



INTER ALIA

JUNE 2020

NEWSLETTER OF THE MANATEE COUNTY BAR ASSOCIATION

NOTE:

The Manatee County Bar Association leadership has determined, based upon the updated CDC guidelines that all *in person* events are cancelled until further notice.



FINRA Arbitration & Pandemic Losses vs. Stockbroker Negligence

By Andre R. Perron, Esq., MCBA Director and Kelley A. Thompson, Esq.



In the midst of falling stock prices and economic downturn, the question on everyone's mind seems to be – "How financially secure am I?" For some people, it leads to the unfortunate realization that their stockbrokers have been negligent or even fraudulent in managing their investments. In today's environment, stockbroker negligence manifests itself in several ways, such as failure to follow clients' instructions, overconcentration of clients' investments, insufficient supervisory and compliance oversight, churning of accounts, selling away and the sale of unsuitable products to their clients.¹ By way of example, complainant lawyers very often consider the issues of concentration, margin, and options.

First, the "majority of losses arising from this falling market relate to the issue of 'concentration.' Concentration is either 1) your portfolio was concentrated too highly in one type of security, such as stocks, bonds, commodities, or 2) your portfolio was concentrated in a sector of the market and that sector performed considerably worse than the market overall. It is no defense that the broker did not know that those sectors were going to be negatively affected by the coronavirus."² Avoiding overconcentration is particularly important for elderly people who are close to retirement as they have insufficient time or means to recover from losses arising from a substantial loss.³

Losses arising from margin calls are also common in market downturn. "The average long-term investor should not use margins for investing and if the broker advised or otherwise supported this strategy, the broker and his company may have breached his/her duty to his/her client."⁴ When brokers use margins, they can undermine the ability of an investor's portfolio to survive bear markets "because a falling market results in margin calls causing the liquidation of often solid positions."⁵

A third strategy that often results in serious portfolio losses is the use of options. "Options are for short-term trading, market timing, and speculation."⁶ Brokers often put unwary clients in long positions on options creating a volatility of risk to the portfolio. "Investors, in this coronavirus freefall who were in short market puts likely got devastated. A broker advising or otherwise supporting this strategy may be responsible for these losses if this strategy was not suitable for the investor."⁷

While anyone can be a victim of stockbroker negligence or fraud, common victims include ex-spouses who have little to no experience in managing finances and the elderly who often suffer from

cognitive diseases substantially impairing their ability to manage their finances. "Consider the case of the 77-year-old blind widow, who was victimized just a few weeks after her husband passed away. She had completely relied on her broker to manage her accounts, given her own severely debilitated condition --- but her broker took advantage of her. The broker placed more than 700 trades in more than 200 different securities, causing the blind widow to lose about \$184,000."⁸ This practice is known as churning and brokers engage in it to realize more gains. Unfortunately, cases like this are not uncommon. When broker negligence or fraud occurs, the customer is obligated to enter the murky waters of FINRA binding arbitration. FINRA, the Financial Industry Regulatory Authority, is a "not-for-profit" organization that – working under the supervision of the SEC,"⁹ regulates broker-dealers and financial advisors.

FINRA provides its own regulatory framework which is full of pitfalls and traps for the inexperienced practitioner. FINRA has detailed arbitration rules for both consumers/investors and industry members. The two main avenues of resolving disputes within the FINRA framework are arbitration and mediation.¹⁰ First, consumers can pursue FINRA mediation. FINRA mediation can be used as an alternative to arbitration, or it can be pursued during any stage of an existing arbitration process.¹¹ A FINRA mediation is initiated when either party files a Request for Mediation.¹² FINRA provides mediators who are experts in this industry familiar with proper investment practices, supervisory regulations, and damage calculation.¹³

In addition, consumers can pursue FINRA arbitration. Under FINRA regulations, investors must resolve their disputes through FINRA arbitration because they previously executed written mandatory arbitration agreements in their account-opening documents.¹⁴ Notably, FINRA arbitration agreements are enforceable in Florida. FINRA arbitration is initiated when an investor complainant files a Statement of Claim, Submission Agreement, and applicable fees.¹⁵ During the arbitration process, parties select their arbitrators through a list provided to them by FINRA.¹⁶ The lists are generated by the "Neutral List Selection System (NLSS) a computer algorithm, to randomly generate lists of arbitrators from FINRA's arbitrator roster."¹⁷ Practitioners in this area typically keep track of individual arbitrator award history to assist in the selection process.

FINRA suggests that complainants consider hiring attorneys to

(continued on page 2)

PRESIDENT'S MESSAGE - JUNE 2020

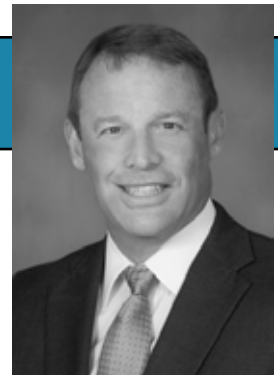
By Charles W. Telfair, IV, MCBA President

This month is a busy one for the MCBA. We have FL Representative (and our very own member), Will Robinson as our speaker for our annual meeting. Representative Robinson will tell us about the state of the State. This meeting will be virtual, and we will also be electing our 2020-21 officers.

Also, we begin our dues renewals this month. We received valuable feedback from our Covid-19 survey, and the Board of Directors took all comments into consideration. We have moved ahead with planning additional virtual meetings over the summer; and, are planning on resuming our in-person luncheons in September, where our guest speaker is scheduled to be Chief Justice Canady.

As mentioned last month, we have launched our online "Find an Attorney" directory. I hope you have had a chance to visit our website at www.manateebar.com to see this feature. It allows ALL active members of the MCBA to be searched by the public by name, firm, and area of practice. This feature is one of the benefits made available to our active members.

The dues will remain at only \$225 this year, and will still continue to include our lunches at Pier 22, as well as your ticket to our Holiday Party and Spring Social (aka Beach Party). We ask that you remit your dues payment as soon as possible to help us to continue to provide all of the great programming and benefits to our membership. Dues will not be considered delinquent until after September 15th, but again, if you can, we hope you will send them in soon. As always, if you should need assistance with your 2020-21 renewal, please contact our Executive Director, Graceann Frederico, to discuss.



(FINRA Arbitration & Pandemic Losses vs. Stockbroker Negligence, continued from page 1)

represent them throughout the arbitration or mediation process because the broker-dealer engages experienced, well-trained defense counsel.¹⁸ In fact, there are several reasons why customers should have attorneys in the FINRA dispute resolution process. First, brokers themselves are more often than not represented throughout the process,¹⁹ so consumers who hire attorneys can level the playing field to some degree. Second, attorneys who routinely practice in this area have the expert knowledge on compliance and broker negligence issues needed to successfully navigate this tricky area of the law. And third, claimant counsel have access to experienced experts in the field to testify on issues of negligence, compliance violations, and damages.

COVID-19 may have been a tsunami for many investors who were not properly represented or positioned. However, such losses are not necessarily the fault of the client. Unfortunately, most victims of stockbroker negligence or fraud do not realize that it was misfeasance of their financial advisor that led to the loss of their retirement savings. This possible misfeasance is something a lawyer, particularly a family or estate planning practitioner, should be prepared to recognize and steer his/her victim-client to proper legal consultation to remedy the wrong.

¹ See *Shook Up by the Market? Now is the Time to Have a Talk With Your Investment Advisor*, BARNES WALKER, <https://barneswalker.com/shook-up-by-the-market->

[talk-to-your-investment-advisor/](https://barneswalker.com/shook-up-by-the-market-).

² *Securities Losses – Coronavirus – What Now?*, BARNES WALKER, <https://barneswalker.com/securities-losses-from-the-coronavirus-what-now/>.

³ Id.

⁴ Id.

⁵ Id.

⁶ Id.

⁷ Id.

⁸ *What We Do*, FINRA, <https://www.finra.org/about/what-we-do>.

FINRA, <https://www.finra.org/#/>.

⁹ *Dispute Resolution*, FINRA, <https://www.finra.org/investors/dispute-resolution>.

¹⁰ *Initiate a Mediation*, FINRA, <https://www.finra.org/arbitration-mediation/initiate-mediation-0>.

¹¹ *Initiate an Arbitration or Mediation*, FINRA, <https://www.finra.org/arbitration-mediation/initiate-arbitration-or-mediation>.

¹³ See id.

¹⁴ *Arbitration Overview*, FINRA, <https://www.finra.org/arbitration-mediation/arbitration-overview>.

¹⁵ *Initiate an Arbitration*, FINRA, <https://www.finra.org/arbitration-mediation/initiate-arbitration>.

¹⁶ *Arbitration Process*, FINRA, <https://www.finra.org/arbitration-mediation/arbitration-process>.

¹⁷ *Arbitrator Selection*, FINRA, <https://www.finra.org/arbitration-mediation/arbitrator-selection>.

¹⁸ *Resources for Investors Representing Themselves*, FINRA, <https://www.finra.org/arbitration-mediation/resources-investors-representing-themselves>.

¹⁹ *How to Find an Attorney*, FINRA, <https://www.finra.org/arbitration-mediation/how-find-attorney>.

The Manatee County Bar Association supports diversity and inclusion in our membership and welcomes lawyers of all backgrounds, ethnicities, races, religions, cultures, sexual orientations and abilities. As part of this initiative, the Manatee County Bar Association has created the Diversity and Inclusion Committee (DAIC) and fully supports its mission to increase the diversity of our membership and the local legal community.

MCBA 2019-20 SECTION CHAIRS:

Solo/Small Firm Section:	Steele Williams, Chair
Probate Section:	Rebecca Proctor, Co-Chair Alexandra St. Paul, Co-Chair
Real Property Section:	Joe Battaglia, Chair
Family Section:	Faith Brown, Chair



YLD News & Happenings

Revisiting MCBA YLD's 2019-2020

By Melissa R. Casanueva, Esq. of Butler Elder Law, P.A.

When I signed up to write this month's article, I knew I wanted it to be a recap of all the Manatee YLD did in 2019-2020. I was excited to be the incoming President and help represent the YLD with the MCBA members, judiciary, and the community. Now that it is time to write this article as my term is ending, September 2019 seems almost a distant memory instead of just being 9 months ago. During this unprecedented time, I still want to take the time to revisit what the MCBA YLD accomplished this year and look forward to how the MCBA YLD will adapt to the "new normal" of 2020-2021.

In the 2019-2020 year, we started and ended our year by providing CLEs for the general MCBA membership. The first CLE was a panel discussion regarding practicing with professionalism in Manatee County. After earning their CLE credits, participants were able to network and make new connections within the MCBA. Our second CLE, Virtual Tips and Tricks for Working Remotely, was just held on June 4, 2020, and was planned in response to the MCBA members requesting instruction on technology being used to work remotely. If you want to learn any fun tips regarding Zoom, I recommend watching the recording!

The Manatee YLD also gave back to the community in varying ways this year. First, we held our annual "Art in the Courthouse" celebration. Each year, members of the Manatee YLD select art

from the Art Department of the Manatee County School District to be displayed on the 5th floor of the Manatee County Judicial Center for the year. Again, thank you to Judge Dees for speaking at our celebration and letting the students and their families know how impactful their art is for the individuals going to those nearby courtrooms.

Additionally, the Manatee YLD chose to support the Safe Children Coalition with the organization's outreach grant. We will be providing a financial literacy program and much needed supplies to Safe Children Coalition's Independent Living division, which focuses on youth sixteen (16) or older, who are living on their own without the support of a caregiver and/or transitioning out of the foster system to living independently. The Manatee YLD received a grant for this cause and will host the event once Safe Children Coalition is able to gather their students together.

The Manatee YLD also enjoyed several networking events throughout the year. We worked together and tested our abilities in an Escape Room, celebrated the season at the MCBA holiday party, and enjoyed kicking off the new year by paintballing. Every year, my favorite networking event is the Java with the Judges. Our Java with the Judges allows attendees to network not only with fellow attorneys, but also to enjoy a cup of coffee or donut while talking with one of our judges or their judicial assistant over breakfast and coffee.


To help our goal of increasing attendance at events, we created the "MCBA YLD of the Year Award" to celebrate our most active YLD participant. The recipient of this award will be announced in next month's Inter Alia!

As my term has ended, I want to finally, but most importantly, give a huge thank you to the Officers and Board of Directors of the 2019-2020 MCBA YLD. Without you all, none of these events would have occurred. As next year's events will be framed as the "new normal", I know that this organization will adapt and still bring meaningful events to its members and community. Even with a year shortened by Covid-19, I am proud of all that the Manatee YLD accomplished this past year. I encourage any attorney who has been practicing 5 years or less or is under the age of 40 to like our Facebook page, or read the MCBA News You Can Use, to keep up to date with events for 2020-2021!

DATES TO REMEMBER:

- | | |
|--------------------|---|
| June 24, 2020 | General Membership Meeting- VIRTUAL MEETING |
| July 29, 2020 | Meet the Judicial Candidates – VIRTUAL MEETING |
| August 26, 2020 | Town Hall Membership Meeting with Judge Bonner – VIRTUAL MEETING |
| September 30, 2020 | General Membership Luncheon Pier 22- Chief Justice Canady |

*dates are subject to change



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 ◇ MANATEE COUNTY CHAMBER OF COMMERCE ◇
 ◇ BETTER BUSINESS BUREAU OF MANATEE COUNTY ◇



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Attorney Jodi M. Ruberg Joins Blalock Walters!

The law firm of Blalock Walters, P.A. is pleased to welcome attorney Jodi M. Ruberg to the firm's estate planning and business and corporate practice groups. Ruberg routinely drafts wills, revocable living trusts and irrevocable trusts and other estate planning documents necessary to implement client goals and long-term personal and charitable objectives. Her areas of concentration allow her to counsel clients in matters of wealth preservation and succession planning for their benefit and for the benefit of their loved ones, and assist in the execution of the documentation necessary to achieve the clients' intended results.



In her business & corporate practice, Ruberg counsels clients regarding entity formation, business governance issues and business transactions. She represents both companies and individuals in the areas of entity selection and formation, corporate governance matters, business succession planning and transitions.

An active member in the community, Ruberg was elected by her peers as a Governor of the Florida Bar, Young Lawyers Division, representing Sarasota, Manatee and Desoto Counties. Ruberg also serves on the Legislative Committee as well as the Health & Wellness Committee for the Florida Bar Young Lawyers Division. She is also a Director of the Sarasota County Bar Association, Young Lawyers Division.

"The Firm is thrilled with the addition of Jodi to our firm," says Matthew Plummer, managing partner. "Jodi's experience and expertise will enhance the level of service and depth provided to our clients. Jodi's commitment to client service and our community align with the firm's values, which make her a perfect addition to the Blalock Walters team."

It's Time To Renew Your Dues!

It's that time of year – to renew your MCBA dues!

The Dues Renewal Form is included in this issue and we ask that you complete it in its entirety. The information is used to keep your profile up-to-date in our database and to advertise your profile in our new, online directory.

The online directory was launched last month as a benefit for all active members of the MCBA. Your profile is listed on the "Find an Attorney" page of the bar website at manateebar.com. The public can now search for an active MCBA attorney by their name, firm, or area of practice.

Although "corona" has forced changes to our current "in person" meetings, we have added two virtual summer meetings (see announcement in this issue).

Dues will remain at only \$225 for the 2020-21 year, and will include your meals at our General Membership Luncheons and entry to our Holiday Party and Spring Social.

We ask that you kindly renew your dues by July 30, 2020. However, the MCBA board has decided to grant an extension until September 15th for any members that may be experiencing hardship. We ask that you please pay your dues on time, but dues will not be found delinquent until September 15th, 2020. If you need assistance with your dues, please contact our Executive Director, Graceann Frederico at mcba@manateebar.com. If your dues are paid by July 30, 2020, you will be entered into a drawing for a \$100 Amazon gift card.

If you would like to pay your dues online, please visit: www.manateebar.com

NEW ADMINISTRATIVE ORDERS:

Please see the 12th Judicial Circuit's website to view new Administrative Orders at <https://www.jud12.flcourts.org/Documents/Administrative-Orders>:

Administrative Order 2020-15a.1 RE: Suspending Evictions Related to Non-Payment of Rent by Residential Tenants and Suspending Foreclosures

Administrative Order 2020-4a.2 Revisions to Covid-19 Emergency Procedures and Mission Essential and Critical Court Functions Specific to Phase 1

Administrative Order 2020-12a.02 Covid-19 Public Health and Safety Precautions and Procedures as Amended

MCBA Announces Two Summer Virtual Events!

The MCBA is excited to announce the addition of two summer virtual membership meetings! Stay tuned and watch your Eblasts and Inter Alia for announcements and how you may RSVP to receive your login link.

Summer Meeting Line Up:

Wednesday, July 29th: Speakers: the four County Court Group 4 Candidates: Melissa Gould, Connie Mederos Jacobs, Christopher M. Pratt, Kristy Zinna

Wednesday, August 26th: Speaker: Chief Judge Kimberly Bonner



JOIN US FOR OUR VIRTUAL TOWN HALL MEETING

ANNUAL MEETING

Election of 2020-21 MCBA Officers

WEDNESDAY, JUNE 24, 2020
NOON VIRTUAL: ZOOM



Special Speaker:

FL State
Representative
Will Robinson

Thank You to Our Sponsors:



You MUST RSVP by June 21st to MCBA@ManateeBar.com A link will be sent with your Zoom log in credentials prior to the meeting.

A Very Big Thank You!

Thank You to the Young Lawyers Division of the MCBA who stepped up to the call to teach our members some new technology tips & tricks! Many of our members responded to our Covid Survey asking for assistance with virtual meetings and working remotely. Over 30 members attended the Working Remotely Tips & Tricks CLE on June 4th. Presenters and Collaborators were:



Sierra Butler, Esq.,
Butler Elder Law



Melissa Casanueva, Esq.,
Butler Elder Law



Greg DeMeuse, Esq.,
Blalock Walters



Anisley Mena, Esq.,
Greene Hamrick Quinlan
& Schermer



Grace Reeves, Esq.,
Legler Murphy & Battaglia



Dustin Wagner, Esq.,
Lightning Law



Jami Worley, Esq.,
Worley Elder Law

The CLE is available for FREE to all active MCBA members. Contact the MCBA office at MCBA@ManateeBar.com to receive your FREE link. Kindly give 24 hours notice.



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The MCBA Congratulates Deborah J. Blue & Jesse R. Butler!

The MCBA congratulates members Deborah J. Blue and Jesse R. Butler on their selection as Florida Super Lawyers. Deborah J. Blue has been named a Super Lawyer for 2020 and Jesse R. Butler has been designated a Rising Star. Super Lawyers, a service of Thomson Reuters, identifies attorneys who have attained a high degree of peer recognition and professional achievement. Each year, approximately five percent of the lawyers in Florida are named Super Lawyers and 2.5% of lawyers 40 years old or younger, or in practice 10 years or less, are named Rising Stars.

Deborah J. Blue specializes in complex marital and family law cases involving equitable distribution, business valuation, alimony, child support, parental responsibility, prenuptial and postnuptial agreements, paternity, and other related matters. Ms. Blue is Board Certified in Marital and Family Law.

Jesse R. Butler is a Florida Bar Board Certified specialist in Appellate Practice, as a well as a civil trial attorney. Mr. Butler's trial practice focuses on cases involving consumer law, legal malpractice, deceptive and unfair trade practices, insurance defense and coverage disputes, and general civil and commercial litigation.

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STATE OF FLORIDA
TWELFTH JUDICIAL CIRCUIT
KIMBERLY CARLTON BONNER
CHIEF JUDGE

MEMORANDUM

TO: All Circuit Users
FROM: Kimberly C. Bonner, Chief Judge
DATE: June 5, 2020
RE: Phase 2

As you know, the Florida Supreme Court has issued several Administrative Orders related to the court re opening plan and other COVID related policies. Similar to the state as a whole, this re-opening is divided into phases. It is important for members of the public, lawyers, and litigants, to understand that the *court phases do not necessarily line up with other statewide phases or business re-openings. Our re-opening is governed by the orders from the Florida Supreme Court. They are not independently developed by county or circuit.* Whereas people voluntarily choose to go certain private businesses or other public places, for the most part, they are in a courthouse because they are compelled to be there. These public buildings are challenging to maintain and keep clean, even in the absence of a pandemic, and we must be able to assure everyone who enters our court facilities that we are taking all possible measures to make sure not only that they are physically safe, but that we are not exposing them to the virus.

The Supreme Court's current required benchmarks for proceeding to Phase 2 include many factors beyond our control, such as an overall decline in COVID 19 numbers within a county over a 14 day period. Two of our three counties have experienced a spike in COVID 19 numbers within the past week. This will delay our ability to meet the benchmark. Other requirements for conducting more in person hearings during phase 2, including jury trials, are temperature and health screenings. The latter requires our county partners to assist and we have been working diligently to get the equipment and personnel necessary.

As a means to get us closer to phase 2, I issued an administrative order last week setting out mandatory use of PPEs starting June 8, and mandatory health screenings in all court facilities beginning June 15. These dates were set with the expectation that the screening resources would have been obtained by June 15, and there is still the possibility that by the end of next week,

everything will be secured to begin these screenings. There is, however, also a possibility that our screening resources will take longer to implement and that this protocol may be delayed.

Even when these measures are in place, we cannot go to Phase 2 until I can certify to the Supreme Court that we've met ALL of the necessary benchmarks. Until we can, we will still be in phase 1, with limited in person proceedings, use of PPEs and mandatory health screens. This will still enable us to begin tackling our criminal docket backlog, as well as some other matters, but with the added restriction of social distancing and use of PPEs/screening. This means we cannot hold in-person criminal arraignments or pleas for out-of-custody defendants until all of the mandatory health screens are in place.

The COVID 19 situation changes daily, and sometimes hourly, and it can be frustrating and confusing to watch the state "re open" when we are not. I will do my best to keep everyone informed on our progress.

Thank you.

Kimberly C. Bonner, Chief Judge



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2020-21 DUES RENEWAL
MANATEE COUNTY BAR ASSOCIATION

Manatee County Bar Association **Annual Dues** for current members are **\$225.00*** for the year (July 1st through June 30th). This notice is payable upon receipt. Please return this completed form with check payable to:

Manatee County Bar Association ~ P.O. Box 796 ~ Bradenton, FL 34206

Note: Renewals may also be paid online at www.manateebar.com

Subject to a 3.5% administration fee

**~ UPDATE YOUR CONTACT & PRACTICE INFORMATION AS YOU WOULD LIKE IT TO
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Member Name: _____ **FL. Bar #:** _____
(lastname, firstname, middle initial)

Complete name of firm: _____

Address: _____ **State** _____ **Zip:** _____

Phone: _____ **Cell:** _____

E-mail address: _____

List 3 primary areas of practice (use attached list to make your selections)

1. _____

2. _____

3. _____

FL Bar Certifications held: _____

Federal Court Admissions: _____

Law School: _____ **Year Admitted to The Florida Bar:** _____

Languages Spoken, other than English: _____

Other State(s) Admitted to Practice Law: _____

***Annual dues paid by credit card require a 3.5% Administration Fee totaling: \$232.86**

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For Office Use: Check #: _____ **Amount: \$** _____ **CC: \$** _____ **Date recvd:** _____

Florida Bar and Federal Court Admissions Listings:

Florida Bar Certifications:	Federal Court Admissions:
Admiralty & Maritime Law	US Court of Appeal for the Eleventh Circuit
Arbitrator	US District Court Middle District of Florida
State & Federal Gov't & Admin Practice	US District Court Northern District of Florida
Adoption Law	US District Court Southern District of Florida
Appellate Practice	Florida Middle District Bankruptcy Court
Antitrust & Trade Regulation Law	Florida Southern District Bankruptcy Court
Aviation Law	Florida Northern District Bankruptcy Court
Business Bankruptcy	United States Supreme Court
Business Litigation	US Court of Appeals for Veterans Claims
Circuit Civil Mediator	US Court of Appeals for the Armed Forces
Civil Mediator	US Court of Federal Claims
Civil Trial Mediator	US Court of International Trade
Criminal Appellate	US Tax Court
City, County & Local Government Law	
Construction Law	
Condominium & Planned Dev. Law	
Criminal Trial	
Civil Trial	
Elder Law	
Education Law	
Family Mediator	
FL. Regional Architect	
FL. Supreme Court Certified Mediator	
FL. Supreme Court Certified Civil Mediator	
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Health Law	
International Law	
Immigration & Nationality	
Intellectual Property Law	
Juvenile Law	
Labor & Employment Law	
Marital & Family Law	
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American and International	Environmental and Land Use	Medical Malpractice
Animal Law	Equal Opportunities	Mergers and Acquisitions
Antitrust and Trade Regulation	Estate Planning	Military
Appellate Practice	Family	Natural Resources
Arbitration	Finance and Investments	Occupational Safety and Health
Asian and Comparative	General Practice	Ocean and Coastal
Asset Forfeiture	Global Technology	Patent
Aviation	Governance and Rule of Law	Personal Injury
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Bankruptcy	Government Administration and Regulation	Product Liability
Biotechnology and Genomics	Government and Administrative	Professional Liability
Business	Government and Public Policy	Public Finance and Bonds
Business and Taxation	Government Contracts	Public Interest
City/County/Local Government	Guardianship	Public Utilities
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Civil Rights	Health Administration	Real Estate/Land Development
Civil Trial	Immigration and Nationality	Securities
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Construction	Intercultural/International Human Rights	Toxic Torts
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Corporate	International Economic	Trusts and Estates
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United States District Court
Middle District of Florida
Fort Myers Division

VACANCY ANNOUNCEMENT

JUDICIAL LAW CLERK

\$64,009 to \$107,807

Announcement No. 20-21

Available: June 2020

Position Closes: When filled

Position Overview

This vacancy is for term law clerks to the Honorable John L. Badalamenti, United States District Judge. The law clerks have full responsibility for assigned cases. The law clerks review complaints for jurisdiction, draft proposed orders, conduct legal research, manage a civil docket, assist with and attend court proceedings, act as a legal advisor on pending litigation, and perform other duties as assigned.

Although the nature of the work is serious, the office environment is personable. There is daily interaction with Judge Badalamenti and the other law clerks. The law clerks must be able to work harmoniously with others and communicate effectively, both orally and in writing.

At the Judge's discretion, one of these three clerks may be hired as a career, rather than a term, clerk. While interested candidates must commit to a 2-year clerkship, the Judge will evaluate the employment relationship after 1 year.

Good character and sound judgment, efficient research, analysis and writing, mindfulness for multiple pending deadlines, professional communication, and a service-oriented and collaborative work ethic are essential and required.

Qualifications

The District's caseload is heavy so the position requires excellent writing and analytical skills. Applicants must have a strong work ethic and be able to meet multiple deadlines in a timely and organized fashion. Efficient, accurate, and concise writing skills are necessary.

At the time of appointment, applicants must be law school graduates and members of a bar. Prior clerkship experience and/or 2 to 3 years of post-graduate legal experience, academic standing in the top 20 percent and experience on law review and/or moot court is preferred.

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MCBA Announces Slate for 2020-21 Board of Directors

At the May, 2020 virtual General Membership Meeting, the MCBA announced its 2020-21 slate as follows:

MCBA 2020-21 SLATE:

PRESIDENT:	Charles Telfair, IV
PRESIDENT-ELECT:	Stephen Dye
SECRETARY:	Brian Iten
TREASURER:	David Wilcox
DIRECTORS:	Rebecca Proctor Mary Levine James Lynch Faith Brown Greg Hagopian Andre Perron
YLD PRESIDENT:	Alexandra Nicodemi
IMMEDIATE PAST-PRESIDENT:	Alexandra St. Paul

RSVP now to attend the virtual Annual Meeting on Wednesday, June 24, 2020 at MCBA@manateebar.com



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The firm's attorneys practicing in the area of Wills, Trusts and Estates are currently accepting referrals and new clients in the following areas:

- Estate planning
- Probate and trust administration and litigation
- Elective share and surviving spouse rights
- Homestead issues
- Probate and trust related appeals
- Elder Law
- Guardianship administration and litigation
- Public benefits and Medicaid planning
- Veteran's benefits



Jeffrey S. Goethe, Esq.

- Admitted to the Florida Bar in 1990
- Florida Bar Board-Certified in Wills, Trusts & Estates
- Fellow, American College of Trust and Estate Counsel
- AV-rated by Martindale-Hubbell
- Current chair of the Florida Probate Rules Committee
- The Florida Bar's RPPITL Section Executive Council; Homestead Committee Co-Chair; Bar Journal Committee Co-Chair; Wills, Trusts & Estates Certification Course Committee Chair; Probate Law and Procedure Committee Co-Vice Chair
- Past President of the Manatee County Bar Association



Lawrence W. Thomas, Esq.

- Admitted to the Florida Bar in 1985
- Past Director and Secretary of the Manatee County Bar Association
- Practice areas include wills, trusts, estates, and elder law



M. Brandon Robinson, Esq.

- Admitted to the Florida Bar in 2015
- United States Department of Veteran's Affairs Accredited Attorney
- Combat Veteran, United States Marine Corps
- Secretary and Director, Manatee County Bar Association Young Lawyer's Division
- Member, Florida Bar Military Affairs Committee
- Practice areas include wills, trusts, estates, guardianship, elder law, and veteran's benefits

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PUBLIC NOTICE
2020 VALUE ADJUSTMENT BOARD
APPLICANTS FOR SPECIAL MAGISTRATE

Opportunities now exist for appraisers and attorneys, who are licensed in the State of Florida and meet the following criteria to serve as Special Magistrate(S) to the 2020 Value Adjustment Board, pursuant to Florida Statute 194.035 and Chapter 12D, Florida Administrative Code, for the purpose of taking testimony and making recommendations with regard to:

1. The Special Magistrate must meet the following qualifications
 - a. A Special Magistrate must not be an elected or appointed official of the county.
 - b. A Special Magistrate must not be an elected or appointed official or employee of a taxing jurisdiction or of the State.
 - c. During a tax year in which a Special Magistrate serves, her or she must not represent any part before the board in any administrative review of property taxes.
 - d. All Special Magistrates must meet the qualifications specified in Section 194.035, F.S.
2. A Special Magistrate appointed to hear issues of exemption, classifications, and portability assessment difference transfers shall be a member of the Florida Bar, with no less than five years experience in the area of ad valorem taxation and having received training provided by the department, or with no less than three years of such experience and having completed training provided by the department.
3. A Special Magistrate appointed to hear issues regarding valuation of real estate shall be a state certified real estate appraiser with not less than five years experience in real property valuation and having received training provided by the department, or with no less than three years of such experience and having completed training provided by the department. A real property valuation Special Magistrate must be certified under *Chapter 475, Part II F.S.*
 - a. A Florida certified residential appraiser appointed by the Value Adjustment Board shall only hear petitions on the just valuation of residential real property of one to four residential units and shall not hear petitions on other types of real property.
 - b. A Florida certified general appraiser appointed by the Value Adjustment Board may hear petitions on the just valuation of any type of real property.
4. A Special Magistrate appointed to hear issues regarding valuation of tangible personal property shall be a designated member of a nationally recognized appraiser's organization with no less than five years experience in tangible personal property valuation and

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Website: www.MANATEEBAR.com

Mailing address: P.O. Box 796, Bradenton, FL 34206

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Graceann Frederico

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Copy deadline is the 1st of the month.

Payment is expected at time of publication.

Checks may be made payable to MCBA, P.O. Box 796, Bradenton, FL 34206.

Ad rates are as follows:

Business card	\$40.00
1/4 page	\$60.00
1/2 page	\$90.00
Full page	\$150.00
Ad Layout	\$25.00



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