

J. RICHARD CASKEY

J. Richard Caskey, PA
305 S. Magnolia Ave.
Tampa, FL 33606
Phone (813) 443-5709
Fax (813) 489-5727
jrc@caskeylaw.com

PRACTICE:

Litigation, mediation, and appeals of estate and trust disputes, including: probate litigation; trust litigation; real estate litigation; will and trust contests; lost or destroyed wills; fiduciary accountings; disputed investment of estate and trust assets; removal of trustees; trustee malfeasance; homestead disputes; will and trust modification; will and trust reformation; pursuit and defense of creditors' claims; life insurance disputes; guardianship disputes; fiduciary fee disputes; attorney fee disputes; and general fiduciary liability. Probate administration. Trust administration. Mediation.

Admitted to The Florida Bar and all Florida State Courts

Admitted to United States District Court, Middle District of Florida

Florida Supreme Court Certified Circuit Mediator

PROFESSIONAL EXPERIENCE:

| | |
|-----------|----------------------------------|
| Present | J. Richard Caskey, PA, Tampa, FL |
| 2003 - 08 | Steven L. Hearn, PA, Tampa, FL |
| 2001 - 03 | Akerman Senterfitt, Tampa, FL |

EDUCATION:

2001 Juris Doctor (J.D.), *With Honors*, University of Florida College of Law
- *Book Award* in Mediation Clinic
- *Book Award* in Trial Practice
- *Book Award* in Income Taxation

2000 Master of Business Administration (M.B.A.), University of Florida
- Dual concentrations in Finance and Management
- Poe Ethics Fellowship

1997 Bachelor of Science (B.S.) in Accounting, University of Florida

BAR ASSOCIATION ACTIVITIES:

The Florida Bar Real Property, Probate & Trust Law (RPPTL) Section

- Probate and Trust Litigation Committee (2005 – Present)
 - Co-Vice Chair (2011 – Present)

- Probate Law and Procedure Committee (2005 – Present)
 - Liaison to The Florida Bar Probate Rules Committee (2009 – 2011)

- Executive Council (2007 - Present)

- Professionalism and Ethics Committee (2012 – Present)

- Editor-in-Chief; *ActionLine* magazine (2008 – 2012) (Substantive legal publication for the RPPTL Section with quarterly circulation of approximately 10,000)

The Florida Bar

- Probate Rules Committee (2009 – Present)
 - Vice-Chair (2011 – 2012)
 - Liaison to RPPTL Probate Law and Procedure Committee (2009 – 2011)

- Rules of Judicial Administration Committee
 - Liaison Sub-Committee, Vice-Chair (2012 – Present)
 - Liaison to Probate Rules Committee (2011 – Present)

Hillsborough County Bar Association (HCBA)

- Chairman; HCBA Leadership Institute (2008-09)

- Chairman; Real Property, Probate & Trust Law Section (2005-07)

AWARDS AND RECOGNITION:

Selected as one of only four lawyers in the state of Florida for the 2009 *Florida Super Lawyers* inaugural "Rising Stars" list in the area of Estate and Trust Litigation; selected again for that list in 2010, 2011 and 2012.

Selected by *Florida Trend* magazine as a member of the "Florida Legal Elite/Up & Comer" list in 2011 and 2012.

Awarded the James M. "Red" McEwen Memorial Award in 2008 for outstanding service to the Hillsborough County Bar Association.

Rated *AV Preeminent*, Martindale-Hubbell.

COMMUNITY INVOLVEMENT:

Board of Directors; MacDonald Training Center, Inc. (2007 – Present)
(Organization dedicated to empowering people with disabilities to lead the lives they choose)

Volunteer T-Ball Coach; Bayshore Little League (2010 - 2012)

Volunteer County Court Mediator (2001-03)

Alachua County Restorative Juvenile Justice Program Mediator (2001)

ARTICLES AND PUBLICATIONS:

Florida Guardianship Practice, Chapter 6, “Use of Joint Assets” (Fla. Bar CLE 7th ed. 2011)

“Alleging Undue Influence: Maybe You Don’t Have to Be So Presumptuous”
- The Florida Bar RPPTL *ActionLine* magazine, Spring 2010

“Homestead and Pay-on-Death Accounts: Two Completely Unrelated Cases of Interest”
- The Florida Bar RPPTL *ActionLine* magazine, Spring 2009

“Protecting the Homestead; Protecting the Public: Waiver of homestead exemption from forced sale is unenforceable.”
- HCBA *Lawyer* magazine, May 2008

“Second District Court of Appeal Upholds Constitutionality of Elective Share”
- The Florida Bar RPPTL *ActionLine* magazine, Spring 2008

“In Search of the Laughing Heir”
- HCBA *Lawyer* magazine, June 2007

“Looking for the Laughing Heir: Potential Expansion of Intestate Succession Laws”
- The Florida Bar RPPTL *ActionLine* magazine, Summer 2007

“Changes in the Law Regarding Revocable Trusts”
- HCBA *Lawyer* magazine, October 2006

“Homestead and Amendment 10: Don't Let the ‘Cap’ Out of the Bag”
- HCBA *Lawyer* magazine, April 2006

“Equitable Adoption: Setting Things Right”
- HCBA *Lawyer* magazine, November 2005

“Reformation of an Unambiguous Trust Instrument”
- HCBA *Lawyer* magazine, September 2005

SPEAKING ENGAGEMENTS AND SEMINAR PRESENTATIONS:

“Homestead Law Update”

Hillsborough County Bar Association Real Property, Probate & Trust Law Section
Featured Speaker, Tampa, FL, November 8, 2012

“Marital Agreements: Inheritance and Other Rights of a Surviving Spouse”

Collaborative Divorce Institute of Tampa Bay
Featured Speaker, Tampa, FL, June 13, 2012

“Professional Practice and Conflicts in Estate Planning”

Venice Estate Planning Council
Featured Speaker, Venice, FL, May 14, 2012

“I’m No Carpenter - Litigating Undue Influence Without the Presumption”

Litigation and Trust Law Symposium 2012
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Ft. Lauderdale, FL, May 10, 2012
Tampa, FL, May 11, 2012

“Adversary Proceedings in Probate”

The Florida Bar Elder Law Section, Probate Committee
Featured Speaker, May 8, 2012

“Probate Law 2012”

The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Program Chair, Ft. Lauderdale, FL, March 22, 2012

“Nuts and Bolts of Probate, Trust, and Guardianship Practice”

15th Annual Bench/Bar Conference
Hillsborough County Bar Association
Speaker, Tampa, FL, November 17, 2011

“Rules of Judicial Administration Update”

Plant City Bar Association; Continuing Legal Education
Featured Speaker, Plant City, FL, April 8, 2011

“Use of Rules of Civil Procedure in Probate”

Rules, Deadlines, and Essential Issues and Developments in Probate Practice
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Program Chair and Speaker
Tampa, FL, March 17, 2011
Ft. Lauderdale, FL, March 18, 2011

“Alleging Undue Influence: Maybe You Don’t Have to Be So Presumptuous”
Hillsborough County Bar Association Real Property, Probate & Trust Law Section
Featured Speaker, Tampa, FL, March 10, 2011

“Alleging Undue Influence”
Sarasota Bar Association; Continuing Legal Education
Featured Speaker, Sarasota, FL, January 26, 2011

“Issues of Judicial Concern in Probate, Trust, and Guardianship Proceedings”
14th Annual Bench/Bar Conference
Hillsborough County Bar Association
Moderator, Tampa, FL, November 16, 2010

“It’s My Indispensable Party and I’ll Die If I Want To: Jurisdiction, Notice, and Interested Parties Under the Probate Code”
When Good Estates Go Bad: Dealing with Unexpected Issues in Probate
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Tampa, FL, March 25, 2010
Ft. Lauderdale, FL, March 26, 2010

“Redistributing the Wealth: Obtaining Attorneys’ Fees in Estate and Trust Matters”
Trust and Estate Stimulus Package: Shovel-Ready Issues for Planners and Litigators
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Ft. Lauderdale, FL, February 10, 2010
Tampa, FL, February 11, 2010

“Hip-Hopping on Adoption and Paternity Issues”
So You Think You Can Dance...But Can You Do the Probate Shuffle?
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Ft. Lauderdale, FL, March 19, 2009
Tampa, FL, March 20, 2009

“The Least Restrictive Alternative”
The Guardianship Team
Florida Legal Education Association (FLEA); Continuing Legal Education
Tampa, FL February 20-21, 2009

“Avoiding Legal Arthritis: Treatment of ‘Joint’ Issues”
2009 Estate and Trust Symposium:
The Best Laid Plans ... A Showdown Between the Drafters and the Litigators
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Co-Speaker, Tampa, FL, February 12, 2009
Speaker, Ft. Lauderdale, FL, February 13, 2009

“Conflicts of Interests in Estate and Trust Matters”

St. Petersburg Bar Association; Continuing Legal Education
Featured Speaker, St. Petersburg FL, November 20, 2008

“The Prudent Practitioner: Avoiding Conflicts of Interests in Estate and Trust Matters”

Clearwater Bar Association; Luncheon CLE Series
Featured Speaker, Clearwater, FL, October 16, 2008

“Various Conflicts of Interests that Might Arise in Estate and Trust Matters”

Estate, Trust and Tax Issues at Their Best!
Hillsborough County Bar Association; Continuing Legal Education
Tampa, FL, October 14, 2008

“Rules of Professional Conduct and Conflicts of Interests”

Hillsborough County Bar Association Real Property, Probate & Trust Law Section
Featured Speaker, Tampa, FL, March 13, 2008

“Who’s in Charge?: Liability Issues and Concerns for Directed Trustees”

Your 2008 Estate and Trust Symposium: Litigating Under the New Florida Trust Code
The Florida Bar Real Property, Probate & Trust Law Section; Continuing Legal Education
Ft. Lauderdale, FL, February 7, 2008
Tampa, FL, February 8, 2008

“The Creative Undue Influencer: Challenging Marriage in Probate”

Hillsborough County Bar Association Real Property, Probate & Trust Law Section
Featured Speaker, Tampa, FL, September 13, 2007

Law Student Forum

The Florida Bar Real Property, Probate & Trust Law Section
Panel Member, Gulfport, FL 2004
Panel Member, Gainesville, FL 2002

Law School Symposium

Phi Alpha Delta
Keynote Speaker, Gainesville, FL 1999; 2000; 2001; 2002