

SEMINAR FOCUSES ON ENGAGING MINORITY LAWYERS IN ESTATE PLANNING WORK

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Organizers of a minority lawyers' seminar were worried that not enough has changed since "Introduction to Will and Trust Drafting" drew only a handful of participants when it debuted in 2007.

Considering that the January 2020 revival registered 140 — and more than a dozen lawyers were turned away at the door — the organizers are justifiably thrilled.

"We pushed it hard, I have to be honest with you," said 17th Circuit Judge Kenneth Gillespie, a prime organizer and Broward County's first black probate judge.

The seminar "How to Set up a Successful Estate Planning and Drafting Practice: 'Introduction to Wills and Trusts Drafting'" was created by former Real Property, Probate and Trust Law Section Chair Rohan Kelley, who saw a need to remedy what one minority practitioner calls a "startling" lack of diversity in the specialty.

Kelley, considered the dean of probate law in Florida, credits Judge Gillespie, one of the specialty's most ardent ambassadors, with the seminar's success.

When Kelley bumped into Judge Gillespie at a retirement party last year, he saw a perfect vehicle for producing a sequel. When he asked for Gillespie's help, Kelley said the judge sprang into action.

"The popular idioms, 'taking the bull by the horns' and 'taking the bit in his teeth' accurately describe Judge Gillespie's reaction," Kelley said.

"My job was to kind of breathe some life into this seminar," Gillespie said. "It was very easy for me to go out to all the minority bar associations; I know all of the presidents."

Joining Kelley and Judge Gillespie as seminar faculty were 17th Circuit Senior Judge Mark Speiser and 11th Circuit Judge Celeste Muir, both with extensive probate experience.



The judges were augmented by experienced practitioners, including Tae Kelley Bronner, Kelley's daughter, a fellow of the American College of Trust and Estate Counsel, and a former chair of The Florida Bar's Probate Rules Committee, among many others.

Duane L. Pinnock, Florida's only black attorney who is board-certified in wills, trusts, and estates, rounded out the practitioners. A former chair of the certification committee for his discipline, Pinnock is also a former chair of the Palm Beach County Bar Association's Estate and Probate Committee.

From 9 a.m. to 5 p.m. in a lecture hall at Nova Southeastern University's Shepard Broad College of Law, participants listened to presentations on everything from "internal office procedure for an estate planning practice" and "estate planning for homestead" to "understanding and using your form bank."

The seminar included live dramatizations of client interviews, and participants were invited to draft wills and estates based on the mock interviews — and submit them to Rohan Kelley for corrections and pointers.

The final chapter was devoted to a "judges' corner" where participants were given an opportunity to discuss what they learned with members of the judiciary who have decades of probate experience.

Judge Gillespie said one of the most enduring values of the seminar was that it was designed as a turn-key operation. Participants left the seminar with printed forms and thumb drives, everything they needed to return to their offices and begin expanding their practices.

“How do you really draft documents, and how do you get them signed, and how do you stay out of trouble, and what it means to have witnesses review the will,” Judge Gillespie said. “How it materializes in the real world. Those are what I call the defining moments in the program, how does this stuff work.”

Post-seminar surveys demonstrated that participants valued the experience, Judge Gillespie said.

“I will tell you that out of the 140 participants, we had about 104 that actually took surveys, and actually gave us feedback on the program, and out of a possible 5, we got a 4.5 overall.”

Pinnock said the experience underscores how seriously some leaders of the profession take their commitment to diversity.

“Anyone can say they are interested in diversity and want to [promote] inclusion,” Pinnock said. “But it takes individuals, particularly individuals in position of prominence and power, to make it a personal position that they are going to make it actually happen.”