

**2005 Estate Planning, Guardianship and Elder Law Conference**  
**August 11-12, 2005 • Moody Gardens • Galveston, TX**  
**December 15-16, 2005 • San Antonio**

**Thursday Morning, Aug. 11, 2005**

**Presiding Officer:**

In Galveston: **H. Clyde Farrell**, Attorney At Law - Austin, TX

9:00 am In Galveston Only 0.75 hr	<b>Wills, Estates, and Trusts Case Law Update</b>  Discussion of recent judicial developments relating to the Texas law of intestacy, wills, estate administration, trusts, and other estate planning matters.  Gerry W. Beyer, Texas Tech University School Of Law - Lubbock, TX
9:45 am In Galveston Only 0.75 hr	<b>Anatomy of a Will</b>  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.  Bernard E. Jones, Attorney At Law - Houston, TX
10:45 am In Galveston Only 0.50 hr	<b>Nursing Home Misrepresentations</b>  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, Wright Abshire, Attorneys - Bellaire, TX
11:15 am In Galveston Only 0.75 hr	<b>Practical Aspects of Guardianship</b>  An overview of guardianship law with an emphasis on everyday practicalities and ethical issues.  Guy S. Herman, Austin, TX

**Thursday Afternoon, Aug. 11, 2005**

**Presiding Officer:**

In Galveston: **Renee C. Lovelace**, The Lovelace Law Firm, P.C. - Dripping Springs, TX

12:00 pm In Galveston Only 0.50 hr	<b>Box Luncheon Presentation: Legislative Update</b>  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, Barnes & Karisch, P.C. - Austin, TX
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1:15 pm In Galveston Only 0.50 hr	<p><b>So You Are Going to Be a Trustee: Things You Should Know</b></p> <p>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.</p> <p>Glenn M. Karisch, Barnes &amp; Karisch, P.C. - Austin, TX</p>
1:45 pm In Galveston Only 0.50 hr	<p><b>Creditor Protection: What Works Now?</b></p> <p>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.</p> <p>Bradley Garrett Korell, Korell &amp; Frohlin, LLP - Austin, TX</p>
2:15 pm In Galveston Only 0.50 hr	<p><b>Annuities: What They're Selling to Consumers This Year</b></p> <p>Consumer protection, red flags, stinky marketing ploys and an enforcement report.</p> <p>Esther Chavez, Office of the Attorney General - Austin, TX</p>
3:00 pm In Galveston Only 0.75 hr	<p><b>Inheritances, Settlements, and Property Transfers: Avoiding Unpleasant Surprises</b></p> <p>This presentation will look at how gifting or transferring property can affect your client's government benefits qualifications. Tax issues will also be discussed.</p> <p>Henry Charles Bauman III, Brown Bauman &amp; Smith - Tyler, TX Deborah A. Green, Law Offices Of Deborah Green - Austin, TX</p>
3:45 pm In Galveston Only 1.50 hrs	<p><b>Guardianship Mock Trial</b></p> <p>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.</p> <p>Donald F. Carnes, Austin, TX Deborah A. Green, Law Offices Of Deborah Green - Austin, TX Steve M. King, Fort Worth, TX D'Ana H. Mikeska, McGinnis, Lochridge &amp; Kilgore LLP - Austin, TX G Gaye Thompson, Thompson &amp; Tiemann - Austin, TX</p>

## Friday Morning, Aug. 12, 2005

### Presiding Officers:

In Galveston: **Susanna A. Bond**, Attorney at Law - Austin, TX

**Deborah A. Green**, Law Offices Of Deborah Green - Austin, TX

8:30 am In Galveston Only 0.75 hr	<p><b>Ethics Panel</b></p> <p>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.</p> <p>Susanna A. Bond, Attorney at Law - Austin, TX Renee C. Lovelace, The Lovelace Law Firm, P.C. - Dripping Springs, TX Pi-Yi Mayo, Law Office of Pi-Yi Mayo - Baytown, TX</p>
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9:15 am In Galveston Only 0.75 hr	<b>Medicare Part D</b>  This session will address prescription drug program eligibility, enrollment, benefits, beneficiary protections, grievances and appeals.  Pi-Yi Mayo, Law Office of Pi-Yi Mayo - Baytown, TX
10:00 am In Galveston Only 0.50 hr	<b>Billing Errors by Medical Providers</b>  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, Brown McCarroll LLP - Austin, TX
10:45 am In Galveston Only 0.75 hr	<b>Do I Really Have to Pay That Bill?</b>  Filing creditor's claims in probate proceedings.  Hon. Sandee Bryan Marion, Fourth Court Of Appeals - San Antonio, TX
11:30 am In Galveston Only 0.75 hr	<b>New Developments in Medicaid Including Estate Recovery</b>  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, Attorney At Law - Austin, TX

## Friday Afternoon, Aug. 12, 2005

### Presiding Officer:

In Galveston: **Gladys B. Burwell**, Galveston County Justice Center - Galveston, TX

1:30 pm In Galveston Only 0.75 hr	<b>Probate and Guardianship on the Cheap</b>  Advice and forms from an associate probate judge for avoiding formal probate and guardianship by using less costly alternatives.  Hon. Susan R. Whitman, Travis County Probate Court No.1 - Austin, TX
2:15 pm In Galveston Only 0.50 hr	<b>Marital Property Agreements after 60</b>  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, Tindall & Foster, P.C. - Houston, TX
2:45 pm In Galveston Only 0.25 hr	<b>Best Elder Law Resources Including a Texas Trust Compendium</b>  Where to start one's search for information.  Renee C. Lovelace, The Lovelace Law Firm, P.C. - Dripping Springs, TX