



REVIEW

SPRING 2022

Trusts VS. Wills: A Tale Of Two Administrations

BY CHRISTINA M. MORELLI, ESQ.

Everyone has heard the terms “will” and “trust,” but not everyone knows the differences between the two. To borrow the phrase “all roads lead to Rome”, both documents direct how you want your property, belongings, cash and financial assets to be handled upon your passing, but accomplish such via different routes. Once you understand your goals, it is a matter of determining the most appropriate document (road) that will lead to the accomplishment of your wishes.

Wills vs. Trusts:

Will: A will spells out how you would like your assets to be distributed and your affairs to be handled after death. This process is facilitated through a judicial procedure called probate.

Trust: A trust transfers ownership of your assets to someone you choose (called the trustee, who in many cases may be you) and dictates how the your assets are to be administered. A trust, like a will, directs the management and distribution of your assets after death; however, this administration occurs outside of probate. 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, charitable trusts or irrevocable trusts.

So, which is better? In sum, it's not accurate to assume one is conclusively “better”. While both documents are road maps reflecting how you want your hard-earned assets to be handled and loved ones taken care of, each document has very distinct and specific benefits. Specifically:

- A will, upon your passing, becomes part of the public record, while a trust can remain private.
- A will allows you to designate guardians for minor children and specify final arrangements (for example: cremation or burial wishes), while a trust typically does not.
- A trust offers greater flexibility and control over how and when you'd like your assets to be provided to your beneficiaries, while the simplicity of a will limits control over the distribution of assets.

By way of example, let's follow Ann and Bart...

Ann is 33 years old and is the proud owner of her two dogs. For her final affairs, Ann would like to be cremated. Ann would also like her house to pass to her cousin and cash gifts be made to her favorite animal charities. Ann's attorney prepares her Last Will and Testament.

Bart is 57 years old and a proud father of his 26-year-old son, Joe. Bart assists Joe with rent as Joe has been in a financial bind due to frequent casino visits. Bart would like to support Joe after his passing but is concerned that the inheritance will be spent at the Hard Rock Casino. Bart's attorney prepares his Trust which provides that Joe's inheritance remains “in trust” for Joe's support during his lifetime.

Creation:

To understand what the road looks like for Ann and Bart with their respective documents, let's start at their creation...

Will: Once a will is executed... that's it.

A trust, however, requires more leg work.

Trust: Once a trust is executed, it will need to be “funded” by retitling any assets to be governed by the trust. A trust can be loosely analogize as buying a car. You can pay for a car which will look great in your driveway, but in order to utilize a car you need to put gas in it. Funding your trust is like putting gas in the car. Without trust assets, it's just a piece of paper. It may say everything you want it to say, but without assets it cannot be utilized in the way it has been designed.

Ann signs her Will and puts the original in a safety deposit box. Notwithstanding appropriate periodic reviews and life changes, the process for Ann during her lifetime is complete.

Bart signs his Trust. To fund the trust, Bart works with his financial institutions to transfer his accounts into the name of his trust. Bart also has his attorney prepare and record a deed transferring his house into the trust.



Christina M. Morelli
Estate Planning

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Our Attorneys



Mark P. Barnebey

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



Anthony D. Bartirome

Estate Planning, Tax Law



Michelina D. Carbone

Finance and Leasing,
Real Estate Law



Anne W. Chapman

Labor & Employment Law



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



Alexander K. John

Business, Health Care Law



Charles F. Johnson, III

Business Litigation



Matthew J. Lapointe

Business, Health Care Law



Mary Fabre LeVine

Appellate Practice,
Business Litigation



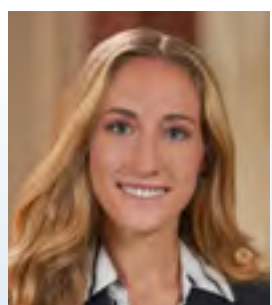
Melanie Luten

Business, Leasing,
Real Estate Law



Fred E. Moore

Florida Board Certified in
Business Litigation



Christina M. Morelli

Estate Planning



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. Van Etten**

Business Litigation

**Clifford L. Walters, III**

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

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Avoid the Pitfalls When Buying Real Estate Online

To understand and minimize your risk, you should be well informed prior to the time of purchase. Speak with experienced counsel before the online auction.

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

It is not news to many Floridians that the latest hot real estate market has been soaring for a while. We are continuing to see a heavy influx of new Floridians. These monied transplants and well-funded private equity buyers have contributed to the ongoing rise in demand for real estate. This increased demand is in turn accompanied by a tight supply of available properties.

Some buyers have turned to less traditional methods of purchasing real property in Florida, hoping to find hidden gems and bargains. While there are certainly opportunities to purchase property through online auctions and tax deed sales, it is important to be knowledgeable about the process before taking action. Prepared buyers can do well. However, for those who fail to do their due diligence before they buy, the pitfalls can be daunting.

Online auctions of foreclosed properties

As the courts sought to deal with the crush of foreclosed properties following the Great Recession, online auctions for foreclosed properties replaced bidding at the courthouse steps. The online auction process allows properties to be sold to bidders quickly and regularly through frequently scheduled auctions.

However, when purchasing foreclosed properties at online auctions, inexperienced buyers seeking bargains can be dragged into litigation unexpectedly. Although a purchaser may be the successful bidder, the perceived bargain is quickly dampened when valid lien-holders emerge and demand payment from the new buyer. The unprepared buyer can encounter unexpected, unsatisfied mortgages, homeowners' association liens and other encumbrances can be

found in advance through proper searches of the appropriate public records.

To avoid both unpleasant surprises and potential post-purchase litigation, it is prudent to conduct proper research on any real properties you are considering purchasing. Become informed about the process of online buying before you take the plunge. Given the difficulty buyers are experiencing with making competitive offers in what has been labeled a sellers' market, online buyers need to protect themselves by conducting appropriate due diligence.

To understand and minimize your risk, you should be well informed prior to the time of purchase. Before the online auction is scheduled to be conducted, speak with experienced counsel to request an owners and encumbrances title search which can identify existing liens and encumbrances that may be on the property. Such reports cost a modest \$75–\$250 and can be obtained within three to ten business days. These reasonable and simple steps may save a purchaser from buying encumbered property and a potential lawsuit to collect the debt.

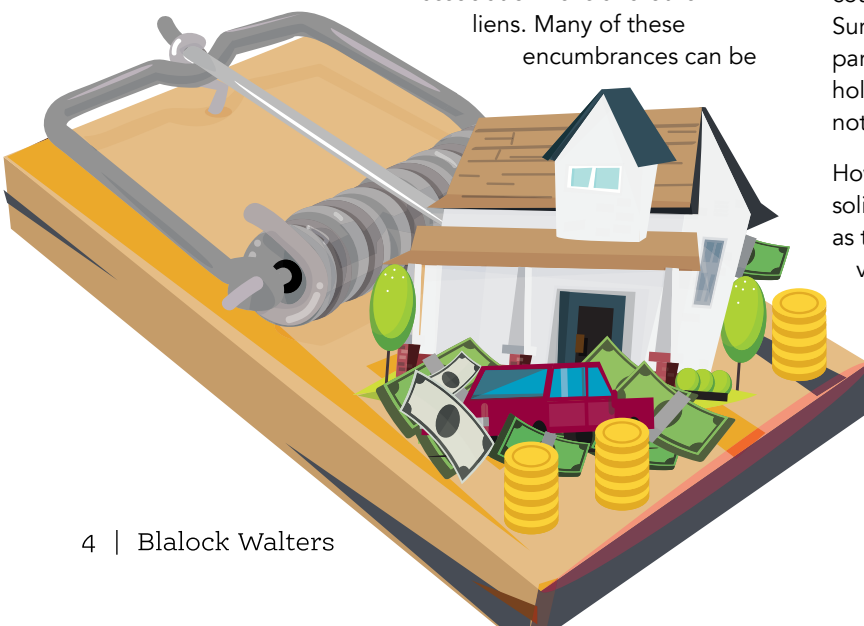
What Are Tax Deed Sales?

Florida tax deed sales opportunities arise when the owners of real property fail to pay their real estate taxes for three years in a row. When this happens, the property will likely be subject to a tax deed sale. Pursuant to Chapter 197 of the Florida Statutes, the proceeds from a tax deed sale are used to pay delinquent, unpaid taxes and sale costs. Sometimes these tax deed sales result in a surplus and there is another process for the distribution of surplus proceeds.

When an excess of funds remains, the Clerk of Court for the county where the property is located must send a Notice of Surplus Funds from Tax Deed Sale form to the appropriate parties pursuant to Section 197.582 of the Florida Statutes. Lien-holders and owners of record then have 120 days to submit a notarized statement to the Clerk and Comptroller.

However, it is important to be wary of companies that purport to solicit property owners who are entitled to collect any surplus, as these companies seek a large fee from an owner's surplus for very little work and no legal representation. This pitfall can be avoided by obtaining representation by experienced counsel who can ensure that the owner receives sound legal advice and the funds to which they are entitled.

CONTINUED ON NEXT PAGE



This is true because if no claims by others are received, there is a conclusive presumption that the legal titleholder of record is entitled to the surplus funds pursuant to Section 197.582(9) of the Florida Statutes.

It is wise for inexperienced persons to engage proficient counsel ahead of time to avoid certain unfavorable outcomes given the complexities of online auctions and tax deed sales.

Given the increased litigation we have encountered related to unprepared buyers, it is strongly suggested to plan ahead by conducting appropriate due diligence, and then navigate these opportunities with the assistance of experienced counsel.

For more information, contact:

Mary Fabre LeVine
941.748.0100, mlevine@blalockwalters.com

or

Jonathan Tortorici at
941.748.0100, jtortorici@blalockwalters.com



Mary Fabre LeVine, Appellate Practice, Business Litigation



Jonathan T. Tortorici
Business Litigation



■ ■ ■ TAX LAW

Is Investing In Opportunity Zones a Good Idea?



Michael R. Huckle
Estate Planning, Tax Law

BY MICHAEL R. HUCKLE, ESQ.

Congress created Opportunity Zones under the Tax Cuts and Jobs Act of 2017 as an economic development tool to encourage investment in distressed areas.

The Act created three main incentives to spur capital investment, providing the following benefits to investors:

- An investor is able to defer eligible capital gains until the sunset of the program, which is December 31, 2026, resulting in the deferred tax being payable in 2027. In order to qualify for this deferral of tax, the eligible capital gains must be invested within 180 days.
- An investor is able to exclude any gains on the appreciation of the investment in the Qualified Opportunity Zone, provided the investor holds the investment for ten years. For example, if an investor were to invest \$100 in a Qualified Opportunity Zone fund and that \$100 appreciates to \$150 in 10 years, the \$50 appreciated is not taxable.
- The final incentive included an ability to receive a basis step-up, but the time period to qualify for those basis step-up incentives has expired.

There are different ways that you can invest in Opportunity Zones, including contributing to an existing Qualified Opportunity Fund, or establishing your own Qualified Opportunity Fund, which requires satisfying several requirements.



If you are interested in learning more or establishing a Qualified Opportunity Fund, please contact Jenifer Schembri or Michael Huckle at 941.748.0100.

Are New Homestead Property Tax Exemptions Coming?



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

Electors may vote whether to approve exemptions for teachers, law enforcement officers, firefighters, EMTs, paramedics, child welfare professionals and active-duty members of the United States Armed Forces and members of the Florida National Guard.

During the 2022 Florida Legislative Session, Legislatures passed both House Bill (HB) 1563 and House Joint Resolution (HJR) 1 relating to an additional homestead property tax exemption for Classroom Teachers, Law Enforcement Officers, Firefighters, Emergency Medical Technicians, Paramedics, Child Welfare Professionals, and Active-duty members of the United States Armed Forces, or Florida National Guard.

HJR 1 proposes an amendment to the Florida Constitution to authorize the Legislature to provide a new homestead tax exemption for the above-referenced people. HB 1563 provides that any of the above-referenced people who hold legal or beneficial title to equity in real property and who make such property their, or their dependents', permanent residence is entitled to an exemption of up to \$50,000 of the property's value between \$100,000 and \$150,000, for all levies other than school district levies."

To counter any strain on fiscally constrained counties, HB 1563 directs the Legislature to appropriate money to such counties to offset reductions in ad valorem tax revenue resulting from the homestead exemption.

Supporters of HJR 1 and HB 1563 believe that the proposal directs tax relief to first responders and other Floridians who perform jobs that citizens rely on daily. Those who oppose HJR 1 and HB 1563 have expressed concerns that the proposal would shift more of the tax burden to renters and businesses.

If HB 1563 is signed into law, the proposed constitutional amendment will be placed on the ballot in the next general election in November 2022. If approved by the electors the amendment and bill will take effect on January 1, 2023.

For questions regarding this bill, contact attorney Marisa Powers at mpowers@blalockwalters.com or 941.748.0100.

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Administration:

Will: The process under a will is initiated by filing documents with the court to open a probate estate. There are different types of probate, but all require authority to be obtained through the court to administer the assets.

Trust: The trustee designated in the document has the authority to initiate the process automatically. The trustee can handle the trust assets and manage affairs on behalf of the trust without the involvement of the court.

Upon Ann's passing, her final affairs are facilitated in accordance with the directions in her will. A probate attorney prepares and files documents to open a probate

estate to provide for the beneficiaries under Ann's will. When certain requirements are satisfied, the court-issued documents are utilized to transfer the house to Ann's cousin and the distributions to the charities named under Ann's will.

Upon passing, Bart's trustee begins managing the trust for Joe and continues to assist Joe with his rent. A couple of years later, Joe decides that his best bet is to go back to school with financial assistance from the trust!

Contact estate planning attorney Christina Morelli at 941-748-0100 or cmorelli@blalockwalters.com to help you decide whether a will or trust is best for you and your loved ones.

If Your Nonprofit Accepts Donations, You May Be Subject To Additional Registration Requirements

However, certain charitable organizations are exempt from registration requirements and you should check before you register

BY JENIFER S. SCHEMBRI, ESQ. AND YAZEN DIDES, ESQ.

If your charitable or tax-exempt organization is doing fundraising in Florida, it likely must register with the Florida Department of Agriculture and Consumer Services (FDACS) and renew the registration on an annual basis.

As the name implies, the Solicitation of Contributions Act requires anyone that intends to solicit donations or contributions from people in the state of Florida to register with the FDACS and renew annually.

This applies to charitable organizations, 501(c)(3) nonprofit entities, sponsors, professional solicitors and professional fundraising consultants. FDACS collects registration fees and has authority to impose penalties for noncompliance. It should be noted that certain charitable organizations are exempt from the FDACS registration requirements, and determination of whether such organization falls under one such exemption should be confirmed prior to the initial registration.

The intent of the Florida Legislature is to:

- Recognize the right of persons or organizations to conduct solicitation activities and
- Protect the public by requiring full public disclosure of the identity of persons who solicit contributions from the public, and of the purposes for which such contributions are solicited and the manner in which the contributions are actually used.

This Florida law places particular emphasis on the act of solicitation.

However, the FDACS has consistently imposed noncompliance penalties upon charitable organizations that have not actively solicited donations, but that have received unsolicited donations from individuals or entities outside of the organization.

For example, any charitable organization that has independent funding and does not actually solicit donations, but accepts unsolicited donations from persons outside its organization must register with the FDACS.

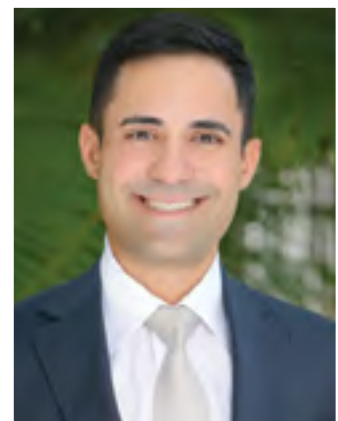
Directors of Florida nonprofit organizations must carefully review the Solicitation of Contributions Act or seek legal counsel before any solicitation of donations and before accepting any donations from individuals or entities outside of the organization.

For additional information regarding the registration requirements for nonprofits under Florida law or if you have questions concerning donations received by a Florida nonprofit, please contact Jenifer Schembri at jschembri@blalockwalters.com or Yazen Dides at ydides@blalockwalters.com.

**REGISTER
NOW!**
or not?



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



Yazen Dides
Business, Health Care,
Tax Law





Manatee Community Foundation's Annual Awards Luncheon Shines Bright Light On Bradenton Area Philanthropic Spirit

Rather than dwelling on the world's problems, MCF Executive Director Susie Bowie said that it is more beneficial to shine the light on improvements our community makes together.

Hopeful to be emerging from the COVID-19 pandemic, the Manatee Community Foundation (MCF) shined a light on good works in the Bradenton area with its annual Spirit of Manatee Awards Luncheon.



"All of the honorees have committed much of their lives to advancing opportunity for others," said MCF Executive Director Susie Bowie. They reflect the quiet, humble and determined way many people give in Manatee County, and they will be celebrated with gratitude."

- **MCF awarded the Charles Clapsaddle Community Spotlight Award posthumously to Paul Sharff, CEO of the Early Learning Coalition (ELC) of Manatee County.** Governor Charlie Crist appointed Sharff CEO in

2008, and Sharff steadily grew ELC into one of the largest nonprofits in Manatee County, supporting over 6,000 children annually. Sharff's sons, Ian and Evan, accepted the award on their father's behalf.

- **Easterseals Southwest Florida, State College of Florida Foundation and The Lakewood Ranch Community Fund nominated Lifetime Spirit honorees Joe and Barbary Najmy.** MCF celebrated the Najmys for decades of leadership in estate planning, charitable giving and inspiring others to support the community. The couple has been active in a multitude of missions, including advancing education, inclusion and access for those with disabilities and community building.

- **MCF gave the Leadership Spirit Award to Steve and Carolyn Roskamp, who were nominated by United Way Suncoast and the School District of Manatee County.** The Roskamps have been dedicated to helping children read on grade level by partnering with Manatee School District and United Way Suncoast to co-design and invest in programs supporting learning gains at Title I schools.

- **Omar Edward won the Leadership Spirit Award for his advocacy on behalf of the youth of Manatee County.** The Sarasota-Bradenton Kappa Alpha Psi Project Guide Right

nominated Mr. Edward, calling him "an amazing advocate for youth." As an alumnus of Boys & Girls Club of Manatee County, he has been a connector, passionate speaker, inspiring role model and genuine leader at the organization.

- **Health Teen Coalition of Manatee County nominated the Young Spirit honoree, Gabriella Cortes-Alban.** Gabriella volunteers as a Teen Health Educator at Healthy Teens Coalition of Manatee County to provide peer education and mentoring services to at-risk youth.

- **MCF honored Bank of America with the Community Spirit Award.** The Bank has created meaningful workforce opportunities and increased financial literacy through their "Better Money Habits" classes.

Blalock Walters is a proud Corporate Ambassador of Manatee Community Foundation, whose mission is to strengthen and enhance our community through philanthropy, education and service.



Blalock Walters serves as a Corporate Ambassador of Manatee Community Foundation. Jenifer Schembri, Matt Lapointe, Will Robinson, Michael Huckle, Susie Walters, Cliff Walters and Christina Morelli attended the annual Spirit of Manatee Awards luncheon.

Bishop Museum Of Science and Nature Brought Dinosaurs Back

Downtown Bradenton's Bishop Museum of Science and Nature hosted "Dino Don's DinoVenture," an outdoor exhibit featuring more than two dozen life-like animatronic dinosaurs. Guests of all ages were transported back in time to walk among the dinosaurs who breathed, blinked, roared and made life-like movements.

This wildly popular exhibit was named after animatronic engineer Don Lessem, a dinosaur expert and author, who has been researching and educating the public about dinosaurs for decades.

"The Dino Don's DinoVenture exhibit was a huge success for the museum," said Attorney **Matt Lapointe**, who serves on the Bishop's board of directors. "The Covid-19 pandemic caused a drastic reduction in visitors to The Bishop during 2020 and much of 2021. The Bishop's new CEO, Hillary Spencer, thought the exhibit would be a great way to get people to come back to the museum."

"The exhibit brought thousands of people to The Bishop. Kids love dinosaurs, and I think the outdoor setting was a big draw as people were still wary about indoor activities. In addition, DinoVenture was The Bishop's first fully bi-lingual exhibit, and the museum has made a commitment that every new exhibit going forward will have interpretive materials in both English and

Spanish."



Josh McGarry and son, Finn, nearly escape feeding time!

Mark Barnebey Earns Annual Good Hero Philanthropic Award From SRQ Magazine

Each year, SRQ Magazine recognizes individuals who have made a significant impact on local nonprofit organizations—from volunteers and board members to individual staff members and donors.

Good Hero Philanthropic Award recipients are ambassadors of the incredible giving back spirit in the region. We congratulate Mark Barnebey on being a Good Hero recipient. Mark is a true unsung hero, giving his time, talent, and financial resources to many local non-profit organizations.

In addition to serving on the board of directors of numerous nonprofit and business professional organizations, most recently, Mark led the Take Stock in Children of Manatee County board of directors as chair, navigating the challenges COVID-19 put on the organization.

It was a heartfelt event showcasing generous giving throughout Manatee and Sarasota Counties.



Proud Barnebey Family: Matthew, Marianne, Mark Barnebey and Kendra Barnebey Whitehead



Realize Bradenton Cookbook Features Local Community Artist and Students

Realize Bradenton's newest book *Tales from the Table* features recipes and stories with a twist of education.

Beautifully illustrated by local artist Don Brandes, this book includes 10 recipes from the Bradenton community and the special memories behind them. Through food, *Tales from the Table* connects us to each other and our heritage.

In addition, each recipe features illustrations, photos, and "Learn Together" activities that were created by a local elementary school teacher to bring fun and education into the kitchen. Over 10,000 of these books were donated to Title 1 Manatee County schools.

"Realize Bradenton believes that cooking and eating together connects people in fun, memorable ways, especially when the recipes are LOCAL," said Johnette Isham, executive director of Realize Bradenton.

"*Tales from the Table* took over a year to develop and we are really proud to showcase ten local families who share their favorite family recipe with the recipe's heritage story." Attorney **Marisa Powers** serves on the board of directors of Realize Bradenton, whose mission is to promote redevelopment and economic growth in downtown Bradenton.

Books are on sale and can be purchased by visiting realizebradenton.com or calling 941.932.9439



33rd Annual Hob Nob Bar-B-Que

Blalock Walters participated in the Bradenton Area Economic Development Corporation's 33rd Annual Hob Nob Bar-B-Que. The popular business networking event attracted more than 800 attendees and featured grill teams crewed by local businesses and restaurants. We partnered with Pier 22 who served their sought-after barbecue pulled pork macaroni and cheese.



Above: Jenifer Schembri, Rachel Layton of ZNS Engineering, Marisa Powers, County Commissioner Misty Servia, Samantha Regala, Chuck Johnson, Christina Morelli and Anne Chapman

Left: Brian Carter of Mauldin & Jenkins, Matt Lapointe, Andy Minor of Merrill Lynch, Blalock Walters Marketing Director Jill McGarry, Jodi Ruberg and Taylor Falkner.



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Emcee Deanne King, NBC News Channel 8 reporter, releases the snatchers



Shirley Blankenship and Tompie Vita (left) are among the ArtCenter guests who scope out their prize options.

ArtCenter ‘Snatches’ Another Successful Fundraiser

“Get ready! Get set! GO!” Those are the key instructions event emcee Deanne King exclaimed at ArtCenter Manatee’s guests during their popular “Snatch It” fundraising event.

Over 150 participants, aka “Snatchers,” raced to snatch prizes up for grabs, such as paintings, jewelry, pottery, wine baskets, boat rides and weekend getaways while over 50 “Cheersers” rooted for them.



Kathy Simon-McDonald, ArtCenter Manatee board member and Mark Barnebey

Breakfast Honors Former Chairs Of Manatee Chamber Boards Of Directors

Cliff Walters and **Bob Blalock** recently joined their esteemed colleagues, each of whom have served as past chair men and women of the Manatee Chamber of Commerce board of directors. Bob served as chair in 1981, followed by Cliff a decade later, serving as chair in 1991. Their leadership and service to our business community has been a catalyst for the continued legacy of Blalock Walters attorneys “making a difference.”

“We are grateful for the engagement and leadership of members of the Blalock Walters firm over many decades,” said Chamber President Jacki Dezelski. “From involvement with the Manatee Young Professionals program, to chairing Chamber committees working on important issues in our community, to the significant commitment of serving as Chairman of the Board, the firm’s team has made a difference.”





Blalock Walters Named Employer Of the Year By Manatee Chamber Of Commerce and Manatee Young Professionals

The Manatee Chamber of Commerce and Manatee Young Professionals held their annual MYP MVP Awards on February 17 at Bishop Museum of Science and Nature.

Blalock Walters won “Employer of the Year” for implementing creative and intentional initiatives to attract and retain young talent to the Bradenton/Sarasota area.

“This year’s winner serves as a great example of an employer committed to the growth and development of young professionals – and how an employer can positively impact our local talent pipeline by implementing strategies that encourage young professionals to work, play, contribute and stay local,” said the award announcer.

“At this company, one-third of the workforce is under the age of 40. Attracting and retaining bright, young talent is key to the continued excellence that this business strives for on behalf of its clients. 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 company.

This business has implemented mentorship programs, employee perks programs, a corporate wellness program, annual performance reviews and team celebrations. This business also offers outstanding benefits, compensation, recognition and professional development opportunities.

Once their young associates complete onboarding and orientation, they are paired with a senior-level mentor, referred to as a ‘Champion.’ These Champions have an important responsibility to ensure a young associate’s success and to inspire them to make a positive difference within the company as well as in the community.

Since its inception over 95 years ago, this company has remained dedicated to the legacy of giving

back to the community. Their tagline is *We Make a Difference* and this not only applies to their clients, but also to their employees and our community. This business has a culture of encouraging its employees to find out what they are passionate about and become involved in the community, and vows to support the charitable paths their employees want to take. Congratulations to this year’s MYP MVP Employer of the Year, Blalock Walters, P.A.!”

Congratulations to all the nominees and honorees, including real estate attorney Amanda Tullidge, one of this year’s Individual Business nominees.

Business Individual of the Year
Katie Howard, Insurance Time of Bradenton, Inc.

Non-Profit of the Year
Danielle Visone, Tidewell Hospice

Entrepreneur of the Year
Katy Kopstad, Sea Breeze Coffee and Tea

**Employer of the Year
Blalock Walters, P.A.**

MYP MVP of the Year
Mitch Lomazov, Excellence Performance

Ryan Harris, Taylor Falkner, Jill McGarry,
Matthew Plummer, Michelina Carbone,
Amanda Tullidge and Mark Barnebey
celebrate the Blalock Walters’
Employer of the Year award.



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Litigation Attorney Daniel VanEtten Named Principal

We are pleased to announce that litigation attorney **Daniel P. VanEtten** has become a principal Blalock Walters. Dan served as a summer law clerk at Blalock Walters in 2015, and joined the firm as an associate attorney after graduating from University of Florida Levin College of Law in 2016.

His practice involves the litigation of business disputes, real estate disputes, probate, estate and trust disputes as well as employment and health law related controversies. He represents individuals, developers, builders, retail stores, non-profit organizations, title companies and other businesses. He has extensive mediation, arbitration and trial experience. Having been born and raised in Manatee County, Dan has a strong commitment to helping his clients achieve successful results.

"With its historic commitment of esteemed service to clients and community, Blalock Walters was the type of firm I wanted to join," said Dan. "I am honored to be joining the ranks of the firm's talented partners, and I look forward to continuing to represent parties in a wide range of litigation matters."

"Dan is an excellent trial lawyer with hands on experience beyond his years," said litigation practice lead Charles Johnson.

Dan can be reached at 941.748.0100 or dvanetten@blalockwalters.com.



Daniel P. Van Etten
Business Litigation

Taylor Falkner Appointed to Manatee Young Professionals Leadership Committee

Operating under the Manatee Chamber of Commerce, the Manatee Young Professionals (MYP) is Tampa Bay's longest running young professional program and provides business, social and community resources for young and young-thinking professionals in Manatee County.

Land Use and Local Government attorney **Taylor Falkner** has been appointed to serve on MYP's Leadership Committee. Members of the Leadership Committee are selected from active young professionals who have displayed strong leadership abilities and a commitment to the growth of the organization through servant leadership.

In her role, Taylor will help strengthen the committee's mission of developing young professionals through community and leadership experiences and overseeing Manatee Young Professionals programs.



Taylor E. Falkner
Land Use, Local Government

Panel Discusses Breaking Barriers For Women In Business During Sarasota Chamber Luncheon

Corporate attorney **Jodi Ruberg** attended the Sarasota Chamber *Women Breaking Barriers in Business* luncheon featuring a panel discussion moderated by former Florida Senator Lisa Carlton. The panel discussed the advancements of women who are breaking stereotypes and excelling in industries and positions not typically held by women.

Telese L. Zuberer, shareholder and president of Icard, Merrill, Cullis, Timm, Furen & Ginsburg, P.A.; **Shawny Robey**, president and CEO of First Step of Sarasota; **Christina Shaw**, senior director special events and hospitality, Atlanta Braves at the Women Breaking Barriers in Business luncheon.

Attorney Jodi Ruberg joins luncheon moderator and former Florida Senator Lisa Carlton





Behind the Suit

Melanie Luten

Business, Leasing, Real Estate Law

What type of law do you practice? My practice consists primarily of commercial leasing work, but I also handle a variety of business transactional matters.

How do you make a difference for your clients? I try to understand each client's business so that I can ensure that agreements address their particular situation and needs. I enjoy helping clients grow their businesses and when it is time to sell those businesses, helping those clients monetize their hard work.

Who has given you the best advice about practicing law and what was that advice? A lawyer that I practiced with early in my career told me to treat clients the way I would want to be treated if our roles were reversed. I try to approach each engagement keeping that advice in mind.

What is your favorite childhood memory? I loved escaping New York City and spending summers in Pottstown, Pennsylvania at camp. I was part of a program where you were paired with a horse for the summer. We learned how to care for "our" horse and rode every day. We also did synchronized swimming, oil painting, and other creative activities. I cried every year when it was time to go home.

What is the most daring thing you've ever done? At the age of 16, I moved away from my parents' home into an apartment in New York City and am forever thankful for the landlord who let a minor sign a lease.

Favorite song? The Rascals – "It's a Beautiful Morning." When I got my first car, a Toyota Tercel, it was like I received my wings of freedom! I would roll the windows down, wind blowing my hair, and listen to this song as loud as the speakers would play.

Most interesting job? I worked as a demonstration model for various products, including Whisker Lickin's cat food.

What do you love most about living in Sarasota/Bradenton?

Coming from the Northeast, I appreciate the water, the weather, and the fact that I rarely have to wear a coat!

Tell us about your four-legged family.

My current four-legged family of Doberman Pinschers are Dylan, age 11; her daughter Aura, age 6; Jagger, Aura's half-brother, age 6; Aura's daughter, Penny, age 1.5. Oh, and Alice the cat.

Melanie cares for Dylan and her brood

What prompted your passion for training Doberman Pinschers?

I started training Doberman Pinschers in 1976. My passion to train started when I took one of my dogs to K9 Command Dogs, which offered obedience and protection training and also sold trained dogs. I watched a demonstration and was totally intrigued. They asked if I wanted to hire them to train my dog and I said, "No! I want you to train ME to train my dog." That started a lifelong journey for me.

On the weekend... I am either training, at competitions or relaxing with my "family." Dog shows have taken me all over the country - as far away as California and some of the midwestern states, but primarily in the northeast and southeast. I've met a lot of wonderful people along the way and, because I have lived in several different states, it has been a great way to integrate into new communities.

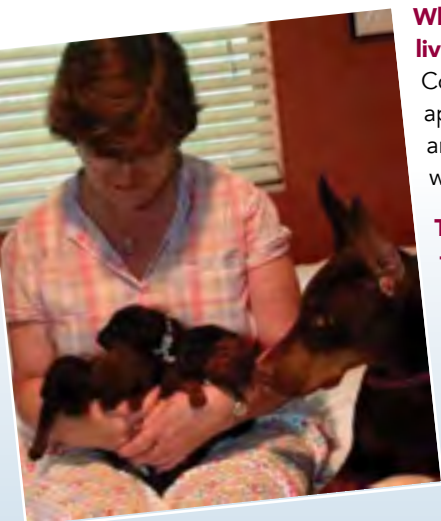
Over the years my dogs have competed in conformation and various performance events earning multiple titles. Aura was one of the Top 20 Conformation Dobermans in 2018 and both Aura and Jagger were Top 20 Obedience finalists in 2020. My dogs have also been featured in calendars.

Community organizations you are involved in... Sarasota Obedience Training Club, Doberman Pinscher Club of Florida, Central Florida Working Dog Association, Doberman Pinscher Club of America. Former member of Humane Society Manatee County board of directors.

Aura placing at the
Doberman Pinscher
Club of America
Top 20 Event



Dylan and
Huey



*The more that you read, the more things you will know,
the more that you learn, the more places you'll go.*

-Dr. Seuss

SUMMER Book Drive

This summer, we are collecting books and supplies
for a donation to children ages 5-11
at the Boys & Girls Clubs of Manatee County

- ♥ New or gently-used book (English and/or Spanish)
- ♥ Activity books (color by number and puzzle books)
- ♥ STEM (science, technology, engineering and math) project books, alphabet and writing game books
- ♥ Crayons, colored pencils and markers

Please drop off your donations at the reception area:

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A small donation can make a BIG difference!



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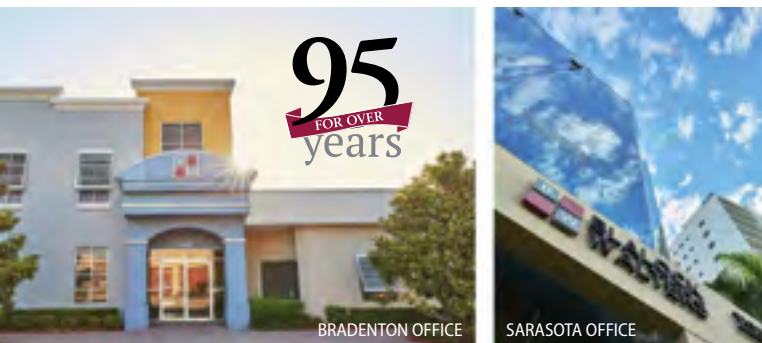
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(941) 748-0100 (941) 745-2093 (fax)
www.blalockwalters.com

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802 11th Street West, Bradenton, Florida 34205

SARASOTA

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

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Jill McGarry
Marketing Director

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