

**28<sup>th</sup> Annual Estate Planning, Guardianship and Elder Law Conference**  
**July 30-31, 2026 • Moody Gardens • Galveston, TX**  
**July 30-31, 2026 • Live Webcast**

**Thursday Morning, July 30, 2026**

**Presiding Officer:**

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

In Galveston  
Only

**Guest Meal Package—\$95**

Have family members or guests joining you in Galveston? 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.

7:30 am  
In Galveston  
Only

**Registration and Exhibit Hall Opens**

Includes continental breakfast.

**Thank You to Our Breakfast Sponsor**



8:20 am

**Welcoming Remarks**

8:30 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

9:00 am  
0.75 hr

**Business Interests in Estate Planning and Medicaid**

Business ownership adds complexity to estate and long-term care planning, where control, transferability, and valuation all matter. This session provides practical guidance on protecting business interests, ensuring continuity during incapacity, and navigating Medicaid eligibility rules.

Ben King, Ross & Shoalmire PLLC - Texarkana, TX

9:45 am

**15-Minute Break**

10:00 am 0.75 hr	<p><b>Medicaid Update</b></p> <p>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.</p> <p>H. Clyde Farrell, Farrell &amp; Johnson PLLC - Austin, TX Marilyn G. Miller, Marilyn G. Miller, Attorney at Law - Dripping Springs, TX</p>
10:45 am 0.50 hr	<p><b>Medicare Supplemental Policies: What You Need to Know and How They Can Save Your Client Money on Their Medical Costs</b></p> <p>Clients who choose fee for service “Traditional Medicare” need to have a Medicare Supplemental or Medigap policy to protect from the costs, deductibles and co-payments of Medicare. This presentation explains open enrollment and the types of policies available to cover all of these medical expenses that fee for service Medicare does not cover.</p> <p>Pi-Yi Mayo, Mayo &amp; Poland PLLC - Baytown, TX</p>
11:15 am 0.50 hr 0.50 hr guardianship	<p><b>A Tour Through the CME</b></p> <p>This presentation provides a practical walkthrough of the Physician’s Certificate of Medical Examination, examining the specific statutory requirements of the Texas Estates Code and the nuances of documenting incapacity. Learn to identify common pitfalls in these assessments to ensure your evidence withstands judicial scrutiny and accurately supports the legal standard for guardianship.</p> <p>Coleton W. Mayo, Mayo &amp; Poland PLLC - Baytown, TX</p>
11:45 am In Galveston Only	<p><b>30-Minute Break for Lunch and Visit Exhibitors (in Galveston)</b></p> <p>Lunch included in registration.</p>

## Thursday Afternoon, July 30, 2026

### Presiding Officer:

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

### LUNCHEON PRESENTATION

12:15 pm 0.75 hr 0.25 hr ethics	<p><b>Planning for Cross Border Families &amp; Assets</b></p> <p>This topic highlights potential estate planning and administration issues faced by U.S. families with non-U.S. assets or beneficiaries, as well as non-U.S. families with U.S. assets or beneficiaries. Special consideration is given to probate avoidance options in and outside of the U.S., as well as estate, gift, and income tax nuances.</p> <p>Lauren M. Fitte, Ripp Grossman &amp; Fitte LLP - Austin, TX</p>
1:00 pm	<p><b>15-Minute Break</b></p>
	<p><b>Tax Penalties - Practical Takeaways for Estate Planners</b></p> <p>This presentation provides essential insights for estate planners and client advisers on tax penalty risks</p>

<p>1:15 pm 0.75 hr 0.25 hr ethics</p>	<p>and how to address them proactively. Hear about the increase in IRS tax penalty enforcement in recent years, practical implications for estate planning clients, and best practices for avoiding (or minimizing) penalty assertions and setting client up for success in defenses.</p> <p>Bri Loughlin Johnson, Perkins Coie - Austin, TX</p>
<p>2:00 pm 1.00 hr 0.50 hr ethics 1.00 hr guardianship</p>	<p><b>Alternatives to Guardianship including Support Services</b></p> <p>Finding the Power in your Powers: avoiding or limiting guardianship through the use of planning tools. The practical implementation of traditional tools such as powers of attorney and supportive decision-making agreements and how to work around their limitations.</p> <p>Hon. Clarinda Comstock, Harris County Probate Court No. Four - Houston, TX Hon. Kenna Seiler, Montgomery County Probate Court Number One - Conroe, TX</p>
<p>3:00 pm</p>	<p><b>10-Minute Break</b></p> <p><b>Thank You to Our Break Sponsor</b></p> 
<p>3:10 pm 0.75 hr 0.25 hr ethics 0.75 hr guardianship</p>	<p><b>Evidentiary, Procedural and Service Issues in Contested and Uncontested Guardianships - "Why Is My Case Not Moving Faster?"</b></p> <p>An overview of the required details and common pitfalls to avoid in contested and uncontested guardianship matters at the incipient stages of filing and how to get your matter heard in court expeditiously.</p> <p>Hon. Lily Leal, Harris County Probate Court No. 5 - Houston, TX</p>
<p>3:55 pm 0.75 hr 0.25 hr ethics</p>	<p><b>"SECUREity" Under the AMBT Blanket: The EDB's Lifetime Stretch Under SECURE</b></p> <p>Gain insight on drafting SECURE-compliant SNTs and repairing non-compliant trusts.</p> <p>Lynnelle Loke Moore, Loke Moore Law, PLLC - San Antonio, TX Materials By: Karen S. Gerstner, Karen S. Gerstner &amp; Associates, P.C. - Houston, TX</p>
<p>4:40 pm 1.00 hr 0.25 hr ethics</p>	<p><b>Unearthing the Practical Use of AI Tools for Our Practice and Yours</b></p> <p>Come away with real, practical tools you can use to begin your AI journey. How are you using AI? If you're not, because you fear it or feel it's too complicated and time consuming, our goal is to help you get going. AI is an elephant to be eaten, bite by bite!</p> <p>Wesley E. Wright, Wright Abshire, Attorneys P.C. - Bellaire, TX Wade Ryan Fitzhenry, Wright Abshire, Attorneys, PC - Bellaire, TX</p>
<p>5:40 pm</p>	

## Thursday Evening, July 30, 2026

7:30 pm  
In Galveston  
Only

### Thursday After-Dinner Dessert Bar & Cocktails | 7:30 to 8:30 p.m. (RSVP Requested)

Join us at the Moody Gardens Pool Deck Terrace for a "Fun with Frost" evening with after-dinner desserts and cocktails. Families and guests are welcome!

#### Thank You to Our Sponsor



## Friday Morning, July 31, 2026

### Presiding Officer:

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

7:30 am  
In Galveston  
Only

### Conference Room and Exhibit Hall Opens

Includes continental breakfast.

#### Thank You to Our Breakfast Sponsor



8:00 am  
0.50 hr

### Marital Property Agreements and What's All the Fuss About?

Analyze Texas marital property agreements—including premarital, postmarital, and agreements converting separate property to community property—with a focus on enforceability issues such as voluntariness, unconscionability, financial disclosure, relevant case law, and practical drafting strategies. Also cover non-marital cohabitation agreements, addressing statute of frauds considerations, public policy limitations, and key drafting provisions for unmarried couples living together.

Stephen F. Post, Fullenweider Wilhite - Houston, TX

8:30 am  
1.00 hr  
0.25 hr ethics  
1.00 hr  
guardianship

### Top Ten Lessons Learned When Handling Contested Guardianships

Discussion of issues that guardianship practitioners should be aware of and prepare to address when involved in guardianship litigation. The discussion includes both pretrial and trial strategies.

Hon. Fransheneka (Fran) Watson, Harris County Probate Court No. 5 - Houston, TX  
Sarah Patel Pacheco, Jackson Walker LLP - Houston, TX


	Darlene Payne Smith, Crain, Caton & James, P.C. - Houston, TX
9:30 am	<b>15-Minute Break</b>
9:45 am 0.75 hr 0.25 hr ethics	<b>Advanced Estate Planning Structures</b> Eric Bean, Ferguson Braswell Fraser Kubasta PC - Houston, TX
10:30 am 0.75 hr 0.75 hr guardianship	<b>Preserving Choice: Legal Standards for Consent and the Need for Guardianship</b>  When does a client have the right to say “yes”—and when does the law step in to say “no”? This course explores the delicate balance between personal autonomy and protection, focusing on a client’s ability to consent and the legal threshold for guardianship. Through practical examples and Texas-specific guidance, attendees will learn how to recognize capacity, preserve client rights, and identify when guardianship is truly necessary.  Victoria D. Seybold, Osborne, Helman, Scott, Knisely & Stanton, LLP - Austin, TX
11:15 am In Galveston Only	<b>30-Minute Break for Lunch and Visit Exhibitors (in Galveston)</b>  Lunch included in registration.

## Friday Afternoon, July 31, 2026

### Presiding Officer:

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

### LUNCHEON PRESENTATION

In Galveston Only	<b>Thank You to Our Luncheon Sponsor</b>  
11:45 am 0.50 hr	<b>NFA Firearms and Gun Trusts</b>  Discuss the basics of owning suppressors, machine guns, and other firearms regulated by the NFA. Hear the legal aspects of forming trusts to own NFA firearms, including lethal pitfalls in drafting them.  Sean P. Healy, Healy Law Offices, P.C. - Tyler, TX
12:15 pm	<b>30-Minute Break and Vendor Announcements</b>
	<b>Navigating Informal Marriage and Putative Spouse Claims in Texas Probate</b>

<p>12:45 pm 0.75 hr 0.25 hr ethics</p>	<p>Texas recognizes two informal paths to spousal status that frequently collide in probate proceedings: informal (or common law) marriage and the newly codified doctrine of the putative spouse.</p> <p>Hon. Jerry Simoneaux, Harris County Probate Court 1 - Houston, TX Joellen Snow, Attorney at Law - Houston, TX</p>
<p>1:30 pm 0.75 hr 0.25 hr ethics</p>	<p><b>Modern Confidence Schemes: Protecting Your Elderly and Wealthy Clients from Financial Abuse, Scams, Exploitation and Criminal Threats</b></p> <p>This presentation raises awareness about elder financial abuse, introduces case examples and types of scams, discusses investigative remedies and equips attorneys to be proactive in defending against criminal enterprises.</p> <p>Bryan Dehan, The Akeeli Group - Houston, TX Michele Kosoy Goldberg, Attorney at Law - Bellaire, TX</p>
<p>2:15 pm 0.50 hr</p>	<p><b>The Right Fit Matters: Counseling Clients on Selecting a Corporate Trustee</b></p> <p>Selecting a corporate trustee is one of the most important (and often overlooked) decisions in trust planning. This presentation provides tools and information to assist in guiding clients beyond just fee schedules to evaluate what truly matters: expertise and performance, service model, flexibility/ adaptability, and long-term fit. Materials include key factors clients should consider and questions to ask when interviewing corporate trustees, as well as practical tips for individuals serving with corporate co-trustees.</p> <p>Theresa A. Clarke, Kean Miller LLP - Houston, TX Anna M. Méndez, Huntington National Bank - Austin, TX</p>
<p>2:45 pm</p>	<p><b>10-Minute Break</b></p> <p><b>Thank You to Our Break Sponsor</b></p> <p><i>The Arc of Texas</i> <b>MASTER POOLED</b> <i>trust</i></p>
<p>2:55 pm 0.75 hr 0.25 hr ethics</p>	<p><b>Medicaid Trusts: A Texas Primer</b></p> <p>Hear an overview of the various types of trusts used in Medicaid in Texas, their rules, requirements, and use cases.</p> <p>Jennifer L. Coulter, Townsend Allala, Coulter &amp; Kludt, PLLC - El Paso, TX John B. Henry III, Law Office of John B. Henry, III, PLLC - Bellaire, TX</p>
<p>3:40 pm 0.75 hr 0.25 hr ethics</p>	<p><b>No, You Can't Do That with a Trust: Recognizing Scam Trusts Before Clients Get Involved</b></p> <p>This program provides a detailed examination of abusive trust arrangements known as "non-grantor, complex, irrevocable, discretionary, spendthrift" trusts, and explains why these structures fail under federal income tax law. The session also offers practical guidance for advising clients who have been</p>

drawn into these schemes and for navigating related ethical considerations.

John R. Strohmeyer, Strohmeyer Law PLLC - Houston, TX

4:25 pm

**Adjourn**