UT Law CLE logo

27th Annual Estate Planning, Guardianship and Elder Law Conference
July 31 - August 1, 2025 • La Cantera Resort & Spa • San Antonio, TX
July 31 - August 1, 2025 • Live Webcast

Thursday Morning, July 31, 2025

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

7:30 am In San Antonio Only	**Registration and Exhibit Hall Opens** Includes continental breakfast. **Thank You to Our Breakfast Sponsor** MEDIVEST
In San Antonio Only	**Guest Meal Package—$95** 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 Thursday and Friday's continental breakfasts and lunches, as well as the Thursday evening after-dinner reception.
8:20 am	**Welcoming Remarks**
8:30 am 0.75 hr 0.25 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 am 0.50 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 am	**15-Minute Break**

10:00 am 0.50 hr	**TRS Beneficiary Designations: Simple Rules, Big Consequences** From outdated forms to unintended heirs, TRS beneficiary designations can create surprising pitfalls for your clients.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 am 0.75 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 am 0.50 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 am In San Antonio Only	**30-Minute Break for Lunch and Visit Exhibitors (in San Antonio)** Lunch included in registration.

Thursday Afternoon, July 31, 2025

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

LUNCHEON PRESENTATION

In San Antonio Only	**Thank You to Our Luncheon Sponsor** HAPPY STATE BANK HAPPY TRUST COMPANY Wealth Management & Trust Services A DIVISION OF CENTENNIAL BANK
12:15 pm 1.00 hr 0.25 hr ethics 0.50 hr guardianship	**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 Dr. Christopher Merkl, Houston, TX

1:15 pm	**15-Minute Break**
1:30 pm 1.00 hr 0.50 hr ethics 1.00 hr guardianship	**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 pm 0.75 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 pm	**10-Minute Break**
3:25 pm 0.50 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 pm 0.50 hr 0.25 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 pm 0.75 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 pm	**Adjourn**

Thursday Evening, July 31, 2025

7:30 pm In San Antonio Only	**Beat the Summer Heat with a Frosty Evening | 7:30 - 8:30 p.m. (RSVP Requested)** Join us on the City View Terrace for a chill evening with after-dinner desserts and cocktails. Families and guests are welcome!

Thank You to Our Sponsor

Friday Morning, Aug. 1, 2025

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

7:30 am In San Antonio Only	**Conference Room and Exhibit Hall Opens** Includes continental breakfast. **Thank You to Our Breakfast Sponsor**
8:00 am 0.75 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 am 0.75 hr 0.75 hr guardianship	**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 am 0.50 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 am	**15-Minute Break**
10:15 am 0.75 hr 0.50 hr guardianship	**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 Kathleen Schultz Wiesenthal, Keever & Wiesenthal - Houston, TX
11:00 am 0.50 hr 0.25 hr guardianship	**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 am In San Antonio Only	**30-Minute Break for Lunch and Visit Exhibitors (in San Antonio)** Lunch included in registration.

Friday Afternoon, Aug. 1, 2025

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

LUNCHEON PRESENTATION

In San Antonio Only	**Thank You to Our Luncheon Sponsor** LEGACY ENHANCEMENT
12:00 pm 0.75 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 pm	**30-Minute Break and Vendor Announcements**
1:15 pm 1.00 hr 1.00 hr guardianship	**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 pm 0.75 hr 0.25 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 pm	**10-Minute Break**
In San Antonio Only	**Thank You to Our Break Sponsor** EVAN HOWELL PROPERTY MANAGEMENT
3:10 pm 1.00 hr 0.25 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 pm 0.75 hr 0.50 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. John Mark Comuzzie, Jackson Walker LLP - San Antonio, TX Bernard E. ("Barney") Jones, Attorney at Law - Houston, TX
4:55 pm	**Adjourn**