

**REGISTRATION FORM  
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**HYATT REGENCY ORLANDO  
JUNE 12-13, 2024**

## **WORKSHOP DESCRIPTIONS**

**Wednesday, June 12, 2024**

**10:30 AM - 11:45 AM      Workshops 1 & 2**



**Don't Kill Your Golden Goose: Lawsuit Protection & Tax Reduction Strategies for Community Owners, Larry Oxenham, American Society for Asset Protection**

Is your financial house in order? Discover the tools you can use to become invincible to lawsuits, save thousands in taxes, and achieve financial peace of mind. By the end of the presentation, you will know how to:

- Protect 100% of your assets from lawsuits. You will learn how to make yourself so unattractive to a plaintiff attorney that they will never pursue a lawsuit against you.
- Save thousands of dollars each year in taxes. You will learn five tax reduction strategies most people fail to utilize, which could save you more than \$10,000 each year in taxes.
- Avoid probate and eliminate all estate taxes. You will be taken through a checklist of items that are important to every estate and business succession plan. You will learn what you should be doing now to prepare for successful business and estate succession.



**Your Leads Your Way, Stephen Shultz, The Open Companies**

FMHA now offers access to an impressive pool of more than 500 leads each month. Stephen Shultz will guide you on the process of optimizing your lead selection to focus on those with the highest potential for conversion into successful sales.

Highlighting your profile to tailor leads matching your pricing criteria and other preferences. Seamlessly integrate with MailChimp and receive automatic recurring exports via email, customized to your liking.

**1:30 PM - 2:30 PM      Workshops 3 & 4**



**Don't Kill Your Golden Goose: Succession Strategies to Protect & Perpetuate Your Business, Larry Oxenham, American Society of Asset Protection**

Learn the strategies and tools the nation's top firms use to save their clients millions of dollars each year. From this lecture, you will learn:

- What exit strategy is right for you: transfer to family members, complete sale, partial sale, IPO, or management buyout?
- Succession strategies that protect your legacy, maximize your freedom, and increase your net worth.
- Legal tools that allow you to transfer the majority of ownership and still maintain 100% control.
- How your business succession strategies and estate plan work together.
- Steps to maximize the sale price of your business.

## **Don't Kill Your Golden Goose: Succession Strategies to Protect & Perpetuate Your Business, *continued...***

- Systems to ensure the continued success of your business through the next generation of owners and managers.
- How to properly structure your business to minimize taxes on sales or transfers. If not planned for, capital gains, estate, and gift tax consequences can cripple the ongoing success of your business.
- Common mistakes and missteps to avoid when selling or creating a succession plan



## **HOA's and You, Dr. Chrissy Jackson, ACM, PHC**

Is it a partnership or a tug of war? Is one or the other winning or do you work together for the betterment of the community and the residents? Who has the ultimate say-so in the relationship? Join Dr. Chrissy Jackson for answers to these questions and anything else you want to know about living/working with an HOA.

**3:30 pm - 5:00 pm      Workshop 5**



## **Mock Eviction Trial, Brian Chase, Atlas Law**

Attorneys and staff will be performing a mock eviction trial based on a resident's violation of the community's rules and regulations. The mock trial will simulate what happens in a rules-based eviction lawsuit. The moderators will stop the mock trial at various points to offer suggestions on how problems can be avoided by better preparation before the trial. The presentation will also include a review of the most common types of rule cases that a community owner might experience: (1) clutter/unkept homes; (2) unapproved occupants; and (3) behavioral issues. The presenters will attempt to provide relevant information in a real-world format to allow community owners to see what goes on at a rules-based eviction. Attendees will learn why better preparation almost always yields better results.

**Thursday, June 13, 2024**

**9:00 am - 9:30 am      State of the Industry**

**9:30 am - 12 noon      Workshop 6**



## **Ask the Attorneys, Zack Lee, Moderator, Lutz, Bobo & Telfair P.A.**

During this workshop, top-of-mind issues will be discussed including:

- All things "pass-on" under .031(5)(c) – a hot ever expanding topic for community owners
- Requirement of rent payment into court registry for cases that are NOT related to nonpayment (2nd DCA case re: rent deposits).
- Acceptance of rent during rules violation cases
- Political signage/flags in communities (it is an election year).
- Witness testimony is required for certain rules violation cases (bad behavior).
- Current issues regarding prospectus amendments and new filings with the DBPR
- ESA's and service animals and the legislation requirements for both under Florida law.
- Selective enforcement and waiver arguments for rules enforcement cases.
- A summary of amendments to Chapter 723
- Abandonment process (title transfer issues) for abandoned homes