

7<sup>TH</sup> ANNUAL

# INTERMEDIATE ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

Earn up to 12.00 Hours of Credit  
Including 3.50 Hours of Guardianship and 2.25 Hours of Ethics Credit

Specialization Credit for: Estate Planning & Probate Law,  
Civil Trial Law, Tax Law, and Family Law



August 11-12, 2005  
Moody Gardens Hotel  
Galveston, Texas

Video Replay  
December 15-16, 2005  
Hyatt Hill Country Resort  
San Antonio, Texas

**ADD****August 10, Galveston • Special Needs Trusts - Video Replay**

# SPECIAL NEEDS TRUSTS VIDEO REPLAY

August 10 at Moody Gardens  
Earn up to 6.75 Hours

# INTERMEDIATE ESTATE PLANNING, GUARDIANSHIP, AND ELDER LAW CONFERENCE

August 11-12, 2005 • Moody Gardens Hotel • Galveston, TX  
Earn up to 12.00 Hours of Credit | 2.25 Hours of Ethics Credit

## WEDNESDAY, AUGUST 10, 2005

9:00 a.m. .50 hr

Basics of SNTs - Why, When, and How

9:30 a.m. .75 hr

Public Benefits

10:15 a.m. .50 hr

Texas Trust Lawyers Toolbox

10:45 a.m. Break

11:00 a.m. .75 hr

Key Drafting Provisions for the SNTs

11:45 a.m. .75 hr

Strategies for Funding SNTs

1:45 p.m. .75 hr

Planning for the Beneficiary: Options, Opportunities & Constraints

2:30 p.m. .75 hr

Administration: The SNT Distribution Plan

3:15 p.m. Break

3:30 p.m. .75 hr

Taxes

4:15 p.m. .50 hr

Housing

4:45 p.m. .75 hr

Everything That Can Go Wrong with SNTs and How to Fix It

5:30 p.m. Adjourn

## CONFERENCE FACULTY

Molly Dear Abshire, Bellaire  
Wright Abshire, Attorneys

Michael B. Cohen, Dallas  
Michael B. Cohen & Associates

Ronald R. Cresswell, Dallas  
Locke Lidell & Sapp, L.L.P.

Deborah A. Green, Austin  
The Law Offices of Deborah Green, L.L.P.

Glenn M. Karisch, Austin  
Barnes & Karisch, P.C.

Renée C. Lovelace, Dripping Springs, Austin, Dallas  
The Lovelace Law Firm, P.C.

Pi-Yi Mayo, Baytown  
Law Office of Pi-Yi Mayo

Mary T. Schmitt Smith, CELA, Bloomfield Hills, MI  
Beier Howlett, PC

Patricia F. Stichter, San Antonio  
Schoenbaum, Curphy & Scanlan, PC

Nancy Sosa, Austin  
Southwest Guaranty Court Trust

## THURSDAY, AUGUST 11, 2005

Presiding Officer: H. Clyde Farrell

8:00 a.m. Registration Opens

Includes continental breakfast.

8:50 a.m. Welcoming Remarks

9:00 a.m. .75 hr

### Wills, Estates, and Trusts Case Law Update

Discussion of recent judicial developments relating to the Texas law of intestacy, wills, estate administration, trusts, and other estate planning matters.

Gerry W. Beyer, Lubbock

9:45 a.m. .75 hr | .25 hr ethics

### Anatomy of a Will

An ideal refresher on key practice points and drafting strategies as well as discussion of ethical issues faced by estate planners. This presentation includes an updated version of the classic paper, *Anatomy of a Will*.

Mickey R. Davis, Houston  
Paper by Steve Akers, Bernard E. Jones,  
and R. J. Watts, II

10:30 a.m. Break

10:45 a.m. .50 hr

### Nursing Home Misrepresentations

This presentation will include the elements of the Nursing Home Reform Act "NHRA" of 1987, Texas nursing home statutes and rules as well as common misrepresentations made by nursing homes and corresponding rebuttals.

Molly Dear Abshire, Bellaire

11:15 a.m. .75 hr | .25 hr ethics

### Practical Aspects of Guardianship

An overview of guardianship law with an emphasis on everyday practicalities and ethical issues.

Hon. Guy Herman, Austin

12:00 p.m. Box Luncheon Presentation

Included in registration.

Legislative Update .50 hr

Summary of probate, guardianship and trust law changes from the 79th Texas Legislature, including new guardianship certification requirements and 867 Trust changes.

Glenn M. Karisch, Austin

Presiding Officer: Renée C. Lovelace

1:15 p.m. .50 hr | .25 hr ethics

### So You are Going to be a Trustee: Things You Should Know

The consequences of deciding to serve as trustee in light of the most significant trust law changes in 20 years—Uniform Prudent Investor Act, Uniform Principal and Income Act, Uniform Trust Code-based changes and more.

Glenn M. Karisch, Austin

1:45 p.m. .50 hr

### Creditor Protection: What Works Now?

Basic strategies and options, in light of new bankruptcy legislation. The focus is on effective use of readily available planning tools rather than "exotics", such as off-shore trusts, Alaska trusts, etc.

To Be Announced

2:15 p.m. .50 hr

### Annuities: What They're Selling to Consumers This Year

Consumer protection "red flags"; "stinky" marketing ploys and an enforcement report.

Esther Chavez, Austin

2:45 p.m. Break

3:00 p.m. .75 hr | .25 hr ethics

### Inheritances, Settlements, and Property Transfers: Avoiding Unpleasant Surprises

This presentation will look at how gifting or transferring property can affect your client's government benefits qualifications. Tax issues will also be discussed.

Henry Charles ("Chuck") Bauman, III, Tyler  
Deborah A. Green, Austin

3:45 p.m. 1.50 hr | .50 hr ethics

### Guardianship Mock Trial

This presentation will examine the roles of the attorney of record, the prospective guardian, the proposed ward, the attorney ad litem, and the presiding judge and will illustrate their duties and responsibilities at a hearing to establish guardianship of an incapacitated adult.

Donald F. Carnes, Austin  
Deborah A. Green, Austin  
Kris Hochderffer, Austin  
Hon. Steve M. King, Fort Worth  
D'Ana H. Mikeska, Austin

5:15 p.m. Adjourn to Reception

FRIDAY, AUGUST 12, 2005

Presiding Officer: To Be Announced

8:30 a.m. .75 hr ethics

Ethics Panel

A panel of practitioners discuss guardianship ethics scenarios with a focus on conflicts of interest as well as end of life and medical treatment decisions.

Susanna Bond, Austin  
Renée C. Lovelace, Dripping Spgs, Austin, Dallas  
Pi-Yi Mayo, Baytown

9:15 a.m. .75 hr

Medicare Part D

This session will address prescription drug program eligibility, enrollment, benefits, beneficiary protections, grievances and appeals.

Pi-Yi Mayo, Baytown

10:00 a.m. .50 hr

Billing Errors by Medical Providers

Many clients and their attorneys are confronted by serious medical billing errors, including Medicare billings. Learn what rules apply to medical billing and what remedies are available for billing errors.

David W. Hilgers, Austin

10:30 a.m. Break

10:45 a.m. .75 hr

Do I Really Have to Pay That Bill?

Filing creditor's claims in probate proceedings.

Hon. Sandee Bryan Marion, San Antonio

11:30 a.m. .75 hr

New Developments in Medicaid including Estate Recovery

Medicaid planning strategies that worked last year but won't now, and how to cope: the new Medicaid estate recovery program, restriction of what a couple may keep under the new "income-first" rule, the demise of the "monthly gifting" rule and more.

H. Clyde Farrell, Austin

12:15 p.m. Lunch on Your Own

FRIDAY AFTERNOON

Presiding Officer: Hon. Gladys B. Burwell

1:30 p.m. .75 hr

Probate and Guardianship on the Cheap

Advice and forms from an associate probate judge for avoiding formal probate and guardianship by using less costly alternatives.

Hon. Susan R. Whitman, Austin

2:15 p.m. .50 hr

Marital Property Agreements After 60

This session will discuss the usefulness of the premarital agreement, as well as the special considerations that must be considered, in drafting and negotiating premarital agreements for the elderly.

Angela G. Pence, Houston

2:45 p.m. .25 hr

Best Elder Law Resources Including a Texas Trust Compendium

Where to start one's search for information.

Renée C. Lovelace, Dripping Spgs, Austin, Dallas

3:00 p.m. Adjourn

Mail this registration form or fax a copy to: (512) 475-6876

REGISTRATION FOR ER05 AND SN05

The University of Texas School of Law • Office of Continuing Legal Education  
Attn: ER05 or SN05 • Post Office Box 7759 • Austin TX 78713-7759

PLEASE PRINT CLEARLY

Bar Card# \_\_\_\_\_ ☐ TX ☐ Other State: \_\_\_\_\_ ☐ N/A

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Registrant's Email (required) \_\_\_\_\_

Invoices, confirmations and receipts are emailed to this address.

INTERMEDIATE ESTATE PLANNING

Registration Includes Course Binder and Thursday Box Lunch

- ☐ Standard Registration ..... \$395.00  
☐ Standard Registration after Aug 3, 2005 ..... \$445.00  
☐ Video Replay: Hyatt Hill Country Resort, San Antonio ..... \$225.00

CONFERENCE PUBLICATIONS AND MEDIA: Allow 2-4 weeks for delivery.

- ☐ Course Binder without Conference Registration ..... \$200.00  
☐ Audio CD Set ..... \$175.00  
☐ eBinder on CD (PDF Format) (\$200 purchased alone; \$50 w/ reg) ..... \$200.00  
☐ DVD (includes all conference sessions) ..... \$225.00

IN-HOUSE CLE: Bring the conference in-house and learn at your convenience.

- ☐ In-House CLE for 2: Includes DVD and 2 Course Binders ..... \$750.00  
\_\_\_\_\_ Add participants (includes Course Binder) for \$200 each ..... \$ \_\_\_\_\_

SPECIAL NEEDS TRUSTS

- ☐ Video Replay: Moody Gardens Hotel, August 10, 2005 ..... \$125.00

CONFERENCE PUBLICATIONS AND MEDIA: Allow 2-4 weeks for delivery.

- ☐ Course Binder without Video Replay Registration ..... \$150.00  
☐ Audio CD Set ..... \$125.00  
☐ eBinder on CD (PDF Format) (\$125 purchased alone; \$50 w/ reg) ..... \$125.00  
☐ DVD (includes all conference sessions) ..... \$125.00

IN-HOUSE CLE: Bring the conference in-house and learn at your convenience.

- ☐ In-House CLE for 2: Includes DVD and 2 Course Binders ..... \$500.00  
\_\_\_\_\_ Add participants (includes Course Binder) for \$125 each ..... \$ \_\_\_\_\_

METHOD OF PAYMENT

TOTAL ENCLOSED ..... \$ \_\_\_\_\_

☐ Check (make checks payable to: The University of Texas at Austin)

☐ VISA or ☐ Mastercard (sorry, no AMEX or Discover)

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Authorized Signature

/    
Exp. Date (mm/yy)

## Intermediate Estate Planning

### GALVESTON

August 11-12, 2005

#### CONFERENCE LOCATION



**Moody Gardens Hotel**  
Seven Hope Boulevard  
Galveston, TX 77524  
1-888-388-8484

\$132 (subject to availability) good through **July 20, 2005**

#### KEY DATES

##### Registration and Cancellation

**August 3, 2005, 5 p.m.**

• **last day for early registration**  
add \$50 for registrations received after this time

**August 5, 2005, 5 p.m.**

• **last day for full refund**

**August 8, 2005, 5 p.m.**

Monday before conference  
• **last day for partial refunds**  
\$50 processing fee applied

## VIDEO REPLAY SAN ANTONIO

December 15-16, 2005



**Hyatt Hill Country Resort**  
9800 Hyatt Resort Dr.  
San Antonio, TX  
210-647-1234

\$119 Special Hotel Rate  
Good through November 15, 2005.

**ADD**

## August 10, Galveston • Special Needs Trusts - Video Replay

If you work with special needs trusts—or want to learn how to use, draft, fund and administer them—don't miss this important program on video on August 10, also at Moody Gardens Hotel.

#### CAN'T ATTEND?

#### Order Conference Publications and Media

##### Intermediate Estate Planning

✓ DVD - \$225    ✓ Course Binder - \$200    ✓ Audio CD Set - \$175    ✓ In-House CLE - See Registration

##### Special Needs Trusts

✓ DVD - \$125    ✓ Course Binder - \$150    ✓ Audio CD Set - \$125    ✓ In-House CLE - See Registration

#### CONFERENCE FACULTY

Molly Dear Abshire  
Wright Abshire, Attorneys  
Bellaire

Henry Charles ("Chuck") Bauman, III  
Brown, Bauman & Smith,  
A Professional Corporation  
Tyler

Gerry W. Beyer  
Texas Tech University School of Law  
Lubbock

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Travis County Probate Court  
Number One  
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Glenn M. Karisch  
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Hon. Steve M. King  
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Number One  
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The Lovelace Law Firm, P.C.  
Dripping Springs, Austin, Dallas

Hon. Sandee Bryan Marion  
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D'Ana H. Mikeska  
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Angela G. Pence  
Tindall & Foster, P.C.  
Houston

Hon. Susan R. Whitman  
Associate Judge  
Travis County Probate Court No. One  
Austin

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This course has been approved for Minimum Continuing Legal Education credit by the State Bar of Texas Committee on MCLE in the amount of 12.00 hours, of which 2.25 credit hours will apply to legal ethics/professional responsibility credit.



The Galveston events are part of our Hawaiian Shirt Series of Galveston conferences, both informal and informative—registrants and speakers are all invited to dress "beach casual."

# UTCLE

THE UNIVERSITY OF TEXAS AT AUSTIN  
THE UNIVERSITY OF TEXAS SCHOOL OF LAW  
P.O. Box 7759 • Austin, TX 78713-7759

*This program is not printed or mailed at state expense.*

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August 11-12, 2005 • Moody Gardens Hotel • Galveston, Texas

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