THE UNIVERSITY OF TEXAS SCHOOL OF LAW

TEXAS CHAPTER OF THE NATIONAL ACADEMY OF ELDER LAW ATTORNEYS

25TH ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

August 10–11, 2023

Moody Gardens ▪ Galveston, Texas

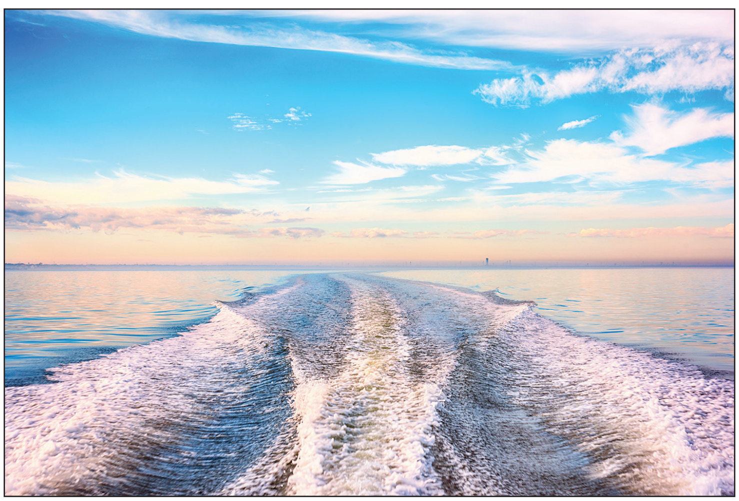
Live Webcast August 10–11

Earn up to 15.00 Hours of Credit Including 3.00 Hours of Ethics Credit and 4.00 Hours of Guardianship – Approved in TX, CA, LA, OK, and PA (Hours Vary by State)

TX Legal Specialization Credit Approved for Estate Planning and Probate Law, and Tax Law

Earn up to 18.00 Hours of Texas Certified Professional Accounting Credit and National Accounting CPE Credit (in-person only)

Certified Financial Planner (CFP) Professional Accreditation, ICB Certified Trust and Financial Advisor (CTFA), and TX Guardianship Certification Board (GCB) Credit Expected



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 9, 2023

Moody Gardens ▪ Galveston, Texas

Live Webcast August 9

Earn Up To 5.50 Hours of Credit Including 0.75 Hour of Ethics Credit

2023

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

August 9, 2023 ▪ Moody Gardens ▪ Galveston, Texas

Earn Up To 5.50 Hours of Credit Including 0.75 Hour of Ethics Credit

Times listed are Central Standard

WEDNESDAY MORNING, AUG. 9, 2023

10:30 a.m. **Registration and Exhibit Hall Opens**

11:00 a.m. **Board Meeting**

11:45 a.m. **Pick Up Lunch**
Included in registration.

THANK YOU TO OUR LUNCHEON SPONSOR

American National Bank & Trust

WEDNESDAY AFTERNOON

GENERAL SESSSIONS (Main Ballroom)

Presiding Officer:
Joy M. Eckelkamp, Rapp and Krock, PC, Houston, TX

12:00 p.m. **Welcoming Remarks**

12:15 p.m. **.75 hr**

Top Five Things Your Elder Law Client Should Know About Their Finances

A comprehensive step by step approach to finances and the decisions necessary to support and protect our aging community.

Dion Hobbs, Merrill Lynch – Special Needs Team, Houston, TX
Rayito O. Stephens, Rayito O. Stephens Law Offices, PLLC, Pearland, TX

1:00 p.m. **.75 hr**

MERP: Is It Really a Lien Against Real Property?

An explanation of why the non-lien from MERP is of concern to title underwriters and how to work with them.

Pam Keever, Keever & Wiesenthal PLLC and American Title Company of Houston, Houston, TX

1:45 p.m. **15-Minute Break to Visit Exhibitors**

2:00 p.m. **1.00 hr**

Long-Term Care Veterans' Benefits

An overview of Non-Service Connected Disability Pension Benefits commonly known as Aid & Attendance. Review and analysis of income and net worth pension eligibility requirements for honorably discharged Veterans' (and their surviving spouses) who served during wartime periods.

Erin W. Peirce, Leu & Peirce, PLLC, Plano, TX

3:00 p.m. **.50 hr ethics**

Who is My Elder Law Client?

A discussion of how to identify your client when other family members are involved in the planning process, addressing conflicts of interest, and attorney-client privilege.

John K. Ross IV, Ross & Shoalmire PLLC, Texarkana, TX
Lisa Shoalmire, Ross & Shoalmire PLLC, Texarkana, TX

3:30 p.m. **15-Minute Break to Visit Exhibitors**

3:45 p.m. **.75 hr | .25 hr ethics**

Couples Medicaid Planning

Explaining the various rules surrounding several types of couple's Medicaid cases, with a focus on the ability to protect assets, to plan in blended families, and to shift gears mid-process as circumstances change.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX

4:30 p.m. **.75 hr**

Private Professional Guardians and Certified Guardians

Private Professional Guardians are playing an increasing role in guardianships throughout the state. Discuss what a PPG is, when it is appropriate to seek out a PPG, what PPGs can and cannot do, and how to represent PPGs in court.

S. Clinton Nix, Bradbury & Nix, Abilene, TX
Nathan Peters, Law Offices of Nathan Peters, PLLC, Denton, TX

5:15 p.m. **Break for Happy Hour & Dinner**

MEDICAID PLANNING WORKSHOP (Vine Room)

Attendees must RSVP for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people.

Please note - the Medicaid Workshop is only available in person.

12:00 p.m. **Welcoming Remarks**

12:15 p.m. **1.75 hrs | .75 hr ethics**

Medicaid Planning Nuts and Bolts - A Case Study

A comprehensive Workshop, in three parts, intended for those who are new to Medicaid planning and are having trouble getting started and putting the pieces together. It will be a hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHSC, and the possible appeal.

Kelley M. Bentley, The Bentley Law Firm, Sugar Land, TX
Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX
Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX
Lynnelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX

2:00 p.m. **15-Minute Break to Visit Exhibitors**

2:15 p.m. **1.50 hrs**

Medicaid Planning Nuts and Bolts - A Case Study

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Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX
Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX
Lynnelle Loke Moore, Loke Moore Law, PLLC, San Antonio, TX

5:15 p.m. Medicaid Planning Workshop Adjourns

5:15 p.m. Break for Happy Hour & Dinner

WHY JOIN NAELA

Texas NAELA
National Academy of Elder Law Attorneys
Texas Chapter

The National Academy of Elder Law Attorneys is a nonprofit association that assists lawyers, bar organizations and others who work with older clients and their families. Established in 1987, the Academy provides a resource of information, education, networking and assistance to those who deal with the many specialized issues involved with legal services to the elderly and disabled.

The Texas Chapter of the National Academy of Elder Law Attorneys was formed in 1995. Membership is available only to attorneys who are members of the national organization (NAELA), and are licensed in the state of Texas. Texas NAELA provides continuing legal education and advocacy to promote and protect the needs of seniors and people with disabilities in Texas.

Becoming a Member

A membership application and national and chapter dues information is available on our website: www.NAELA.org/join.

Learn more at **www.TexasNAELA.com**.

WEDNESDAY EVENING
(Main Ballroom)

TEXAS NAELA DINNER,
Annual Meeting, Election of Officers, and Member Recognition

6:15 p.m.

Included for registrants;
$75 for non-registrant guests

THANK YOU TO OUR DINNER SPONSOR

CADENCE
Asset Management & Trust

7:00 p.m. 1.00 hr

Moderated Table Discussion: What's Your Version of the Texas Estates Code?

Probate Code to Estates Code to e-filing to pandemic and beyond: Do you sometimes feel like the procedure is so different county to county that we cannot possibly be using the same law? Join your colleagues as we compare notes and see just how different or just how similar we really are across the State.

Wesley E. Wright, Wright Abshire, Attorneys P.C., Bellaire, TX

8:00 p.m. Adjourn

Are you a 1st or 2nd year attorney? Attend most UT Law CLE conferences for just $195!

Call 512.475.6700 to register.

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Houston, TX

CATHY KIM FOWLKES*—CO-CHAIR
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Abilene, TX

MEGAN BAUMER*
Law Office of Michael Baumer
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KELLEY M. BENTLEY
The Bentley Law Firm
Sugar Land, TX

JENNIFER L. COULTER*
Townsend Allala, Coulter & Kludt, PLLC
El Paso, TX

CICI C. CUNNINGHAM*
Attorney at Law
Humble, TX

BENECIA FLORES
Petrosewicz Law Firm, P.C.
Richmond, TX

DION HOBBS
Merrill Lynch – Special Needs Team
Houston, TX

MELANIE IBARRA-HERRERA*
The Garrett Law Firm
Austin, TX

PAM KEEVER
Keever & Wiesenthal PLLC and American Title Company of Houston
Houston, TX

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Loke Moore Law, PLLC
San Antonio, TX

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The Toups Law Firm
Spring, TX

WESLEY E. WRIGHT
Wright Abshire, Attorneys P.C.
Bellaire, TX

*Planning Committee member

25TH ANNUAL

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Certified Financial Planner (CFP) Professional Accreditation, ICB Certified Trust and Financial Advisor (CTFA), and TX Guardianship Certification Board (GCB) Credit Expected

Times listed are Central Standard

THURSDAY MORNING, AUG. 10, 2023

Presiding Officer:
John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX

7:30 a.m. Registration and Exhibit Hall Opens

Includes continental breakfast.

THANK YOU TO OUR BREAKFAST SPONSOR

CADENCE Asset Management & Trust

8:20 a.m. Welcoming Remarks

8:30 a.m. .50 hr

IRAs In Estate Planning, or Trust Me, I'm an EDB for RMDs After the RBD

We've seen a lot of changes in how IRA's and retirement plans are taxed after the participant's death, especially when left in trust. Here's what you need to know when planning an estate with significant tax-deferred assets.

Dianne Reis, Attorney at Law, Plano, TX

9:00 a.m. .75 hr

Legislative Update

Update on trust, estate and guardianship legislation passed during the 88th legislative session.

Lauren Davis Hunt, Osborne, Helman, Scott, Knisely & Stanton L.L.P., Austin, TX

9:45 a.m. 15-Minute Break to Visit Exhibitors

10:00 a.m. .75 hr

Medicaid Update

Latest developments affecting planning and applications for Medicaid to pay for nursing home care and home care.

H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX

10:45 a.m. .50 hr ethics

Drafting for the Trustee in a Challenging Environment

Explore 20 drafting ideas to help the trustee in the administration of a trust and to minimize their liability. The materials include "Trustee Boot Camp: A Checklist for New Trustees."

Dave Folz, Trust Counselor LLC, Dallas, TX
Sarah Patel Pacheco, Jackson Walker LLP, Houston, TX

11:15 a.m. .75 hr | .75 hr G

Guardianships During Divorce

Two of the most difficult legal proceedings a person can go through in life are divorces and guardianships. Explore how to handle the challenges that arise when these two practice areas collide.

Hon. Guy Herman, Travis County Probate Court #1, Austin, TX
Jason S. Scott, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX

Materials By:
Victoria D. Seybold, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX
Jami Milner Turner, Friday Milner Lambert Turner PLLC, Austin, TX

12:00 p.m. 30-Minute Break for Lunch and Visit Exhibitors

Lunch included in registration.

THURSDAY AFTERNOON

Presiding Officer:
Bryn A. Poland, Mayo & Poland PLLC, Baytown, TX

THANK YOU TO OUR LUNCHEON SPONSOR

Frost BANKING INVESTMENTS INSURANCE

LUNCHEON PRESENTATION

12:30 p.m. .75 hr ethics

The "Difficult" Clients

Explore how to define, spot, course correct and terminate "difficult" clients and client relationships.

John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX

1:15 p.m. 15-Minute Break to Visit Exhibitors

1:30 p.m. 1.00 hr | .50 hr ethics | 1.00 hr G

Alternatives to Guardianship Including Supports and Services

An examination and discussion from the perspectives of the bench and in practice on lesser restrictive alternatives and available supports and services in guardianship. Which work? Which do not? And, how, in every case, the answer is, "It depends."

Hon. Jason Cox, Harris County Probate Court #3, Houston, TX
Nathan Peters, Law Offices of Nathan Peters, PLLC, Denton, TX

2:30 p.m. .75 hr

Things Every Texas Estate Planner Should Know About Advising New to Texas Clients, Including Transfer of Guardianship from Another State

An overview of common issues for Texas Estate Planners to address when working with clients who have moved to Texas from another state, such as identifying tax issues and updating estate planning documents. Also hear a discussion of the steps for transferring a guardianship case from another state, from closing the case in the sending state to acceptance in Texas.

Brian D. Cororve, Gray Reed, Houston, TX
M. Elizabeth Raxter, Law Office of Elizabeth Raxter, PLLC, Lockhart, TX

3:15 p.m. 10-Minute Break to Visit Exhibitors

THANK YOU TO OUR BREAK SPONSOR

LEGACY ENHANCEMENT TRUST

GUEST MEAL PACKAGE—$75

You can now purchase a guest meal package for family and guests that includes Thursday and Friday's continental breakfasts and lunches and Thursday's evening reception.

3:25 p.m. .50 hr

Not So Fast! 7 Steps For Deciding Whether and How To Discuss the Federal Estate Tax Return with the Personal Representative

The federal estate tax return is often not mentioned to the client in the course of a probate attorney's representation of an executor or administrator of a decedent's estate. Given such factors as the looming sunset of the current gift and estate tax exemption, the opportunity for portability of a married decedent's unused exclusion to a surviving spouse, and negative consequences that can result from failing to file a federal estate tax return, this presentation offers some steps for the probate attorney to consider when deciding whether to include a discussion of the federal estate tax return when representing an executor or administrator of a decedent's estate.

Nikki L. Laing, Godwin Laing, PLLC, Texarkana, TX

3:55 p.m. .75 hr

What All Estate and Probate Attorneys Need to Know About Medicaid Estate Recovery

A practical guide to the Medicaid Estate Recovery Program (MERP) in two parts. Address the preplanning techniques estate planners can (and cannot) use to avoid MERP and provide a step-by-step guide for how to defend against a MERP claim in the probate estate of a Medicaid recipient who did not engage in the necessary preplanning.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX

4:40 p.m. .75 hr

What All Estate and Probate Attorneys Need to Know About Medicaid Planning and Drafting

Issue-spotting and discussion highlighting elder law issues for which every estate planner and probate attorney should be on the lookout.

Renée C. Lovelace, The Lovelace Law Firm, P.C., Tyler, TX
Meredith Ann Sullivan, Farrell & Johnson PLLC, Austin, TX

Materials By:
H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX

5:25 p.m. Adjourn to Reception

NETWORKING RECEPTION

5:25 p.m. – 6:25 p.m.

Join us for drinks and hors d'oeuvres
with program faculty and attendees

FRIDAY MORNING, AUG. 11, 2023

Presiding Officer:
Margaret Svoboda, American National Bank of Texas, Rockwall, TX

7:30 a.m. Conference Room and Exhibit Hall Opens

Includes continental breakfast.

8:00 a.m. 1.00 hr | .50 hr ethics | 1.00 hr G

Role of the Guardian

Examine the duties and responsibilities of a guardian under Texas law and guardianship administration, from initiation to closing, including the code requirements of selling and leasing property, ethical issues, and more.

Hon. Polly Jackson Spencer, Senior Statutory Probate Judge, Retired, San Antonio, TX

Materials Bys:
Maite Elorduy, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX
Jason S. Scott, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX

9:00 a.m. 1.00 hr | .50 hr ethics | 1.00 hr G

Role of the Ad Litem

A review of the responsibilities of the attorney ad litem and guardian ad litem in guardianship proceedings with an emphasis on practical application of the statutes, conduct in uncontested and contested proceedings, and pointers on applications for fees.

Fatima Breland, The Breland Law Firm, PC, Houston, TX

10:00 a.m. 15-Minute Break to Visit Exhibitors

10:15 a.m. .50 hr

Cribs, Million Dollar Listings, and Property Wars: How Executors can Navigate the Drama of Administering Estates with Real Property

A review of an executor's powers and fiduciary duties relating to the administration of real estate in probate proceedings, including the interplay between a beneficiary's vested ownership interest and an executor's right of possession, whether a power of sale is really all that powerful, and dealing with a surviving spouse's homestead rights.

T. Aaron Dobbs, Gray Reed & McGraw LLP, Houston, TX

10:45 a.m. .50 hr

A Decade of Trust Decanting in Texas

Texas adopted its trust decanting statute in 2013. Ten years (and several amendments) later, practitioners are still grappling with when and how to decant a trust. Hear an overview of trust decanting in Texas, with a specific focus on decanting in response to unanticipated elder law and special needs issues.

Jeff Chadwick, Winstead PC, The Woodlands, TX

11:15 a.m. .50 hr

Pooled Trusts for Older Clients

How to find, use, and compare pooled trusts for older clients, including clients planning for themselves, spouses, and other family members. Whether clients have substantial or modest resources, there are a variety of pooled trust strategies to consider suggesting to older clients who are seeking to protect care options throughout the future.

Renée C. Lovelace, The Lovelace Law Firm, P.C., Tyler, TX

11:45 a.m. 30-Minute Break for Lunch and Visit Exhibitors

Lunch included in registration.

FRIDAY AFTERNOON

Presiding Officer:
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX

LUNCHEON PRESENTATION

12:15 p.m. .75 hr

Accessing and Managing Digital Assets After Death

Gain insight on basic information about digital assets to estate planners and attorneys representing executors or administrators of estates, while also providing practical advice for how to access and manage those assets before and after death.

Maite Elorduy, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX
Hailey M. Hanners, Osborne, Helman, Scott, Knisely & Stanton, LLP, Austin, TX

1:00 p.m. 30-Minute Break and Vendor Announcements

1:30 p.m. .50 hr

The Corporate Transparency Act and YES, It Impacts Estate Planners!

The Corporate Transparency Act of 2020 mandates that certain business entities disclose beneficial ownership information to FinCEN to combat illegal activities such as money laundering, terrorism financing, and tax fraud. Estate planners who use business entities for asset holding or wealth structuring should be aware of the CTA's reporting requirements and possible penalties for noncompliance, as some of these entities may fall under the Act's purview.

Antonio "Tony" Castillo, Kemp Smith LLP, El Paso, TX

2:00 p.m. .75 hr

To Fund…or Not to Fund: When Plans Go Awry

What do you do when the original estate planner is frustrated because of actions taken by the testator after execution of his or her will? What if the parties refuse to fund a QTIP (Marital), Credit Shelter (Bypass) Trust or other Testamentary Trust? Hear about the practical, tax, and legal issues the attorney should consider.

Paul D. Strug, Weycer, Kaplan, Pulaski & Zuber, PC, Houston, TX

2:45 p.m. **10-Minute Break**

2:55 p.m. .75 hr

Life Settlements: Why Clients Don't Have to Die or Be Terminally Ill to Get Value from Their Life Insurance

Gain insight into why clients purchase life insurance and confirm that life insurance is an asset that (i) requires and can benefit from active management as the contract matures, (ii) can be sold similar to other financial assets and (iii) may have a value to the policyowner that is significantly greater than the cash surrender value. Review the various types of insurance commonly used in estate planning, the evolution of universal life insurance that has contributed to the development of the life settlement market, the tax treatment of life settlements should a policy be sold in a life settlement, options for working with a life settlement for clients who need additional funds for retirement and a discussion of trust owned life insurance and how the life settlement option is of particular importance for fiduciaries to understand to avoid potential liability for a policy surrender or lapse.

Tama Brooks Klosek, Klosek & Associates PLLC, Houston, TX

3:40 p.m. 1.00 hr | .25 hr ethics | .25 hr G

Ask the Experts

Hear a panel of seasoned experts respond to your frequently—and sometimes infrequently—asked questions, including practice, professional and ethical issues in estate planning, probate, guardianship and elder law. Please submit your questions in advance to **ConferenceQA@utcle.org**.

Moderator:
H. Clyde Farrell, Farrell & Johnson PLLC, Austin, TX

Panelists:
John B. Henry III, Law Office of John B. Henry, III, PLLC, Bellaire, TX
Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX
Dianne Reis, Attorney at Law, Plano, TX

4:40 p.m. **Adjourn**

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Bellaire, TX

*Planning Committee member

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512.475.6700

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REGISTRATION—Select from ONE of the columns below

Texas NAELA members who have a paid registration to UT Law's Estate Planning and Elder Law Conference may attend the TX NAELA Summer Conference at no charge!
(use far right column to register for both events)

WEDNESDAY ONLY

TX NAELA SUMMER CONFERENCE ONLY
(Open to TX NAELA Members ONLY)

Includes Electronic Course Binder Download (PDF) in "Your Briefcase".

❑ Live, In-Person Registration $245
❑ Live Webcast Registration $245

❑ Medicaid Session RSVP (space is limited, in-person only)
❑ Wednesday Lunch RSVP
❑ Wednesday Evening Dinner RSVP
❑ Wednesday Evening Guest Dinner Ticket. . . $75 x ____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 8, 2023
Please note that the printed binder will arrive 6–8 weeks after the event. Delivery to P.O. boxes is not permitted.

❑ Printed and Shipped Binder with Registration (Shipping Included) $48.71 ($45)

Webcast Add-on
Register for the in-person conference and add on the webcast format for attendance flexibility.

❑ Webcast Add-on $75

Registration Subtotal $________

THURSDAY AND FRIDAY ONLY

UT LAW ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

Includes Electronic Course Binder Download (PDF) in "Your Briefcase".

❑ Live, In-Person Registration $625 | $675 after Aug. 2
❑ Live Webcast Registration $625 | $675 after Aug. 2
❑ Thurs–Fri Guest Meal Passes (limit 5). . . . . $75 x ____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 10, 2023
Please note that the printed binder will arrive 2–3 weeks after the event. Delivery to P.O. boxes is not permitted.

❑ Printed and Shipped Binder with Registration (Shipping Included) $81.19 ($75*)

Webcast Add-on
Register for the in-person conference and add on the webcast format for attendance flexibility.

❑ Webcast Add-on $75

Registration Subtotal $________

ALL THREE DAYS

UT LAW ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE AND TX NAELA SUMMER CONFERENCE
(Open to TX NAELA Members ONLY)

Includes Electronic Course Binder Download (PDF) in "Your Briefcase".

❑ Live, In-Person Registration $625 | $675 after Aug. 2
❑ Live Webcast Registration $625 | $675 after Aug. 2
❑ Medicaid Session RSVP (space is limited, in-person only)
❑ Wednesday Luncheon RSVP
❑ Wednesday Dinner RSVP
❑ Wednesday Evening Guest Dinner Ticket. . . $75 x ____
❑ Thurs–Fri Guest Meal Passes (limit 5) . . . . . $75 x ____

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 11, 2023
Please note that the printed binder will arrive 2–3 weeks after the scheduled webcast. Delivery to P.O. boxes is not permitted.

❑ Wednesday Conference $48.71 ($45)
❑ Thursday and Friday Conference $81.19 ($75*)
*Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

Webcast Add-on
Register for the in-person conference and add on the webcast format for attendance flexibility.

❑ Wednesday Webcast Add-on. $75
❑ Thursday and Friday Webcast Add-on. $75

Registration Subtotal $________

Texas NAELA
National Academy of Elder Law Attorneys
Texas Chapter

Want to join NAELA?
Visit www.TexasNAELA.com

Can't make the live conference? Consider post-conference options

UT Law Estate Planning, Guardianship and Elder Law Conference ONLY

eConference – For Texas MCLE Credit
Includes Electronic Course Binder Download (PDF) and program video/audio. Available 6–8 weeks after live event. Hours may vary depending on actual event runtime.

❑ Individual eConference $675

Post-Course Binder – For Research and Self-Study
Comprehensive binder with papers and slides, available for delivery 6–8 weeks after live event.

❑ Electronic Post-Course Download (PDF) $297.69 ($275*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.
❑ Printed Post-Course Binder $351.81 ($325*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

Estate Planning, Guardianship and Elder Law Materials SUBTOTAL $ ________

PAYMENT INFORMATION

ORDER GRAND TOTAL $________

METHOD OF PAYMENT
❑ Check (make check payable to The University of Texas at Austin) ❑ VISA ❑ MasterCard ❑ American Express ❑ P.O.

Card/P.O. # ________ CVV # ______ Exp. Date (mm/yy) ______ / ______

Authorized Signature ________

* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Texas Sales and Use Tax Exemption Certificate with order.

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THE UNIVERSITY OF TEXAS SCHOOL OF LAW
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ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE
TEXAS NAELA SUMMER CONFERENCE
August 9, 10–11, 2023 ■ Moody Gardens ■ Galveston, Texas

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ERT23/ER23

GALVESTON

August 9, 10–11, 2023

CONFERENCE LOCATION

Moody Gardens Hotel
Seven Hope Boulevard
Galveston, Texas
888.388.8484

Special Room Rate: $217
through July 18, 2023
(subject to availability)

Parking:
Complimentary self-parking

KEY DATES

August 2, 2023
Last day for early registration rates

August 4, 2023
Last day for full refund cancellation

August 7, 2023
Last day for partial refund cancellation
$50 processing fee applied

August 9, 2023
TX NAELA Summer Conference Begins
Open to Members ONLY

August 10, 2023 8:20 a.m., CT
Conference Begins

August 11, 2023
Last day to order a printed and shipped course binder with in-person or webcast conference registration.

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