THE UNIVERSITY OF TEXAS SCHOOL OF LAW

TEXAS CHAPTER OF THE NATIONAL ACADEMY OF ELDER LAW ATTORNEYS

27TH ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

July 31–August 1, 2025

La Cantera Resort & Spa ▪ San Antonio, Texas

Live Webcast July 31–August 1

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

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)

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July 30, 2025

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2025

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

July 30, 2025 ▪ La Cantera Resort & Spa ▪ San Antonio, Texas

Earn Up To 5.00 Hours of Credit (Expected) Including 0.50 Hour of Ethics Credit MCLE Credit Approved in TX, CA, and PA
Earn up to 6.00 Hours of Texas Certified Professional Accounting Credit

WEDNESDAY MORNING, JULY 30, 2025

10:15 a.m. **Registration and Exhibit Hall Opens**

10:30 a.m. **Board Meeting**
All TX NAELA members are welcome to join.

11:30 a.m. **Pick Up Lunch**
Included in registration.

THANK YOU TO OUR LUNCHEON SPONSOR

CADENCE Asset Management & Trust

WEDNESDAY AFTERNOON

GENERAL SESSSIONS (Main Ballroom)

Presiding Officer:
Lisa Shoalmire, Ross & Shoalmire PLLC, Texarkana, TX

11:50 a.m. **Welcoming Remarks**

12:00 p.m. .50 hr

Transitioning Between Public Benefit Programs

Changes in a client's health, living arrangement, resources, or income can derail the client's well-crafted, and sometimes long and hard-fought, eligibility plan. Learn how to help a client on public benefits when the client needs the services of a different program than the one they are on.

Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX

12:30 p.m. .75 hr

Can't I Even Discharge My Student Loans in Death? A Practical Guide to Handling Probate Creditors

A practical guide to handling debt in probate estates from the initial inquiry into whether there is debt to the final payment or barring of any creditors. Discuss set-asides and family allowances as well as MERP, how to treat secured and unsecured creditors, and how creditor processes vary in dependent and independent administrations.

Jennifer L. Coulter, Townsend Allala, Coulter & Kludt, PLLC, El Paso, TX
Jessica L.D. Guobadia, Crain Caton & James, Houston, TX

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

1:30 p.m. .75 hr

Stretch It Out: Drafting and Funding Trusts that Qualify Under SECURE Act 1.0 and 2.0

The SECURE Act 1.0 and SECURE Act 2.0 changed the rules regarding naming trusts as beneficiaries of qualified accounts. Learn how to avoid pitfalls so that your trusts protect your clients' loved ones as intended.

Christopher T. Freyder, Rainey & Rainey, PLLC, Georgetown, TX

2:15 p.m. .50 hr

Don't Screw Up the Guardianship Case for the Future Litigator

Realistic strategies for handling contested guardianships, including tips for voir dire, jury trial and appeal.

Jessica Newill, Gardner Law Firm, San Antonio, TX

2:45 p.m. .75 hr

Trust Me, It's Taxable: Trust Income and Estate Tax for Elder Law Attorneys

This session breaks down the complex world of trust taxation with a practical focus on grantor status, special needs trusts, Medicaid planning, and estate tax inclusion.

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

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

3:45 p.m. .75 hr

Planning with Marital Property in Mind

Marital property can be a friend or foe. An understanding of marital property rules and planning strategies related to them are an essential tool in any elder law attorney's toolbox.

Ruth-Ann Toups, The Toups Law Firm, Spring, TX

4:30 p.m. .50 hr

Scammed Clients: How to Advise from a Law Enforcement Perspective

Learn about some of the most common frauds and scams, where to report suspected fraud and scams and share tips to protect yourself from scammers.

Sharleigh D. Drake, Texas Department of Public Safety, Criminal Investigations Division, San Antonio, TX

5:00 p.m. .50 hr ethics

Real World AI Use in Elder Law Practice

Hear real examples from the field on how elder law attorneys use AI today—and what they have learned along the way.

Ben King, Ross & Shoalmire PLLC, Texarkana, TX
P. James Rainey, Rainey & Rainey, PLLC, Waco, TX

5:30 p.m. **Break to Business Meeting and Reception**

MEDICAID PLANNING WORKSHOP (San Jose Room)

Attendees must RSVP and pay an additional fee of $95 for the Medicaid Planning Workshop when registering for the conference. Attendance is limited to the first 24 people.

11:50 a.m. **Welcoming Remarks**

12:00 p.m. 1.25 hrs

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. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.

Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

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

1:30 p.m. 2.00 hrs | .50 hr ethics

Medicaid Planning Nuts and Bolts - A Case Study

Continuation of the 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. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.

Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

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

3:45 p.m. 1.75 hrs

Medicaid Planning Nuts and Bolts - A Case Study

Continuation of the 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. A hands-on, interactive case study from the initial client call to the gathering and interpretation of information, the Medicaid application, correspondence with HHS, and the possible appeal.

Lori A. Leu, Leu, Peirce, & Olson, PLLC, Plano, TX
Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX

5:30 p.m. Break to Business Meeting and Reception

WEDNESDAY EVENING, JULY 30, 2025

THANK YOU TO OUR RECEPTION SPONSOR

LEGACY ENHANCEMENT

5:30 p.m. – 6:30 p.m.

Included for registrants;
$60 for non-registrant guests.

WEDNESDAY GUEST MEAL PASSES—$60

Have family members or guests joining you in San Antonio?

You can now purchase a guest meal package for each of your guests, that includes Wednesday's lunch and reception.

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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**.

27TH ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

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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)
Additional Credit Expected for ICB Certified Trust and Financial Advisor (CTFA) and TX Guardianship Certification Board (GCB)

Times listed are Central Standard

THURSDAY MORNING, JULY 31, 2025

Presiding Officer:
Christina Lesher, The Law Office of Christina Lesher, PC, Houston, TX

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

Includes continental breakfast.

THANK YOU TO OUR BREAKFAST SPONSOR

MEDIVEST

8:20 a.m. **Welcoming Remarks**

8:30 a.m. **.75 hr | .25 hr ethics**

How Do We Practice Law?

Have you ever wondered how other attorneys handle the practical aspects of managing clients and cases? Do other attorneys store original documents for clients? Are will-reading ceremonies a thing? This presentation discusses survey results from Texas attorneys in this practice area.

Dianne Reis, Attorney at Law, Plano, TX

9:15 a.m. **.50 hr**

Case Law Update

A review of recent cases affecting the practice of estate planning, guardianship, and elder law in Texas and around the country.

Elisa Dillard Rainey, Rainey & Rainey, PLLC, Waco, TX

Materials By:
Gerry W. Beyer, Texas Tech University School of Law, Lubbock, TX

9:45 a.m. **15-Minute Break**

GUEST MEAL PASSES—$95

Have family members or guests joining you in San Antonio?

You can now purchase a guest meal pass for each of your guests, that includes Thursday and Friday's continental breakfasts and lunches.

10:00 a.m. **.50 hr**

TRS Beneficiary Designations: Simple Rules, Big Consequences

From outdated forms to unintended heirs, TRS beneficiary designations can create surprising pitfalls for your clients. This session covers the essential rules, common mistakes, and smart planning strategies to ensure TRS benefits align with your clients' estate plans.

Lindsey James-West, LKJ Financial, Houston, TX

10:30 a.m. **.75 hr**

Medicaid Update

Identify and explain recent changes in Medicaid law and policy. Discuss Medicaid advocacy strategies that are "hot," either because they are new or because they are underutilized but work well.

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

11:15 a.m. **.50 hr**

Handling Special Assets in Planning and Administration

Explore how to plan for and administer special assets, including minerals, business interests, crypto, cattle, and promissory notes.

Adrianne Graves, Graves Law PLLC, Houston, TX

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

Lunch included in registration.

THURSDAY AFTERNOON, JULY 31, 2025

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

THANK YOU TO OUR LUNCHEON SPONSOR

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LUNCHEON PRESENTATION

12:15 p.m. **1.00 hr | .25 hr ethics | .50 hr G**

Recognizing Potential Incapacity of a Client

Discuss how to recognize potential incapacity in clients and the limitations any such incapacity causes. The discussion includes identifying the varying levels of capacity, steps that can be taken to identify capacity, and the types of incapacity a person may suffer from.

Moderator:
Jessica L.D. Guobadia, Crain Caton & James, Houston, TX

Speaker:
Dr. Christopher Merkl, Houston, TX

1:15 p.m. **15-Minute Break**

CONFERENCE ACCREDITATION

The University of Texas School of Law is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org. **Earn up to 18.00 credits.**

Field of Study: Specialized Knowledge

Delivery Method: Group-Live

Program Level: Intermediate and Advance

Advanced Preparation: None

Prerequisite: A foundational understanding of estate planning, guardianship, elder law, or related legal and financial disciplines.

Learning Objectives:

Gain insights into recent changes in Medicaid law and policy, effective advocacy strategies, and the enrollment process for Medicare Parts A, B, C, and D.

Learn how to recognize potential incapacity in clients, explore lesser restrictive alternatives to guardianship, and understand the practical applications of these alternatives.

Discover strategies for handling special assets in estate planning and administration, including minerals, business interests, crypto, cattle, and promissory notes, as well as planning for ranch owners.

Examine the ethical and practical uses of AI in law practice, understand the implications of licensed legal paraprofessionals, and explore the ethical considerations in estate planning.

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

Lesser Restrictive Alternatives / Supports and Services to Guardianship: A Guide for a Practical Practice

Discuss lesser alternatives to guardianships including power of attorneys, representative payees, care managers, and 1301 management trusts, and other creative alternatives when dealing with legal issues or assets in other jurisdictions.

Hon. Amy Rigby Parsons, Harris County Probate Court #3, Houston, TX
Andrea Lee Uresti Barr, Barr Law, PLLC, Sugar Land, TX
Tara Zinn, Harris County Probate Court #3, Houston, TX

Materials By:
Gus G. Tamborello, Gus G. Tamborello, P.C., Houston, TX

2:30 p.m. .75 hr

When and How to Enroll in Medicare Parts A, B, C, D

This presentation covers when beneficiaries should enroll in Medicare, the differences between Parts A, B, C, and D, and the process and deadlines for enrolling in each.

Pi-Yi Mayo, Mayo & Poland PLLC, Baytown, TX

3:15 p.m. 10-Minute Break

3:25 p.m. .50 hr

Estate Planning for Ranch Owners

Does your ranch-owning client plan to liquidate it or keep it in the family for generations to come? Learn practical planning strategies to address multi-generational ownership, liability protection needs, and desired tax treatment of the family ranch.

Tanya E. Feinleib, Langley and Banack, Inc., San Antonio, TX

3:55 p.m. .50 hr | .25 hr ethics

Pitfalls and Problems with Licensed Legal Paraprofessionals

A discussion of the current status of the Texas Supreme Court's proposed rules regarding Licensed Legal Paraprofessionals, the issues presented by LLPs, and some alternative solutions.

Ruth-Ann Toups, The Toups Law Firm, Spring, TX

4:25 p.m. .75 hr ethics

Ethics and Practical Uses of AI in Your Law Practice

This presentation explores the ethical and practical uses of AI in estate planning, guardianship, and elder law, offering guidance on current AI tools and leveraging AI while upholding professional responsibilities. It examines AI's potential to automate tasks, improve efficiency, and enhance client service while addressing ethical considerations and relevant ABA rules, including billing for AI-related services.

Greg Lambert, Jackson Walker LLP, Houston, TX

5:10 p.m. Adjourn

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BEAT THE SUMMER HEAT WITH A FROSTY EVENING
(RSVP Requested)

7:30 p.m. – 8:30 p.m.

Join us on the City View Terrace for a chill evening with after-dinner desserts and cocktails. Families and guests are welcome!

FRIDAY MORNING, AUG. 1, 2025

Presiding Officer:
Benecia Flores, Petrosewicz Law Firm, P.C., Richmond, TX

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

Includes continental breakfast.

THANK YOU TO OUR BREAKFAST SPONSOR

CADENCE Asset Management & Trust

8:00 a.m. .75 hr

Medicaid Asset Protection Trusts

Learn how Medicaid Asset Protection Trusts can be strategically utilized to help your clients qualify for long-term care benefits while preserving assets and avoiding trust-busting traps.

Lisa Shoalmire, Ross & Shoalmire PLLC, Texarkana, TX

8:45 a.m. .75 hr | .75 hr G

A Toolkit for Contested Guardianships

This session provides you with guidance, forms, and strategy considerations to help you be successful in your next contested guardianship case.

Christopher C. Burt, BoyarMiller, Houston, TX

9:30 a.m. .50 hr

Ask an HHSC Representative

Gain insight on a variety of topics including the processing of client applications, utilizing the 211-call system, setting up an online account on yourtexasbenefits.com and the loading of large attachments.

Leslea Tate Pickle, Texas Health and Human Services Commission, Austin, TX

10:00 a.m. 15-Minute Break

10:15 a.m. .75 hr | .50 hr G

The Four-Step Process for Sale of Property

Whether Guardianship, Dependent Administration or Sale of a Ward's (Minor's) property without Guardianship, there are legislative requirements and title underwriter requirements in relation to the documents that have to be filed with the courts to obtain permission to sell real property owned. Discuss applications, time limitations, verified accountings, reasons for selling and Deeding requirements.

Thad Barreneche, Title Resources Guaranty, Dallas, TX
Pam Keever, Keever & Wiesenthal and American Title Company of Houston, Houston, TX
Tonya Knauth, Attorney at Law, Houston, TX

11:00 a.m. .50 hr | .25 hr G

Working with Adult Protective Services

Elder Law, Guardianship and Estate Planning attorneys frequently encounter family members who are either alleged victims or alleged perpetrators of abuse, neglect, and/or exploitation. This session provides attorneys with a framework of reference for how Texas Adult Protective Services performs its investigations and recommendations on how to best accomplish successful outcomes when confronted with an APS investigation.

Terry W. Hammond, Kemp Smith, LLP, El Paso, TX
Laura Palmquist, Texas Department of Family and Protective Services, Austin, TX

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

Lunch included in registration.

FRIDAY AFTERNOON, AUG. 1, 2025

Presiding Officer:
Wesley E. Wright, Wright Abshire, Attorneys P.C., Bellaire, TX

THANK YOU TO OUR LUNCHEON SPONSOR

LEGACY ENHANCEMENT

LUNCHEON PRESENTATION

12:00 p.m. .75 hr

Legislative Update

Update on new legislation impacting estate planning, guardianships, trusts and related practice areas.

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

12:45 p.m. 30-Minute Break and Vendor Announcements

1:15 p.m. 1.00 hr | 1.00 hr G

Representing Proposed Wards: How Disorganized is Legally Disorganized?

Hear strategies to employ when your proposed ward has capacity (or partial capacity) and ways to work with the applicant's attorney to protect the rights of your proposed ward.

Lauren Olson, Leu, Peirce, & Olson, PLLC, Plano, TX
Kathleen Schultz Wiesenthal, Keever & Wiesenthal, Houston, TX

2:15 p.m. .75 hr | .25 hr ethics

Death and Fraud on the Community

Explore the fundamentals of fraud-on-the-community claims, including a discussion of the claim's origins, elements, defenses, remedies, related causes of action, and practical examples from Texas cases.

Eric Bean, Ferguson Braswell Fraser Kubasta PC, Houston, TX

3:00 p.m. 10-Minute Break

THANK YOU TO OUR BREAK SPONSOR

EVAN HOWELL PROPERTY MANAGEMENT

3:10 p.m. 1.00 hr | .25 hr ethics

SECURE Act Final Regulations: Planning for Distribution of Retirement Assets

Discuss notable provisions in the SECURE Act Final Regulations relating to retirement assets from an estate planning perspective. In particular, evaluate naming trusts as beneficiaries of retirement assets.

Karen S. Gerstner, Karen S. Gerstner & Associates, P.C., Houston, TX

4:10 p.m. .75 hr | .50 hr ethics

Protecting the Client and Their Plan from Interlopers and Do-Gooders

When other advisors, family, and friends involve themselves in the estate planning process they may help or interfere, or both. This presentation addresses the ethical and practical issues that result and offers real world solutions that put the client's interests and goals first.

Bernard E. ("Barney") Jones, Attorney at Law, Houston, TX
Sarah Patel Pacheco, Jackson Walker LLP, Houston, TX

4:55 p.m. Adjourn

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Texas Department of Family and Protective Services
Austin, TX

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Harris County Probate Court #3
Houston, TX

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Texas Health and Human Services Commission
Austin, TX

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Mayo & Poland PLLC
Baytown, TX

ELISA DILLARD RAINEY*
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REGISTRATION

WEDNESDAY

TX NAELA SUMMER CONFERENCE
(OPEN TO TX NAELA MEMBERS ONLY)

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

❑ Live, In-Person Registration. . $345 | $445 after July 24
❑ Medicaid Session (space is limited) $95
❑ Wednesday Guest Meal Package (limit 5) . . . $60 x ___

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 1, 2025
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) $102.84 ($95*)

Wednesday Registration Subtotal $_____

THURSDAY AND FRIDAY

UT LAW ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

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

❑ Live, In-Person Registration . . . . . $775 | $875 after July 17
❑ Live Webcast Registration $875
❑ Thurs–Fri Guest Meal Pass (limit 5). . . . . $95x _____
❑ Thursday Evening Beat the Summer Heat with a Frosty Evening RSVP . . . . . Free x ___

Printed and Shipped Binder with Registration (Shipping Included) – Available for order through August 1, 2025
Please note that the printed binder will arrive 2–3 weeks after the event. Delivery to P.O. boxes is not permitted.

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

❑ Webcast Add-on $100

Thursday and Friday Registration Subtotal $_____

REGISTRATION SUBTOTAL FOR ALL THREE DAYS $_____

TX NAELA MEMBERS — SAVE $100 WITH REGISTRATION FOR BOTH CONFERENCES **-$100 $_____**

Texas NAELA
National Academy of Elder Law Attorneys
Texas Chapter

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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 $875

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Comprehensive binder with papers and slides, available for delivery 6–8 weeks after live event.

❑ Electronic Post-Course Download (PDF) $319.34 ($295*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

❑ Printed Post-Course Binder $373.46 ($345*)
* 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.

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ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE
TEXAS NAELA SUMMER CONFERENCE

July 30, 31–August 1, 2025 ■ La Cantera Resort & Spa ■ San Antonio, Texas

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ERT25/ER25

SAN ANTONIO

July 30, 31–August 1, 2025

CONFERENCE LOCATION

La Cantera Resort & Spa
16641 La Cantera Parkway
San Antonio, TX 78256
210.558.6500
855.499.2960 (reservations)

Special Room Rate: $223
Discounted Resort Fee: $30
good through July 1, 2025
reference "UT Law CLE Elder Law Conference"
(subject to availability)

Parking:
Please visit www.utcle.org/conferences/ER25
for daily and overnight rates

KEY DATES

July 17, 2025
Last day for early registration rates

July 25, 2025
Last day for full refund cancellation

July 28, 2025
Last day for partial refund cancellation
$50 processing fee applied

July 30, 2025
TX NAELA Summer Conference Begins
Open to Members ONLY

July 31, 2025 8:20 a.m., CT
Conference Begins

August 1, 2025
Last day to order a printed and shipped course binder with in-person or webcast conference registration.

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