20th Annual Labor Day Retreat

The Business Law Section of the Florida Bar

SEPTEMBER 4-7, 2015 · THE RITZ-CARLTON, NAPLES

this weekend

Chairs' Welcomes P.2
Retreat Schedule P.3
CLE Information P.4
Optional Activities/FAQs P.5
Sponsors P.6

How Do You Achieve Distinction in Florida's Dynamic Business Law Climate?

Stay on top of the latest legal developments. Learn to use the newest tricks of the trade. Get to know other leaders in your legal specialty. Build a network. The Florida Bar's **Business Law Section** can help you do all this and more. The first step was joining us this weekend at the beautiful Ritz-Carlton Naples... Now that you're here, get out there & *Show Your Stripes*!

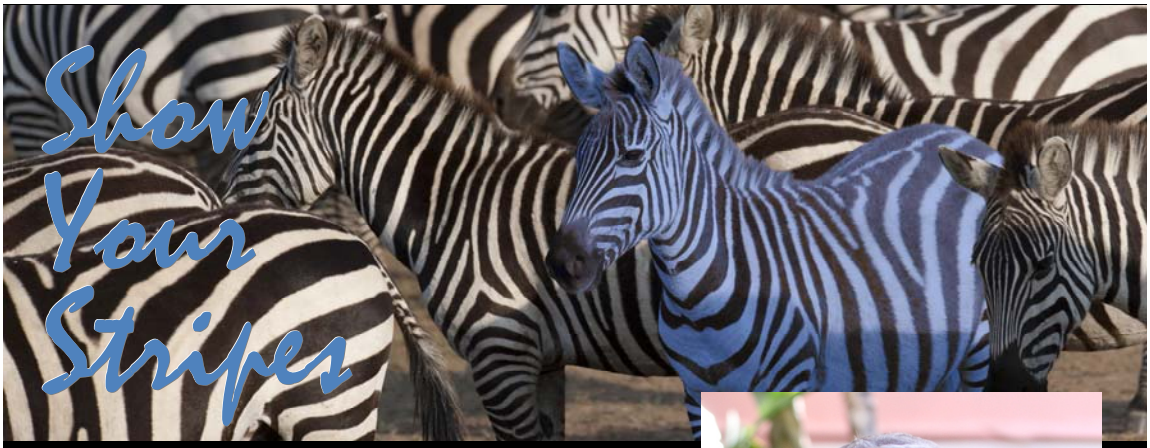
BUSINESS LAW SECTION
OF THE FLORIDA BAR

Download the App!

Make sure you're up-to-date on any last minute adjustments to the Retreat Schedule and get in touch with your fellow attendees via our mobile website, accessible straight from your smartphone or tablet. If you haven't downloaded the APP yet, look for it in the App Store under "FlaBizLaw Retreat." *<sponsored by Association Benefits International>*

Follow Us on Social Media!

Browse real time photo updates and happenings from the weekend — & post your own favorite photos — on our Twitter feed at @flabizlaw and our Facebook page (Business Law Section of the Florida Bar).



From the 2015-2016 Section Chair -
A Message from G. Alan Howard

Welcome to the Business Law Section's 20th Annual Labor Day Retreat! This is truly the Section's marquee event. It is a great opportunity for us to relax with family and friends, network with colleagues and judges, and do so in a beautiful beachside setting. I want to extend my personal thanks to Jodi Cooke and her amazing Retreat Committee. They have put in countless hours to make this Retreat a memorable and rewarding experience.

Please take advantage of the opportunities to participate in committee meetings, attend CLE programs and sit in on the annual Business Court Judges Roundtable. There are also recreational options ranging from golf to yoga to kayaking. We have brought back the popular wine tasting (this year featuring wines of the Napa Valley) and 5K Fun Run, each benefitting the Florida Bar Foundation. Our Saturday luncheon speaker is Steve Zuckerman, formerly of Berger Singerman, the author of "How to Make Your own Rain Power:" Dinner on Friday night is Safari-themed and Saturday night is the ever popular Family Dinner and Casino Night. I look forward to spending time with you and your family this weekend. Please enjoy the Retreat at the beautiful Ritz-Carlton Naples Beach Resort!

From the 2015 Retreat Chair - Welcome Back to The Ritz!

We are so excited that you've joined us for another amazing Labor Day Weekend at the beach! We hope you agree there's no better way to end a summer. If this is your first Retreat, make sure you join your fellow first-timers for the champagne toast during the First Retreat Meet-n-Greet on Saturday evening.

If you've attended the Retreat before, you'll notice that our schedule has moved around a bit compared to past years. This was a conscious effort by the Retreat Committee in response to feedback we'd received that the Retreat schedule had become so busy, there was no opportunity for free/family time. We decided to try front-loading the weekend with "business" stuff in order to give attendees all day Sunday to spend as they wish—in the pool, at the spa, or on the green. We hope you are able to take advantage of that opportunity, and we welcome your feedback for the future. Feel free to reach out to a committee member (listed above) and tell them what you think!

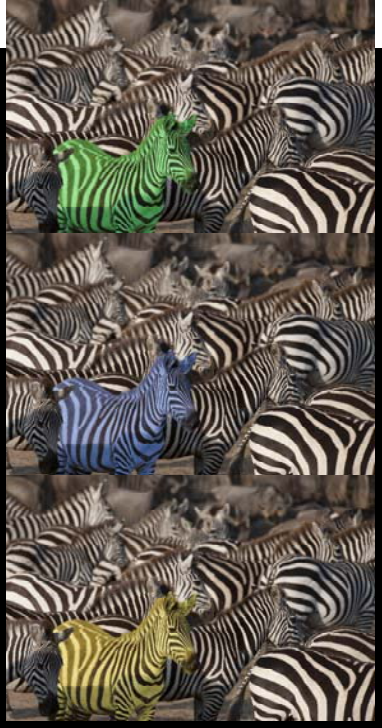
2015 Retreat Committee

Jodi Cooke
Chair

Lori Vaughan
Vice Chair

Jason Burnett
Michael Chesal
Michael Dal Lago
Alan Howard
Zachary Hyman
Paige Greenlee
David Jennis
Jennifer Morando
Mark Nichols
Jon Polenberg
Adina Pollan
Jeanne Seewald
Mark Stein
Dineen Wasylik
Bill van Nortwick

JoAnn Shearer
Program Administrator



Hotel Shuttle Information

If you are staying at the Ritz-Carlton Golf Resort, there is a complimentary shuttle running back and forth to the Ritz-Carlton Beach Resort from 7:00 a.m.—11:00 p.m. on Friday & Saturday and from 7:00 a.m.—10:00 p.m. on Sunday & Monday, leaving every hour from the front of each hotel. You will need your Resort card to board the shuttle.

Ritz Kids Information

The Ritz Kids Program on Friday and Sunday nights required pre-registration, but if you would like to utilize the program and did not make a reservation, you may inquire with the front desk re: remaining availability. The cost is $85 per child for children 5 & up and was not part of your Retreat registration fee. The additional cost will be billed directly to your hotel room.

RETREAT SCHEDULE

Friday, September 4

2:00 p.m.—6:00 p.m.
Chapter 607 Task Force (Plaza I)
Proceedings Supplementary Task Force (Port Royal)
Retreat Registration (Registration Foyer)

2:00 p.m.—4:00 p.m.
Communications/Social Media Committee (Plaza II)
Inclusion/Mentoring/Diversity Committee (Plaza III)

4:00 p.m.—6:00 p.m.
Bankruptcy Judicial Liaison Committee (Salon I & II)
Marketing Committee (Plaza II)
Pro Bono Committee (Plaza III)

6:30 p.m.—11:00 p.m.
Ritz Kids

6:30 p.m.—7:30 p.m.
Welcome Reception (Salon III & IV)

7:30 p.m.—10:00 p.m.
Summer Safari Dinner (Vanderbilt Ballroom)
Sponsored by Michael Moecker & Associates, Inc.

10:00 p.m.—12:00 a.m.
Adult Hospitality Suite (Vue)
Sponsored by Akerman

Saturday, September 5

7:00 a.m.—7:45 a.m.
3rd Annual 5k Fun Run/Walk
To benefit The Florida Bar Foundation
Sponsored by Akerman

8:00 a.m.—4:00 p.m.
Retreat Registration (Registration Foyer)

8:00 a.m.—10:00 a.m.
Breakfast Bar (Registration Foyer)

8:15 a.m.—9:15 a.m.
Computer Law & Technology Committee (Estuary)
Opinion Standards Committee (Port Royal)

9:15 a.m.—9:30 a.m.
Espresso Break (Registration Foyer)
Sponsored by Default Specialists, Inc.

9:30 a.m.—12:00 p.m.
Bankruptcy/UCC Committee (Salon III & IV)
Business Litigation Committee (Artisans)
Corporations/Securities Committee (Port Royal)
eDiscovery Committee (Aqua Lane)
Intellectual Property Committee (Estuary)

12:00 p.m.—1:00 p.m.
Networking Luncheon (Vanderbilt I)
How to Make Your Own Rain Power
Speaker: Steve Zuckerman
Sponsored by Thompson Reuters

1:15 p.m.—2:15 p.m.
Business Court Roundtable (Vanderbilt II & III)

2:30 p.m.—3:20 p.m.
CLE: The Latest Legal Developments

Understanding Money Laundering Risks & Enforcement Trends—What Your Clients Should Know (Salon I)
Presented by Navigant Consulting

CMBS 2.0/2.5/3.0: Rules, Requirements & Perspectives (Salon II)
Presented by Berger Singerman

3:30 p.m.—4:20 p.m.
CLE: The Tricks of the Trade

Everything You Don't Know About eDiscovery (Salon I)
Presented by U.S. Legal

Taking the Fifth: Client Advice & Advocacy When "Taking the Fifth" and Invoking the Privilege Against Self-Incrimination (Salon II)
Presented by Baker Donelson

4:30 p.m.—5:20 p.m.
CLE: The Climate of Law

Law Firm Financing (Salon I)
Presented by nPerspective

The Branding of the Legal Profession: Pitfalls & Challenges (Salon II)
Presented by Peretz Chesal Hermann

5:30 p.m.—6:00 p.m.
Legislation Committee (Salon I)
Membership Committee (Salon II)
First Retreat Meet-n-Greet (Plaza Ballroom)

6:30 p.m.—7:30 p.m.
Networking Reception (Salon III & IV)

7:30 p.m.—10:00 p.m.
Family Dinner & Casino Night (Vanderbilt Ballroom)
Casino sponsored by Gillis Way Duncan & Campbell
Raffle sponsored by Messana, P.A.

10:00 p.m.—12:00 a.m.
Adult Hospitality Suite (Vue)
Sponsored by Gray Robinson

Sunday, September 6

8:30 a.m.—11:00 a.m.
Family Breakfast Buffet (Salon III & IV)
Sponsored by Burr Forman

9:00 a.m.—12:00 p.m.
Annual Golf Tournament

10:00 a.m.—12:00 p.m.
Annual Kayak Adventure
Sponsored by Peretz Chesal Hermann

5:30 p.m.—6:30 p.m.
2nd Annual Wine Tasting Benefit (Port Royal)
To benefit The Florida Bar Foundation
Sponsored by The Gordian Group, Alan Howard, & Peter Valori

6:30 p.m.—11:00 p.m.
Ritz Kids

6:30 p.m.—7:30 p.m.
Networking Reception (Artisans)

7:30 p.m.—10:00 p.m.
Dinner on the Town

10:00 p.m.—12:00 a.m.
Adult Hospitality Suite (Vue)
Sponsored by Gray Robinson

Monday, September 7

8:00 a.m.—10:00 a.m.
Breakfast Bar (Salon I & II)

8:30 a.m.—11:30 a.m.
Executive Council (Salon I & II)

CLE Information

How To Make Your Own Rain Power (Course #1407734N, 1.0 General Credits)

Speaker: Steve Zuckerman

Come learn Steve's six-step plan, as articulated in his 2014 book *Rain Power*, for lawyers and other professional service providers to reach their professional and personal goals by becoming rainmakers. This innovative and pragmatic approach to attaining the wealth you desire and cultivating a deep feeling of happiness and satisfaction goes far beyond the number of zeroes in your bank account.

Understanding Money Laundering Risks & Enforcement Trends — What Your Clients Should Know (Course #1506339N, 1.0 General Credits)

Presented by Navigant Consulting

Speakers: Alma Angotti, Anita Cream, Stan Murphy (Moderator)

Anita Cream, Assistant United States Attorney and Chief of the Asset Recovery and Victims' Rights Division, and Alma Angotti, Managing Director of Navigant and former enforcement official for the SEC/FinCEN/FINRA, will participate in an interactive panel discussion moderated by Stan Murphy, Managing Director of Navigant, to discuss lessons learned from recent anti-money laundering enforcement actions, recent trends in suspicious activity, and what your client can do to demonstrate the "culture of compliance" necessary to stay out of trouble.

CMBS 2.0/2.5/3.0: Rules, Requirements & Perspectives (An Insider's View) (Course #1506337N, 1.0 General Credits)

Presented by Berger Singerman

Speaker: Shahram Siddiqui

The world of commercial mortgage backed securities (CMBS) has changed dramatically from what it was just a few years ago. In this session, participants will learn about what's changed, what's new and what matters in the CMBS universe from an insider who has been on all sides of these transactions. The program will address issues related to CMBS from both the litigation and corporate perspectives.

Everything You Don't Know About eDiscovery (Course #1506342N, 1.0 General Credits)

Presented by U.S. Legal

Speakers: Honorable Joseph P. Farina (Circuit Court Judge—Retired), Trenton L. Walton (CCE, ACE)

You guessed it—this presentation will cover everything you don't know about eDiscovery.

Taking the Fifth: Client Advice and Advocacy When "Taking the Fifth" and Invoking the Privilege Against Self-Incrimination (Course #1506336N, 1.0 General Credits)

Presented by Baker Donelson

Speaker: Marisa Rosen

"Taking the Fifth" in civil proceedings is often a double-edged sword; the privilege prevents an individual's compelled self-incrimination, but its consequences can severely undermine a civil litigant's case, as well as create ethical issues for the attorneys. This presentation aims to educate attorneys about the current state of the law regarding the privilege in Florida's state and federal courts and to discuss attorneys' professional and ethical obligations to their client, the opposing party, and the court when a witness is considering invoking or has invoked the privilege in a civil dispute.

Law Firm Financing (Course #1506340N, 1.0 General Credits)

Presented by nPerspective

Speaker: Gary Colbert

This presentation will examine topics in law firm financing, including start-up capital, operating cash flows, and debt.

The Branding of the Legal Profession: Pitfalls & Challenges (Course #1506341N, 1.0 General Credits)

Presented by Peretz Chesal Hermann

Speaker: Steven Peretz

With law firms now spending millions on branding and advertising, the converging trends of abbreviating firm names, geographic expansion, frequent name partner migrations, and the explosive use of domain names and adwords, have all led to an unprecedented level of litigation over law firm trademark rights. With an assist from "Better Call Saul," this presentation will address the following scenarios: What happens when a law firm abbreviates its full name to the first name? Can a famous law firm stop a company from using its name? What happens when the widow of a named partner objects to the firm's continued use of the partner's name? Are the sons of named partners able to start a new firm using the same names? Can a firm continue to used the name of a departing partner in its domain name? Can a law firm use the name of another law firm as a Google Adword? Some of the answers may prompt you to revisit your branding plans and partnership agreements...

Back by Popular Demand!

We are hosting a Business Court Judges' Roundtable again this year (immediately following the Member Luncheon on Saturday), and we are thrilled to welcome the Honorable Jennifer D. Bailey, Alice L. Blackwell, Patti E. Henning, Lisa T. Munyon, Meenu T. Sasser, Steven S. Stephens, and John W. Thornton, Jr., as our guests for the panel. Our own Rick Gross will moderate. Make sure you don't miss it!

(Course #1506338N, 1.0 General Credits)

FAQs

Frequently Asked Questions

1. *Why did the CLE and other scheduled activities move around this year?*

Over the last few years, we've periodically surveyed Section members and Retreat-goers about how we could make the Retreat experience better. A common complaint was that the schedule is so loaded every day of the Retreat, members rarely have any time to spend with their families or just relax. To remedy that issue, we tried to carve out Sunday for "down time" this year—no substantive commitments or CLE, just fun optional activities. We hope you'll let us know if you like it this way or not.

2. *Which events are for non-section member attendees (family members & guests)?*

All attendees are welcome to attend the evening cocktail receptions, the dinner events, the adult hospitality suites (but see below), and the Sunday family breakfast buffet. The Saturday & Monday morning continental breakfasts are for Section members and sponsors only, as is the Saturday member luncheon. Most optional activities are also open to all attendees (if age appropriate).

3. *What does "Adult" Hospitality Suite mean?*

Our networking time after dinner each night (in the Vue) is intended to be an adult venue. Due to the late hour and the atmosphere, we ask that you make alternate arrangements for all Retreat attendees and guests under the age of sixteen.

Optional Activities - what, when & where

These activities required pre-registration, but if you did not sign up prior to your arrival and would like to participate, you should check with the Retreat Registration desk for any remaining availability.

3rd Annual 5k & Fun Run: Get your motor running before the meetings Saturday morning at our annual 5k & fun run to benefit the Florida Bar Foundation's Children's Fund. We will gather outside the front entrance of the Beach Resort at 7:00 a.m. and informally make our way either 3.1 miles (for the serious runners) or 1 mile (for the leisurely walkers). Water will be provided. 100% of the $40 per-person fee will be donated to the Children's Fund. *<sponsored by Akerman>*

Annual Golf Tournament: This year's tournament will be held on Sunday morning, September 6th, at the Tiburon Golf Course. Located just three miles from The Ritz-Carlton Beach Resort, Tiburon offers championship golf in a lush, coastal setting that is also a Certified Audubon Cooperative Sanctuary. Tee times begin at 9:00 a.m. (check with Mark Nichols at mnichols@polenbergcooper.com for your assigned time). The tournament fee of $85 will automatically be assessed to your hotel room.

Annual Kayaking Excursion: Come enjoy a leisurely float through the local mangroves and saltmarshes, to the delicate areas where Naples' wildlife can thrive and flourish. We will launch from Naples Marina & Excursions (12345 North Tamiami Trail) at 10:00 a.m. on Sunday morning, September 6th. Plan to arrive a few minutes early to handle paperwork and be fitted with gear. The all-inclusive fee of $50 per person must be paid to the Florida Bar ahead of time. *<sponsored by Peretz Chesal Hermann>*

2nd Annual Wine Tasting Benefit: Back by popular demand, this year's wine tasting event has been expanded to allow for greater participation and support of the Florida Bar's Childrens' Fund. The tasting will be held on Sunday evening, September 6th, at 5:00 p.m. in the Port Royal room of the Beach Resort and will feature Napa Valley wines from the three sponsors' personal wine collections. 100% of the $40 per-person/$75 per couple fee will be donated to the Children's Fund. *<sponsored by Alan Howard, Peter Valori, and the Gordian Group>*

Spa: The Ritz-Carlton Spa, Naples, features rejuvenating and healing steam rooms, saunas, aqua lounges, and an outdoor mineral pool, as well as a host of therapeutic services. They have generously offered a 20% discount on all treatments for Retreat attendees. Reservations should be made through the Ritz-Carlton Spa directly.

The 20th Annual Labor Day Retreat Is Brought To You By:

2015-2016 Section Sponsors

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