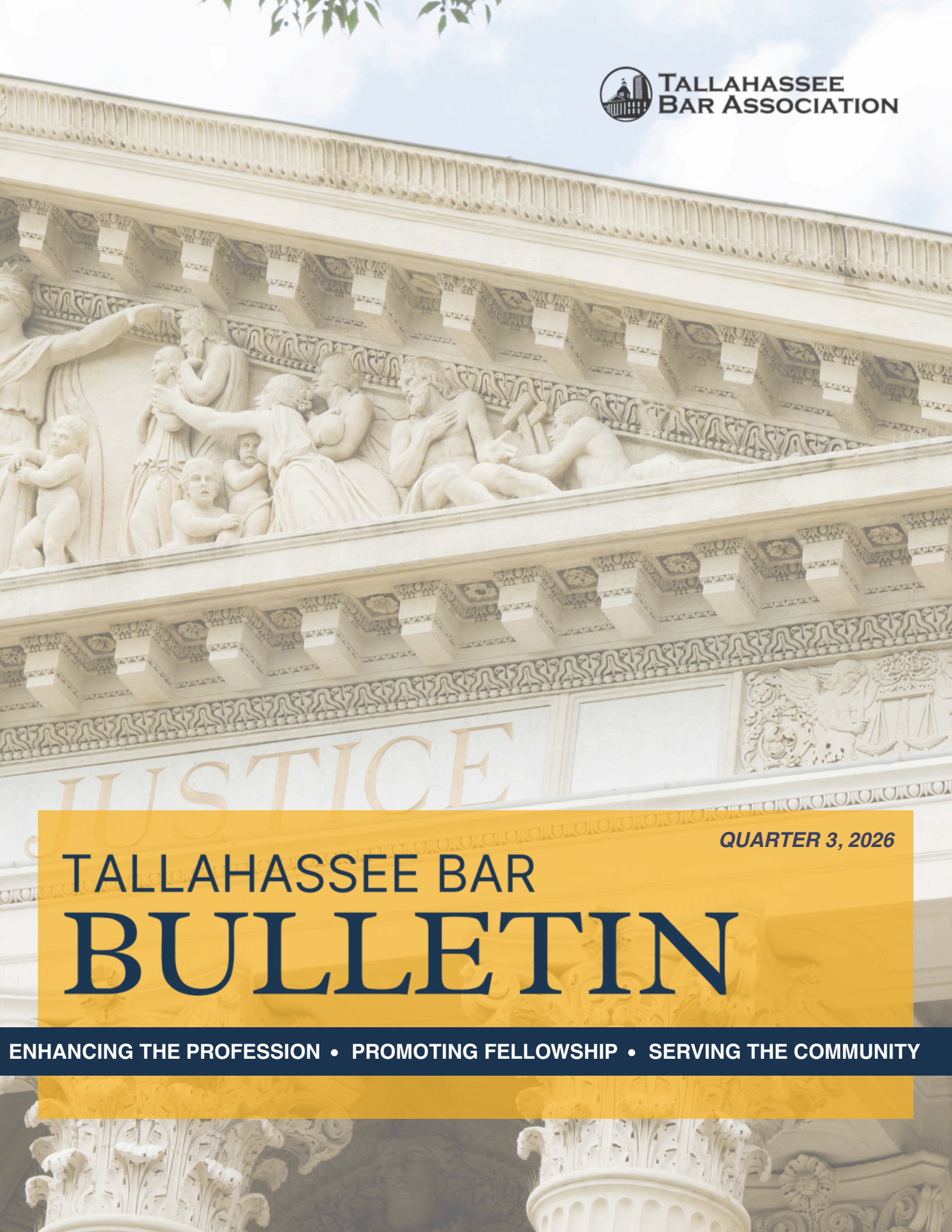




TALLAHASSEE
BAR ASSOCIATION



QUARTER 3, 2026

TALLAHASSEE BAR BULLETIN

ENHANCING THE PROFESSION • PROMOTING FELLOWSHIP • SERVING THE COMMUNITY

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PRESIDENT'S MESSAGE

One of the things I have appreciated most during my time as President of the Tallahassee Bar Association is the opportunity to see our legal community in so many different settings. Our work can be demanding, but the relationships we build with one another are what make this profession so rewarding.

Over the past few months, TBA has had the chance to connect with members and future members in a variety of ways. We gathered to learn from judicial candidates, welcomed FSU Law's newest students into our professional community, and enjoyed a thoughtful conversation about justice and the experiences that shape our understanding of it. We have also taken time to relax and enjoy each other's company. Each of these events serves a different purpose, but together they reflect what I hope TBA continues to be: an organization that supports our profession and brings people together in impactful ways.

We have several important TBA initiatives underway. Following our Judicial Candidate Forum, we are exploring opportunities to provide additional services and resources to the Low Bono Center, which will give our members an opportunity to expand access to legal assistance. I look forward to sharing more details as these efforts take shape.

The Nominating Committee has also begun its work for the coming year. Please mark your calendars for our Annual Meeting on November 10th, when the slate of TBA Officers and Directors will be announced. Voting will take place electronically following the meeting, so please watch for additional information and make sure you have an opportunity to participate.

Looking a little further ahead, 2027 membership renewals are just around the corner. Renewals must be completed by December 31st, and we will be sending reminders as the deadline approaches. Thank you in advance for continuing to support TBA through your membership. Our ability to offer programs, CLE opportunities, community initiatives, and professional resources depends on the participation of our members.

We also still have several opportunities to finish the year together, including our Chili Cookoff on October 7th, a CLE webinar with i2x Solutions on October 20th, our Annual Meeting on November 10th, and our Bench & Bar Holiday Party on December 16th. I hope you will make time to join us.

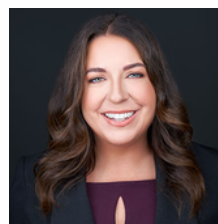
As my year as President begins to wind down, I am especially grateful for the many people who have made this year meaningful: our volunteers, speakers, sponsors, board members, and our members. TBA is only as strong as the people who choose to participate in it. Thank you for continuing to show up, support one another, and invest in the Tallahassee legal community.

I look forward to seeing many of you in the months ahead, and to all that we can accomplish together as we close out 2026. Thank you, as always, for allowing me to serve in this important role

With Gratitude,

Elizabeth Desloge Ellis

President, Tallahassee Bar Association





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Equity Compensation Is Not a Diversification Strategy: What Attorneys Need to Know

By Pooja Patel, Partner & Private Wealth Advisor, Southern Wealth



Attorneys working with executives, founders, and business owners are often present through major life, business, and estate planning decisions.

While financial advisors and CPAs typically guide investments and tax strategy, attorneys frequently have visibility into the legal and structural decisions that sit alongside those conversations. Together, those perspectives can surface risks that might otherwise go unaddressed, and one of the most common is a concentrated stock position that no one has fully examined.

When diversification is discussed, the conversation almost always centers on two statements: *“This stock is what made me wealthy”* and *“I do not want to pay taxes”*. Both are understandable. Neither should be the sole driver of a long-term wealth strategy.

Concentration Creates Wealth. Diversification Helps Preserve It

Many executives build significant wealth through concentrated ownership in a successful company. When a substantial portion of a family's net worth is tied to a single stock, they are exposed to company-specific risk. A downturn can affect employment, compensation, and investments simultaneously, and even exceptional companies experience volatility, leadership changes, and unexpected disruptions.

This becomes especially important as clients transition from accumulation to distribution. During retirement, a concentrated position can create additional pressure if shares must be sold during unfavorable market conditions to generate income. A diversified portfolio is better positioned to withstand changing market environments and support income needs over time.

Emotions Often Drive Concentrated Stock Decisions

Research shows that in concentrated stock situations, emotions run approximately eight times stronger than logic. That gap explains why so many clients lean into their loyalty for their company or feel attached to the investment that helped create their success.

The conversation should not be about abandoning a winning investment. Instead, it should focus on aligning the portfolio with long-term goals, risk tolerance, and future income needs. As clients move closer to retirement, protecting wealth often becomes just as important as creating it.

The Goal Is Maximizing After-Tax Wealth, Not Avoiding Taxes

Many clients delay diversification because of capital gains taxes. While tax efficiency matters, avoiding taxes should not become the investment strategy. The real objective is maximizing after-tax wealth while managing risk appropriately.

A thoughtful diversification plan may include gradual sales over time, tax-budgeted dispositions across multiple years, charitable gifting and donor-advised funds, trust and family gifting structures, and direct indexing with tax-loss harvesting. These strategic approaches can help manage tax liabilities while reducing concentrated risk and improving portfolio flexibility.

A Principle Worth Remembering

Wealth is often created through concentration. It is preserved through diversification.

For clients entering the distribution phase of life, diversification, proactive rebalancing, and tax-aware portfolio management can help protect against market volatility, improve flexibility, and support long-term financial goals.

Attorneys are often among the first professionals to recognize when concentrated equity has become a planning concern. By working collaboratively with financial advisors and CPAs, they can help clients move from wealth creation to wealth preservation, and ensure that a successful outcome today does not become an unnecessary risk tomorrow.

Southern Wealth, a longtime member and proud supporter of the **Tallahassee Bar Association**, has been named by Forbes as a **2026 Best-in-State Wealth Management Team**.

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Author Bio

Meet Pooja Patel, Partner and Private Wealth Advisor at Southern Wealth. A Florida State University graduate, Pooja has been with the firm for eight years and brings a focused, collaborative approach to comprehensive financial planning. She works closely with medical professionals, business owners, and senior-level executives, specializing in wealth accumulation, distribution, and tax mitigation strategies. Pooja and the Southern Wealth team work hand-in-hand with clients' CPAs and attorneys, making her a natural partner for members of the legal community looking for a financial advisor who understands the value of coordinated, multidisciplinary planning. Her approach is built around streamlining the full financial picture so that every professional on your team is working toward the same goals. Outside of the office, Pooja stays active through CrossFit, enjoys traveling, and values time with friends and family.



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What Are You Waiting For?

The Importance of Timing Discovery

By: Chris Korta, Harvest Discovery



Postponing the discovery phase of that new case that just came across your desk can significantly impact its outcome, and not in a good way.

Beginning discovery early is essential to preserving relevant electronically stored information (ESI) and meeting discovery obligations. Early identification of key custodians, data sources, and relevant systems helps prevent the loss of potentially important evidence and allows for the implementation of appropriate preservation measures before routine deletion or data changes occur. This is particularly true for mobile phone data, where user settings often determine how long information is retained before it is automatically deleted. That text message that is critical to your case may be gone a week later if preservation efforts are not taken early.

Starting discovery early also provides a clearer understanding of the scope of the case, enabling the development of realistic discovery plans that are designed to avoid unnecessary disputes over preservation or production.

Early and well-formed discovery strategies improve efficiency and help control costs throughout litigation. By conducting an early case assessment, you can identify the most relevant information, eliminate duplicative or irrelevant data before review, and focus resources on the evidence that matters most.

An early and targeted discovery phase shortens review timelines, supports more informed litigation and settlement decisions, and helps ensure that discovery is conducted in a defensible and proportionate manner

Author Bio

Chris Korta is a certified eDiscovery specialist through ACEDS (Association of Certified eDiscovery Specialists) and is responsible for the strategic operations of Harvest Discovery and the case management of its clients. Chris is a 30-year veteran of the custom software development industry and has served the past 7 years as the Executive Vice President at Kikoda: a Tallahassee-based firm specializing in custom software development, data analytics, and cloud programming/management.



&



HAPPY HOUR



THANK YOU TO EVERYONE WHO JOINED US AND THE YOUNG LAWYERS SECTION FOR A FUN EVENING AT LAKE TRIBE BREWING COMPANY! WE LOVED SEEING SO MANY TBA MEMBERS AND MEMBERS OF YLS COME TOGETHER TO UNWIND, NETWORK, AND ENJOY SOME GREAT COMPANY.

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BENEFIT

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ELIGIBILITY

Eligible applicants include attorneys working in public service or the nonprofit sector who are newly licensed, newly relocated to Tallahassee, or new to the Tallahassee Bar Association.

PURPOSE

Early-career and public service attorneys often face significant financial obligations, including student loan repayment and mandatory bar expenses. The TBA believes that cost should not be a barrier to building professional relationships, accessing CLE opportunities, or engaging in the local legal community.

APPLICATION PROCESS

Interested attorneys should submit a resume and a brief cover letter expressing interest in TBA membership and confirming employment in the public or nonprofit sector.

Applications are currently open and approved on a rolling basis

To apply, please email your resume and cover letter to
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CLE LUNCHEON **PERCEPTIONS OF JUSTICE**

Law, Literature and Film

By: Terry Lewis

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THANK YOU TO EVERYONE WHO JOINED THE TALLAHASSEE BAR ASSOCIATION FOR OUR SPECIAL CLE ON JULY 22ND, FEATURING TERRY LEWIS, FORMER JUDGE AND AUTHOR OF PERCEPTIONS OF JUSTICE, AT THE FSU COLLEGE OF LAW.

WE ENJOYED AN ENGAGING DISCUSSION AS JUDGE LEWIS SHARED INSIGHTS FROM HIS NEW BOOK AND EXPLORED THE MANY WAYS PERCEPTIONS OF JUSTICE SHAPE OUR LEGAL SYSTEM, OUR COMMUNITIES, AND THE PEOPLE WHO INTERACT WITH THEM.

WE APPRECIATE EVERYONE WHO TOOK THE TIME TO ATTEND AND PARTICIPATE IN THIS THOUGHTFUL CONVERSATION, AND WE EXTEND A SPECIAL THANK YOU TO JUDGE TERRY LEWIS FOR SHARING HIS TIME AND EXPERTISE WITH THE TBA COMMUNITY. WE LOOK FORWARD TO SEEING EVERYONE AT OUR UPCOMING EVENTS!

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I have served as president of the Tallahassee Bar Association (2005) and was the founding President of the Capital City Justice Association (2010). Accolades include the Southern Trial Lawyer's Warhorse Award (2025).

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MEMBERS OF THE LEGAL COMMUNITY TO
LEARN MORE ABOUT THE CANDIDATES AND THE
UPCOMING JUDICIAL ELECTIONS.**

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By: For The Record

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Tallahassee Bar Q3 Event Recap!

By: **Louise St. Laurent**, Stearns Weaver Miller



The Tallahassee Bar Association has had a busy few months bringing our legal community together for professional development,

thoughtful conversation, and a little fun.

This quarter, TBA hosted a Judicial Candidate Forum on July 22, providing members an opportunity to hear directly from candidates seeking to serve our community on the bench. On August 19, we hosted Grounds for Greatness with FSU Law School's 1L students, followed by our August 26 CLE luncheon, Perspectives of Justice with Terry Lewis, featuring insights and reflections from his latest book. We rounded out the quarter on September 10 with a happy hour at Lake Tribe Brewing, hosted with the Young Lawyers Section.

Mark your calendars for several great events still to come in 2026:

- October 7 – TBA Chili Cook Off
- October 20 – CLE Webinar with i2x Solutions
- November 10 – TBA Annual Meeting
- December 16 – Bench and Bar Holiday Party

We are grateful to everyone who has attended, participated in, sponsored, or helped organize our events this year. These gatherings are an important part of what makes Tallahassee's legal community so special, and we hope to see you at of our upcoming events as we close out another great year for TBA.

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*REMINDER: EVERYTHING IS STILL SUBJECT TO CHANGE

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JAN. 18TH

FEBRUARY



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RECEPTION**
FEB. 11TH
5:00 - 8:00 PM
DUNLAP CHAMPIONS CLUB

MARCH



CLE I MARKEL CASE
MAR. 3RD
11:30 - 1:00 PM
CAPITAL CITY COUNTRY CLUB



HAPPY HOUR
MAR. 18TH
5:00 - 7:00 PM
DEEP BREWING COMPANY

APRIL



**TABLE FOR 8
WITH BRIDGE TO LAW
SCHOOL**
APR. 18TH
5:30 - 8:00 PM
BETH MOOR LOUNGE IN
LONGMIRE AT FLORIDA
STATE UNIVERSITY

MAY



LAW DAY
MAY 5TH
5:30PM
A.C. MARRIOTT

JUNE



HAPPY HOUR
JUN. 4TH
PICKLE PAD

JULY



CANDIDATE FORUM
JUL. 22ND
5:30 - 7:30 PM

AUGUST



CLE LUNCHEON
AUG. 26TH
11:30 - 1:00 PM



GROUNDS FOR GREATNESS
AUG. 19TH
9:00 - 11:00 AM

SEPTEMBER



**HAPPY HOUR WITH
YOUNG LAWYERS SECTION**
SEP. 10TH

OCTOBER



**CHILI COOKOFF
BENEFITING LEGAL AID
FOUNDATION**
OCT. 7TH
5:30 - 8:30 PM



CYBER SECURITY WEBINAR
OCT. 20TH
12:00 - 1:00 PM

NOVEMBER



**TBA ANNUAL MEETING
AND LUNCHEON**
NOV. 10TH

DECEMBER



**ANNUAL BENCH & BAR
HOLIDAY PARTY**
DEC. 16TH

TALLAHASSEE BAR BULLETIN

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