

9TH ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

Earn up to 13.00 Hours of Credit
Including 3.00 Hours of Guardianship Credit and 2.75 Hours of Ethics Credit

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



August 9-10, 2007
Moody Gardens Hotel
Galveston, Texas

Major sponsorship provided by
The Center for Special Needs Trust Administration

9TH ANNUAL
ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

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G indicates guardianship hours in program

THURSDAY MORNING, AUGUST 9, 2007

Presiding Officer: H. Clyde Farrell, Austin, TX

8:00 a.m. Registration Opens

Includes continental breakfast.

8:50 a.m. Welcoming Remarks

9:00 a.m. .75 hr

**Recognizing and Categorizing Client Issues:
Top Ten Common (Mostly Non-Tax) Problems
and Solutions**

An expert estate planner looks at common sets of issues that arise from different categories of clients—blended family, multi-state assets, problem beneficiaries, non-traditional relationships, etc.—and outlines the key issues to keep in mind for each situation.

Patrick J. Pacheco, Houston, TX

9:45 a.m. .75 hr

**A New Look at Funding Marital Deduction
and Bypass Trusts**

Get practical advice about issues that arise when funding various gifts made under wills. Review the thought process used when deciding (i) which assets to allocate to which gift, (ii) how to allocate post-death appreciation and income, and (iii) how to make sure that the executor documents and implements the funding that is decided upon.

Mickey R. Davis, Houston, TX

10:30 a.m. .50 hr

**Simplifying Complexity: Practical Planning
for Beneficiary Designations**

This session will attempt to move beyond detailing the technical rules, problems, and limits of beneficiary designations, and, instead, will survey practical planning options for designating the beneficiaries of non-probate assets such as life insurance, retirement accounts, and multiparty accounts.

Michael Wayne Hatfield, Lubbock, TX

11:00 a.m. Break

11:15 a.m. 1.00 hr G including .25 hr ethics

The Role of the Guardian

This session discusses the duties and responsibilities of a guardian under Texas law, including ethical issues. All aspects of guardianship administration, from initiation to closing, will be covered.

Stephen Jody Helman, Austin, TX

Luncheon Presentation

**Sponsored by The Center for Special Needs
Trust Administration**

12:15 p.m. Pick up Box Lunch

Included in conference registration fee.

12:30 p.m. .75 hr

**What Am I Doing Wrong? A Panel of
Former and Current Statutory Probate Court
Personnel**

An overview of the Texas probate court system, with an emphasis on practicing in the state's statutory probate courts.

Moderator: Craig Hopper, Austin, TX
Tricia Deats, Austin, TX
Steven D. Fields, Fort Worth, TX
Elizabeth Hetrick, San Antonio, TX

THURSDAY AFTERNOON

**Presiding Officer: Patricia F. Stichler,
San Antonio, TX**

1:30 p.m. .75 hr

**Wills and Trusts Case Law Update: How
Developments Affect Drafting and Planning**

What do we really need to know about recent cases to avoid drafting errors and meet our clients' estate planning goals? A leading Texas scholar and practitioner provides the answers.

Gerry W. Beyer, Lubbock, TX

2:15 p.m. .50 hr

**Probate and Estate Planning Developments
in the 2007 Legislative Session**

2007 Texas legislative developments affecting decedents' estates, guardianships and trusts, with an emphasis on elder law.

Glenn M. Karisch, Austin, TX
Barbara J. Lipscomb, Austin, TX

2:45 p.m. .50 hr

Estate Planning Outside of Probate

A discussion of the ever-growing problem of dealing with assets which pass outside of probate—multiparty accounts, trust assets, beneficiary designation property, etc.

Glenn M. Karisch, Austin, TX
Barbara J. Lipscomb, Austin, TX

3:15 p.m. Break

3:30 p.m. .75 hr

**Handling a Medicaid Estate Recovery
Program (MERP) Claim in Texas**

This session will provide a practical, hands-on discussion of the MERP Claims Process from a Texas Probate Code perspective. The presentation will include a summary of the (latest) MERP statute, the Texas creditor's claims process, an analysis of the procedures utilized by Medicaid in pursuing enforcement of their claim, along with a "how-to" discussion of planning and handling the claim.

Randy Drewett, Beaumont, TX

4:15 p.m. .75 hr G including .25 ethics

Roles and Responsibilities for Ad Litem

An experienced probate judge presents an overview of attorney ad litem responsibilities with an emphasis on everyday practicalities, tips, and ethical issues.

Hon. Guy Herman, Austin, TX
Paper by Hon. Steve M. King, Fort Worth, TX

5:00 p.m. .50 hr G

"Janie's Got a Gun"

A discussion of what a guardian can and should do when their ward engages in criminal behavior or gets arrested.

Krista A. Chacona, Austin, TX

5:30 p.m. Adjourn

FRIDAY MORNING, AUGUST 10, 2007

**Presiding Officer: Hon. Gladys B. Burwell,
Galveston, TX**

7:45 a.m. Conference Room Opens

Includes continental breakfast.

8:30 a.m. 1.00 hr ethics including .25 hr G

**Breakfast: Ask the Experts
What Do You Do When You Get a Call
and the Question Is...**

A panel of seasoned practitioners responds to frequently—and sometimes infrequently—asked questions, including practice, professional and ethical issues in estate planning, probate, guardianship and elder law.

Questions for our experts can be submitted in advance to: jjefferson@law.utexas.edu

Moderator: H. Clyde Farrell, Austin, TX
Deborah A. Green, Austin, TX
Craig Hopper, Austin, TX
Pi-Yi Mayo, Baytown, TX
Marilyn G. Miller, Dripping Springs, TX
Patricia F. Stichler, San Antonio, TX

9:30 a.m. .75 hr

Medicare Facts and Questions

This session discusses common scenarios that beneficiaries encounter and ask their attorneys about every day.

Pi-Yi Mayo, Baytown, TX

10:15 a.m. Break

10:30 a.m. 1.00 hr

Medicaid: Current Practice and Legislative Developments

A discussion of Texas legislative and regulatory changes; federal changes under the Deficit Reduction Act of 2005, including annuities and transfer issues; and effects of changes on planning strategies.

H. Clyde Farrell, Austin, TX
Patricia F. Sitchler, San Antonio, TX

11:30 a.m. .75 hr

Agency Perspective on Public Benefits

This panel of key agency representatives will share insights into the procedures currently employed to administer rules for Medicaid eligibility and those pursuant to the Medicaid Estate Recovery Program.

Moderator: Wesley E. Wright, Bellaire, TX
Flora A. Fearon, Texas Department of Aging and Disability Services, Austin, TX
Shari Nichols, Texas Health and Human Services Commission, Austin, TX
Stephanie Ryan, Texas Department of Aging and Disability Services, Austin, TX
John Stockton, Texas Health and Human Services Commission, Austin, TX

12:15 p.m. Lunch on Your Own

FRIDAY AFTERNOON, AUGUST 10, 2007

Presiding Officer: Hon. Gladys B. Burwell, Galveston, TX

1:15 p.m. .50 hr ethics including .25 hr G

How Fiduciaries Can Stay Out of Trouble

When those not-so-common issues arise, how do you advise your client with respect to his responsibilities as an agent, guardian, trustee or executor? This session discusses ethical issues and tips for avoiding problems.

Ashley E. Ressmann, San Antonio, TX

1:45 p.m. .75 hr ethics including .25 hr G

Fiduciary Compensation: What You Can Charge and When

A discussion of ethical and practical issues regarding what you can charge and when as it applies to guardians, trustees, administrators, and executors.

David P. Stanush, San Antonio, TX

2:30 p.m. .75 hr

Special Needs Trusts—Common Problems, Common Solutions, Common Mistakes

This session will focus on third-party special needs trusts and how to plan and draft to avoid future trust administration problems.

Renee C. Lovelace, Dripping Springs, Austin, Dallas, TX

3:15 p.m. Adjourn

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Mail this registration form to:

The University of Texas School of Law, Attn. ER07
P.O. Box 7759, Austin, TX 78713-7759 or fax a copy to: (512) 475-6876

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REGISTRATION – Includes Course Binder and Thursday Box Lunch Presentation

☐ Early Registration Fee due by Wed., August 1, 2007..... \$425.00

☐ Registration Fee after Wed., August 1, 2007 \$475.00

CONFERENCE PUBLICATIONS AND MEDIA

Allow 2–4 weeks from conference date for delivery.

☐ Course Binder \$200.00

Note: Conference registration includes Course Binder.

☐ Audio CD Set \$175.00

☐ eBinder on CD (PDF format) \$200.00/\$50.00
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In-House CLE: Bring the conference in-house and learn at your convenience.

Allow 2–4 weeks from conference date for delivery.

☐ In-House CLE for 2 includes Audio CD Set and 2 Course Binders \$750.00

_____ Add participants (includes Course Binder) for \$200 each \$ _____

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

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Exp. Date (mm/yy)

G indicates guardianship hours in program

GALVESTON

August 9-10, 2007

CONFERENCE LOCATION



Moody Gardens Hotel

Seven Hope Boulevard
Galveston, TX 77554
1-888-388-8484
409-741-8484

SPECIAL RATE \$153

(subject to availability)
good through July 18, 2007

Self-Parking: Complimentary
Valet: \$7 day, \$10 night
(subject to change)

*Rooms sell out quickly - please
reserve early!*

KEY DATES

Registration & Cancellation

August 1, 2007-5 p.m.

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

August 3, 2007-5 p.m.

last day for full refund

August 6, 2007-5 p.m.

last day for partial refunds
\$50 processing fee applied

August 9, 2007-9 a.m.

conference begins

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Minimum Continuing Legal Educa-
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Committee on MCLE in the amount
of 13.00 hours, of which 3.00 credit
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