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**The Honorable Yarborough and
Members of the Judiciary Committee**

Subject: Urgent Support for the Estate Plan Registry Accountability and Access Act

To the Honorable Members of the Florida Judiciary Committees,

I respectfully present for your review a legislative proposal aimed at improving Florida's estate and probate processes by creating a voluntary Estate Plan Registry.

This registry would allow Floridians to record the existence and location of their wills, trusts, powers of attorney, and other estate documents—without uploading or storing the documents themselves. It is designed to help families and legal representatives avoid the frustrating and often expensive delays that occur when estate planning documents are lost, inaccessible, or unknown during times of incapacity or after death.

Florida's large senior population and high number of out-of-state property owners make it uniquely positioned to benefit from this kind of practical and secure tool. The Estate Plan Registry supports legal transparency and promotes smoother probate proceedings while maintaining privacy and attorney-client control.

The proposed bill would:

- Establish a secure, Florida-based registry for estate document metadata (not documents themselves).
- Allow voluntary participation by residents, attorneys, or fiduciaries.
- Help courts, attorneys, and families quickly verify the existence and location of estate plans when needed.

This Registry strengthens—not replaces—the essential role of estate planning attorneys and complements Florida's existing probate code. It has the potential to reduce court backlogs, minimize family disputes, and protect the intent of decedents with greater certainty.

I would be honored to discuss this proposal further and collaborate on ways to bring this initiative forward. Thank you for your time, your leadership, and your consideration.

Sincerely,

/s/ Sandra Widmann

Florida Real Estate Broker, Business Owner, Financial Administrator, Estate Planning Paralegal
Founder, Estate Plan Registry

Be It Enacted by the Legislature of the State of Florida:

Section 1. Short Title.

This act shall be known as the “Estate Plan Registry Act.”

Section 2. Legislative Intent.

It is the intent of the Legislature to provide a secure, voluntary means for Florida residents to register the existence and location of estate planning documents. This act aims to improve the efficiency and transparency of the probate process without infringing upon privacy rights or replacing the role of legal counsel.

Section 3. Definitions.

As used in this act:

“Registry” means the Estate Plan Registry, a secure platform operated by Estate Plan Registry LLC, a Florida limited liability company.

“Registrant” means any person, attorney, fiduciary, or legally authorized representative who submits information to the Registry on behalf of themselves or another individual.

“Estate planning documents” include, but are not limited to:

- Last wills and testaments
- Trust agreements
- Durable powers of attorney
- Healthcare surrogates or advance directives

“Location” refers to the physical or digital location where the document is stored, including attorney offices, safe deposit boxes, or secure online vaults.

Section 4. Establishment of the Estate Plan Registry.

1. There is established a voluntary public service known as the Estate Plan Registry, to be administered by Estate Plan Registry LLC.
2. The Registry shall allow individuals to securely submit the following information:
 - (a) The existence of an estate planning document;
 - (b) The name of the document holder (or testator);
 - (c) The document's date (if known);
 - (d) The location or custodian of the document;
 - (e) The name and contact information of the attorney or person responsible for the document.
3. No actual estate planning documents shall be uploaded, stored, or maintained by the Registry, but may offer that service at a later date.
4. The Registry shall maintain all records in compliance with industry standards for privacy and data security.

Section 5. Confidentiality and Access.

1. Registrations shall be confidential and accessible only to:
 - (a) The registrant;
 - (b) The attorney of record;
 - (c) Court-appointed representatives or fiduciaries;
 - (d) Any party authorized by law or written consent of the registrant.
2. The Registry shall provide verification of registration, upon request, to appropriate legal authorities or representatives involved in probate or incapacity proceedings.

Section 6. Liability.

1. Estate Plan Registry LLC and its affiliates shall not be held liable for:
 - (a) The accuracy of information provided by registrants;
 - (b) The failure of any party to retrieve or update information;
 - (c) Any loss arising from a registrant's failure to properly file estate documents or notify beneficiaries.
2. Participation in the Registry shall not be construed as legal compliance with Florida probate laws nor shall it substitute for properly executed legal instruments.

Section 7. Rulemaking and Oversight.

The Department of Legal Affairs may adopt rules necessary to facilitate state-level awareness of the Estate Plan Registry and collaborate with legal organizations for voluntary public participation. No state funds shall be appropriated for the operation or maintenance of the Registry.

Section 8. Effective Date.

This act shall take effect _____.