siblings or diffusing management responsibilities among all of them. If the parents choose a manager-managed LLC, the agreement should specify how that manager is to be chosen and for how long the manager will serve. It may also be advisable to impose some restrictions on the manager, requiring him or her to get the approval of a supermajority of the members (or unanimous approval) for certain actions, such as significant capital improvements, selling the property, or renting the property.

The ownership restrictions in the LLC agreement should include a prohibition on any family member selling or transferring his or her interest to anyone other than a sibling or a lineal descendant. Third parties should be excluded. Such limitations will protect all of the owners from third party claims against an owner's interest. Potential claims may arise out of an owner's divorce or financial difficulties. These restrictions also protect an owner from being required to liquidate his or her interest to "spend down" the owner's share at the time of disability or old age, prior to receiving governmental benefits, like Medicaid.

The agreement should contain provisions dealing with an owner who wishes to sell his or her interest. In that case, the other owners should have the right (or perhaps the obligation) to buy the interest, pro-rata. The agreement should provide a method for



**Matthew J. Lapointe**  
Business, Health Care Law

determining the purchase price and a built-in discount, because no sales commission is paid and because the seller is getting paid for something he or she did not have to buy and for something that otherwise would probably not be sold for decades to come. In the event of an owner's death, the agreement would allow the LLC interest to be passed down to the owner's children or to a trust for their benefit, if the children are minors.

Another issue that should be addressed in the operating agreement is the question of foreclosure. If one of the owners is not able to meet his or her financial obligations, should the LLC have the right to lower that owner's interest over time, while allowing him or her to continue to use the property? Or should the LLC have the right to foreclose on a defaulting member and expel him or her from ownership? This is a difficult issue that is best discussed while the parents are still alive and with due consideration of each adult child's relative ability to fund his or her maintenance obligations. Whether or not the parents are able to establish a maintenance fund will play into this discussion as well.

**If the parents are able, they should consider establishing a maintenance fund and contribute to it regularly while they are still alive.** Alternatively, the proceeds from life insurance could fund the maintenance fund when the parents die. The LLC operating agreement should address the preparation of an annual budget and fair assessments to be paid by each owner.

Ordinary maintenance costs can be paid by the owners on an annual basis, and a portion of each year's assessment should go into the maintenance fund. Regular maintenance should be within the responsibility of the LLC manager, but major maintenance or capital improvements should require the approval of a majority, or perhaps a supermajority, of the owners. If the parents were not able to establish a maintenance fund or if the owners struggle with building reserves, then renting the property is a good way to generate the necessary funds. The operating agreement should address what approval is required to rent the property.



*Open discussion between the generations and a comprehensive LLC operating agreement can assure your vacation home stays in the family.*

**The agreement should also contain a dispute resolution mechanism, such as mediation and binding arbitration.**

**How and when the owners use the property should also be addressed in the operating agreement.** Certain days -- perhaps Memorial Day, 4<sup>th</sup> of July, and Labor Day -- might be designated "open days" on which anyone and everyone can enjoy the home together. Otherwise, the calendar can be allocated fairly among the owners, with the possibility of certain weeks dedicated to rentals. The LLC manager can maintain the calendar or one of the other owners can be appointed the "scheduler," with the final schedule subject

to a majority vote of the owners.

**Finally, it is important that the operating agreement provide an exit strategy.** At some point, the owners may agree that it is time to sell the property. In other cases, some owners who do not use the vacation property as much as they'd like may wish to sell their interests to other owners who would like to use it more. As discussed above, owners should be restricted to transferring their interests only to other owners or to lineal descendants. The operating agreement should specify when the agreement itself should terminate. This date can be at the agreement of all the owners, or after as little as 5 to 10 years or as long as 30 to 50 years, depending on the number of owners involved, the expense of maintaining the property, the existence of a maintenance fund set up by the parents, and other issues.

As with most things in life, a plan makes all the difference. Leaving the vacation property to each of the children in equal shares, without addressing all of the complexities of co-ownership, maintenance costs and the potential for serious disputes among the owners is not a plan. Open discussion between the generations and the negotiation of a comprehensive LLC operating agreement can assure the vacation home stays in the family and is available for the enjoyment of future generations.

To plan your operating agreement, call Attorney Matthew Lapointe at 941.748.0100.



# Who Inherits My Assets If I Have No Will?

BY JENNA KYLE MELTZER, ESQ.

As estate planning attorneys we are often asked, "Who will inherit my assets if I die without putting a will in place?"

Many people believe that without a last will and testament (a will), the state of Florida will automatically become the beneficiary of their estate upon their death. This is incorrect.

**When you die without a will, you are considered to have died "intestate". The state of Florida has a statute in place outlining who a person's beneficiaries are if they do in fact die intestate. This default set of instructions is not always what people would presume or prefer.** This article will take a look into Florida Statutes 732.101 and 732.102 and explore who your beneficiaries would be if you died in the state of Florida without a will.

Florida Statute 732.101 provides who your beneficiaries would be if you died without a will but with a spouse. If you die with a spouse and with no children, your spouse will inherit 100 percent of your estate. The same is true if you die with a spouse and with children, who are children of both you and your spouse.

However, if you die with a spouse, but with children who were not also children of your spouse, your spouse would receive 50 percent of your estate and your children would share the other 50 percent.

For example, Stanley died married to Tracy. Stanley and Tracy had no children together, but Stanley had a daughter, Sabrina, from a previous marriage. Therefore, Tracy would inherit 50 percent of Stanley's estate and Sabrina would inherit the other 50 percent. Further, if you die with a spouse, with some children in common and some children not in common, your spouse will receive 50 percent and your children will receive 50 percent.

But, not everyone is married at the time of their death. If you die without a will and without a spouse, Florida Statute 732.102, instructs who your beneficiaries would be.

First, we look to see if you died with any children. If you die with children, your estate will be divided equally amongst your children. In the sad instance that one of your children predeceases you, with a child or children themselves (your grandchildren) your estate would be divided amongst the number of children you had, with your living children getting their share, and the child or children of your deceased child (your grandchildren) receiving their parent's share. For example, Stacy died without a spouse, but with two surviving children, Rebecca and Richard. Sadly, Stacy's daughter Rochelle predeceased her. Rochelle had two children, Anna and Andrew. Stacy's estate would be divided as follows: one third to Rebecca, one third to Richard and one third divided equally amongst Anna and Andrew.

But, if you also had no living children or grandchildren at the time of your death, we look to see if either of your parents are living. If both of your parents are living, they each receive 50 percent of your estate. If only one of your parents is still living, they will receive 100 percent of your estate.

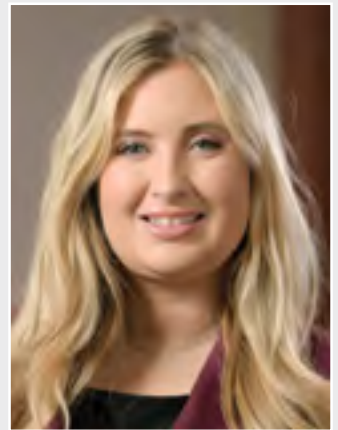
In the instance you have no living parents we then look to see if you have any living siblings. If you have living siblings, they will equally inherit your estate. If you have a half sibling, your half sibling will inherit half of what your full blood siblings are inheriting. In the instance one or more of your siblings predeceased you, we look to see if that sibling had any children (your nieces and nephews). If they did, those nieces and nephews would inherit their parent's share of your estate. For example, Kevin died without a spouse, without living children/grandchildren and without living parents. Kevin was survived by his sister Amy and his brother Alan. Kevin was predeceased by his brother Calvin who had two children, Kevin's nephews, Isaac and Brian. Kevin's estate would be distributed as follows: one third to Amy, one third to Alan and one third divided equally amongst Isaac and Brian.

However, not everyone will be survived by siblings and or nieces and nephews. In the instance you die with no spouse, no living children, no living parents, no living siblings and no living nieces and nephews, your estate will be divided in two. Thus, 50 percent of your estate will go to your maternal side of your family and 50 percent will go to your paternal side of your family, in the following order:

- Grandfather and grandmother equally, or the survivor of them
- If none, uncles and aunts and children or grandchildren of your uncles and aunts (cousins)
- If there are no surviving beneficiaries on one side of your family, for example the maternal side, the other side with surviving beneficiaries, the paternal side, would receive 100 percent of your estate.
- If there are still no surviving beneficiaries, we then determine if you had a spouse who predeceased you. If so, we then go through the following process, explained above, for that spouse to determine a beneficiary/beneficiaries.
- In the extremely unlikely case that there are still no beneficiaries, your estate will "escheat" (go) to the state of Florida.

Based on the above explanation you see it is possible that the state of Florida could be the beneficiary of your estate if you die without a Will, but it is incredibly unlikely. Nonetheless, while it is likely not the state of Florida, these default beneficiaries might not be who you envisioned inheriting your estate. To ensure your estate is inherited by your desired beneficiaries, it is important to work with an estate planning attorney to create an estate plan that reflects your wishes and works best for you and your family.

To make sure your assets are going to those you prefer, contact Estate Planning Attorney Jenna Kyle Meltzer at 941.748.0100.



Jenna Kyle Meltzer  
Estate Planning



■ ■ ■ LABOR AND EMPLOYMENT LAW

# Should Employers Implement a Jury Trial Waiver?

BY ANNE C. CHAPMAN, ESQ.

Employers should consider requiring jury trial waivers for employees. **Arbitration agreements in the employment context have been used by employers for years to avoid having to publicly litigate employment related claims filed against them by employees.**

Mandatory arbitration agreements normally require that if an employee wants to pursue a legal claim against their employer, either during employment or after, the dispute will be subject to mandatory arbitration instead of pursuing the claim through a lawsuit in the court system. To date, with a few exceptions, courts have routinely upheld the enforceability of these arbitration agreements related to employment claims when challenged.

**In March 2022, the law concerning the enforceability of mandatory arbitration provisions changed when President Biden signed the Ending Forced Arbitration of Sexual Assault and Sexual Harassment Act of 2021 which amended the Federal Arbitration Act (FAA).**

Specifically, the FAA was revised to include new language providing that mandatory arbitration provisions would be deemed invalid in certain circumstances, including when a sexual harassment claim is alleged. As a result of this amendment, employees subject to mandatory arbitration agreements concerning employment claims may now elect to file a sexual harassment claim in court whereas previously they could have been required to arbitrate the sexual harassment claim.

This exception from arbitration only applies to sexual harassment claims and not workplace harassment claims based on other protected characteristics (i.e. race, religion). Furthermore, claims alleging discrimination, including sex discrimination, are not subject to the exception and can be required to be arbitrated if there is a valid arbitration agreement. Likewise, nothing in the amendment prohibits the parties from agreeing to arbitrate after the alleged sexual harassment claim arises. But, a pre-claim arbitration agreement will not be upheld.

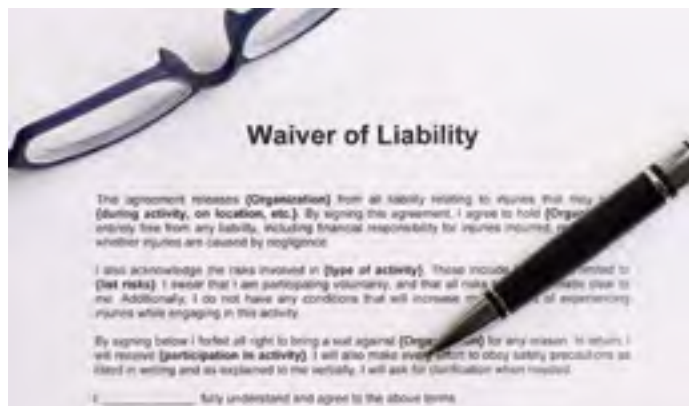
Given this development, employers should consider whether or not to implement a jury trial waiver provision in their application and/or employment agreement. Avoiding a jury trial concerning a legal claim filed against an employer by an employee can have several benefits.

In non-jury trials, a judge is the fact finder as opposed to a jury. Generally, juries tend to be friendlier to employees rather than employers in employment related disputes. The same is not true of judges. Non-jury trials also tend to be shorter and therefore less costly than jury trials.

**Florida courts have upheld jury trial waivers by employees. If an employer wants employees to agree to waive the right a jury trial, it should be made conspicuous in the application or agreement.** This can be achieved by making the provision a stand-alone provision, in distinctive font and in plain language.



Anne W. Chapman  
Labor & Employment Law



Additionally, the provision should be mutual and either near the signature line or initialed by employee. Drafting the waiver with these tips in mind will increase the chances of it being upheld against a challenge that the employee did not knowingly sign the provision.

Finally, notably, neither a mandatory arbitration agreement nor a jury trial waiver has any impact on an employee's ability to file a claim with a government agency. An employee still must comply with

any administrative requirements (including filing a Charge of Discrimination, if applicable) prior to proceeding with either arbitration or a court case.

**If you have any questions about whether a jury trial waiver or arbitration provision would work for your company or questions concerning its drafting and implementation, you should contact Anne Chapman at 941.748.0100.**



**Clifford L. Walters, III**  
Business, Estate Planning,  
Land Use and Leasing, Real  
Estate Law



**Charles F. Johnson, III**  
Business Litigation



**Matthew J. Lapointe**  
Business,  
Health Care Law



**Fred E. Moore**  
Florida Board Certified in  
Business Litigation



**Jenifer S. Schembri**  
Business, Estate Planning;  
Florida Board Certified in  
Tax Law

## 7 Attorneys Recognized As Best Lawyers in America®, Lawyer Of the Year

Blalock Walters, P.A. is pleased to announce that five attorneys have been selected by their peers for inclusion in Best Lawyers in America® 2023 and two attorneys have been named "Lawyer of the Year."

**Mark P. Barnebey** received the Best Lawyers in America® 2023 "Lawyer of the Year" award in Land Use and Zoning Law in Sarasota metro area. Additionally, **Will C. Robinson** was named Best Lawyers in America® 2023 "Lawyer of the Year" in Real Estate Law in Sarasota metro area.

Only a single lawyer in each practice area and designated metropolitan area is honored as the Best Lawyers "Lawyer of the Year," making this accolade particularly significant.

**Clifford L. Walters, III** has been named in the Best Lawyers in America® 2023 list in the field of Real Estate Law; **Charles**

**F. Johnson** selected in the practice area of Commercial and Litigation – Real Estate and Commercial Litigation; **Matthew J. Lapointe** was selected for Corporate Law; **Fred E. Moore** was selected in Commercial Litigation; and **Jenifer S. Schembri** is being recognized in Tax Law.

Best Lawyers® in America is the oldest and most respected peer-review publication in the legal industry. For more than three decades it has been regarded – by both the profession and the public – as the most credible measure of legal integrity and distinction in the United States. A listing in Best Lawyers is widely regarded as a significant honor conferred on a lawyer by his or her peers. The lists of outstanding attorneys are compiled by conducting exhaustive peer-review surveys in which tens of thousands of leading lawyers confidentially evaluate their professional peers.





## Blalock Walters Earns 2023 Best Law Firm Ranking By *U.S. News and World Report* and Best Lawyers® For 9th time

For the ninth consecutive year, the firm has been ranked as a "Best Law Firm" by *U.S. News and World Report* and Best Lawyers®. Firms included in the 2023 edition of *U.S. News – Best Lawyers® "Best Law Firms"* are recognized for professional excellence with consistently impressive ratings from clients and peers.

To be eligible for a ranking, a firm must first have a lawyer recognized in *The Best Lawyers in America®*, which recognizes six percent of lawyers practicing in the United States.

"U.S. News has more than three decades of experience evaluating key institutions in society and their service to consumers," said Tim Smart, executive editor at *U.S. News*. "Law firms perform a vital role, and ranking them is a key extension of our overall mission to help individuals and companies alike make important decisions."

The 2023 rankings incorporate more than 8.2 million evaluations of more than 115,000 individual leading lawyers from more than 22,000 firms. More than 2,000 firms received a national law firm ranking this year.



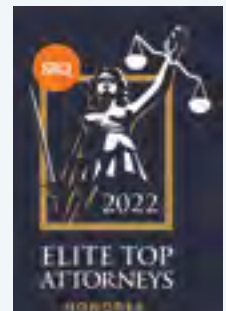
## Tortorici Says I Do!

Litigation attorney **Jon Tortorici** and his high school sweetheart, Bryce (Antinori), celebrated their nuptials October 15, 2022 at Christ the King Catholic Church followed by a reception at the Vault in Tampa. Congratulations to the happy couple and best wishes for a lifetime of love and laughter.

## 15 Named SRQ Elite Top Attorneys

Congratulations to the 15 attorneys listed below who were recognized by their peers as "SRQ Elite Top Attorneys."

The respect of one's peers, especially in the discerning legal profession, reflects a defining level of great achievement," said *SRQ Magazine* Editor in Chief, Lisl Liang. "We are humbled by the overwhelming number of thoughtful nominations we received from this community of professionals."



## MAKING A DIFFERENCE

**Mark Barnebey** – Local Government and Land Use Law

**Anthony Bartirome** – Estate Planning, Tax Law

**Anne Chapman** – Labor & Employment Law

**Charles Johnson** – Business Litigation

**Matthew Lapointe** – Business & Corporate, Health Care Law

**Fred Moore** – Business Litigation

**Matthew Plummer** – Real Estate Law, Finance Law, Leasing

**Marisa Powers** – Local Government and Land Use Law, Business Litigation

**Jodi Ruberg** – Business & Corporate, Health Care Law

**Scott Rudacille** – Local Government and Land Use Law

**Jenifer Schembri** – Tax Law, Estate Planning, Business & Corporate Law

**Timothy Shaw** – Real Estate

**Robert Stroud** – Business & Corporate, Health Care Law

**Amanda Tullidge** – Real Estate Law, Finance Law, Leasing

**Clifford Walters III** – Real Estate Law, Business & Corporate Law

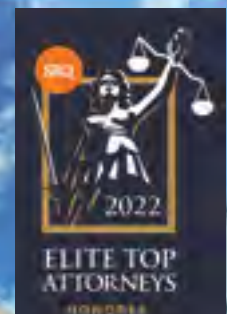


**BLALOCK  
WALTERS**  
ATTORNEYS AT LAW

WE MAKE A DIFFERENCE

Dedicated and innovative counsel making a positive difference for our clients and community.

Business & Corporate | Business Litigation | Estate Planning  
Finance Law | Health Care Law | Labor & Employment Law  
Land Use Law | Local Government Law | Real Estate Law | Tax



SARASOTA • BRADENTON

blalockwalters.com | 941.748.0100





## Welcome New Attorneys

### Jenna Kyle Meltzer Joins Estate Planning Group

We are pleased to welcome attorney **Jenna Kyle Meltzer**. She is a member of The Florida Bar, National Academy of Elder Law Attorneys and Florida Association of Women Lawyers.

Jenna concentrates her practice on estate planning and trust and probate administration, including ancillary probate administration. Jenna is adept at drafting wills, revocable living trusts and irrevocable trusts and advanced directives to help clients achieve their estate planning goals. She is also experienced in drafting estate planning documents, such as health care surrogate, HIPAA authorization and durable power of attorney.

Jenna earned her Juris Doctor degree from Stetson University College of Law, where she graduated Magna Cum Laude and earned her Elder Law Certificate of Concentration. She received a Bachelor of Commerce in Human Resources and Industrial Relations from St. Mary's University, Halifax, Nova Scotia, Canada.

"Jenna is an exceptional addition to our thriving estate planning and probate practice," said practice group leader, Jenifer Schembri. "She will enhance the level of service and depth we provide to our clients. Jenna's commitment to client and community service aligns with the firm's values, which make her a perfect addition to the Blalock Walters team."

Jenna Kyle Meltzer can be reached at 941.748.0100 or by email at [jmeltzer@blalockwalters.com](mailto:jmeltzer@blalockwalters.com).



**Jenna Kyle Meltzer**  
Estate Planning

### Business & Corporate/ Health Care Groups Welcome Mark Clare

Joining the firm's business & corporate and health care practice groups is **Mark C. Clare**. Mark served as summer law clerk for Blalock Walters while attending University of Georgia School of Law. This fall, Mark was sworn in as an attorney by The Honorable Andrea McHugh at the Sarasota County Historic Courthouse.

Mark's practice includes counseling clients regarding entity formation, business governance issues, business transactions and health care transactional and regulatory matters. He earned his Juris Doctor from University of Georgia School of Law and Bachelor of Business Administration in Finance from University of Miami.

"During his time as law clerk, Mark exhibited commitment to client service and eagerness to learn," said Managing Partner Matt Plummer. "We are thrilled to have him join the Blalock Walters team as an attorney."

Mark Clare can be reached at 941.748.0100 or [mclare@blalockwalters.com](mailto:mclare@blalockwalters.com).



**Mark Clare**  
Business, Health Care



**The Honorable Andrea Stephens** swearing in Mark Clare at the Historic Sarasota County Courthouse.

## Ryan Harris Helps The Feel Good Fund and Has Fun Playing Volleyball While Doing It

Real estate attorney **Ryan Harris** and girlfriend, Britt, play beach volleyball for MVP Sports and Social. Their team, The Grinch Gang, placed second at the Holiday Tournament in Lakewood Ranch benefiting The Feel Good Fund.



Ryan Harris serves to opponents



The Grinch Gang team and cheering section include (back) Matt Plummer with wife Nicole and kids Luke and Lily; Maddie McKennell, Laura Harris, Ryan Harris, Jason Harris, Miranda Kogalanu, Jack Harris and (front) Britt Winkers, Tom Harris and pups Mango, Rory and Maverick

Jackie Mori, legal assistant, was featured in *Florida Trend Magazine*

## Breast Cancer Survivor Finds Support On Dragon Boating Team

BY ART LEVY, FLORIDA TREND MAGAZINE, OCT 10

**Jacqueline Mori** has been an integral part of Southwest Florida's Survivors in Sync dragon boat racing team, which includes 54 breast cancer survivors. Jacqueline (Jackie) Mori was 43 in 2005 when she was diagnosed with breast cancer.

"I found out during a routine mammogram at the Sarasota Memorial Breast Health Center and was told the cancer was very aggressive and that I would have to have chemotherapy and radiation," Mori said. "I first had a lumpectomy, followed by chemo and then radiation. Losing my hair was very traumatic for me. I had gone to one support group during my treatment and realized that was not for me."

It would be another eight years before Mori realized that, perhaps, joining a support group wasn't such a bad idea, after all.

"I happened upon the 2014 International Breast Cancer Dragon Boat Festival being held at Nathan Benderson Park in Sarasota," she says. "I had no idea what dragon boating was and why all these breast cancer survivors from around the world were doing it and loving it. I stayed at the festival the entire day, stalking the local team. The following month, I went to a practice and was bit by the dragon!"

Since then, Mori has been an integral part of Southwest Florida's Survivors in Sync dragon boat racing team, which includes 54 breast cancer survivors and other athletes who practice on the water three times a week — Monday and

Wednesday evenings and Saturday mornings — at Nathan Benderson Park.

The team won gold medals in the 200-meter and 500-meter races at the 2022 Club Crew World Championship held at the Benderson course and also won a silver medal in the 2,000-meter race. The team competed at the 2018 International Breast Cancer Dragon Boat Festival in Italy and placed fourth in the world. Next year, Survivors in Sync plans to compete in New Zealand.

The experience has helped Mori both mentally and physically.

Because it involves extensive use of the upper body, "dragon boating for breast cancer was once thought as not a good idea," she says. But Dr. Don McKenzie, a sports medicine physician in Canada, thought otherwise.

"The sport grew big in Canada for breast cancer patients. In June 1996, the first breast cancer survivor dragon boat team entered a competition. Survivors in Sync started out as a fun activity to get together with other survivors," Mori says. "When you are on the water, you forget about breast cancer and anything else that is troubling. It is

exhilarating to move the boat all in sync and cross over the finish line — hopefully first."



Jackie Mori

Photos courtesy of Florida Trend Magazine

## Dan VanEtten Elected to Manatee County Bar Association Board of Directors



Daniel P. VanEtten  
Business Litigation

**Dan VanEtten** joins the esteemed list of Blalock Walters attorneys who have served as Manatee County Bar Association (MCBA) officers, directors, and presidents. Dan, who has been a member of MCBA since joining the firm as an attorney in 2016, will now serve on the board of directors.

The Manatee County Bar Association is a nonprofit voluntary organization for attorneys and judges in Manatee County, Florida.

Established in 1902, and officially incorporated in 1963, the stated purpose includes, "inculcating in its members' the principles and duties of service to the public, improving the administration of justice and advancing the science of jurisprudence among the members; maintaining the highest standards in the profession of law in the County of Manatee and in the State of Florida; and maintaining and promoting social and recreational gatherings in order to provide for a cooperative spirit among the members of the Bar and their families."





# Behind the Suit

**Matthew Lapointe**

Business, Health Care Law

**What type of law do you practice and what type of clients do you serve?** I am a business lawyer. About 60 percent of my clients are in the health care industry -- mostly physicians, dentists, chiropractors and veterinarians. The remaining 40 percent of my clients are small businesses in various sectors of the economy -- manufacturing, retail, restaurants, software, engineering, and commercial real estate, among others. Most of my work consists preparing contracts and agreements for my clients' businesses, including helping clients buy and sell their businesses or professional practices.

**How do you make a difference for your clients?** I try to educate my clients on the legal landscape and explain legal concepts in everyday English. I help clients to identify risks and then I draft contracts that fairly allocate those risks among the parties. My clients rely on me for straightforward advice.

**What is the most rewarding part of your job?** I particularly enjoy representing clients who are purchasing a business or a professional practice. It is very rewarding to help someone navigate what at first seems to be a bewildering process and to break it down, step-by-step, so that they understand what is going on and the purpose of each of the various documents. Closing a deal like that is the achievement of a significant goal in that client's life, and I am very honored to be able to help the client achieve that goal.

**What community/professional/nonprofit organization(s) are you involved with?** I am a trustee of the Bishop Museum of Science and Nature, a director of the Society for the Prevention of Cruelty to Animals of Manatee County, and I am a volunteer mentor to a 7th grader in the Take Stock in Children program.

**What three activities are you most likely doing outside of your "Business Suit?"** Reading a book at the beach, exploring one of Florida's beautiful nature preserves or hiking or skiing in the White Mountains of New Hampshire.

**What makes you laugh?** I definitely have a ready laugh and it doesn't take much. I love Bugs Bunny cartoons, The Three Stooges, and old Marx Brothers movies. Some of my favorite

comic actors are Will Ferrell, Amy Schumer, Paul Rudd, Jonah Hill, and Melissa McCarthy. I just watched *The Nice Guys*, with Ryan Gosling and Russell Crowe, on Netflix and had many laugh-out-loud moments.

**Favorite author and why?** I have so many favorites, it's hard to narrow it down to one or two. I think my favorite non-fiction author is David McCullough, who just died this past summer. My favorite books of his are *Truman*, *The Path Between the Seas* (about the Panama canal) and *John Adams*. His books are deeply researched, very thorough and even-handed, and his narrative flows beautifully.

My favorite author of fiction is probably John Irving, who wrote perhaps my favorite novel, *A Prayer for Owen Meany*. A sprawling novel that explores themes of fate and predestination as well as the meaning of loyalty and friendship, *A Prayer for Owen Meany* is just a great book.

**Favorite band and why?** I am a huge Beatles fan, and I have to consciously avoid going to the Beatles Channel first when I turn on my Sirius XM radio app in the car. I like stuff I can sing along to (not that I can actually sing), and the Beatles' melodies are catchy and singable.

**What motivates you to work hard?** My kids' tuition bills.

**What has been your favorite vacation? And/or what destinations are on your bucket list?** My wife, Kristen, was a non-traditional college student who finished her bachelor's degree in her late 20s, after we were married. Her major was art history and as a graduation present, we decided to take a trip to Italy. We visited the major museums in Florence and Rome, but Kristen also took me to these little churches and palazzos in Rome and Florence that had incredible art and sculpture and were off the beaten path. We had also learned some Italian by listening to cassette tapes (showing my age) in the car and really enjoyed trying to order food or give taxi drivers instructions in Italian. Our travel bucket list is long, but it includes northern Europe, Spain and Portugal.

**What is your favorite childhood memory?** I remember spending many summer hours water-skiing with my friends, Mark Ferreira and Jon Magan. My family had a summer

cottage in Portsmouth, RI and my childhood summers were very special. The cottage is still in the family, and I love watching the next generation enjoy it as much as I did.



Matt with sons Michael (left) and Ben (right) on Father's Day



Matt and his wife, Kristen, in Lincoln, NH



## Jenny Ordóñez – Certified Paralegal

Jenny Ordóñez works in the Land Use and Local Government Department and holds an Advance Certification in Land Use and Real Estate. She works closely with attorneys Mark Barnebey, Scott Rudacille, Marisa Powers and Taylor Falkner.

**How do you make a difference for Blalock Walters clients?** I become a bridge between client and attorney. A lot of times, staff is the first contact that a client has with the firm. It is our responsibility to make the best first impressions. In our practice area, the attorneys work closely with local governments as government attorneys or appear in front of various government entities on behalf of our clients. While I cannot give legal advice, my procedural experience and knowledge of land use and local government (along with a listening ear) provides client confidence that we are working diligently on their matter towards success and completion.

**What is the most rewarding part of your job?** The attorneys and legal assistant Cheryl Lycans, who I spend more time with than my own family. We have been called the "Land of Rainbows and Bunnies"

by others in the firm. I think this refers to our camaraderie and commitment to excellence and serving our clients and community. This all starts with our Department Head, Mark Barnebey. His years of service to our community was recently recognized by *SRQ Magazine* as hero of the year. Scott Rudacille has been recognized by the *Islander* for a number of years as attorney of the year. Most importantly, both Mark and Scott believe in family first. This includes their own families and our department families. Marisa and Taylor are both newer to our department and are equally kind, family oriented and at the top of the game as female attorneys in a mostly male dominated field. They are both active in the community as well. Marisa with PACE Center for Girls and Taylor with the Manatee Young Professionals.

I have worked with Mark and Scott for over 15 years, here at Blalock Walters, P.A. for nine years. They have watched my daughters grow up. My daughters have been in and out of our office like they are part of the department (work family). My oldest daughter has actually worked for Blalock Walters for several summers.

The biggest show of their commitment to family was when my youngest daughter experienced a spinal cord injury. My department rallied around us and supported us during her recovery.

**Who is your greatest inspiration and why?** My daughters! First, when my oldest daughter overcame her fear of

talking to strangers to becoming stage manager, fundraising and performing with the Lakewood Ranch High School Thespians. Second, when my youngest daughter walked for the first time after her spinal cord injury. They have inspired me to overcome fear and circumstances to have the life that you want to have.

**What makes you laugh?** When children use very grown-up words, in the correct context. As parents we have all been "one upped" by our children.

**What motivates you to work hard?** I am motivated to set an example for my children and to honor the trust that my attorneys put in me to be conscientious and dedicated to making a difference not only with our clients, but also our community.

**On the weekends, I...** Go to church and spend time with family. My faith has sustained me through all of my life experiences. Hanging out with my husband, Fredy, is so fun and peaceful. He inspires me to keep the faith and stay in a place of peace. The fact that our kids are the most important part of our lives is a shared passion that is equally within both of us. As a blended family, we have the blessing of bonus children that we would not have otherwise.

**My most inspirational moment in life is...** Helping people, especially women, to overcome emotional trauma and difficult life experiences. I have served on the prayer team at church and am currently training to be a mental health coach. I have also facilitated "Divorce Care" classes to help women overcome the trauma of divorce. When a woman is able to have a healthy more peaceful life because of a conversation, prayer or cup of coffee with me, I feel inspired to keep helping.

## Staff Spotlight



Jenny and husband Fredy



Fredy with sons Emmanuel and Kenneth.



Daphne and Rachael at Blowing Rock, NC

# Blalock Walters Halloween Costume Contest



**Spirited Staff Members:**  
Back: Melissa Vance, Martin Forbes  
Front: Lisbeth Bruce, Amanda Baker,  
and Mona Davis



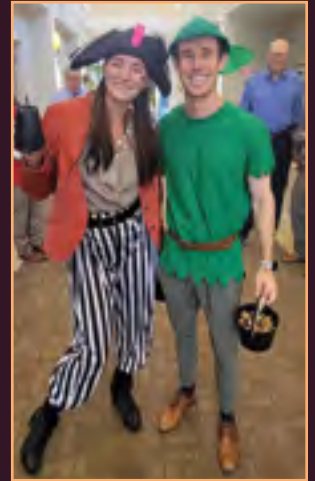
**Cowgirls:** Jill McGarry  
and Jackie Mori



**Real Estate Peter Pan:**  
Back: Matt Plummer, Stephen Perry, Linda Taylor,  
Nikki Carlock, Jordan Suits, Sue Bradley, Matt Staggs  
Front: Amanda Tullidge, Ryan Harris, Alana Fleischer,  
Nadia Warden, Laura Smidt



**Land Use:** Marisa Powers, Taylor Falkner,  
Jenny Ordóñez, Mark Barnebey and Cheryl Lycans



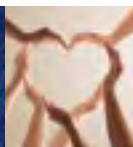
**The Costume Contest winners:** Laura Smidt as  
Captain Hook and  
Ryan Harris as Peter Pan



**Estate Planning,** Dana Gentry  
and Jenna Meltzer



## Making A Difference



### Stepping Up For Hurricane Ian Relief Drive

The firm helped “make a difference” by organizing a supply drive for those impacted by Hurricane Ian. Collectively, employees contributed over 200 pounds of food and supplies for the local food banks.



In addition to the supply drive, the firm donated numerous cases of Blalock Walters bottled water to local organizations. **Amanda Tullidge** and **Marisa Powers** contributed monetarily through their Women’s Giving Circle, Cheers for Charity. And **Jodi Ruberg** collected and delivered to those in need in her hometown of Englewood.

“We are grateful to Blalock Walters for their partnership and support of our mission,” said Cindy Sloan, Food Bank of Manatee director. “The staff at Blalock Walters are so generous with their donations, which will help those affected by Hurricane Ian tremendously.”

### Bash At Bishop Celebrates Museum’s 75th

Our longtime support of The Bishop Museum of Science and Nature continued at the annual Bash at the Bishop. It was a lovely evening under the stars as we celebrated the museum’s 75th anniversary. Attorney **Matt Lapointe** serves as vice president of the museum’s board of trustees and said this annual fundraiser brings exciting exhibitions, programs and initiatives to all ages in our community.

“Thank you to all of those who joined us for our annual Bash at The Bishop,” says Director of Development Brandy Harlan. “It was a brilliant evening celebrating 75 years of wonder and curiosity. We are so proud to gather our community to join us in celebration. We are grateful for the brilliance of our donors, supporters, event sponsors, corporate partners, guests, staff and volunteers who made this stunning evening possible.”



### Pace Center For Girls Shares Students’ Successes At Believing In Girls Luncheon

PACE Center For Girls student, Kylie, courageously shared her story with more than 250 PACE supporters at the recent Believing in Girls Luncheon.

She said, “I know for certain, if I had not gone to PACE, I would have dropped out of school and my life would not be on the track it is now.”

Kylie was 14 when she started at PACE and school came second to the heavy responsibilities that she had at home. She recalled that her counselor helped her find her purpose outside of being a caretaker for her younger siblings and understand that she was put here for a reason. She has since earned her GED and plans to pursue a nursing degree. Congratulations, Kylie!

Kylie’s success story is one of so many from PACE Center for Girls and its mission to provide young women an opportunity for a better future through education and counseling.

Blalock Walters is a proud advocate of PACE and the Believing in Girls luncheon was a heart-warming reminder that all girls have the power and strength to become tomorrow’s leaders and change makers. Attorney **Marisa Powers** is a longtime PACE supporter and hosted the firm’s table.



In front are Anne Chapman, Marisa Powers and PACE graduate Sandra and in the back row are PACE luncheon guest, PACE student, Jill McGarry, Taylor Falkner and Jenna Meltzer, all celebrating young women who are pursuing better futures through education and counseling.

Chuck Johnson, Matt Plummer and Fred Moore help celebrate the Bishop Museum’s 75th anniversary at the Bash at the Bishop





## Wit and Wisdom of Aging Luncheon Encourages Embracing Opportunity

Blalock Walters sponsored Pines of Sarasota Foundation's Wit & Wisdom of Aging luncheon featuring moderator Ray Collins, award-winning journalist and former ABC7 news anchor.

Welcomed by new President Ruth Frazier, guests enjoyed lunch by Michael's on East followed by the panel discussion. Embracing opportunity and following your instincts was the theme of this year's Wit and Wisdom panel.



The spirited panelists were nurse and educator, Dr. LaVerne Green; Howard Millman, theater producer and director and author Dr. Nancy Schlossberg, who each shared the decisions that changed the trajectory of their lives and careers. These decisions were defining moments that led to happy results. Their message to the audience? Listen to your heart and take chances!

Attending on behalf of the firm were Marketing Director **Jill McGarry** (right) and Estate Planning attorney **Jenna Meltzer** (left), who said, "It was wonderful to support Pines of Sarasota Foundation's mission of caring for seniors after they have outlived their resources."



**Dr. LaVerne Green**  
Nurse and Educator



**Howard J. Millman**  
Theater Producer and Director

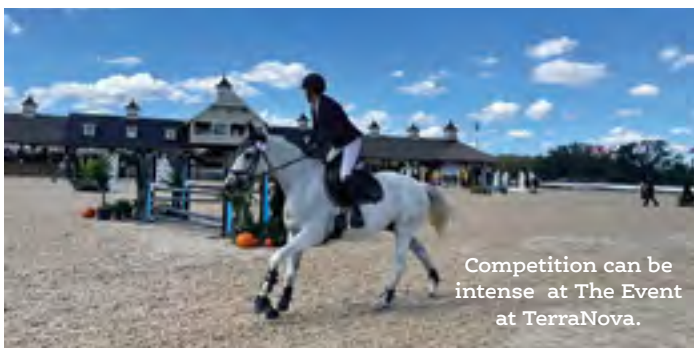


**Dr. Nancy K. Schlossberg**  
Professor Emerita and Author

## Second Annual Event At Terra Nova

TerraNova Equestrian Center held its second annual Event at TerraNova. It was an exciting weekend of dressage, competitions, and fundraising for Hurricane Ian disaster relief for local nonprofit partners, including Sarasota Manatee Association for Riding Therapy: SMART, an organization that attorney **Jenifer Schembri** has longtime supported.

Managing partner **Matt Plummer** and his family attended the event and watched all the action!



Competition can be intense at The Event at TerraNova.



Enjoying the second annual Event at Terra Nova were Managing Partner Matt Plummer (back row) ringside with his family: wife Nicole, son Luke, mom Nancy, daughter Lily and father Bob.



**BLALOCK  
WALTERS**  
ATTORNEYS AT LAW

WE MAKE A DIFFERENCE

## Book Drive For Boys and Girls Clubs

Employees from the firm organized a book and supply drive to benefit the children at Boys & Girls Clubs (BGC) of Manatee. The Club Kids were thrilled to receive the donated books, puzzles, games and art supplies.

"Boys & Girls Clubs of Manatee County is so proud of our continued partnership with our friends at Blalock Walters," said BGC Executive Director Dawn Stanhope. "We are so appreciative of their acts of kindness with the recent book and supply drive. Blalock Walters has always had a strong commitment to our community, as shown through their staff's volunteerism, board leadership and projects like these to support our youth. Thank you to everyone who participated, the kids are very excited!"

**Boys and Girls Clubs Executive Director Dawn Stanhope, middle, is surrounded by excited kids for their book donations from Blalock Walters**



## Just For Girls Waves of Success Honors Blalock Walters, Barnebeys For Years Of Service

Just For Girls celebrated their annual event, Waves of Success, at IMG Academy Golf Club November 4. The Just For Girls choir of 14 girls sang three songs to kick-off the evening, followed by awards, a silent online auction and dancing.

The organization announced the 2022 Honorary Girl, Marianne Barnebey, who was among the first girls to walk through the doors on January 6, 1969. She serves as a member of the Bradenton City Council and is a former vice mayor.

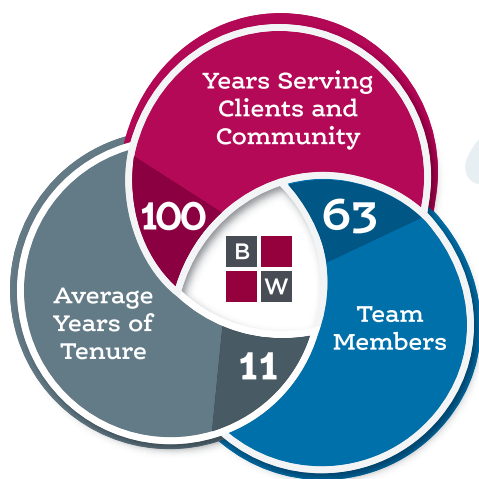
Also honored was attorney **Mark Barnebey**, foundation president in 2021, with 12 years of board service from 2010-present. Blalock Walters has been a longstanding major contributor of Just For Girls. Mark also helped them with a Palmetto redevelopment, resulting in a Florida Planning Association Award.

Also recognized was Gail Hannah, Foundation president with 29 years of service from 1991-2020 who served as president until 2020. Her family was also recognized at the 50th anniversary with an Honorary Girl Award for their generations of service to Just for



**Jeffrey Meltzer, Jenna Meltzer, Taylor Falkner, Marianne Barnebey and Mark Barnebey attend the Just For Girls Waves of Success and accept honors for longstanding contributions by the firm and its attorneys.**

Girls and its foundation. Tom "Generous" Jess of Jess Jewelers, host of the Annual Charity Fishing Tournament for the benefit of Just for Girls, Board Member Alumnus and Honorary Girl, Tom Jess Silverberg were also recognized for their service.



**Blalock Walters**  
**By the Numbers**

### **Susie Bowie, Executive Director Manatee Community Foundation:**

Blalock Walters is well known by many as a trusted firm with attorneys who are not only extremely well qualified but who go the extra mile for their clients and for our community. Manatee Community Foundation, now nearly 20 years old with a total charitable impact of more than \$60 million, was built and continues to be nourished by outstanding members of the Blalock Walters team who understand the importance of thoughtful estate planning and what philanthropy means to this community.

Our board and staff are proud to be affiliated with the firm with its years of impact to Manatee and Sarasota counties and the people who live and give here.





802 11th Street West  
Bradenton, Florida 34205

PRESORTED  
STANDARD  
US POSTAGE  
**PAID**  
PERMIT #1363  
MANASOTA, FL



BRADENTON OFFICE



SARASOTA OFFICE

## Dedicated and Innovative Counsel Making a Positive Difference For Our Clients and Community

Business & Corporate | Business Litigation | Estate Planning  
Finance Law | Health Care Law | Labor & Employment Law  
Land Use Law | Local Government Law | Real Estate Law | Tax Law

# 2023

h a p p y  
n e w   y e a r



Our priority in the new year is  
continuing to make a positive  
difference in your personal  
and professional goals  
and endeavors.

The Blalock Walters team  
wishes you health, happiness  
and prosperity in the new year!