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BLALOCK WALTERS REVIEW

WE MAKE A DIFFERENCE

VOLUME 2, 2014

Economic Incentives Can Spur Redevelopment



Mark P. Barnebey, Esq.

Economic incentives are available from local governments in various forms to help spur development and redevelopment throughout the Gulf Coast area. Such incentives have played key roles in a variety of projects including the extensive renovation of the historic Manatee River Hotel (now a Hampton Inn) in downtown Bradenton and the creation of the IT Works! Corporate headquarters in the old Riverside Plaza building in Palmetto. Available incentives differ from one governmental jurisdiction to another and can include several different sets of financial benefits. Ad valorem tax abatement, facade grants, construction reimbursement, and other financial grants are among the types of incentives that may be available in some jurisdictions. Tax credits may also be available for historic and designated brownfield properties.

Although available in Sarasota County for some time, the voters of Manatee County approved a referendum which allowed ad valorem tax exemption to be used to spur the relocation of businesses to Manatee County or encourage the expansion of existing business already located within the County. Earlier this year, the County Commission examined when and how this type of incentives should be used and adopted Resolution R-14-084, setting forth guidelines for granting of an ad valorem tax incentive to a business. The factors examined generally include:

1. The number of new full-time positions created in Manatee County as a result of relocating or expanding in Manatee County;
2. The average wage of the new employees located in the county;
3. The total amount of capital investment;
4. The commitment to local procurement;
5. The net positive contribution to the local economy (return on investment); and
6. Any other economic related characteristic that provides sustainability of economic development within unincorporated areas of Manatee County.

Each project is evaluated on a case by case basis and the county can exempt a development from the payment of all county ad valorem taxes for a period of up to 10 years depending on the evaluation of the factors listed above.

Continued on Page 3 | Economic Incentives



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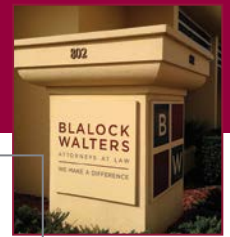
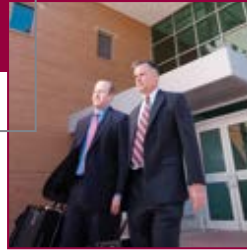
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Real Estate

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Clifford L. Walters, III
Business, Estate Planning, Land Use, Real Estate

Matthew D. Westerman
Business Litigation, Immigration, Labor and Employment



Blalock Walters Expands To St. Petersburg, Opening Third Location

Blalock Walters, P.A. is pleased to announce that the firm has expanded its services into Pinellas County. In an effort to continue to serve clients regionally, Blalock Walters has increased the number of locations to three. Blalock Walters was founded in the early 1920s, opening its first office in downtown Bradenton, where the firm is still headquartered. In 2005, Blalock Walters opened its Sarasota location at One Sarasota Tower. Most recently, an office in St. Petersburg was opened to serve clients in the greater Tampa Bay area.

The St. Petersburg office assists clients in all 11 service areas, with a focus on Health Care, Labor & Employment, and Business & Corporate services. Attorney Matt Westerman, Board Certified in Labor & Employment Law, is leading the office and can be contacted at **727.343.3209** or mwesterman@blalockwalters.com.

Blalock Walters makes a difference by serving client needs within our multiple practice areas: Banking Law, Business & Corporate, Business Litigation, Estate Planning, Health Care Law, Immigration Law, Labor & Employment Law, Land Use Law, Local Government Law, Real Estate Law, and Tax Law. ■

Robert Blalock and Clifford Walters Selected for Inclusion In The Best Lawyers in America 2015



Robert G. Blalock, Esq.



Clifford L. Walters, Esq.

We are pleased to announce that Robert G. Blalock and Clifford L. Walters, III have been selected by their peers for inclusion in The Best Lawyers in America® 2015. Bob was selected in the field of Trust and Estates and Cliff in the field of Real Estate Law.

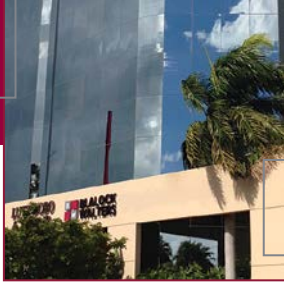


A listing in Best Lawyers is widely regarded as a significant honor conferred on a lawyer by his or her peers. The lists of outstanding attorneys are compiled by conducting exhaustive peer-review surveys in which tens of thousands of leading lawyers confidentially evaluate their professional peers. If the votes for an attorney are positive enough for inclusion in Best Lawyers, that attorney must maintain those votes in subsequent polls to remain on the list for each edition. ■

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Florida's New Data Breach Law Effective July 1, 2014



Michael D. Magidson, Esq.



Ann K. Breitinger, Esq.

Michael D. Magidson, Esq. and Ann K. Breitinger, Esq.

Florida's new data breach law, the Florida Information Protection Act of 2014 (FIPA) applies to any entity that has personal information about Floridians. The holder of this personal information is referred to as a "covered entity." The new law also applies to "third party agents," which are entities contracted to provide a service that allows them access to Floridians' personal information. For example, a billing company would be a third party agent of a medical practice.

FIPA puts new, stringent notice requirements on covered entities. Upon determining that a breach has occurred, notification

to the affected individuals must be made within 30 days. The Florida Department of Legal Affairs or a law enforcement agency may authorize a delay in notification. Further, if the covered entity determines that the breach will not result in identity theft or financial harm (after consulting with law enforcement), notification may be delayed. Third-party agents are required to notify the applicable covered entity within 10 days of determining that a breach occurred.

In the event over 500 individuals' personal information is affected by a breach, the covered entity must notify the Florida Attorney General's office in writing. If a breach affected over 1,000 individuals, the covered entity must contact the consumer reporting agencies.

Failure to comply with FIPA can result in fines of up to \$500,000 per breach as well as an action brought by the AG's Office for unfair or deceptive trade practices.

HOW TO COMPLY: FIPA is more stringent than Florida's previous

data breach laws, which means current security protocols should be updated to comply. Covered entities should ensure that they have written information security programs and incident response plans in place. Further, covered entities' employees must understand their role and obligations so that they can quickly respond to a data breach. Covered entities should ensure that their third party agents also have security measures in place.

FOR HEALTHCARE PROVIDERS: Although FIPA applies to all entities holding personal information, health care providers are especially at risk of data breaches due to the sheer volume of sensitive personal information they hold. The FIPA requirements are very similar to the updated HIPAA laws that became effective in September 2013. In some cases, FIPA requires a quicker notification of information breach than HIPAA. In complying with both FIPA and HIPAA written security protocols and written plan for the event of a breach are key in complying with the regulations and preparing for a breach.

For more information or if you have questions please contact Mike Magidson or Ann Breitinger at **941.748.0100**, or any one of the attorneys in our Health Care Law services area. ■

Continued from Page 1 | Economic Incentives

Attorneys of Blalock Walters have been involved in a number of projects which have involved economic incentives as attorney for either the developer or the local government and are happy to assist in developing a successful project with you.

Blalock Walters is a member of Economic Development Corporations for both Manatee and Sarasota Counties. Mark Barnebey is Chair-Elect for the Bradenton Area Economic Development Corporation and Jonathan Fleece is the Chair-Elect of the Manatee Chamber of Commerce. ■

TAX DISCLAIMER

Our firm provides the information in this Newsletter for general guidance only, and 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.



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EEOC Issues Enforcement Guidance On Pregnancy Discrimination



Matthew D. Westerman, Esq.

On July 14, 2014, the EEOC issued its long-anticipated Enforcement Guidance on Pregnancy Discrimination and Related Issues (Guidance). The Guidance adopts new and dramatic substantive changes to federal law regarding employer obligations to pregnant

employees. Employers must become aware of the new rules, as they not only explain the EEOC's enforcement position, but also expand federal law to provide greatly enhanced protections to pregnant employees.

The Guidance applies to virtually every federal workplace law that deals with employee pregnancies and related conditions, including the Pregnancy Discrimination Act (PDA), the Americans with Disabilities Act (ADA), the Genetic Information Nondiscrimination Act (GINA), the Affordable Care Act (ACA), the Family and Medical Leave Act (FMLA), and Executive Order 13152, which prohibits discrimination in federal employment based on parental status. Among the new changes covered by the Guidance are the following:

- The PDA requires employers to accommodate pregnant employees, regardless of the severity of their pregnancy-related work limitations, if the types of accommodations are provided to other employees with similar abilities or inabilities to work.
- The ADA requires accommodation of pregnancy-related disabilities, regardless of their relationship to a healthy and routine pregnancy. Therefore, employers will likely be required to provide accommodations for conditions that are present in most pregnancies, such as balance issues, morning sickness, and changes in body size.
- The PDA requires accommodations for pregnant women where non-pregnant similarly abled or disabled individuals have received accommodations. The EEOC declares that an employer may not

provide light duty to only those employees suffering from workplace injuries, but must also provide light duty to pregnant employees, if needed.

- Common employer policies, such as a policy that restricts sick leave, may disparately impact pregnant women.
- The EEOC takes the position that employers that provide health insurance must provide prescription contraceptives in health plans and states when coverage must be provided for fertility treatments unique to women.

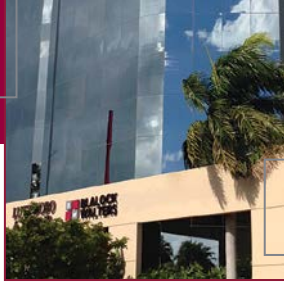
We anticipate that the EEOC will begin an aggressive enforcement campaign of these new rules. Clients should be proactive in familiarizing themselves with the Guidance's obligations and implementing best employment practices for compliance. Blalock Walters can assist you with the creation of new policies and procedures and provide counsel when addressing these issues. Please contact Matt Westerman, Board Certified in Labor and Employment Law, to obtain more information at mwesterman@blalockwalters.com. ■

Cliff Walters Honored As Goodwill Ambassador Of The Year



Congratulations to Cliff Walters on being selected as one of this year's recipients of Goodwill Ambassador of the Year 2014. Cliff has been a member of the Goodwill Manasota Board of Directors for three decades and served as Board Chair on three occasions. We thank Cliff for his long-standing commitment to

making a difference in our community. ■



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Blalock Walters Expands The Firm's Business And Health Care Practice Areas By Welcoming Alexander John



Blalock Walters is pleased to welcome attorney Alexander Kurian John to our Business and Health Care Practice Groups. Alex received his B.A. from Boston University and his J.D. from University of Florida Levin College of Law. His legal internships included the Office of the General Counsel at Shands Hospital in Gainesville, Florida, and

Legal Aid of Manasota, Sarasota, Florida. Alex was also a Law Clerk at Blalock Walters during the summer of 2013.

The firm is happy to have Alex as a part of its Health Care and Business practice. His skills and dedication to clients and our community fit the "we make a difference" culture of Blalock Walters. We are pleased to have him join the firm and add to our continued growth and success. Contact Alex at ajohn@blalockwalters.com. ■

BLALOCK WALTERS INDUSTRY FOCUS: Equine Law

Business Transitions Group Offers Specialized Equine Services

The equine industry includes many different business interests with unique legal needs. Equine law relates to all legal aspects of horses and horse-related activities.

Our team at Blalock Walters understands the unique and specialized needs of the equine industry and those passionate about their horses, and is prepared to offer the specialized services, including tax, business services, litigation, employment, immigration, land use, real estate, business succession planning, and estate planning.

Generally speaking, our team at Blalock Walters is able to provide specialized services, addressing the unique equine needs of horse owners, businesses, professionals, associations and facilities with the following:

- Prepare, review, or negotiate equine-related contracts (such as purchase and sales agreements, leases, stallion service contracts, liability waivers/releases, facility use agreements, stallion management agreements, and boarding contracts)
- Establish businesses, including corporations, partnerships, joint ventures, syndication, or limited liability companies

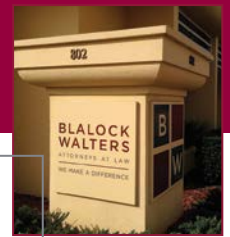
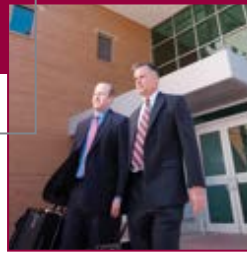


- Assist with tax planning and resolving tax disputes, including "hobby loss disputes" with the government
- Real estate purchases or transactions
- Handle or resolve zoning and land use disputes
- Litigation involving horse related matters

For more information about our Equine Law practice, please contact attorney Jenifer Schembri at **941.748.0100** or jschembri@blalockwalters.com. ■



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Hiring An Insider: What Nonprofits Need To Know



Jenifer S. Schembri, Esq.

While it is not uncommon for nonprofits to engage in business transactions with insiders, i.e., doing business with an entity related to a board member or officer of the nonprofit organization, it is important that the nonprofit engage in due diligence and strict

corporate governance to ensure that such related party transactions will not run afoul of IRS rules.

The Intermediate Sanctions rules set forth in Section 4958 of the Internal Revenue Code impose penalties in the event that the 501(c)(3) organization enters into a transaction with a so-called disqualified person that is considered an excess benefit transactions. An excess benefit transaction has three parts: (1) a tax-exempt organization is involved; (2) an economic benefit is provided by the organization, directly or indirectly to a disqualified person; and (3) the value of the economic benefit provided by the organization exceeds the value of the benefit received by the organization from the disqualified person. All three requirements must be met to trigger a violation.

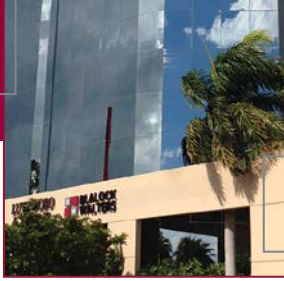
Disqualified Person. A disqualified person is a person who is in a position to exercise substantial influence over the affairs of the organization during the five-year period prior to the date of the transaction, regardless of whether they actually exercise such influence. In the event a person is deemed to be a disqualified person, any family member (not just immediate family), and entities in which such disqualified person owns at least 35% will also be deemed disqualified persons. Persons having substantial influence are voting members of the board of directors, the president, CEO, CFO, and any other person who has responsibility for implementing decisions in the organization. In the event a transaction does not involve a disqualified person, the analysis is complete. However, if there is a transaction between the organization and a disqualified person, the next step is to determine if it is an excess benefit transaction.

Excess Benefit Transaction. An excess benefit is defined as the amount by which the value of the economic benefit provided by the organization, either directly or indirectly, to or for the use of a disqualified person exceeds the value of the consideration (including the performance of services) received by the organization. For purposes of determining value received, fair market value of property and service is used.

Penalty for Violation. In the event a nonprofit participates in an excess benefit transaction with a disqualified person, the penalty is 25% of the excess benefit transaction, payable by the disqualified person (i.e., the insider). In the event that the transaction is not corrected, there is an additional 200% excise tax imposed on the disqualified person. In addition, there is an excise tax of 10% imposed on the organization manager (which may include board members) who knowingly participated in the excess benefits transaction, which in the aggregate for all managers shall not exceed \$10,000.

Rebuttable Presumption. For those nonprofit organizations that engage in transactions with insiders, it is very important that they take certain steps to establish a rebuttable presumption that the transaction is not an excess benefit transaction. A rebuttable presumption is established if three requirements are satisfied: (1) the arrangement is approved in advance by the governing body, i.e., the board of directors; (2) comparable data is used (that data says that the compensation is reasonable and not an excess benefit); and (3) contemporaneous documentation of these steps (there is adequate documentation recorded concurrently with the transaction). Failure to establish the rebuttable presumption will not necessarily result in a violation, but it will strengthen the organization's position. The IRS may rebut the presumption if it develops sufficient evidence to the contrary, however.

For more information, please contact Jenifer Schembri at jschembri@blalockwalters.com. Jenifer is a Principal in our Business & Corporate, Estate Planning, and Tax Law Groups. ■



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MESSAGE FROM THE PARTNERS



Do you ever wonder how attorneys identify great lawyers, in another community, who have the expertise to handle the challenge at hand? Well there are two gold standards that astute lawyers rely upon.

First is Florida Board Certification under which lawyers are evaluated for professionalism and tested for expertise. Only 6% of eligible attorneys are board certified (though there are a number of areas of law in which certification is not available). One can be assured of enhanced and proven competency when engaged with a board certified attorney.

Second, is the Martindale-Hubbell rating that is given to attorneys. This rating is developed from input of judges and other attorneys that is used to evaluate lawyers for reputation, competency and ethics. It has been the "go to" guide for lawyers for many years and ranks lawyers from competent to preeminent (AV).

We are pleased that almost half of our lawyers are board certified in their fields of expertise including real estate, wills trusts & estates, health care, city, county & local government, business litigation, tax, and labor & employment law.

And we are particularly pleased that 19 of our 23 attorneys have received an AV or Preeminent Rating from Martindale-Hubbell. Having more than 80% of the lawyers within a firm ranked with AV ratings is not a common circumstance in firms of our size.

So you can be assured we will respond to you and your referrals with a team of great professionals backed up by terrific paralegals and a wonderful staff. To Make a Difference we have to be uncommonly focused on addressing our clients' needs every day. We appreciate your confidence, your referrals, and the thanks you give to us; especially in recognizing our staff who are rated "AAA". ■

Clifford L. Walters, III, Esq.

Jill McGarry Joins Blalock Walters As Marketing Director

Blalock Walters is pleased to announce that Jill McGarry has joined the firm as Marketing Director. Jill will lead the firm's marketing and public relations initiatives for the Bradenton, Sarasota, and St. Petersburg offices.



Jill has more than ten years of experience in the local community in marketing, media, and public relations. Prior to joining Blalock Walters, she held marketing and community relations positions at the *Bradenton Herald* and Meals on Wheels PLUS of Manatee.

"The firm is thrilled to have Jill join our team of advisors. Community outreach is a critical part of Blalock Walters' mission, so Jill's experience and relationships will be a great asset," said Jonathan Fleece, Principal.

A graduate of Leadership Manatee, Jill is also a member of Legal Marketing Association, Florida Public Relations Association, the Manatee Chamber of Commerce and Manatee Young Professionals. She has served on many boards of director and committees, including Junior Leadership Manatee, Women's Resource Center of Manatee, Boys & Girls Clubs of Manatee, and Humane Society of Manatee County.

To contact Jill, please call **941.748.0100** or email her at jmcgarry@blalockwalters.com. ■

Address Change?

To update your contact information or add a co-worker or friend to this newsletter mailing list, please contact

Jill McGarry at 941.748.0100 or email us at

contact-us@blalockwalters.com



Mike Magidson Earns Florida Bar Board Certification in Health Law

We are pleased to announce that Principal Michael D. Magidson has earned board certification in Health Law by The Florida Bar Board of Legal Specialization and Education. Mike is now one of only 127 board certified health lawyers in Florida, out of more than 98,000 Florida lawyers.

With Mike's accomplishment, Blalock Walters is now one of the few law firms in Florida with three or more board certified health law lawyers. Nearly half of Blalock Walters' 23 attorneys are now board certified across seven practice areas.

Certification is the highest level of evaluation by The Florida Bar of the competency and experience of attorneys in the areas of law approved for certification. According to the Florida Bar, only



six percent of eligible Florida lawyers are board certified in one or more of 24 certification areas. Board certification requires a lawyer to show substantial involvement in the area of certification, pass a rigorous examination and complete a thorough peer review process.



Mike is a member of the firm's Business & Corporate and Health Care Law practice groups. He counsels clients regarding entity formation, business governance issues, business transactions and health care transactional and regulatory matters. You can contact Mike at mmagidson@blalockwalters.com. ■

Jonathan Fleece, Jenifer Schembri Among Florida Trend's Legal Elite



Jonathan D. Fleece, Esq.



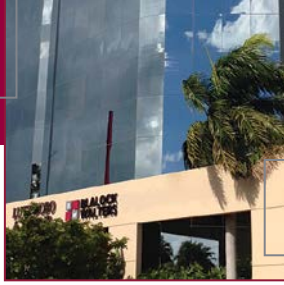
Jenifer S. Schembri, Esq.

Congratulations to principals Jonathan Fleece and Jenifer Schembri for selection in Florida Trend's Legal Elite, 2014. Florida Legal Elite presents a prestigious roster of attorneys chosen for highest honors by their peers. The lawyers listed exemplify a standard of excellence and by so doing, have garnered the respect and esteem of their colleagues. The list of winners represents fewer than 2% of the active Florida Bar members who practice in Florida.

Jonathan is a leading health care and business attorney. He is Board Certified in Health Law by The Florida Bar and is also AV Peer Review Rated in Martindale-Hubbell.

Jenifer practices in the areas of individual and business tax planning, entity formations, corporate business planning, including succession planning and business transitions, charitable planning, and all aspects of estate planning, including trust and estate taxation and wealth preservation. She is Board Certified in Tax Law by The Florida Bar and is also a Certified Public Accountant. She is AV Peer Review Rated in Martindale-Hubbell. ■





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What Is A Contract Venue Clause And Why Is It Important To Me?



Mary Fabre LeVine, Esq.

Oftentimes people sign contracts without thoroughly reading the fine print, where important clauses like those involving venue can be found. What is “venue”? It is the geographical location, i.e. city, county and state which may exercise jurisdiction over

the parties and their dispute, and is where a lawsuit may be brought. Jurisdiction means the Court which may decide a parties’ dispute, and render a judgment or decision which is legally binding and enforceable on them. While there are laws governing certain types of disputes, for example, real property litigation occurs where the property is located, parties can, and usually do, include venue clauses in every contract.

Why does the Court location matter? Venue clauses are important because they give leverage to the party who chooses the location of the Court where the dispute over contract terms will be decided. Oftentimes, a party will want its contract dispute decided by the Courts in its hometown, where they and their counsel are located. The local courts offer clients and their counsel the further advantage of familiarity with the law, the judges, and approach taken in a particular circuit of jurisdiction.

Florida law recognizes the rights of contracting parties to agree on the law to be applied to their disputes and the forum or Court in which the dispute may be heard. Usually, the venue selected must have some relation to the parties and their contract. It may be where the home offices for a company are located, as companies are generally to be sued where their principal office is located.

When you are presented with a contract, it is important to review the venue clause and ask your lawyer to review the terms to protect your interests before you sign. Planned venue selection when a contract is being prepared, is the time to choose your local Courts to plan ahead to reduce potential litigation costs, and provide advantages over an adversary.

Once the contract is made, the venue issue is decided. Therefore, at the beginning of a lawsuit, it is not uncommon for the parties to aggressively litigate the venue issue to secure the venue and court which is most favorable and convenient for a particular party. As companies contract with others from different areas, states or countries, this issue becomes more important as a front-end risk management planning tool when the contract is being prepared.

American courts are usually presented with venue clauses which are either mandatory or permissive. The Courts are generally bound to, and do uphold those venue clauses which they find to be mandatory. Mandatory venue clauses require that the particular court selected and located in a specific city and/or county is the exclusive Court or only Court to decide the dispute. The use of the words ‘exclusive’ and ‘shall’ are often the hallmarks of a mandatory venue clause.

Permissive venue clauses on the other hand use words such as ‘may’ rather than the more limiting terms ‘exclusive’ and/or ‘shall.’ Where a venue clause is found by the Courts to be permissive, the Courts generally hold that such Courts may have jurisdiction to decide the dispute. Generally speaking permissive clauses provide the parties may choose between one or another Court to decide their dispute.

Mary LeVine is a principal in Blalock Walters Litigation Group, and can be reached at mlevine@blalockwalters.com. ■

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Amendment to the Florida Solicitation of Contributions Act



Jenifer S. Schembri, Esq.

The Florida Solicitation of Contributions Act (the Act) requires anyone who solicits donations, i.e., charitable organizations, sponsors, professional solicitors and fund-raising consultants, to register with the Florida Department of Agriculture and Consumer Affairs (the DACA). Recent amendments to the Act have added some additional administrative and reporting requirements which became effective July 1, 2014.

A few important changes for charitable organizations to note include:

1. Charitable organizations must report changes to their registration statement within 10 days. Examples of changes include: (i) anything related to the organization's registration statement, including activities in other states; or (ii) criminal, administrative, or other actions against the organization. Failure to disclose this information within the 10-day window will result in automatic suspension of the organization, until such time that the information is submitted.

2. Organizations are required to adopt a conflict of interest policy. This is intended to cover transactions between the organization and any party in which an officer, director, or trustee has a direct or indirect financial interest. This certification must be submitted along with the organization's annual registration statement, and must contain a certification of compliance from each of the organizations officers, directors, and trustees.

3. In regards to the filing of the organization's annual financial statement, the following brackets have been established by the recent amendment.

- Annual contributions of less than \$500,000: An audit, review or compilation of the financial statement is optional.
- Annual contributions between \$500,000 and \$1 million: The financial statement must be audited or reviewed by an independent certified public accounting firm.
- Annual contributions of \$1 million and greater: The financial statement must be audited by an independent certified accountant firm.

4. All charitable organizations that have more than \$1 million in total revenue and spend less than 25% of their total function expenses on program service costs must file supplemental information.

This supplemental information should include the names and specific sums paid to all: (i) employees or consultants that were paid more than \$100,000 during the preceding fiscal year; and (ii) service providers that were paid more than \$100,000 during the preceding fiscal year (a description of the services provided must be included).

These organizations must also provide: (i) total salaries of all persons employed by the charitable organization; (ii) fund-raising amounts paid to professional solicitors, and contributions received from professional solicitors; (iii) travel expenses; and (iv) overhead and other expenses related to managing and administering the charitable organization.

5. If the charitable organization uses collection receptacles for donated items, a permanent sign must be displayed on each sign of the receptacle, including: name of the organization, business address, telephone number, and the DACA registration number.

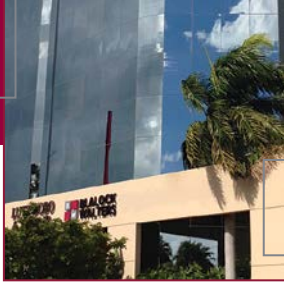
6. All written and website solicitation must include the following statement:

A COPY OF THE OFFICIAL REGISTRATION AND FINANCIAL INFORMATION MAY BE OBTAINED FROM THE DIVISION OF CONSUMER SERVICES BY CALLING TOLL-FREE WITHIN THE STATE. REGISTRATION DOES NOT IMPLY ENDORSEMENT, APPROVAL, OR RECOMMENDATION BY THE STATE.

The statement must also include a toll-free number for the DACA, along with the website for the DACA.

7. Failure to comply with the Act may lead to a cease and desist order, and/or monetary penalties ranging from \$5,000 to \$10,000.

If you have any questions you may contact one of our estate planning attorneys or a member of our Nonprofits/Foundation industry team at 941.748.0100. ■



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Marisa Powers Has Been Appointed to 12th Circuit Grievance Committee



We are pleased that litigation attorney Marisa Powers will serve a three year term on The Florida Bar’s 12th Circuit Grievance Committee “B”.

The grievance committee reviews complaints with much the same purpose as a grand jury. The committee decides, after a case is submitted to them by Bar counsel,

whether there is probable cause to believe a lawyer violated the professional conduct rules imposed by the Supreme Court of Florida and whether discipline against the lawyer appears to be warranted. Each of Florida’s 20 judicial circuits has a least one such committee.

Marisa’s law practice involves the litigation of business disputes; probate, estate and trust disputes; employment litigation; and construction law related controversies. She represents individuals, developers, builders, retail stores, non-profit organizations, title companies, and other businesses handling a variety of matters, including breach of contract, business torts, real estate disputes, lien foreclosure actions, claims of undue influence, and mortgage foreclosure matters. Marisa is AV Peer Review Rated in Martindale-

Hubbell and is also a member of the Manatee County Bar Association, Vice President of the Florida Association of Women Lawyers-Manatee County, and is a Barrister of Manatee American Inn of Court. Contact Marisa at mpowers@blalockwalters.com. ■

GOOD LUCK, SAVANNA WRIGHT!

Blalock Walters would like to introduce Savanna Wright, our extraordinarily personable and skilled intern. Heartfelt congratulations are extended to Savanna who recently received early acceptance to Belmont University in Nashville, TN, where she plans to earn a degree in Entertainment Law and Industry Studies, with a minor in English. As an accomplished singer/songwriter, performing regularly in Sarasota and Manatee Counties in the country and pop music fields, Savanna plans to actively pursue a musical career while studying at Belmont. Good luck Savanna, we look forward to seeing your name in lights some day! ■



Congratulations To Amanda

Congratulations to one of our real estate attorneys, Amanda Smith, on her marriage to Daniel Tullidge. Amanda and Dan wed on June 7, 2014, at Our Lady of the Angels Church, followed by a beautiful reception at Lakewood Ranch Country Club. The happy couple spent a magnificent week honeymooning in Jamaica! ■



Save the Date...

Learn more about **Business Succession and Estate Planning** at one of our upcoming seminars presented by Jenifer Schembri, Board Certified in Tax Law; C.P.A.; LL.M. in Taxation, and principal in our Business & Corporate, Estate Planning, and Tax Law Groups.

All seminars are no charge and will be held at Blalock Walters, 802 11th Street West, Bradenton, Florida 34205.

Tuesday, Dec. 2 8-9 a.m. Business Succession Planning

Wednesday, Dec. 10 5:30-7 p.m. Estate Planning

Thursday, Jan. 8 8-9 a.m. Business Succession Planning

Thursday, Jan. 22 5:30-7 p.m. Estate Planning

Please call Jill McGarry at 941.748.0100 to reserve your space today!

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