

**AGENDA**  
**SOLO & SMALL FIRM SECTION**  
***Executive Council Meeting***  
**One Ocean Resort & Spa in Atlantic Beach**  
**Friday, August 30, 2024**  
**1:45 p.m. – 5:00 p.m.**  
**Solaria**

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- I. Welcome and Call to Order** – Renee Thompson, Chair
  - A. Attendance – Sign-in sheet
  - B. Excused Absences: Priscilla Warren and Paige Greenlee
- II. Robert’s Rules of Order Overview** – Nick Shannin, Parliamentarian (***Exhibit A***)
- III. Secretary’s Report** – Michelle Gilbert, Secretary
  - A. Consideration of Minutes of June 21, 2024 (***Exhibit B***)
- IV. Financial Report** – Stephanie Myron, Treasurer (***Exhibit C/D***)
- V. Chair Report** – Renee Thompson
  - A. New Committee
  - B. Executive Council (***Exhibit E***)
  - C. Committee Appointments
  - D. Upcoming Executive Council Meetings
  - E. LRP and Out of Country CLE
  - F. Council of Sections – Leadership Conference Wednesday, June 25, 2024, at 10:00 AM for SSFS Officers.
- VI. Board of Governors’ Report** – Jesse Butler

## VII. Committee Reports – As Needed

- A. CLE Committee – Amanda Barton, Chair
  - 1. Scheduled CLEs (**Exhibit F**)
  - 2. Annual Ethics & Professionalism Update Virtual (Oct. 25, 2024) – Bill Curphey, Co-Chair; Amanda Barton, Co-Chair
  - 3. Tech Update 2025 (March 7, 2025) – Camara Williams, Co-Chair; Michelle Adams Gumula, Co-Chair
  - 4. Tech Thursdays – Zack Zuroweste
  - 5. CLE Fiscal Subcommittee – Linda Calvert Hanson, Chair
- B. Agriculture Law Committee – Mike Olexa, Chair
- C. Publicity, Marketing, and Public Relations – Lisa Tipton, PR and Communications Consultant
- D. Publications Committee – Michelle Gilbert, Publications Chair; Alicia Perez, Communications Chair
  - 1. SOURCE
  - 2. Bar Journal
- E. Technology Committee – Liz McCausland
- F. Mentorship Committee – Zack Zuroweste, Chair; Masimba Mutamba – Co-Chair
- G. Sponsorship Committee – Rebekah Taylor, Chair; Starlett Massey, Co-Chair
- H. Membership Outreach & Expansion Committee – John Maceluch, Vice Chair
  - 1. Voluntary Bar Leaders Conference – Renee Thompson/Stephanie Cagnet Myron
- I. Affiliates Outreach Committee – Priscilla Warren, Chair (**Exhibit G**)
- J. Long Range Planning Committee – John Maceluch
- K. Recruitment & Retention Committee – Stephanie Myron, Chair

L. Pro Bono Awards Committee – Chrissy Davis, Chair

**VIII. New Business**

A. Reimbursement Policy (*Exhibit H*)

**IX. Old Business**

**X. Adjournment**

**Informational**

**Reception - 5:15 p.m. Verandina**

**Dinner – 7:00 p.m. North Beach Fish Camp (only for those who RSVP'd)**

**Executive Council Meeting**

October 4-5, 2024

The Riding Academy, Ocala

**Executive Council Meeting**

February 7-8, 2025

JW Marriot Bonnet Creek, Orlando

**Long Range Planning Meeting**

March 27-30, 2025

The Union Station

Nashville, TN

**Out of Country CLE Trip**

Canada

**Annual Meeting and Executive Council Meeting**  
June 27, 2025  
The Boca Raton

# ***EXHIBIT A***

## Robert's Rules of Order Newly Revised (RONR (12<sup>th</sup> ed.))

### Motion

- ☐ A member *makes* the motion – another member *seconds* the motion – chair states the question on the motion - RONR (12<sup>th</sup> ed.) 4:2
- ☐ “Neither the making nor the seconding of a motion places it before the assemble; only the chair can do that, by the third step (stating the question)” - RONR (12<sup>th</sup> ed.) 4:3
- ☐ “Under parliamentary procedure, strictly speaking, discussion of any subject is permitted only with reference to a pending motion”- RONR (12<sup>th</sup> ed.) 4:7<sup>1</sup>

### Amend

- ☐ Must be seconded - RONR (12<sup>th</sup> ed.) 12:7
- ☐ Is debatable whenever the motion to which it is applied is debatable - RONR (12<sup>th</sup> ed.) 12:7
- ☐ Is generally amendable – limited to two degrees (primary and secondary) - RONR (12<sup>th</sup> ed.) 12:7
- ☐ Requires a majority vote - RONR (12<sup>th</sup> ed.) 12:7
- ☐ Friendly Amendment – “Regardless of whether or not the maker of the motion “accepts” the amendment, it must be opened to debate and voted on formally (unless adopted by unanimous consent) - RONR (12<sup>th</sup> ed.) 12:91

### Debate

- ☐ Maker of the motion speaks first - RONR (12<sup>th</sup> ed.) 42:9
- ☐ No one is entitled to speak a second time in debate as long as a member who has not spoken on the motion desires the floor - RONR (12<sup>th</sup> ed.) 42:9
- ☐ Alternate the floor, as far as possible, between those favoring and those opposing the motion - RONR (12<sup>th</sup> ed.) 42:9

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<sup>1</sup> RONR (12<sup>th</sup> ed.) p. 34, ll. 23-35 – p. 35, ll. 1-2: “In large assemblies, this rule requires firm enforcement.” “The general rule against discussion without a motion is one of parliamentary procedure’s powerful tools for keeping business “on track,” and observance of its spirit can be an important factor in making even a very small meeting rapidly moving and interesting.” - RONR (12<sup>th</sup> ed.) 4:8

**Previous Question** (Call the Question is non-standard form) - RONR (12<sup>th</sup> ed.) 16:6

- Must be seconded - RONR (12<sup>th</sup> ed.) 16:5
- Is not debatable - RONR (12<sup>th</sup> ed.) 16:5
- Requires a two-thirds vote - RONR (12<sup>th</sup> ed.) 16:5
- Chair may ask if any objection to closing debate - RONR (12<sup>th</sup> ed.) 16:7
- Vote on the Previous Question is only a vote to close debate - not a vote on the motion being debated - RONR (12<sup>th</sup> ed.) 16:2

**Postpone to a Certain Time (or Definitely)**

- "[M]otion by which action on a pending question can be put off, within limits, to a definite session day, meeting, or hour, or until a certain event" - RONR (12<sup>th</sup> ed.) 14:1
- Must be seconded - RONR (12<sup>th</sup> ed.) 14:4
- "Is debatable; but debate is limited in that it must not go into the merits of the main question" - RONR (12<sup>th</sup> ed.) 14:4

**Lay on the Table**

- "[E]nables the assembly to lay the pending question aside temporarily when something else of immediate urgency has arisen or when something else needs to be addressed before consideration of the pending question is resumed" - RONR (12<sup>th</sup> ed.) 17:1<sup>2</sup>
- Must be seconded - RONR (12<sup>th</sup> ed.) 17:3
- Is **not** debatable - RONR (12<sup>th</sup> ed.) 17:3

**Voting**

- "[B]asic requirement for approval of an action or choice by deliberative assembly, except where a rule provides otherwise, is a majority vote" - RONR (12<sup>th</sup> ed.) 44:1
- Majority vote means more than half of the votes cast by persons entitled to vote, excluding blanks and abstentions - RONR (12<sup>th</sup> ed.) 44:1
- A two-thirds vote - at least two-thirds of the votes cast by members entitled to vote, excluding blanks and abstentions - RONR (12<sup>th</sup> ed.) 44:3
- Chair takes a rising vote for two-thirds vote - RONR (12<sup>th</sup> ed.) 44:5

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<sup>2</sup> "[C]ommonly misused in ordinary assemblies - in place of a motion to Postpone Indefinitely, a motion to Postpone to a Certain Time, or other motions. - RONR (12<sup>th</sup> ed.) 17:1 "It is not in order to move to lay a pending question on the table if there is evidently no other matter requiring immediate attention." - RONR (12<sup>th</sup> ed.) 17:14

# ***EXHIBIT B***



**MINUTES**  
**SOLO & SMALL FIRM SECTION**  
***Executive Council Meeting***  
**Hilton Bonnet Creek Resort in Orlando**  
**Friday, June 21, 2024**  
**Taylor**

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- I. **Welcome and Call to Order** – Renee Thompson, Chair
  - a. Attendance – Mike Olexa, Priscilla Harvey, Paige Greenlee, Sean Desmond, Zack Zuroweste, Masimba Mutamba, Linda Calvert Hanson, Nick Shannin, Michelle Gumala, Liz McCausland, Lisa Tipton, Jacina Parson, Camara Williams, Bill Curphey, Alicia Perez, Mindi Wells, G.C. Murray, Whitney Bledsoe, Starlett Massey  
Section members: Vanessa Vasquez, president from Miami SSFS; Mary Walter; Keiah Thompson, Assistant County Attorney, Pinellas; Brian Brijbag from Springhill; Jacqueline Ledona from Miami
  - b. Excused Absences: Amanda Barton
  
- II. **Secretary’s Report** – Michelle Gilbert
  - a. Consideration of Minutes of April 5, 2024 (***Exhibit A***) -  
Cristina Alonso moved to accept minutes, Zack Zuroweste seconded, and motion passed.
  
- III. **Financial Report** – Stephanie Myron (***Exhibit B***) read an overview of budget and revenue which is shy of budget. She thanked Michelle Gumula and Rebekah Taylor for sponsorships. She also advised that thanks to Linda Calvert Hanson, our CLE revenue is very good.

- IV. Chair Report** – Renee Thompson discussed options for long range planning in February, 2025, as pricing is a challenge. She attended the Council of Sections where the discussion about removing \$10 per member, then \$5 per member from the section revenue by the bar, or about \$17,000 was held. Discussion was held about mollifying the effect of this mandatory charge for 2024-25 by possibly having the bar cover all AV costs. There is another Council meeting in January, 2025 by which time we would like to have a proposal to address. Renee also discussed adding a line item to our budget to cover the expense of members attending the Voluntary Bar Convention, which Gabrielle Hermesman will handle.
- V. Board of Governors’ Report** – Liz McCausland shared that she attended a BOG meeting in Key West last year where they approved a budget. One suggestion was to raise bar dues, prorating section fees, and opting out of the Florida Bar Journal. She is waiting to hear if she will be reappointed.
- VI. Committee Reports**
- a. Long Range Planning Committee – John Maceluch has been working on Nashville with Savannah as a backup, depending upon affordability.
  - b. Membership Outreach & Expansion Committee – John Maceluch, Vice Chair has been working on this new position with Michelle Gumula, Mindi Wells, Starlett Massey, and Michelle Gilbert, all of whom volunteered.
  - c. Technology Committee – Liz McCausland attended the Presidential Showcase on AI. She wants to review AI vendors and products. Tech Tips have been helpful and they are starting Tech Thursday paid CLEs moderated by Zack

Zuroweste, with Liz McCausland and Sean Desmond assisting.

- d. CLE Committee – Amanda Barton, Chair was absent, and she is also serving on CLE Fiscal Committee. A substitute is needed for Nick Shannin for Wednesday Wisdom in July, 2024.
  - i. CLE Programing Consultant Contract previously approved through June 2024.
  - ii. Scheduled CLEs (**Exhibit C**) - Linda Calvert Hanson explained that we have open dates and going forward we will use webinar program chairs to select an idea, moderator and speaker. There is a deadline of July 31, 2024 to submit this CLE information the SOURCE digital publication. Starlett Massey, Stephanie Myron, Mindi Wells, Vanessa Vasquez volunteered to be on the committee.
  - iii. CLE Fiscal Subcommittee – Linda Calvert Hanson, Chair confirmed she will manage this new group.
    1. CLE Programs Guide Part 1 – updated 6/1/24 (**Exhibit D**)
  - iv. Annual Ethics Update Virtual (Oct. 25, 2024) – Bill Curphey, Co-Chair; Amanda Barton, Co-Chair- Bill Curphey confirmed that they are on track for this CLE.
  - v. Florida Law Update 2024 – Judge Jennifer Griffin, Chair stated that the CLE went well. Renee Thompson offered that we may reduce this to 5 hours.
  - vi. Tech Update 2025 – Camara Williams, Chair asked for volunteers and discussed possible changes in format. Liz McCausland suggested a format with 3 hours of general content and 2 hours with breakout content.
- e. Agriculture Law Committee – Mike Olexa, Chair confirmed there is a webinar on October 23, 2024 on Conservation

Easements: traps for the Unwary, and he thanked Jennifer Griffin and Linda Calvert Hansen for their assistance.

- f. Sponsorship Committee – Rebekah Taylor, Chair
- g. Publications Committee – Michelle Gilbert, Publications Chair; Alicia Perez, Communications Chair- Michelle Gilbert discussed rebranding as SOURCE and promoting our signature CLEs that occur 3 times a year. We also are looking for Journal articles. Alicia Perez was announced as the new communications chair.
  - i. LINK
  - ii. Bar Journal
- h. Publicity, Marketing, and Public Relations – Lisa Tipton, PR and Communications Consultant discussed increasing our ability to reach more people and ways to communicate, with a messaging app, like Signal.
- i. Mentorship Committee – Zack Zuroweste, Chair discussed soliciting government attorneys transitioning, and putting resources on our website. Masimba Mutamba is assisting.
- j. Recruitment & Retention Committee – Stephanie Myron, Chair asked that we all reach out and solicit members.
- k. Pro Bono Awards Committee – Chrissy Davis, Chair was absent.
- l. Affiliates Outreach Committee – Priscilla Warren, Chair had very little news to report other than the Paralegal Award.

## VII. New Business

- a. Voluntary Bar Conference will be attended by Renee Thompson, Stephanie Myron and Alicia Perez.
- b. PR Florida, Inc. Contract Renewal (**Exhibit E**) was included for approval in a motion by Zack Zuroweste, which was seconded by Jennifer Griffin and passed.

- c. Advancing Legal Education Contract Renewal (**Exhibit F**) was included for approval in a motion by Zack Zuroweste, which was seconded by Jennifer Griffin and passed.

## **VIII. Old Business**

- a. Program Administrator Ricky Libbert – Retirement Gift of \$5,000 was received.
- b. Destination CLE Trip Recap was given by Cristina Alonso.
- c. Trade Winds Contract Attrition Payment was discussed by Cristina Alonso who said that the Florida Bar agreed to pay the majority amount, a little over \$5,000. For future meeting, surveys will be sent out to gauge participation.

- IX. Adjournment** - Nick Shannin moved to adjourn, John Maceluch seconded, and the motion passed.

## **Informational**

### **Executive Council Meetings**

August 30-31, 2024

One Ocean Resort & Spa

Atlantic Beach

October 4-5, 2024 \*TENTATIVE\*

The Riding Academy

Ocala

February 2025

TBD

# ***EXHIBIT C***

**THE FLORIDA BAR**  
Solo Small Firm General Final Budget

	<b>Budget BY 24-25 TOTAL</b>
937-9370-00937-00000-3001 Annual Fees	86,490
937-9370-00937-00000-3002 Affiliate Fees	900
<b>Total Fee Revenue</b>	<b>87,390</b>
937-9370-23700-00000-3351 Sponsorship Rev	15,000
937-9370-23700-00000-3391 Section Profit Split	160,000
937-9370-23700-00000-3392 Section Differential	18,000
<b>Other Event Revenue</b>	<b>193,000</b>
937-9370-23700-00000-3899 Investment Alloc	14,484
<b>Non-Operating Income</b>	<b>14,484</b>
<b>Total Revenue</b>	<b>294,874</b>
937-9370-23700-00000-4134 Web Services	1,800
937-9370-23700-00000-4301 Photocopying	100
937-9370-23700-00000-4311 Office Supplies	100
<b>Total Staff &amp; Office Expense</b>	<b>2,000</b>
937-9370-00937-00000-5051 Credit Card Fees	1,900
937-9370-23700-00000-5051 Credit Card Fees	1,000
937-9370-23700-00000-5101 Consultants	59,000
<b>Total Contract Services</b>	<b>61,900</b>
937-9370-23700-00000-5501 Employee Travel	3,980
937-9370-23700-00000-5531 Brd/Off/Memb Travel	35,115
937-9370-23700-00000-5599 Other Travel	28,800
<b>Total Travel</b>	<b>67,895</b>
937-9370-23700-00000-6301 Mtgs TFB Ann Meeting	7,200
937-9370-23700-00000-6311 Mtgs General Meeting	27,000
937-9370-23700-00000-6399 Mtgs Other	8,600
937-9370-23700-00000-6451 Committee Expense	100
937-9370-23700-00000-7001 Grant/Award/Donation	9,700
937-9370-23700-00000-7999 Other Operating Exp	5,500
<b>Total Other Expense</b>	<b>58,100</b>
937-9370-00937-00000-8021 Section Admin	41,268
<b>Total Admin &amp; Internal Expense</b>	<b>41,268</b>

937-9370-23700-00000-9692 To/From Council	500
<b>Total InterFund Transfers Out</b>	<b>500</b>
<b>Total Expense</b>	<b>231,663</b>
<b>Net Income</b>	<b>63,211</b>



# ***EXHIBIT D***

**THE FLORIDA BAR**  
**Solo Small Firm Section Rollup**  
**For the Twelve Months Ending June 30, 2024**

	June	YTD 2024	YTD 23-24 Budget	YTD 2023
3001-Annual Fees	-	87,930	89,190	89,955
3002-Affiliate Fees	(45)	1,285	1,000	1,395
<b>Total Fee Revenue</b>	<b>(45)</b>	<b>89,215</b>	<b>90,190</b>	<b>91,350</b>
3301-Registration-Live	-	-	3,000	-
<b>Total Registration Revenue</b>	<b>-</b>	<b>-</b>	<b>3,000</b>	<b>-</b>
3351-Sponsorships	-	14,850	15,000	24,500
3391-CLE Profit Split	7,451	190,965	150,000	201,220
3392-Section Differential	1,390	22,713	18,000	25,900
<b>Other Event Revenue</b>	<b>8,841</b>	<b>228,528</b>	<b>183,000</b>	<b>251,620</b>
3699-Other Operating Revenue	-	36	-	10,620
3901-Eliminated InterFund Revenue	-	-	-	45
<b>Other Revenue Sources</b>	<b>-</b>	<b>36</b>	<b>-</b>	<b>10,665</b>
3899-Investment Allocation	2,461	59,602	24,612	48,355
<b>Non-Operating Income</b>	<b>2,461</b>	<b>59,602</b>	<b>24,612</b>	<b>48,355</b>
<b>Total Revenue</b>	<b>11,257</b>	<b>377,381</b>	<b>300,802</b>	<b>401,990</b>
4111-Rent Equipment	-	-	300	-
4134-Web Services	-	739	2,500	996
4301-Photocopying	-	-	100	-
4311-Office Supplies	-	55	100	-
<b>Total Staff &amp; Office Expense</b>	<b>-</b>	<b>794</b>	<b>3,000</b>	<b>996</b>
5051-Credit Card Fees	817	2,077	1,950	2,545
5101-Consultants	4,000	50,250	55,000	40,083
<b>Total Contract Services</b>	<b>4,817</b>	<b>52,327</b>	<b>56,950</b>	<b>42,628</b>
5501-Employee Travel	7,097	14,828	11,968	14,182
5531-Board/Off/Memb Travel	11,413	34,805	26,980	22,724
5571-Speaker Travel	-	195	7,150	5,439
5599-Other Travel	5,569	19,107	35,000	25,185
<b>Total Travel</b>	<b>24,079</b>	<b>68,935</b>	<b>81,098</b>	<b>67,530</b>
6001-Post 1st Class/Bulk	-	179	-	-
6301-Mtgs TFB Annual Meeting	-	-	7,200	3,202
6311-Mtgs General Meeting	-	21,292	27,000	20,327
6319-Mtgs Other Functions	-	-	500	-
6325-Mtgs Hospitality	-	-	1,800	-
6332-Mtgs Room Attrition	-	9,069	-	-
6399-Mtgs Other	-	7,297	23,500	7,276
6401-Speaker Expense	-	-	6,500	-
6451-Committee Expense	-	-	100	-
6599-Brd/Off Other	-	-	75	-
7001-Grant/Award/Donation	13,000	22,359	24,400	1,243

7999-Other Operating Exp	(1,126)	2,204	4,000	397
<b>Total Other Expense</b>	<b>11,874</b>	<b>62,400</b>	<b>95,075</b>	<b>32,444</b>
8021-Section Admin Fee	-	40,754	40,631	41,779
8101-Printing In-House	-	45	50	-
8171-Course Approval Fee	-	-	150	-
8901-Eliminated IntEnt Exp	(1,500)	1,500	-	1,500
<b>Total Admin &amp; Internal Expense</b>	<b>(1,500)</b>	<b>42,299</b>	<b>40,831</b>	<b>43,279</b>
9692-Transfer Out-Council of Sections	-	500	500	500
<b>Total InterFund Transfers Out</b>	<b>-</b>	<b>500</b>	<b>500</b>	<b>500</b>
<b>Total Expense</b>	<b>39,270</b>	<b>227,255</b>	<b>277,454</b>	<b>187,378</b>
<b>Net Operations</b>	<b>(28,013)</b>	<b>150,126</b>	<b>23,348</b>	<b>214,613</b>
2001-Fund Balance, Beginning	-	766,819		
<b>Fund Balance, Ending</b>	<b>-</b>	<b>916,946</b>		

# ***EXHIBIT E***

**SOLO & SMALL FIRM SECTION EXECUTIVE COUNCIL 2024-2025**

462578

Ms. Renée Elise Thompson, Chair (2025)  
Upchurch, Watson, White & Max  
Thompson Law Center PLLC  
7 E. Silver Springs Blvd., Ste. 500  
Ocala, FL 34470-6603  
Ofc. (352) 877-4767  
Cell: (352) 208-3896  
Email: [rthompson@uww-adr.com](mailto:rthompson@uww-adr.com)  
Practice: Mediation, Civil Litigation, and  
Animal Law

383465

Mr. John Joseph Maceluch, Jr., Chair-  
Elect (2025)  
Sunshine Legacy Law, PLLC  
P.O. Box 771  
Panama City, FL 32402-0771  
Ofc: (850) 312-5112  
Cell: (850) 510-0755  
Email: [john@sunshinelegacylaw.com](mailto:john@sunshinelegacylaw.com)  
Practice: Elder, Estate Planning,  
Probate and Trust Litigation  
Admitted in GA

88973

Ms. Stephanie Cagnet Myron, Treasurer  
(2025)  
Cagnet Myron Law, P.A.  
12300 South Shore Blvd., Ste. 202  
Wellington, FL 33414-6509  
Ofc: (561) 877-0230  
Cell: (561) 806-9322  
Email: [smyron@cagnetmyronlaw.com](mailto:smyron@cagnetmyronlaw.com)  
Practice: Victim's rights - Stalking,  
Cyberstalking, Cyberbullying, Revenge  
Porn, Domestic Violence, and Sexual  
Violence

549452

Ms. Michelle Garcia Gilbert, Secretary  
(2025)  
Gilbert Garcia Group, P.A.  
2313 W. Violet St.  
Tampa, FL 33603-1423  
Ofc: (813) 638-8920  
Cell: (813) 810-1414  
Email: [mgilbert@gilbertgrouplaw.com](mailto:mgilbert@gilbertgrouplaw.com)  
Practice: Business, Commercial Litigation,  
Corporate, Elder, Estate Planning,  
Guardianship, Probate and Trust Litigation,  
Real Estate/Land Development

327580

Ms. Cristina Alonso, Immediate Past Chair  
(2025)  
Alonso Appeals  
2020 Ponce De Leon Blvd., Ste. 1005B  
Coral Gables, FL 33134-4480  
Ofc: (954) 667-8675  
Cell: (305) 298-7663  
Email: [alonso@alonsoappeals.com](mailto:alonso@alonsoappeals.com)  
Practice: Civil Appeals and Appellate Trial  
support in state and federal courts

84058 Mr. Jesse R. Butler, Board Liaison  
(7/1/2025)

Dickinson & Gibbons, P.A.  
401 N. Cattlemen Rd., Ste. 300  
Sarasota, FL 34232-6438  
Ofc/Cell: (941) 366-4680  
Email: [jbutler@dglawyers.com](mailto:jbutler@dglawyers.com)  
Practice: Appellate Practice, Civil Litigation,  
Civil Trial, Commercial Litigation,  
Consumer, Contracts, Insurance, Legal  
Malpractice, Personal Injury, Product  
Liability, Professional Liability, Trial

551181

Ms. Priscilla A. Horn, Representative (2025)  
6570 51st Ave.  
Vero Beach, FL 32967-5315  
Ofc: (772) 562-4780  
Cell: (772) 643-0266  
Email: [pris2323@yahoo.com](mailto:pris2323@yahoo.com)  
Practice: Virtual Paralegal

83792

Ms. Amanda Lea Barton (2025)  
Exec Council Member  
LumaLex Law  
Davinci  
1680 Michigan Ave., Ste. 700  
Miami Beach, FL 33139-2551  
Ofc: (786) 526-1155  
Cell: (239) 280-7596  
Email: [abarton@lumalexlaw.com](mailto:abarton@lumalexlaw.com)  
Practice: Cannabis related

748412

Ms. Linda Susan Calvert-Hanson (2025)  
Exec Council Member / CLE Consultant  
21612 N.E. 46th Ave.  
Earleton, FL 32631-6827  
Cell: (904) 808-1040  
E-mail: [linda.calvert.hanson@gmail.com](mailto:linda.calvert.hanson@gmail.com)  
Happily Retired

386741

Mr. William Edward Curphey (2025)  
Exec Council Member  
Curphey & Dersch, P.A.  
816 137th St. N.E.  
Bradenton, FL 34212-2753  
Ofc: (866)842-1129  
Cell: (727) 599-4785  
Email: [billcurphey@gmail.com](mailto:billcurphey@gmail.com)  
Practice: Civil Litigation, Employment,  
Occupational Safety and Health, Real Estate

569372

Ms. Christine Riley Davis (2025)  
Exec Council Member  
Davis Appeals  
200 2nd Ave. S., Ste. 347  
Saint Petersburg, FL 33701-4313  
Ofc: (850) 739-0448  
Cell: (850) 524-3478  
Email: [cdavis@davisappeals.com](mailto:cdavis@davisappeals.com)  
Practice: Appellate and Trial Support in state  
and federal court

187877

Mr. Damon Christopher Glisson  
Chair Emeritus  
Law Office of Damon C. Glisson  
5908 Fortune Pl  
Apollo Beach, FL 33572-2643  
Ofc: (813) 645-6796  
Cell: (813) 245-3268  
Email: [damon@glisson1.com](mailto:damon@glisson1.com)  
Practice: Estate Planning, Probate and  
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Family

635928

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10500

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110015

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44638

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125822

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93922

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102772

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316751

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36327

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91930

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9570

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Practice: Appellate Practice,  
City/County/Local Government, Election,  
Campaign and Political, Litigation/Trial  
Advocacy/Advocacy, Mediation, Personal  
Injury

92090

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Trial

622931

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Practice: Workplace Law, Investigations,  
Training, Education, Mediation  
Ohio and Florida Bars

77133

Mr. Camara Azikiwe Williams (2025)  
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28707

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Guardianship, Litigation/Trial  
Advocacy/Advocacy, Probate and Trust  
Litigation, Securities, Wills, Trusts and  
Estates

#### **PROGRAM ADMINISTRATOR**

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# ***EXHIBIT F***



# Upcoming CLE

All one-credit CLEs are 12–1 PM. One-credit live Zoom webinars purchased through Florida Bar InReach are \$55 for Solo & Small Firm Section members and \$100 for non-section members. All registrants have 90-day, on-demand access. Wednesday Wisdom live Zoom webinars are free and are for section members only unless otherwise noted. Details and registration are available at [fsolosmallfirm.org/calendar](https://fsolosmallfirm.org/calendar). Interested in presenting a CLE program? Please email Solo & Small Firm Section CLE Committee Chair [Amanda Barton](#).

## September 2024

**12**— How to Conduct Virtual Court Proceedings Using Technology. InReach webinar by [Darren Stotts](#), PersanteZuroweste, Clearwater. Moderator: [Zack Zuroweste](#), Clearwater. First in the Section’s new “Tech Thursday” CLE Series. Course number 8639 is approved for 1 CLE, 1 Technology. [REGISTER](#)

**17**—Legal Nomads: Thriving by Leveraging Technology. InReach webinar by [Liz McCausland](#), Orlando. Moderator: [Chrissy Davis](#), Tallahassee. Course Number 8412 is approved for 1 CLE, 1 Technology. [REGISTER](#)

**25**—You Don’t Need to Be a Tax Lawyer to Understand These Tax Essentials. Free Wednesday Wisdom Zoom webinar for Solo & Small Firm Section members\* by [Justin J. Klatsky](#), Valrico Law Group. Moderator: [Jennifer Kuyrkendall Griffin](#), Suwannee County Judge. Course number 8416 is approved for 1 CLE, 1 Tax Law certification credit. \*Registration will be approved when section membership is confirmed. [REGISTER](#)

## October 2024

**15**—Ethical and Practical Realities of Guardianships. InReach webinar by [Michelle Garcia Gilbert](#), Gilbert Garcia Group, P.A., Tampa. Moderator: [Keiah Townsend](#), Clearwater. Course number 8606 is approved for 1 CLE, all of which may be applied toward Ethics. *Registration opens soon.*

**23**—Conservation Easements: Traps for the Unwary. Free Wednesday Zoom webinar for Solo & Small Firm Section members\* by [Katherine R. English](#), Pavese Law Firm, Fort Myers, Moderator: [Jennifer Kuyrkendall Griffin](#), Suwannee County Judge. Course number 8419 is approved for 1 CLE. \*Registration will be approved when section membership is confirmed. [REGISTER](#)

**25**—(8:30 AM–1 PM) Annual Ethics & Professionalism Update. InReach video webcast. Program Chairs: [Bill Curphey](#) and [Amanda Barton](#). Professionalism & Ethical Considerations for Attorneys, [Scott Westheimer](#), Sarasota; Ethical Perils of Communicating with Clients Using Text Messages, Professor [Peter A. Joy](#), St. Louis, MO.; Ethical Trust Accounting – From Deposits to Disbursements, [Debra J. Davis](#), Tampa; Professionalism and Ethical Issues When Practicing Virtually, Including in Transactions that Cross State Lines, Professor Emeritus of Law, [Tim Chinaris](#), Rockford, FL; AI & Ethics: 2 Years Later, [Jonathan Grabb](#), Tallahassee. Course Number 8443 is approved for 5 CLE, 2 of which may be applied toward Ethics; 1 Technology, 2 Professionalism. Solo & Small Firm Section members register for \$250; non-members \$295. *Registration opens soon.*

## November 2024

**14**—Everything You Need to Know About E-Filing and E-Filing Solutions. InReach webinar by [Kevin Johnson](#), Tampa, and [Liz McCausland](#), Orlando. Moderator: [Zack Zuroweste](#), Clearwater. Part of the Section’s new “Tech Thursday” CLE series. Course number 8646 is approved for 1 CLE, 1 Technology. *Registration opens soon.*

**19**—5 Top Tips on Using AI to Be a Better Lawyer. InReach webinar by [Vanessa Vasquez de Lara](#), Vasquez de Lara Law Group, Miami; and [Elina Magaly Santana](#), Santana Rodriguez Law, P.A., Coral Gables. Moderator: [Megan Murray](#), Tampa. Course Number 8634 is approved for 1 CLE, 1 Technology. *Registration opens soon.*

**20**—A Cautionary Tale for Lawyers: Recognizing and Climbing out of Addiction. Free Wednesday Zoom webinar for Solo & Small Firm Section members\* by [Scott W. Spradley](#), Flagler Beach. Moderator: [Jennifer Kuyrkendall Griffin](#), Suwannee County Judge, Course Number 8617 is approved for 1 CLE, 1 Substance Abuse.

## December 2024

**17**—Cybersecurity: Considerations and Best Practices When Hiring a Technology Company. InReach webinar by [Jason Alderman](#), Miami Shores. Moderator: [Cristina Alonso](#), Pembroke Pines. Course number 8642 is approved for 1 CLE, 1 Technology. *Registration opens soon.*

# ***EXHIBIT G***

**Affiliate Outreach Committee/Paralegal Liaison Report (for 08/30/24 EC meeting):**

SSF SECTION, AWARD NEWS: The Solo and Small Firm Section's annual Paralegal of the Year Award was presented on June 21, 2024, at The Florida Bar's Annual Convention in Orlando, to Rebecca J. Schriver, FRP, CP. Rebecca has been with the law firm of Foerster, Isaac & Yerkes, P.A., in Jacksonville for over 37 years. Congratulations, Rebecca!

Current PAF President Sherry Webber, ACP, FCP, FRP, recently announced in PAF's "In Brief" newsletter, that the PAF Executive Committee is in the process of searching for an Executive Director to handle the structuring of ongoing business operations and management of PAF's affairs. In light of this significant undertaking, the PAF Executive Committee has decided to suspend their Annual Fall Seminar for 2024 (usually held in October). Accordingly, the SSF Section's reciprocal annual seminar table exchange will NOT be requested at this time.

Also, the Northeast Florida Paralegal Chapter (NEFPA, Inc., which is NOT affiliated with PAF, Inc.), has announced the dissolution of their chapter due to decreased membership and revenue, and are referring their paralegal members to PAF's First Coast Chapter in Jacksonville.

Finally, information is always provided to our SSF members on any paralegal questions they may have, in my contribution to "The Paralegal Corner" column of each issue of The Link.

Respectfully submitted,

Priscilla Warren, CP/FRP

# ***EXHIBIT H***



# The Florida Bar Solo & Small Firm Section Reimbursement Form

Name: \_\_\_\_\_ Atty. # \_\_\_\_\_

Firm: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

In accordance with the policies outlined on the reverse of this form and the policies of the Solo and Small Firm Section, please reimburse the following:

**Travel Expenses – Any AMOUNT over \$24.00 requires a receipt.**

Executive Council Meeting Reimbursement - \$400  
Long Range Planning Reimbursement - \$1,250

Date of Travel: \_\_\_\_\_

Purpose of Travel: \_\_\_\_\_

Airfare (receipt or photocopy of ticket required) \$ \_\_\_\_\_

Mileage: \_\_\_\_\_ miles at .67 per mile \$ \_\_\_\_\_

Taxi: \$ \_\_\_\_\_

Rental Car: \_\_\_\_\_ days \$ \_\_\_\_\_

Meals: Up to \$60 per travel day/any amount over \$24.00 requires a receipt

<b>Record actual amount per meal:</b>	DAY 1	DAY 2	DAY 3	
Breakfast (example \$14 / day)	\$ _____	\$ _____	\$ _____	
Lunch (example \$16 / day)	\$ _____	\$ _____	\$ _____	
Dinner (example \$30 / day)	\$ _____	\$ _____	\$ _____	
<b>Total Meals</b>				\$ _____

Lodging (hotel receipt required (not credit card slip)  
— room and tax only) \$ \_\_\_\_\_

Other (please explain) \_\_\_\_\_ \$ \_\_\_\_\_

**Total Travel Expense** \$ \_\_\_\_\_

**TOTAL REIMBURSEMENT** \$ \_\_\_\_\_

<b>Meetings</b>	<b>Total Expenses</b>	<b>Carry-over</b>
August	_____	_____
October	_____	_____
February	_____	_____
Long Range Planning	_____	_____
June	_____	_____

\_\_\_\_ Make check payable to me.  
\_\_\_\_ Make check payable to my firm.

Officer's Approval:  
\_\_\_\_\_  
Stephanie Cagnet Myron

Return form to Treasurer:  
Stephanie Cagnet Myron  
Email: smyron@cagnetmyronlaw.com

Date \_\_\_\_\_

# STANDING BOARD POLICIES

## REGARDING SECTION DISBURSEMENT POLICIES

### 5.54 Section Disbursement Policies

- (a) **Disbursement Authorization.** Expenditures may be made only as authorized by the approved budget.
- (b) **General Purchasing and Contracting Policies.** All standing bar policies regarding purchasing, contracting, employment for personal services and documentation of expenditures must be observed. Policies are not reproduced here in detail. Bar staff will guide a section through compliance.

Purchase orders are required for all purchases of goods and services over an amount established by the executive director. Documentation of bids secured and evidence of receipt are required. Original invoices or receipts are required for payment of expenses except when the section member has made payment to the vendor. In those cases a copy of the invoice or bill is acceptable. Invoices or receipts are not required for normal miscellaneous office expenses such as copying, postage and telephone charges. Personal services may not be paid without a written contract approved by the executive director or designee.

- (c) **Disbursement Approval.** The officer designated by the section must approve in writing the payment of reimbursable expenses in excess of the amount approved by the section as part of the required disclosure outlined in standing board policy 5.54(c) for officer and member expense reimbursements. These requests and appropriate documentation must be sent to the designated officer for approval and then forwarded to the program administrator for payment.

The designated officer has the discretion to accept a signed, written statement of explanation from the reporting individual if the original invoices, receipts, or other documentation are not available. The requestor must state the nature and amount of the expenditures and that the documentation is not available.

The designated officer may not approve that officer's own reimbursement request and another section officer must approve the reimbursement request prior to payment.

- (d) **Entertainment Expenses.** Sections should not expend section funds for entertainment purposes. However, minor amounts may be expended for refreshments at functions that invite attendance of the general section membership. Fees collected specifically for entertainment purposes at a section function may be expended for those purposes.
- (e) **Section Reimbursement Policy.** Sections may separately budget a fixed amount to be paid annually to section officers for reimbursement of all expenses incurred as opposed to reimbursing expenses on an item-by-item basis. Except for the expense allowance provided for section officers, all reimbursement of expenses must be in accordance with, or be on a more restrictive basis as determined by individual sections, the following:

(1) *Telephone Charges.* All conference call charges must identify the parties called and the amount and purpose of the call. Telephone calls up to \$50.00 per month may be reimbursed without itemization. If charges exceed that amount, all charges must be identified by the following:

- (A) party called;
- (B) telephone number called; and
- (C) purpose of the call.

(2) *Copy Costs.* Office copy costs must not exceed 10¢ per copy and must be itemized by number of copies and purpose. "Miscellaneous" or "general" are appropriate descriptions for small numbers of copies.

(3) *Postage.* The reimbursee must itemize contents, recipients, and costs for large mailings. Mailings should be done by section staff at the bar headquarters when possible.

(4) *Printing.* All printing must be done at bar headquarters unless, for the benefit of the section and the bar, circumstances warrant otherwise.

(5) *Travel Expenses.* Travel expense reimbursement is essentially the same as for bar staff.

- (A) Air fare in all instances must be economy class.
- (B) The section establishes the mileage reimbursement rate up to the maximum the IRS allows without the reporting requirement.

(C) When taxis or other ground transportation are not practicable, a rental car may be used. Reasonable rental car rates will be reimbursed.

(D) The method of travel should be the most economical, considering both time and travel costs.

(E) Actual, reasonable meal expenses will be reimbursed on approval by an authorized section officer. An individual will not be reimbursed for a group meal function paid for by the section.

(F) Copies of receipts for lodging, meals, out-of-town travel expenses (such as airline tickets) and all other charges of \$25.00 or more (other than mileage) must be attached.

(G) When paying expenses (such as meals) for other individuals, the names of the other parties must be indicated and the relation to bar activity disclosed.

(H) CLE speaker expense in excess of bar CLE policy may be reimbursed. The reimbursement must be provided for in the section's annual budget as an "excess speaker expense."

(I) The travel expenses of the companion of a bar CLE speaker may be reimbursed in the same amounts and for the same items as otherwise allowed for the speaker. The reimbursement for a CLE speaker's companion must be provided for in the section's annual budget as an "excess speaker expense."

(6) *Time Limits for Reimbursement Requests.* Reimbursement requests must be submitted within 30 days of the end of the reporting quarter. Expense reports due for periods ending on June 30 must be filed by July 15. A section may hold expense reimbursements for the last quarter of the fiscal year until July 15. An officer designated by the section may approve reimbursements outside these limits if there are extenuating circumstances.

- (f) **Conflicting Policies.** Sections may establish policies specific to the individual section within the umbrella policies of the bar. The bar policy will override the section policy if there is a conflict between them.

\*@.56 per mile.

\*\*\$60 per day Bar member meal reimbursement.

\*\*\*Receipts required for all charges \$25 and over.