

2022 REVIEW

WINTER 2021-2022

COVID-19 and the use of Zoom for litigation

How much has the coronavirus pandemic impacted proceedings in and out of court?

BY MARY FABRE LEVINE, ESQ. AND JONATHAN TORTORICI, ESQ.

Much has changed since the novel coronavirus first began making headlines in 2019, and the legal field is certainly no exception. Given the difficulty of social distancing in the courtroom, the vast array of legal proceedings have shifted from in-person to remote using primarily the Zoom format. While no one could have accurately predicted the impact COVID-19 would have on the legal system (and society at large), it appears that remote proceedings using Zoom for hearings, trials, depositions and mediations—as well as meetings with clients and experts—are here to stay while the pandemic persists.

The reasons for this shift are varied. While the pandemic forced the closure of courthouses to the public, the courts adapted so cases could continue to be moved through the judicial system. Slowly, the courts and counsel adapted to using Zoom proceedings so that cases could be adjudicated without undue prejudice to all involved.

THE GOOD NEWS is, for routine matters, the time savings and convenience of a Zoom hearing is beneficial. Cost savings are achieved by having less travel and time consumed by attending proceedings in person at the courthouse.

THE LESS GOOD NEWS is that using Zoom for trials and/or depositions (where many documents are being introduced into evidence or as exhibits) makes the process more cumbersome. To adapt, the lawyers prepare and send out binders of documents to the litigants, witnesses, lawyers and the court so everyone can turn to the correct document when testimony is elicited from a witness.

For litigants to be certain not to miss the proceedings, it is wise to have the notice for the hearing or deposition readily available so you can timely dial in or log in to the proceedings. If it is for a hearing, you may need to wait until the court allows you access to the proceedings, so be patient. For depositions and some hearings, you may need your driver's license to allow the court or the court reporter to accurately confirm your identity.

The remote Zoom format does, however, have its shortcomings. Some common examples include technical mishaps, unplugged laptops whose charge expires and the possibility of bandwidth or connectivity issues.

Counsel may find it difficult to keep the audience's attention, invoke emotion or analyze non-verbal cues. Other issues include lack of attention, since some people may find it difficult to stare at a computer screen for an extended period of time. Others may not have the necessary equipment to participate.

However, what is most important is to understand these issues to maximize the effectiveness of the proceedings and do your best to be a good participant.

Continued on Page 4



Mary Fabre LeVine, Appellate Practice, Business Litigation



Jonathan Tortorici Business Litigation

Read "Tips to make your courtroom Zoom meeting successful" on Page 4



Be a champion and advocate for others to achieve their potential, solve issues and grow together



Matthew Plummer
Managing Partner



“We strive to be your champion, to help you solve legal issues, to achieve your goals, and to promote and advocate for you and your business within the local community.”

We can't believe we are already approaching the end of the year! 2021 has flown by in a flurry of activity as we have continued to navigate the COVID-19 pandemic and slowly take steps to resume normal operations.

We've stayed busy advising our clients, including those in the medical and business fields, on the best and safest ways to re-open in compliance with ever-changing laws and regulations. While both our Bradenton and Sarasota Blalock Walters offices have stayed open since the beginning of the pandemic to timely serve the needs of our clients, we are pleased to see more friendly faces as employees and clients alike return to the office.

As we re-connect, we are incredibly pleased to welcome several new attorneys to our Firm this year. **Jonathan Tortorici, Taylor Falkner, and Samantha Regala passed the Florida Bar exam this summer and have already integrated seamlessly into our Business Litigation, Land Use and Corporate departments, respectively. Christina Morelli and Michael Huckle bring additional depth and expertise to our Estate Planning Department, and as the real estate market continues to stay active, Ryan Harris and Matthew Payne are joining our team in the areas of residential Real Estate and Leasing.** These new attorneys bring their up-to-date knowledge to the firm and allow us to meet the time-sensitive needs of our clients.

Our attorneys, new and old, had the opportunity to connect this fall at our annual Blalock Walters retreat. Every year we take the opportunity to think deeply about our firm as it exists now and the ways in which we can adapt, innovate and continue that success into the future. The addition of bright, young talent is key to the continued excellence that we strive for on behalf of our clients, but even more so is taking the time to grow this talent by teaching them real-world skills needed in their field and fully integrating them into the culture and values of the firm.

One of the major themes of this year's retreat was how to be someone's "champion". While we focused this idea specifically in regard to mentoring our young attorneys to achieve greatness in their chosen fields, we also consider this to be a laudable goal for the firm in our representation of our clients. We strive to be your champion, to help you solve legal issues, to achieve your goals, and to promote and advocate for you and your business within the local community. As we move into the holiday season, we thank you all for the opportunity to champion your goals. We wish you a safe and festive holiday season and a prosperous new year.

—Matthew Plummer

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Jill McGarry
Marketing Director

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OSHA issues emergency temporary standard related to COVID-19 vaccinations for 100 or more employees

BY ANNE W. CHAPMAN, ESQ.

As expected, the U.S. Occupational and Safety Health Administration issued an emergency temporary standard (ETS) related to the COVID-19 vaccination and employees on November 4, 2021. **The ETS requires employers with 100 or more employees to ensure the entire workforce is either fully vaccinated or subjected to weekly COVID-19 testing.**

Within days of its publication, a Federal Appeals Court issued a stay preventing its implementation. This measure is not permanent. Therefore, it is unclear if or when the ETS will be enforced. A summary of the ETS as published is below:

COVERAGE: Employers with 100 or more employees (with exceptions for some healthcare employers and federal contractors covered by other COVID-19 provisions)

EXCEPTION: Employees who are remote or work exclusively outdoors are not covered by the requirements, even if they work for a covered employer.

REQUIREMENTS: Ensure that work force is 100% vaccinated by determining vaccination status of each employee. This duty requires that an employee show acceptable proof of vaccination status and that the employer maintain a record of this proof. Any



Anne Chapman
Labor & Employment Law

such record should be kept confidential as it is considered a "medical record."

ALTERNATIVES: In the event an employee cannot get vaccinated (and requires a reasonable accommodation for medical or religious reasons) then an employer must require weekly COVID-19 testing and require the employee to provide proof of negative testing.

An employer is able to offer this option to any employee, in lieu of vaccination, if the employer elects. The employer is not required to pay for the cost of testing. Unvaccinated employees are also required to wear face coverings while indoors.

PAID TIME OFF (PTO): Employers are required to provide four hours of PTO for an employee to receive a vaccination. An employer is not required to provide sick time to the employee related to a positive COVID-19 test.

TRAINING: The ETS also requires that the employer provide information to the employee related to the ETS, COVID-19 and OSHA.

For more information regarding employment law, please contact Anne Chapman at (941) 748-0100 or achapman@blalockwalters.com.

Tips to make your courtroom Zoom meeting successful | continued from Page 1

- Treat remote Zoom proceedings as if you are in the courtroom
 - Test your technology beforehand
 - Make sure to have your notice available for the proper Zoom hearing participant code information
 - Ensure your laptop is plugged in
 - Treat your appearance with the same formality as you would in an actual courtroom so dress appropriately
 - Speak clearly and directly when prompted by counsel or the court
 - Mute your microphone when not speaking and on all breaks
 - Make sure documents are available for quick and easy access
 - Let us know if you face any technological or access issues so we can work together with you and with our firm's technology
 - Limit background noise and avoid unwanted interruptions (e.g. ensure your cell phone is turned off or silenced)
 - Make sure the backdrop area is well-lit and appropriate (as it will be displayed in the Zoom frame when you appear)
- Finally, change is constant and we are adapting.** Although some trials have recently returned to the in-person format, remote proceedings are likely to be the norm for other court proceedings. Just as telephonic hearings were used in the past, virtual Zoom hearings will likely continue in their place. By anticipating and avoiding the potential pitfalls with this technology, we can do our best to make Zoom proceedings a powerful and effective tool for advocacy.

For more information, please contact business and litigation attorneys Mary Fabre LeVine and Jonathan Tortorici at 941.748.0100 or email them at mlevine@blalockwalters.com and jtortorici@blalockwalters.com.

Land use attorneys can counsel you in all aspects of the permitting and development approval

BY TAYLOR FALKNER, ESQ.

Attorneys in the Blalock Walters' land use department represent private clients in all aspects of the permitting and development approval process.

We counsel developers and private land owners on matters that require land use and local government expertise, from preliminary application to representation during the public hearing process, in order to obtain the land use approvals needed for a successful development.

Our land use department provides comprehensive legal services to a broad base of private clients on land use issues and regulations before federal, regional, state and local administrative agencies. We represent clients before municipal and county boards and commissions on a vast range of zoning, permitting and development issues.

More specifically, our department specializes in helping clients obtain successful and profitable development approvals, including obtaining entitlements for undeveloped land and enhancing development approvals for existing projects. Typical representation includes land development and permit approvals, comprehensive plan amendments, rezones, developments of regional impact, special approvals, street vacations, subdivision approvals, variances, change of use and other governmental regulatory matters.

In conjunction with our land use representation, we are also able to assist developers in creating homeowners and condominium association documents, as well as covenants, restrictions and



Taylor Falkner
Land Use, Local Government

easements, for commercial, residential and mixed-use projects.

Our land use and local government attorneys also provide services for public entity clients through our expertise in local government law. Our attorneys have experience representing many different governmental agencies including cities, counties, community development districts (CDD) and recreation districts (RD) resulting in extensive experience in code and agreement drafting, as well as general advice on day-to-day matters.

Over the past year, the land use attorneys have represented clients in the following:

- Comprehensive plan amendment for a 5,000-acre new town and agrihood.
- Rezoning and site plan approval for a 1,300-acre mixed-use development.
- Successful defense of a petition challenging the denial of a development order by a municipal client.
- Site plan approval for a redevelopment of a regional mall site.
- Rezoning for national and regional retail clients.
- Approval of a comprehensive plan amendment for a statewide homebuilder.
- Rezoning and site plan approval for a national fast food vendor.
- Various rezoning, site plan, and change of use applications.
- Street vacations to eliminate unneeded right of way.
- Turnover of an animal shelter to the county government.

For more information, contact Taylor Falkner at (941) 748-0100 or email her at tfalkner@blalockwalters.com.



Follow this age-appropriate estate planning guide for every stage of your life

"Life is what happens when you're making other plans." – JOHN LENNON

BY CHRISTINA MORELLI, ESQ.

This rings true no matter what stage of life. If we've learned anything during this COVID-19 era, it is that it's impossible to predict and control the future. Life just happens.

Your crystal ball is likely as good as the next guy's, which is why it is important to have documents in place to ensure you have a say while navigating life as it happens.

With that said, you may think estate planning doesn't apply to you: you aren't old enough or you don't have an "estate" or significant assets... so there's nothing to plan. Well, if you're over the age of 18, please think again.

IN YOUR 20's:

Once you turn 18, your parents no longer have authority to make health or financial decisions for you. Advance Directives are a set of important documents that you should have regardless of your financial condition.

Advanced Directives

POWER OF ATTORNEY: This document delegates authority to an "agent" to handle financial matters on your behalf. The functions that your agent can perform may be general or specific depending on how much authority you wish to grant to your agent.

HEALTH CARE SURROGATE DESIGNATION: A Health Care Surrogate is an individual who you specifically grant the ability to make medical decisions on your behalf. This document is only used in the unfortunate event you are unable to make your own health care decisions. If you are able to communicate your wishes to your health care providers, the Health Care Surrogate Designation is not used.

LIVING WILL: Unlike a Last Will and Testament, a Living Will is effective while you are alive. It is a legal document that spells out medical treatments you would and would not want to be used to keep you alive, as well as your preferences for other medical decisions, such as pain management or organ donation.

Why are these important?

In sum, the pragmatic answer to this question is: peace of mind. In the unfortunate event you are deemed unable to make financial or medical decisions, but a decision must be made, these documents will come into play to reflect your wishes and designate who will make these decisions on your behalf. Advance Directives avoid the need for a guardianship, save time and money, and ensure the person you would trust to make these decisions knows your wishes and is able to serve in that role.

By way of example, let's fol-

low Sue: She is a 26-year-old driving home from work. She gets in a car accident and is taken to the hospital. A myriad of situations can arise. Worst case scenario, Sue cannot make medical decisions for herself because complications occur and she's not able to consent to a procedure.

If she did not designate a Health Care Surrogate, family members may disagree about how her doctor should proceed. Sue may also have wished that her longtime significant other, who works in the medical field, make the decision. This does not only delay the decision, but also detracts from the possibility of her actual wishes being carried out.

IN YOUR 30's:

Personal and financial circumstances typically shift in your 30s. You may own a home, may have gotten married, started a family and grown your assets. To make sure your spouse, children and assets are protected, it is an important time to discuss with an attorney which legal strategies to employ to best serve your goals:

LAST WILL AND TESTAMENT ("Will"): A Will directs upon your death who will inherit your assets, who will be in charge of settling your estate and, if necessary, who will care for your children if you and your spouse are unable to.

TRUST: A Trust transfers ownership of your assets to someone you choose (called the trustee, who in many cases may be you) and dictates who will manage your assets for the beneficiaries you designate. Trusts can hold different kinds of assets, such as real estate and investment accounts. Trusts can also be set up in many different ways.

You may have heard of Living Trusts, Revocable Trusts or Irrevocable Trusts.

Why are these important? Peace of mind that your loved ones will be taken care of after your passing and ensure your hard-earned assets will be managed in accordance with your wishes.



Christina Morelli
Estate Planning

Sue made a full recovery and is now 33 years old, married, and a proud mother of her one-year-old son, Jimmy. She wants to make sure Jimmy is taken care of in the event she and her husband are not able to care for him. Sue would like to designate her brother and sister-in-law to be legal guardians to take care of Jimmy in the unfortunate situation that Sue and her husband are unable to.

What happens if a Last Will and Testament or Trust are not prepared?

If Jimmy receives an inheritance because both Sue and her husband have predeceased him, a minor guardianship will need to be established for Jimmy who has not yet reached age 18.

A minor guardianship is a court process that appoints individual(s) to have legal authority and a duty to care for a minor's person and/or property (this may be the same person). Without a Will in place stating who Sue would like to assume these roles, it is up to the court process to decide who would be Jimmy's legal guardian(s) in this unfortunate situation.

IN YOUR 40's

If the above documents are in place – congratulations! It may be a good time to review to make sure your documents are still current. If not, it's important to catch up.

Sue and her husband are now in their 40's. Their assets have grown, and they decided to update their existing documents. Sue would like to make a charitable donation to the hospital that helped her in her 20's.

Sue also remembers what it was like to be 18 years old and thinks it's a good idea for Jimmy's inheritance to be held and protected in a trust, with her brother in charge of managing

the assets as trustee. Sue would like the trust to assist Jimmy as he navigates his 20's. The trust instructs the trustee to make disbursements to help pay for Jimmy's schooling, rent, medicals bills, etc.; giving her brother (as trustee) authorization to make these disbursements at his discretion. The remaining trust assets will be distributed, in their entirety, to Jimmy when he turns 30 years old, ending the trust.

IN YOUR 50's AND 60's

At this juncture, your familial, personal and financial realm has likely expanded. This is a critical time to get documents in place, if you have not already, as well as a good time to review and update existing documents.

Sue's son, Jimmy, is now a legal adult, and her new goal is to avoid probate. She contacts her estate planning attorney to discuss what she can do at the forefront to make the transfer of her assets at her passing as simple of a process as possible for her loved ones who survive her.

IN YOUR 70's AND BEYOND

At this stage, with your estate plan complete, the focus should be on reviewing and updating your documents as appropriate.

In sum, life happens, and circumstances (like Sue's) change throughout the years. Having documents in place provide clarity to loved ones, ease for execution of wishes and peace of mind that even though "life is what happens when you're making other plans," you have your plan and are prepared for the life that happens.

For more information, contact Estate Planning Attorney Christina Morelli at (941) 748-0100 or email her at cmorelli@blalockwalters.com.

Having documents in place provides clarity to loved ones, ease for execution of wishes and peace of mind because you are prepared for the life that happens.



IMPORTANCE OF **Buy-Sell Agreements**

A buy-sell agreement provides for the orderly transition of a business when unforeseen events occur

BY SAMANTHA REGALA, ESQ. AND MATTHEW LAPOINTE, ESQ.

Imagine a scenario in which there are two women who co-own a business. One of the owners unexpectedly passes away. A few months after the co-owner's passing, the husband of the deceased owner approaches the surviving owner and tells her that his wife's interest in the business has passed to him and he asks why he hasn't received his deceased wife's share of the profits since she passed away.

He then asks for copies of the financials of the business and suggests that perhaps the surviving owner is taking too much in compensation. If the surviving owner and the husband are unable to reach an accommodation, it is very likely that this situation will need to be resolved in court.

If the co-owners had a buy-sell agreement in place, the surviving owner would have been able to avoid such a costly problem. A buy-sell agreement can be a stand-alone agreement or buy-sell provisions can be incorporated into an LLC operating agreement or a shareholders agreement. **Buy-sell agreements can address many scenarios in addition to the death of a partner, such as a partner's disability, retirement, a business partner who fails or refuses to meet his or her obligations or a business partner who becomes addicted to drugs or alcohol.** Any of these issues can be the "trigger events" that require one owner to sell to the other owner.

Once the trigger events are defined in the agreement, the next step is to lay out a mechanism for determining the price of the interest being acquired. There are several options. The price can be set by a formula agreed upon by the owners.

Alternatively, the owners could meet on an annual basis (or more frequently, if they prefer) and, usually in consultation with their CPA, agree upon the value of the business. That value would then be memorialized in a "Certificate of Agreed Value," which would be binding on the owners for an agreed period of time, usually one year. If any trigger event occurs in the ensuing year, the value set forth in the certificate would be set the purchase price of the seller's interest in the company.

The buy-sell agreement could also provide that, upon the occurrence of a trigger event, the company will hire a business appraiser to determine the value of the departing owner's interest.

Usually, the buy-sell agreement also addresses the payment of the purchase price. It would probably be an extreme burden

on the company and the remaining owner to require the purchase price to be paid all at once at the closing of the purchase and sale. Rather, the buy-sell agreement will provide payment terms that are designed not to be too much of a burden.

For example, perhaps 10 percent of the purchase price would be paid at the closing and the remainder would be paid by a promissory note bearing a reasonable rate of interest. This would allow the surviving owner to avoid a large one-time payment (money which the business may not be able to access easily) or to avoid having to find financing to pay for the departing (or deceased) owner's interest.

Buy-sell agreements can be used to establish the fair value for shares of the business, develop exit plans for business partners, keep business interests with the surviving owners, and create a business continuity plan. Buy-sell agreement are valuable tools to provide orderly transitions for small- and medium-sized businesses; and it is important that the businesses have these agreements in place at the time of formation.

Without an agreement in place, the owner will have to resort to the courts to resolve these issues. A lawsuit over the ownership of a business or the value of an owner's business interest can be a long and expensive process and could lead to a decision by a judge that may not be in the best interests of the remaining owner or the business itself. Taking the time to put in place a comprehensive buy-sell agreement at the formation of the business is well worth the legal fees to avoid future problems and the much higher costs that come with them.

For more information, please contact Matthew Lapointe at mlapointe@blalockwalters.com or Samantha Regala at sregala@blalockwalters.com or call 941.748.0100.



Samantha Regala
Business & Corporate Law



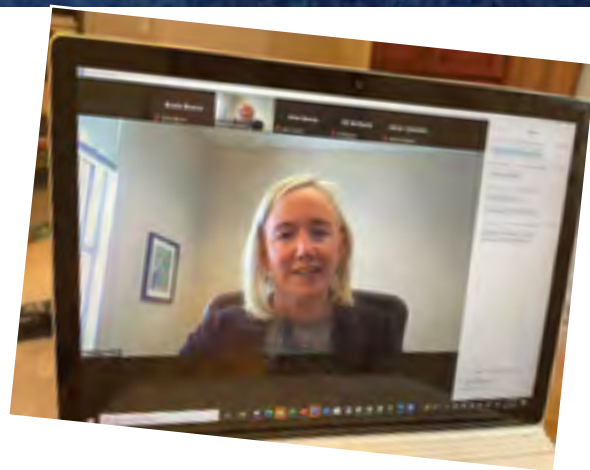
Matthew Lapointe
Business, Health Care Law

Presented by Anne Chapman

What small businesses should know: Evolving COVID-19 policies and protocols for employers

There are many questions regarding COVID-19 that employers have in today's rapidly-evolving business environment. It can be challenging to understand the legal landscape of COVID-19 vaccinations in the workplace.

Labor and employment attorney Anne Chapman shared her expertise on COVID-19 protocols and policies employers can consider implementing in order to create a safe, supportive workplace to businesses and members of Manatee Chamber of Commerce via Zoom. Find more useful labor and employment information at blalockwalters.com or email Ann Chapman at achapman@blalockwalters.com.



Making A Difference



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WE MAKE A DIFFERENCE

Manatee Chamber names Small Businesses of the Year

As a previous Small Business of the Year recipient, Blalock Walters is thrilled to congratulate the 41st annual awards winners named by the Manatee Chamber of Commerce.

This program recognizes small businesses and non-profit organizations for "quality and excellence" as exemplified by growth, productivity, customer service, job creation and overall contribution to the community.

This year there were 230 nominations and these seven winners were chosen from among the 90 finalists:

- Take Stock in Children of Manatee County
- Vet Care Express Animal Ambulance
- Crystal Clean Green Cleaning
- Ellenton Discount Pharmacy
- Florida Suncoast Real Estate Inc.
- Shake Station
- HOPE Family Services

Blalock Walters attorneys **Mark Barnebey** and **Chuck Johnson** serve on the Take Stock in Children of Manatee County board of directors and **Matt Lapointe** is a Take Stock mentor to a Bradenton 6th grader.

"We are very thankful to the Chamber and excited to be recognized as a Nonprofit

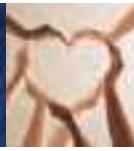
Business of the Year," said Mark Barnebey, the immediate past chair of the board of directors. "This is a testament to the Take Stock In Children of Manatee County staff, mentors, students, donors and board members. Even during this COVID year, we have continued our efforts to improve the opportunities for long term success for our students and expand those opportunities to even more deserving students."

Blalock Walters commends the Manatee Chamber of Commerce for their continued support and recognition of our community's small businesses and organizations.

"It was an incredible celebration of resiliency, commitment, core values, generosity, and success," said Jacki Dezelski, Chamber president and CEO. "It was remarkable to hear about the successes these businesses and nonprofits had in the face of many challenges. Without exception, the narratives shared about these award winners included an emphasis on serving clients at the highest level, supporting employees, rewarding excellence within their teams and a priority in giving back to the community."

Courtesy of Manatee Chamber of Commerce





Marisa J. Powers
Business Litigation, Land Use
and Local Government Law

Marisa J. Powers elected to Realize Bradenton board

Attorney **Marisa J. Powers** has been elected to the Realize Bradenton board of directors. She will be a fantastic addition to this vibrant organization whose mission is to promote redevelopment and economic growth in downtown Bradenton.

"In addition to her legal experience and professional affiliations, Marisa is dedicated to the future of Bradenton and volunteers much of her time and talent to our community," said Carrie Price, Realize Bradenton's board chair. "We are excited to bring her enthusiasm to the Realize Bradenton board of directors."

Marisa Powers is an attorney practicing in the areas of local government, litigation and land use. Marisa has been involved with many local organizations including, Turning Points, PACE Center for Girls, and Manatee Young Professionals. She currently serves as the president of the Manatee Inn of Court which is dedicated to promoting the highest levels of professionalism in the practice of law.



Manatee County's Carmen Ruiz-Morales, Habitat For Humanity Director of Community Programs Sheryl Boddy, CEO Diana Shoemaker, Ms. Pedro, Attorney Michelina Carbone and Legal Assistant Alana Fleischer celebrate the Pedro Family home closing.

Real Estate Department assists Habitat For Humanity with closing

It is always an honor to work with Manatee County Habitat for Humanity and the families they serve.

Real estate attorney **Michelina Carbone** and legal assistant **Alana Fleischer** helped the Pedro Family close on the home they worked so hard to earn.



Attorney Stephen Perry, Adam Robson, Attorney Matthew Staggs and Jeremy Young golfed together.



Steve McGonagle, Ed Taaffe, Natalie Russell and attorney Chuck Johnson formed a foursome to golf and support the Bradenton Police Department's Bradenton Blue Foundation.

Golf tournament raises money for police department foundation

We enjoyed supporting the 2021 Wagner Realty Golf Classic at Tara Country Club. All proceeds from the tournament benefit Bradenton Police Department's Bradenton Blue Foundation, which was developed to support our officers and community by raising funds for specialty training, technology, safety equipment and community outreach.

9/11/2001 PATRIOT DAY

— WE WILL NEVER FORGET —

20th ANNIVERSARY



Jill McGarry, Will Robinson,
Taylor Falkner, Marisa Powers and
Mark Barnebey at memorial luncheon.



Blalock Walters sponsors moving events commemorating 20th Anniversary of the September 11 terrorist attacks

It was a distinct honor to sponsor and attend the 2021 Tribute to Heroes Memorial Luncheon at The Grove Restaurant in Lakewood Ranch in September.

Men and women in uniform, community leaders and public officials gathered to remember the hundreds of emergency workers who gave their lives to save others on the fateful day of September 11, 2001.

An annual Tribute to Heroes Memorial Service was held at the Bradenton Riverwalk Emergency Services Memorial. Land use and local government attorney **Mark Barnebey** attended the service, which is a joint effort of local fire departments, law enforcement and emergency services.

Speakers at the Tribute to Heroes observance were Bradenton Mayor Gene Brown and Palmetto Mayor Shirley Groover Bryant.

"Our mantra is 'never forget,' and this year it is also 'restoring American patriotism,'" said Michael Williamson, division chief of the Parrish Fire District and Tribute to Heroes event co-chair.



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NAMED BEST LAW FIRM FOR 8TH YEAR



Law firms included in the 2022 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. Blalock Walters has six lawyers listed in The Best Lawyers in America – **Clifford L. Walters, III; Charles F. Johnson; Matthew J. Lapointe; Fred E. Moore; William C. Robinson, Jr. and Mark P. Barnebey.**

“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 2022 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.



Congratulations

Amanda Tullidge

for her well-deserved recognition
as one of the *Business Observer's*
40 Under 40

Amanda Tullidge is the youngest principal at Blalock Walters, Manatee County's oldest and largest law firm. She specializes in commercial and residential real estate transactions. She is the founder of Cheers for Charity, a women's giving circle which fundraises for local charities, and served as grants chairperson for past five years for Lakewood Ranch Community Foundation.

**The apple doesn't fall far from the tree
with Amanda and her father, Bob Smith.**

They share the same passion for their chosen profession and their community. It is very fitting that they receive this honor together.

“As a former real estate attorney himself, my father has obviously been an important mentor in my professional development,” said Amanda. “However, his biggest influence has been in instilling the importance of community service and civic engagement. I'm honored to have reached this point in my career and to share this achievement with my role model.”

Real Estate Attorney Amanda Tullidge with her father Bob Smith, daughter Eleanor and family.



Taylor Falkner, Land Use,
Local Government Law



Ryan Harris, Banking, Real
Estate Law



Michael Huckle, Estate
Planning, Tax Law



Christina Morelli, Estate
Planning Law



Matthew Payne, Leasing,
Real Estate Law



Samantha Regal, Business &
Corporate Law



Jonathan Tortorici,
Business Litigation

Alana Fleischer
Real Estate Legal Assistant

Peggy Lobdell
Accounting

Melissa Vance
Reception

Here we grow!

**Welcome to 7 attorneys and 3 staff members
who will enhance our level of client service**

Our team continues to grow as we strive to meet our clients' ever-increasing needs and challenges, while still providing a high level of service that has been the bedrock of the firm's history. To that end, the firm is thrilled to add these attorneys and staff to our Blalock Walter's family.



**BLALOCK
WALTERS**
ATTORNEYS AT LAW

WE MAKE A DIFFERENCE



Mark Clare and Austin Rockwood spent the summer working closely with Blalock Walters senior attorney mentors to learn about the firm's practice groups. They were given a variety of assignments to help them prepare for their budding legal careers.

Two promising, young student interns gain valuable experiences as summer law clerks



Austin Rockwood

Austin Rockwood is in his second year at University of Florida's Levin College of Law.

What made you choose law?

I chose a law degree because I want to apply my philosophy major to a career that involves real-world problem solving. I also love to read. And, offering advice and counsel to people is incredibly rewarding.

What type(s) of law interest you?

Litigation, trusts & estates and land use & local government law have been the most interesting, especially after getting to experience them hands-on this summer at Blalock Walters.

Did you enjoy your summer at Blalock Walters?

I have loved my time at Blalock Walters. I have gained tremendous experience while working with wonderful people who have a positive impact on the local community.



It has been a privilege to work alongside people who have such a positive impact on their clients and the local community.

I gained tremendous experience while working with the attorneys and staff.



Mark Clare

Mark Clare is in his third year at the University of Georgia School of Law.

What made you choose law?

I chose to pursue law so that I could build on my undergraduate degree in finance and specialize my career in an area that was complex and practical. Additionally, I was interested in solving challenging problems, negotiating business transactions and drafting contracts.

What type(s) of law interest you?

I prefer transactional work, and I am specifically interested in corporate, health care, tax and real estate law.

Did you enjoy your summer at Blalock Walters?

I have really enjoyed my time at Blalock Walters, and everyone has been extremely welcoming. I appreciate that the attorneys have taken the time to share their knowledge and experience with me. They have also given me the chance to work on a variety of projects in all of the areas of law that I am interested in, and the projects have been great learning experiences.



I am grateful for my time as a law clerk this summer. I was able to work on a variety of projects in all of the areas of law that I am interested in, which were great learning experiences.





Behind the Suit

Fred Moore

Florida Board Certified in Business Litigation

What type of law do you practice and what type of clients do you serve?

I am a commercial trial attorney. I serve closely held businesses, construction clients, real estate professionals and other attorneys.

How do you make a difference for your clients?

I strive to provide value to my clients in terms of practicality of reaching their goals because litigation can become emotional for some, and they lose sight of hard-to-value successes. I work to understand the nature of their businesses so that my counsel can be closely tailored to their circumstances.

What is the most rewarding part of your job?

I am very satisfied when a client's matter is favorably resolved, but additionally, I enjoy getting to know my clients and the nature of different types of business endeavors.

In what community, civic, and nonprofit organization(s) are you involved?

Legal Aid of Manasota, Inc., Police Athletic League of Manatee County and William Monroe Rowlett Academy for Arts and Communications.

What three activities are you most likely to be doing outside of your "Business Suit?"

Watching my kids sports/bands, enjoying outdoor activities and traveling.

What's the most daring thing you've ever done? Explain.

I moved to Breckenridge, Colorado after college and obtained a chauffeur's driver's license for the resort to drive the ski bus (and free ski for the season).

What was your first job?

My dad fired me from mowing the lawn because I refused to do it early on Saturday mornings. Thus began a lifelong dedication to stubbornly sticking to my guns.

What motivates you to work hard?

I have five other humans that love me, count on me, and look up to me.

Who is your favorite cook and what dish of theirs do you like best?

Me! I am a notoriously picky eater, so I cook exactly what I like. My baking is probably my favorite. Cookies are my specialty!

My hidden talent is...

Supporting my wife's law practice. Since she's solo, I listen, advise and laugh along with her in her career journey.

If you had a warning label, what would it say?

"Warning: Contains Explosives" for many reasons.

What is your proudest accomplishment?

Being married to Lisa Moore.

What makes you laugh?

Being married to Lisa Moore.

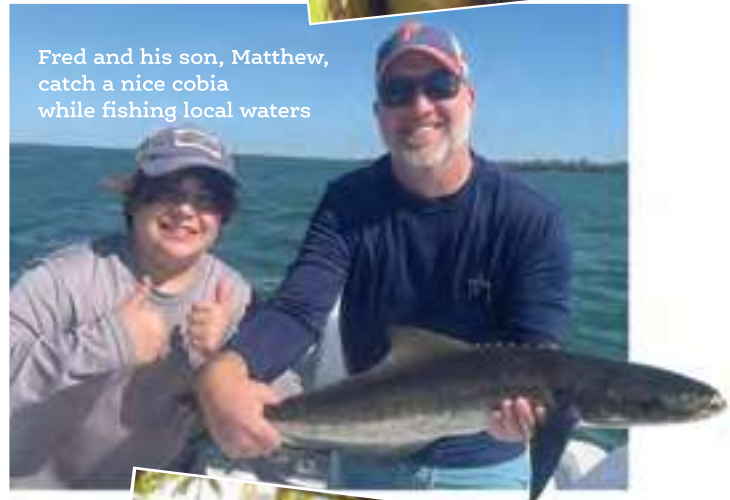
What song would you say best sums you up?

"Ain't Life Grand" by Widespread Panic

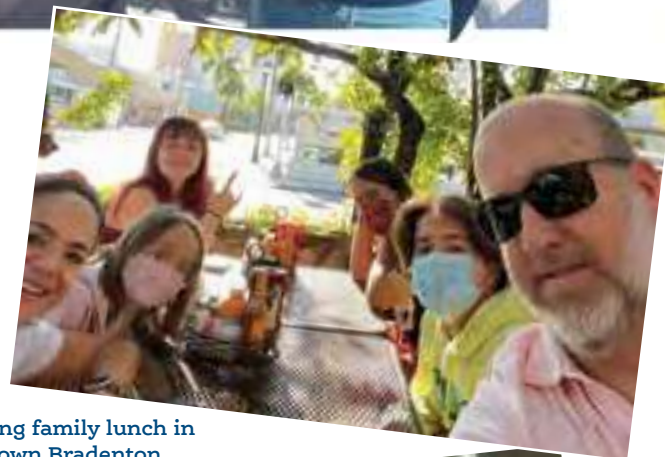
Fred and his daughter, Anna



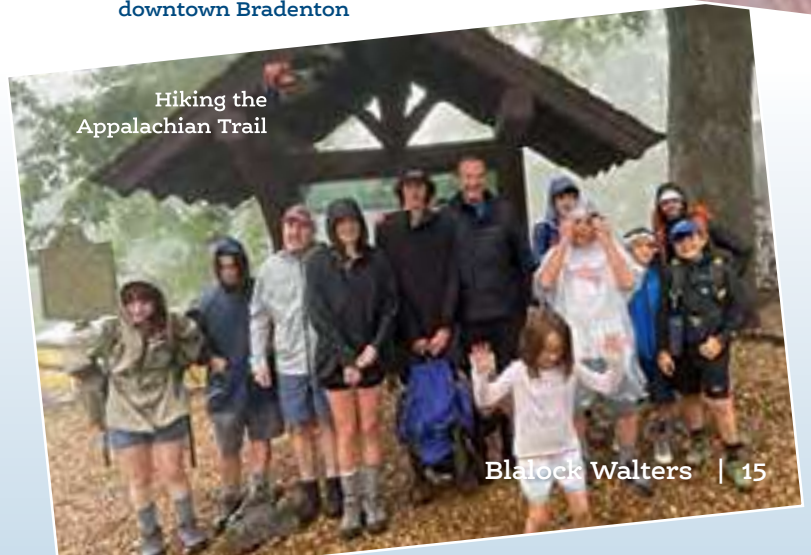
Fred and his son, Matthew, catch a nice cobia while fishing local waters



Enjoying family lunch in downtown Bradenton



Hiking the Appalachian Trail





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

Mark Barnebey elected treasurer of Florida Municipal Attorneys Association

The Florida Municipal Attorneys Association (FMAA) was formally organized during late 1981 and adopted its constitution in May of 1982. Its membership consists of over 800 attorneys who specialize in the legal representation of municipalities. These members include full-time and part-time city attorneys and their assistant city attorneys as well as attorneys who engage in private practice and who render specialized legal representation to municipalities.

The FMAA's primary objective is to provide a permanent forum for municipal attorneys to identify and address legal problems of common concern among Florida's municipalities, and to study, summarize and disseminate legislation, court decisions and administrative rulings affecting municipal operations.

Mark Barnebey serves as director of FMAA's executive board and was elected as treasurer for 2021-2022. Mark is board certified in city, county and local government law. He has practiced land use and local government law for the past 35 years. He has successfully represented clients regarding a wide variety of development projects including multi-use projects, an arena and a power plant. Mark served as the senior land use attorney for Manatee County for 13 years, Manatee School Board attorney or special counsel for another 12 years, city attorney for the City of Palmetto for over 10 years and counsel for several special districts and agencies.



Congratulations Mr. and Mrs. Yazen Dides

Business and health care attorney Yaz Dides and bride, Deven, said, "I DO!" on October 9 at the Pelican Club in Jupiter, Florida. Congratulations to the beautiful couple!



Welcome to new family member Suhana John

Congratulations to health care attorney Alex John and his wife, Alana, on the birth of their beautiful daughter, Suhana Ariela John. Her unique name was chosen to represent both parents' cultures: Suhana is Hindi for "beautiful" and Ariela is Alana's Hebrew name. Alex and Alana are so in love!

Jackie Mori – Legal Assistant, Litigation Department

Staff Spotlight

How long have you been with the firm?
10 years

What is the most rewarding part of your job? Working on a case from start to finish, especially when the outcome is in our favor.

What are you most likely to be doing outside of the office? Tell us about it... Dragon Boating! I started this sport seven years ago when I became a part of Survivors In Sync, a women's dragon boat racing team made up of all breast cancer survivors.

I absolutely love the competition and the camaraderie of our team. In 2018, we participated in the International Breast Cancer Festival in Florence, Italy, and Survivors in Sync won fourth in the entire world! The 2020 International event was postponed due to COVID-19, but we are scheduled to compete in New Zealand in 2023.

Who is your greatest inspiration and why? My mother. At 92, she is still living independently on her own. She has the biggest heart and loves her family so much. Mom loves going out to dinner with her family and recently went to a family reunion in New York! Her secret to a long and happy life is not to eat vegetables (Ha!) and to always be happy and not hold grudges.

What was your first job? Did you enjoy it? My first job was at age 15. I worked at Autoline, a factory that made spark plug wires for cars, and it seemed like the whole town of Copiague, New York worked there. The same year, I was promoted to the packaging department, which was a big deal!

Favorite band and why? Aerosmith! I have seen them in concert at least 12 times! The last time was in 2019 in Las Vegas with five of my best friends from high school.

What do you love most about living in Sarasota/Bradenton? The beaches, of course! I moved to Sarasota from NY in 1992, and I still get that "vacation vibe" when I go over the Ringling Bridge on my way to Lido Beach.

What motivates you to work hard? Being involved in a group sport. You want to be the best you can be, for not only yourself, but for your team. Our coach motivates us to work hard at every practice.

What has been your favorite vacation? And/or what destinations are on your bucket list? I loved Italy, especially Bellagio; it is colorful, charming and unique. In addition, there is potential for a George Clooney sighting! My bucket list includes New Zealand and Australia and I would also love to go to Greece, Portugal and Spain.

What is your proudest accomplishment? Giving birth to my son, Marc, who is now 27 years old!

What song would you say best sums you up? "Don't Worry, Be Happy!"



Jackie Mori



Survivors in Sync celebrate winning first place in Dragon Boating



Jackie with her brother Mike,
sister Joyce, brother Jim,
mother Frances and sister Jerri



The Plummer Family

The Event at TerraNova features Olympic sport of 3-day eventing

Equestrian and attorney **Jenifer Schembri** and Managing Partner **Matt Plummer** attended The Event at TerraNova with their families. Blalock Walters sponsored The Event, which showcases the Olympic sport of three-day eventing. Like an equestrian triathlon, eventing tests the abilities of horse and rider in three phases—dressage, cross-country and show jumping.

The Event benefitted Southeastern Guide Dogs, Sarasota Manatee Association For Riding Therapy (SMART) and Meals on Wheels Plus of Manatee. It created a unique and exciting experience for all levels of riders, horses and spectators.



Annual attorney retreat builds strong relationships



Michelina Carbone, Brice Antorini, Jon Tortorici, Erica Hart, Michael Farr, Dan VanEtten and Melissa Ann

We had a successful attorney retreat full of strategic planning, thoughtful conversations, camaraderie, smiles and laughter. We wrapped up the weekend with some friendly competition at Top Golf.



Matt Lapointe, John Arnett, Christina Morelli, Deven Dides, Yaz Dides, Chuck Johnson and Lisa Johnson



Blalock Walters attorneys and their significant others at Top Golf

EMPLOYEE APPRECIATION EVENT



Cliff and Susie Walters



Michael Farr, Erica Hart with
Rolf and Yvonne Eprecht



Anthony and Sherry Gray



The Bruce Family



The McGarry Family



The Plummer Family

Baseball, a beautiful evening and camaraderie...

That's what the Blalock Walters family-friendly **Summer Bash** was all about. We enjoyed each other's company outside of the office at LECOM Park in downtown Bradenton. Attorneys, staff and family members cheered on our hometown minor league baseball team, the Bradenton Marauders.



Marty Marauder and the kids



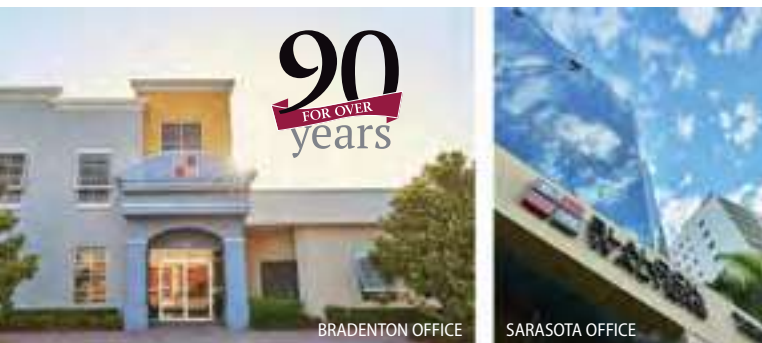
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Dedicated and innovative counsel making a positive difference for our clients and community

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

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Wishing you a 2022
full of love, family, warm memories
and good health