

AYESHA SOLOMON

ALACHUA COUNTY

PROPERTY APPRAISER

KNOWLEDGEABLE - COMMUNITY FOCUSED - COMMITTED





Probate & Estate Planning *Summit*

- The Alachua County Property Appraiser's Office hosted its first Probate and Estate Planning Summit in February 2022.
- Between 2022 and 2026, **nine** summits were held to reach communities most affected by heirs' property and properties with a single remaining owner.
- Specifically, "**single remaining owner**" in this case refers to parcels where a co-owner is deceased and there is no estate planning on record.





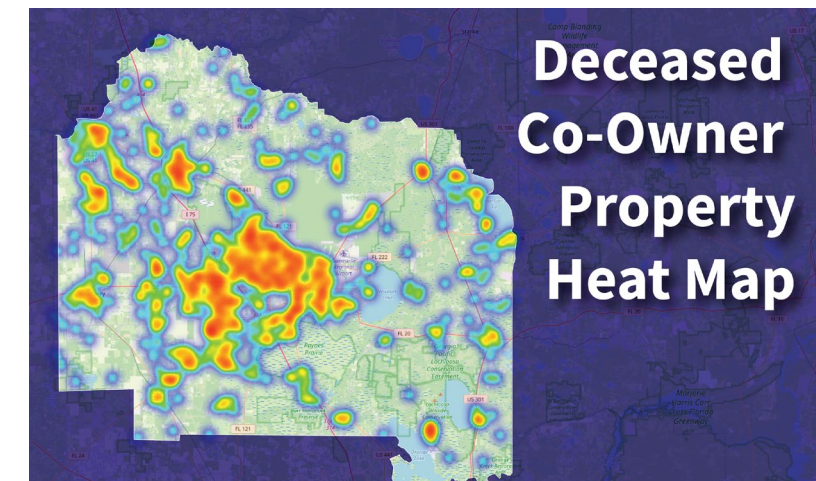
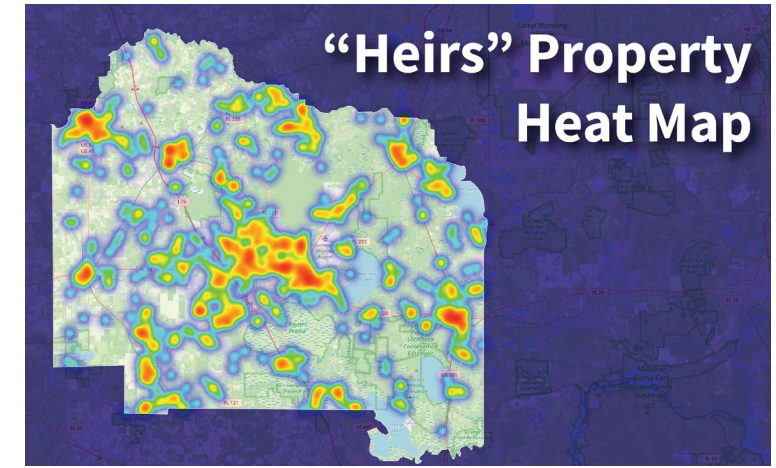
Probate & Estate Planning *Summit*

- The **10th Summit is scheduled for August 13, 2026, at Greater Bethel AME Church in Gainesville**, continuing countywide outreach to residents at risk.
- As of 2025, properties in these categories account for **approximately \$640 million in total property value in Alachua County.**



Data-Driven Approach

- We used a dual data-driven approach to identify areas most affected by heirs' property and estate planning challenges.
- Heat maps were developed using both data sets to identify hotspot areas where these issues are most concentrated.
- **Two key data sets were analyzed:**
 - Parcels classified as heirs' property throughout the county.
 - Parcels with a single remaining owner who does not have any estate planning on record.



Data-Driven Approach Cont.

- These hotspot areas guide the selection of summit locations, ensuring events are held in central and accessible locations for affected communities.
- As of **2026**, approximately **1,700 parcels** are classified as heirs' property, and roughly an additional **1,600** parcels have a single remaining owner with no estate planning on record

Community & Partner Engagement

- Summit events attract an average of **100+** attendees.
- Partners include the Alachua County Tax Collector, UF Levin College of Law, Three Rivers Legal Services, the Federation of Southern Cooperatives, and other local legal service providers.



John Power | TAX COLLECTOR

UF UNIVERSITY of FLORIDA



Community & Partner Engagement Cont.

Sample Mailers

- Targeted direct mailers are sent to properties within each summit's designated hotspot that meet the criteria of heirs or single remaining owner.



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Presents

Probate and Estate Planning Summit

May 15th at 6 pm

Meeting Located inside
Newberry Municipal building

Our records indicate this parcel is listed as "heirs" property.

Join us at the City of Newberry's Municipal building on May 15th at 6 p.m. for our Probate and Estate Planning Summit! We hope to bring community awareness to the probate process while introducing programs and financial resources that are currently available.

City of Newberry's Municipal building is located at:
25420 W Newberry Rd, Newberry, FL 32669

This ongoing collaborative initiative serves as an opportunity to be more accessible to residents who may be affected by these issues. This interactive panel discussion features representatives from the Alachua County Tax Collector, the University of Florida Levin College of Law, Three Rivers Legal Services Inc., the Federation of Southern Cooperatives, and the Alachua County Property Appraiser.

Each panelist will discuss how the extensive probate process directly impacts their respective offices, provide insights on preventative measures to help avoid these issues, and answer any questions the audience may have about these processes.

For more info go to:
www.acpaffl.org/peps
or scan our QR Code

CONTACT
PHONE:
(352)-213-4966
EMAIL:
communications@acpaffl.org

We hope to see you there!



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Summit Objectives

Provide residents with a general overview of heirs' property, including the process for resolving it, and estate planning options that can help protect their property in the future.

Introduce constituents to programs, financial resources, and legal services available to assist with property and estate matters.

Enable residents to connect directly with partners and professional service providers to learn about available support.



Next Phase: Hands-On Probate and Estate Planning Workshops

- To complement the countywide summits, we expanded our outreach to include hands-on Probate and Estate Planning Workshops.
- These workshops provide residents with practical guidance to understand and address heirs' property and estate planning challenges.
- Our 5th workshop is scheduled for September 26, 2026 in Gainesville, Fl



Next Phase: Hands-On Probate and Estate Planning Workshops Cont.



The workshops incorporate two tracks- Heirs' Property Track:

- Participants learn how to identify heirs
- Navigate the probate process
- Understand shared ownership challenges
- Prepare documents to reduce the burden on legal representatives.

AGENDA TRACK 1

Heirs Property Navigating the Probate Process

- | | |
|---|---|
| <p>9:00 - 10:00 AM</p> <p><input type="checkbox"/> CHECK-IN & BREAKFAST
Enjoy a light breakfast, connect with community partners, and explore available resources.</p> | <p>1:30 - 1:40PM</p> <p><input type="checkbox"/> Stretch Break
Time to stand, stretch, and reset.</p> |
| <p>10:00 - 10:15AM</p> <p><input type="checkbox"/> Opening Session
Welcome and overview of the day.</p> | <p>1:40 - 2:25 PM</p> <p><input type="checkbox"/> After Probate: Why Estate Planning Still Matters
NINA PALMER, THREE RIVERS LEGAL SERVICES
Understand why creating or updating an estate plan is important after probate is complete.</p> |
| <p>10:15 - 10:45 AM</p> <p><input type="checkbox"/> Probate 101: Speaking the Language
TYLER DAMON LATTIMORE, UNIVERSITY OF FLORIDA LEVIN COLLEGE OF LAW
Learn common probate terms, key roles, and important documents to help you better understand the process.</p> | <p>2:25 - 3:10 PM</p> <p><input type="checkbox"/> Shared Property, Different Opinions
LYTANYA BROWN ESQ., FEDERATION OF SOUTHERN COOPERATIVES
Explore what happens when heirs disagree, the risks of inaction, and available options to help families move forward.</p> |
| <p>10:45 - 12:00PM</p> <p><input type="checkbox"/> Family Tree Lab: Mapping Ownership and Heirs
TYLER DAMON LATTIMORE, UNIVERSITY OF FLORIDA LEVIN COLLEGE OF LAW
Interactive session to begin building your family tree, understand shared ownership, and learn how heirs are identified. Attorneys will be available to answer questions.</p> | <p>3:10 - 3:45PM</p> <p><input type="checkbox"/> Resource & Application Hub
Receive assistance with program applications, legal services, and next steps following the Family Tree activity.</p> |
| <p>12:00 - 1:00 PM</p> <p><input type="checkbox"/> Lunch Provided</p> | |
| <p>1:00 - 1:30PM</p> <p><input type="checkbox"/> Getting Started: What to Know When Probate Begins
DIANA W. JOHNSON, ESQ., THREE RIVERS LEGAL SERVICES
Learn what happens when probate starts, including timelines, court involvement, and early steps families should take.</p> | |



Next Phase: Hands-On Probate and Estate Planning Workshops Cont.

Estate Planning Track:

- Participants explore estate planning tools
- Define property goals
- Begin drafting an estate plan
- Learn how different ownership types affect property rights and taxes



AGENDA TRACK 2

Estate Planning Planning Ahead to Protect Your Property

- 9:00 - 10:00 AM**
CHECK-IN & BREAKFAST
Registration, light breakfast, and access to resource tables.
- 10:00 - 10:15 AM**
Opening Session
Welcome and overview of the day.
- 10:15 - 10:45 AM**
What's the Plan? Defining Your Property Goals
NINA PALMER, THREE RIVERS LEGAL SERVICES
Guided discussion to help you identify your goals and understand why planning ahead matters.
- 10:45 - 12:00 PM**
Estate Planning Options Explained
DIANA W. JOHNSON, ESQ. & NINA PALMER, THREE RIVERS LEGAL SERVICES
Learn about wills, trusts, lady bird deeds, beneficiary designations, and other tools, including how each option works.
- 12:00 - 1:00 PM**
Lunch Provided
- 1:00 - 1:45 PM**
Your Legacy in Action: Build an Estate Plan
LYTANYA BROWN ESQ., FEDERATION OF SOUTHERN COOPERATIVES
Hands-on workshop where participants begin outlining an estate plan using tools discussed earlier. Facilitators will be available for guidance.
- 1:45 - 1:55 PM**
Stretch Break
Time to stand, stretch, and reset.
- 1:55 - 2:40 PM**
Resource & Application Hub
Additional time to ask questions, receive guidance, and access available programs.
- 2:40 - 3:25 PM**
Understanding Property Ownership and Tax Impacts
LALLY GOMEZ-ROBERTS, ALACHUA COUNTY PROPERTY APPRAISER'S OFFICE
Learn how different ownership types affect property rights, homestead exemption, and property taxes.
- 3:25 - 3:45 PM**
Q&A and Next Steps
Final questions, takeaways, and guidance on what to do next.



Workshop Objectives

Through interactive activities, guided exercises, and access to legal professionals, the workshops aim to:

- Equip residents with a foundational understanding of property succession and estate planning.
- Enable participants to take actionable steps to protect property, including starting or completing relevant legal documents.
- Provide direct access to legal, financial, and county resources for follow-up support.



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Creating the Heirs' Property & Estate Planning Legal Network

The Need

- Many residents do not qualify for existing legal services
- Demand for legal assistance exceeds available resources
- Limited access to specialized expertise for complex cases



Creating the Heirs' Property & Estate Planning Legal Network Cont.

The Solution

- Established a Heirs' Property & Estate Planning Legal Network
- Connects residents to private probate and estate planning attorneys
- Expands access beyond existing program eligibility
- Provides a clear pathway to professional legal guidance



Key Features of the Legal Network

How the Legal Network Works

Prepared Residents

Complete a summit and hands-on workshop before connecting with an attorney

Licensed Attorneys

Network includes 15 licensed attorneys specializing in probate and estate planning

Structured Support

Guidance on title clearing, probate, estate planning, and document filing

Long-Term Protection

Helps families preserve and transfer property across generations





A Unified, Countywide Effort

- **Wide-ranging partners:** constitutional officers, existing probate and estate services, the University of Florida, and private attorneys.
- **Fully aligned and committed:** all contribute expertise, resources, and guidance.
- **Shared mission:** all partners working together to tackle heirs' property and estate planning challenges

Remaining Gap: Funding for the Legal Network

- Funding needed to fully support the Heirs' Property and Estate Planning Legal Network.
- Ensures continued access to private attorneys for residents ineligible for other programs.
- Critical to sustaining the network and countywide collaborative support.



Why Funding Matters

- Covers attorney fees, allowing free or reduced-cost probate and estate planning services.
- Typical case in our Legal Network costs **~\$350/hour** and may require up to **5 hours of legal work.**
- Ensures all residents, including those ineligible for other programs, can access legal guidance.



Anticipated Impact

- More residents complete estate planning and probate groundwork, protecting property and families.
- Lower risk of property loss and title disputes, preserving family-owned land and community stability.
- Expanded access to Legal Network services; attorneys can handle **~50 cases per year**, providing timely support.



Thank
You!



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