

21ST ANNUAL

ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE

August 1–2, 2019
Moody Gardens ■ Galveston, Texas

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, and OK. Expected for LA)

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

Earn up to 18.00 Hours of TX CPE & National Accounting CPE

(Certified Financial Planner (CFP) and TX Guardianship Certification Board (GCB) Expected)



TX NAELA MEMBERS – COME A DAY EARLY!

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

July 31, 2019
Moody Gardens ■ Galveston, Texas

Earn Up To 5.25 Hours of Credit Including 0.75 Hour of Ethics Credit

2019

TEXAS NAELA SUMMER CONFERENCE

Open to TX NAELA Members ONLY

July 31, 2019 ■ Moody Gardens ■ Galveston, Texas

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WEDNESDAY MORNING, JULY 31, 2019

Presiding Officer:

Paul Premack, The Premack Law Office,
San Antonio, TX

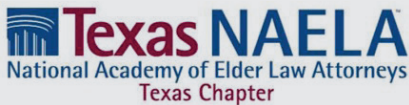
10:30 a.m. Registration Opens

11:00 a.m. Board Meeting

12:00 p.m. Meet the Board:
New Members' Lunch

New to TX NAELA? Meet current members at this informal luncheon mixer.

WHY JOIN NAELA



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.

GENERAL SESSIONS (in Main Ballroom)

1:15 p.m. .75 hr

Medicaid for Kids

Get an overview of Medicaid programs for minors in Texas, includes challenges, strategies and planning opportunities.

Christina Leshner, The Law Office of Christina Leshner,
PC, Houston, TX

2:00 p.m. .50 hr

Distributions from SNTs: What is Allowed and When?

A major and very important duty of a SNT trustee is to administer the trust in a way that does not interfere with the trust beneficiary's eligibility for public benefits. This program will discuss (1) considerations to evaluate each distribution request; (2) many examples as to how you may and may not use the SNT to provide for the beneficiary; and (3) some alternatives to consider.

Lori Lynn Noack-May, Cadence Bank, NA, Houston, TX

2:30 p.m. .50 hr

Lawyers and Ombudsmen – Advocating Together for Residents' Rights

As required by the Older Americans Act, each state has a Long-Term Care Ombudsman Program (LTCOP) that addresses complaints and advocates for improvements in the long-term care system. The Texas Long-Term Care Ombudsman Program, which is independent within the Texas Health and Human Services Commission, works to improve the quality of life and care for residents of nursing and assisted living facilities by providing prompt, informal complaint resolution and promoting systemic change on behalf of residents' interests. Explore how lawyers and ombudsmen can advocate for long-term care facility residents' rights.

Suzanne Mitchell, JD, Nursing Home Policy
Specialist, Office of the State Long-Term Care
Ombudsman, Texas Health and Human Services,
Austin, TX

3:00 p.m. .50 hr

Health Care Public Policy Issues

Hear a highlight of the latest public health policy issues, including HHS Religious Freedoms for Healthcare Workers; Surprise Bills from Out of Network Providers; Prescription Crises: Not Just Costs Anymore; and Texas Health Care Bills of Note.

Andrea M. Gray, Fargason, Booth, St. Clair, Richards
& Wilkins, LLP, Lubbock, TX

3:30 p.m. Break

3:45 p.m. .50 hr

Office Practice: Unusual Signing Scenarios and Procedures

In these litigious times, it is crucial that signing procedures comply with all applicable laws. This is especially true when a client has the mental capacity to sign but is physically unable to do so. This presentation will cover execution ceremony scenarios that are governed by specific statutes, as well as those that aren't – such as marks, stamps, and Xs.

Randy Drewett, Attorney at Law, Beaumont, TX

4:15 p.m. .50 hr ethics

Ageing or Impaired Attorneys: How to Step Away from Law Practice, and When?

A growing number of attorneys are practicing until very late in life and encountering cognitive and other disabling impairments that may lead to the end to wind down a practice. This presentation covers some of the most important considerations involving this subject, including some suggested processes for handling the issue.

Chris C. Ritter, Texas Lawyers' Assistance Program,
State Bar of Texas, Austin, TX

4:45 p.m. .50 hr | .25 hr ethics

Diminished Capacity: Potential Clients and Existing Clients

Explore the ethical and legal issues faced by an attorney when engaging a new client or working with an existing client. Also, address specific elder law planning techniques and how a client with diminished capacity might impact that planning.

John R. McNair, Underwood Perkins, P.C., Dallas, TX

5:15 p.m. Break for Dinner

MEDICAID PLANNING WORKSHOP**(in Vine Room)**

Attendees must RSVP for the Medicaid Planning Workshop. Attendance is limited to 24.

1:15 p.m. 2.25 hrs | .75 hr ethics**Medicaid Planning Nuts and Bolts - A Case Study, Part 1**

This is a full-day 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.

Moderator:

Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX

Panelists:

Kelley M. Bentley, The Bentley Law Firm, Houston, TX
 Danielle Feick, Fowlkes Law Firm, PC, Abilene, TX
 Lori A. Leu, Leu & Peirce, Plano, TX
 Sally A. Mirabella, Sally Mirabella Law, PLLC, The Woodlands, TX

3:30 p.m. Break**3:45 p.m. 1.50 hrs****Medicaid Planning Nuts and Bolts - A Case Study, Part 2**

Continuation of the full-day 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.

Moderator:

Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX

Panelists:

Kelley M. Bentley, The Bentley Law Firm, Houston, TX
 Danielle Feick, Fowlkes Law Firm, PC, Abilene, TX
 Lori A. Leu, Leu & Peirce, Plano, TX
 Sally A. Mirabella, Sally Mirabella Law, PLLC, The Woodlands, TX

5:15 p.m. Break for Dinner**WEDNESDAY EVENING (in Main Ballroom)**

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

5:35 p.m.

Included for registrants;
 \$75 for non-registrant guests

**THANK YOU TO OUR
 DINNER SPONSOR**

**6:20 p.m. Return to Sessions****GENERAL SESSIONS****6:30 p.m. .75 hr****VA Pension Rules (A&A)**

A discussion relating to the comprehensive changes that went into effect October 18, 2018 relating to VA Non-Service Connected Disability Pension Benefits. The presentation will explore eligibility requirements, the differences between VA Benefits and Medicaid Benefits, and the planning techniques that Elder Law attorneys should be aware of when advising their clients on public benefits.

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

7:15 p.m. .75 hr**Medicaid Planning for Couples**

Focus on planning for couples needing Medicaid. It will look at the differences between spousal impoverishment and non-spousal impoverishment programs, determine asset protection strategies, and evaluate the effects of various living arrangements on eligibility and asset limitations.

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

8:00 p.m. Adjourn**MEDICAID PLANNING WORKSHOP**

Attendees must RSVP for the Medicaid Planning Workshop. Attendance is limited to 24.

6:30 p.m. 1.50 hrs**Medicaid Planning Nuts and Bolts - A Case Study, Part 3**

Continuation of the full-day 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.

Moderator:

Cathy Kim Fowlkes, Fowlkes Law Firm, PC, Abilene, TX

Panelists:

Kelley M. Bentley, The Bentley Law Firm, Houston, TX
 Danielle Feick, Fowlkes Law Firm, PC, Abilene, TX
 Sally A. Mirabella, Sally Mirabella Law, PLLC, The Woodlands, TX

8:00 p.m. Adjourn**TX NAELA CONFERENCE FACULTY AND PLANNING COMMITTEE****PAUL PREMACK*—CHAIR**The Premack Law Office
San Antonio, TX**DANIELLE FEICK**Fowlkes Law Firm, PC
Abilene, TX**LORI LYNN NOACK-MAY**Cadence Bank, NA
Houston, TX**APRIL ROGERS*—DIRECTOR**The University of Texas School
of Law
Austin, TX**CATHY KIM FOWLKES***Fowlkes Law Firm, PC
Abilene, TX**ERIN W. PEIRCE**Leu & Peirce, PLLC
Plano, TX**SANDRA PEREZ ARD***Attorney at Law
Dickinson, TX**ANDREA M. GRAY***Fargason, Booth, St. Clair,
Richards & Wilkins, LLP
Lubbock, TX**BRYN A. POLAND***Mayo & Poland PLLC
Baytown, TX**KELLEY M. BENTLEY**The Bentley Law Firm
Houston, TX**CHRISTINA LESHER**The Law Office of Christina
Leshner, PC
Houston, TX**ELISA DILLARD RAINEY***Rainey & Rainey, Attorneys at
Law LP
Waco, TX**JENNIFER L. COULTER**Townsend Allala, Coulter, &
Kludt, PLLC
El Paso, TX**LORI A. LEU**Leu & Peirce
Plano, TX**CHRIS C. RITTER**Texas Lawyers' Assistance
Program, State Bar of Texas
Austin, TX**RANDY DREWETT***Attorney at Law
Beaumont, TX**JOHN R. MCNAIR***Underwood Perkins, P.C.
Dallas, TX**MEREDITH ANN SULLIVAN***Farrell, Burdett & Johnson PLLC
Austin, TX**JULIE ANN EZELL-PEREZ***Ezell & Ezell, PLLC
Harlingen, TX**SALLY A. MIRABELLA***Sally Mirabella Law, PLLC
The Woodlands, TX

*Planning Committee member

H. CLYDE FARRELL*Farrell & Johnson PLLC
Austin, TX**SUZANNE MITCHELL**Office of the State Long-Term
Care Ombudsman, Texas Health
and Human Services
Austin, TX

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Earn up to 18.00 Hours of TX CPE & National Accounting CPE

(Certified Financial Planner (CFP) and TX Guardianship Certification Board (GCB) Expected)

THURSDAY MORNING, AUG. 1, 2019**Presiding Officer:****H. Clyde Farrell, Farrell & Johnson
PLLC, Austin, TX****7:30 a.m. Registration Opens**

Includes continental breakfast.

8:20 a.m. Welcoming Remarks**8:30 a.m. .75 hr****Financial Powers of Attorney: Do You Want
Fries With That Will?**

Drafting a statutory durable power of attorney used to be simple: You ask a couple questions, zap out the form, and bring it to the will signing ceremony with all the other documents. But these days we have to discuss compensation, co-agents, and hot powers. Even the location of the signing matters now. Can we design a form that works for all clients?

Dianne Reis, Attorney at Law, Plano, TX

9:15 a.m. .75 hr**Estate Planning 101**

A very practice oriented nuts & bolts overview / how-to / to-do for basic estate planning, from the initial contact, planning conference & terms of engagement, to the signing ceremony, exit letter & beyond, with forms, options and insights for what is and is not appropriate depending on the circumstances.

Bernard E. ("Barney") Jones, Attorney at Law,
Houston, TX**10:00 a.m. Break****10:15 a.m. .75 hr****Medicaid Update**

Current status of the Texas Medicaid Program's policy of treating some (but not all) tax-deferred retirement accounts as exempt from counting as "resources"; and other recent changes in Medicaid law and policy that Texas attorneys planning estates of older clients need to know about.

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

11:00 a.m. .75 hr**Legislative Update**

Hear an update on Texas estate and trust legislation, including probate, guardianships, trusts, powers of attorney, and other related matters.

Craig Hopper, Hopper Mikeska, PLLC, Austin, TX

11:45 a.m. .75 hr**From Long Term Care Medicaid Policy to Fair Hearings**

Hear a former Texas Health and Human Services Commission (HHSC) attorney, and current ALJ, give an overview of Medicaid Fair Hearings, including possible changes in the legislature and the implementation of such changes. Also, discuss documentary evidence for the hearings.

Shari L. Nichols, Texas Health and Human Services
Commission, Austin, TX**12:30 p.m. Pick Up Lunch**

Included in registration.

THURSDAY AFTERNOON**Presiding Officer:****Bryn A. Poland, Mayo & Poland PLLC,
Baytown, TX****THANK YOU TO OUR
LUNCHEON SPONSOR****LUNCHEON PRESENTATION****12:50 p.m. .50 hr****Firearms in the Workplace**

Get the latest legal insight on firearms in the workplace, including rights of employees and visitors vs. rights of employers; open vs. concealed carry; carry in offices/work areas vs. firearms in automobiles on company premises; enforcement issues pertaining to exclusion of firearms; and potential liability issues connected with either "carry" or "don't carry" rules.

Ross Asher Jr., Roberts Markel Weinberg Butler
Hailey PC, Houston, TX**1:20 p.m. Break****1:35 p.m. .50 hr****Sex, Drugs, Guns, Cars and Dementia**

Cover how the unique aspects of sexual consent, firearm possession, drug use, and driving are impacted as cognitive function declines.

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

2:05 p.m. .50 hr**Drafting for Incapacity Determinations in
Trusts and Powers of Attorney**

Examine the commonly-used definitions of incapacity, individually-created definitions of incapacity, and the pros and cons of using common definitions versus creative language.

Renée C. Lovelace, The Lovelace Law Firm, P.C.,
Austin, TX**2:35 p.m. 1.00 hr | .50 hr ethics | 1.00 hr G****Alternatives to Guardianship Including
Supports and Services**

An examination of the twin concepts of the doctrine of 'less restrictive alternatives' to guardianship and the concept of 'supports and services' and how the two interact to limit or obviate the need to create a guardianship.

Hon. Steve M. King, Senior Statutory Probate Judge,
Fort Worth, TX**3:35 p.m. Break****3:45 p.m. .75 hr | .75 hr guardianship****Guardianship and Divorce**

Learn when divorce is appropriate in a guardianship context, when a guardian is required for a divorce of an incapacitated person, and the appropriate court to hear a divorce action involving a guardianship.

Monica Ann Benson, Katten & Benson,
Fort Worth, TX**4:30 p.m. .50 hr****The Medicaid Estate Recovery Program:
What It Is, What It Isn't, and How to Avoid It**

Discuss the Medicaid Estate Recovery Program (MERP), its rules, requirements, and exemptions. The presentation will be geared to practical guidance for practitioners facing MERP claims.

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

5:00 p.m. .50 hr

The Trouble with Accountings: From Checklists to Traps

A practical review of issues and pitfalls related to demands for accountings and the response. How to best educate the client and properly respond.

Ellen Pearson Stewart, Barnes Lipscomb Stewart & Ott, Austin, TX

5:30 p.m. Adjourn to Reception

THANK YOU TO OUR SPONSOR



RECEPTION

AQUARIUM DINNER AND RECEPTION

6:00 p.m. to 7:30 p.m.

Bring your family to the aquarium for food and fun!

Included for registrants; \$30 for non-registrant guests

FRIDAY MORNING, AUG. 2, 2019

Presiding Officer:

Kelley M. Bentley, The Bentley Law Firm, Houston, TX

7:30 a.m. Conference Room 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.

Craig Hopper, Hopper Mikeska, PLLC, Austin, TX

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

Role of the Ad Litem

An overview 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. The materials include numerous checklists, comprehensive references, and forms.

Hon. Steve M. King, Senior Statutory Probate Judge, Fort Worth, TX

10:00 a.m. Break

10:15 a.m. .50 hr

Real Estate Owned with Others

An overview of the newly passed Uniform Partition of Heirs Property Act (UPHPA) and how it can impact the severance of jointly owned property.

Rishi Batra, Texas Tech University School of Law, Lubbock, TX

10:45 a.m. .50 hr | .25 hr ethics

Trustee/Guardian Resignation: How to Jump Ship

Get an overview of the resignation process generally including how to "jump ship" when no successor is named or available. Also, hear a discussion of discharge and to what extent resignation and/or discharge affects liability.

Christopher D. Jones, Sprouse Shrader Smith PLLC, Amarillo, TX

11:15 a.m. .50 hr

Evolution of Trusts in Elder Law

An overview of how this traditional estate planning tool has been tailored to meet the distinctive needs of the Elder Law and Special Needs practitioner.

Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX

11:45 a.m. Pick Up Lunch

Included in registration.

FRIDAY AFTERNOON

Presiding Officer:

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

LUNCHEON PRESENTATION

12:05 p.m. 1.00 hr | .25 hr ethics | .25 hr G

Ask the Experts

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

Moderator:

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

Panelists:

Craig Hopper, Hopper Mikeska, PLLC, Austin, TX

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

Marilyn G. Miller, Marilyn G. Miller, Attorney at Law, Dripping Springs, TX

1:05 p.m. Exhibitor Announcements & Break

1:35 p.m. .50 hr

A Window into a Financial Institution's World of Elder Financial Exploitation

There is not one industry worldwide that is prepared for the "Tsunami" coming down the pike when it comes to the millions of people who have already or are getting ready to roll into the senior category. Many services, including geriatric doctors, senior living and dementia/Alzheimer's facilities, and education resources to prepare seniors for changes coming in their life, are in short supply. Financial institutions are considered "first responders"—they have eyes and ears on senior customers most times long before anyone else. Learn about the red flags, the many variations of fraudsters that financial institutions see, the avenues that can be taken to help mitigate the exploitation, and the various ways of reporting exploitation to local, state, or federal agencies. Being PROACTIVE is everything in slowing down the tide!

Sandy Sullivan, Frost Bank, San Antonio, TX

2:05 p.m. 1.00 hr

When Exploitation Allegations Make Their Way to Adult Protective Services

The Texas Department of Family and Protective Services – Adult Protective Services (APS) is responsible for investigating allegations of abuse, neglect, and exploitation in Texas. In 2018, APS received 16,490 allegations of exploitation of the elderly and disabled in Texas. APS validated a small percentage of these allegations. Identify and explore the reasons for APS exploitation investigations, the investigation process, and ultimate resolution of and ramifications resulting from exploitation allegations.

Terry W. Hammond, Attorney at Law, Bryan, TX
Penelope T. Leuchtag, Texas Department of Family & Protective Services, Houston, TX
Mary McFaden, Harris County District Attorney Office, Houston, TX

3:05 p.m. 1.00 hr ethics

Elder Law Ethics Jeopardy

Cover various categories of ethical issues facing elder law attorneys, using the Texas Disciplinary Rules of Professional Conduct, where the answers are in the form of questions. Get ready to volunteer to play Elder Law Ethics Jeopardy!

Mary Alice Jackson, Mary Alice Jackson, P.C., Austin, TX
Rebecca C. Morgan, Stetson University College of Law, Gulfport, FL

4:05 p.m. Adjourn

NEW THIS YEAR! GUEST MEAL PACKAGE—\$50

Have family joining you in Galveston? You can now purchase a guest meal package for them that includes Thursday and Friday's continental breakfasts and lunches.

CONFERENCE FACULTY

ROSS ASHER JR.
Roberts Markel Weinberg Butler
Hailey PC
Houston, TX

RISHI BATRA
Texas Tech University School of Law
Lubbock, TX

MONICA ANN BENSON
Katten & Benson
Fort Worth, TX

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

H. CLYDE FARRELL
Farrell & Johnson PLLC
Austin, TX

TERRY W. HAMMOND
Attorney at Law
Bryan, TX

CRAIG HOPPER
Hopper Mikeska, PLLC
Austin, TX

MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

BERNARD E. ("BARNEY") JONES
Attorney at Law
Houston, TX

CHRISTOPHER D. JONES
Sprouse Shrader Smith PLLC
Amarillo, TX

HON. STEVE M. KING
Senior Statutory Probate Judge
Fort Worth, TX

PENELOPE T. LEUCHTAG
Texas Department of Family &
Protective Services
Houston, TX

RENÉE C. LOVELACE
The Lovelace Law Firm, P.C.
Austin, TX

MARY MCFADEN
Harris County District Attorney Office
Houston, TX

MARILYN G. MILLER
Marilyn G. Miller, Attorney at Law
Dripping Springs, TX

REBECCA C. MORGAN
Stetson University College of Law
Gulfport, FL

SHARI L. NICHOLS
Texas Health and Human Services
Commission
Austin, TX

DIANNE REIS
Attorney at Law
Plano, TX

JOHN K. ROSS IV
Ross & Shoalmire LLP
Texarkana, TX

ELLEN PEARSON STEWART
Barnes Lipscomb Stewart & Ott
Austin, TX

SANDY SULLIVAN
Frost Bank
San Antonio, TX

PLANNING COMMITTEE

H. CLYDE FARRELL—CHAIR
Farrell & Johnson PLLC
Austin, TX

APRIL ROGERS—DIRECTOR
The University of Texas School of Law
Austin, TX

KELLEY M. BENTLEY
The Bentley Law Firm
Houston, TX

RANDY DREWETT
Attorney at Law
Beaumont, TX

TINA R. GREEN
Capshaw Green, PLLC
Texarkana, TX

CRAIG HOPPER
Hopper Mikeska, PLLC
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MARY ALICE JACKSON
Mary Alice Jackson, P.C.
Austin, TX

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HON. STEVE M. KING
Senior Statutory Probate Judge
Fort Worth, TX

CHRISTINA LESHAR
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RENÉE C. LOVELACE
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PI-YI MAYO
Mayo & Poland PLLC
Baytown, TX

MARILYN G. MILLER
Marilyn G. Miller, Attorney at Law
Dripping Springs, TX

BRYN A. POLAND
Mayo & Poland PLLC
Baytown, TX

PAUL PREMACK
The Premack Law Office
San Antonio, TX

ELISA DILLARD RAINEY
Rainey & Rainey, Attorneys at Law LP
Waco, TX

NANCY SOSA
Cadence Bank
Austin, TX

WESLEY E. WRIGHT
Wright Abshire, Attorneys
Bellaire, TX

REASONS TO ATTEND

The **Estate Planning, Guardianship and Elder Law Conference** presents current developments and practical tips for estate planners and elder law attorneys, offers essential information for guardians ad litem, and provides a must-have set of materials and resources.

- Review what matters now when drafting a durable power of attorney in *Financial Powers of Attorney: Do You Want Fries With That Will?*
- Hear the latest legislative and agency updates, including a presentation by the Health and Human Services Commission (HHSC).
- A closer look at investigating allegations of abuse and exploitation; including a bank's process of reporting fraud, the APS investigation process, and ultimate resolution of and ramifications resulting from exploitation allegations.
- Explore guardianship essentials, key issues, and alternatives—for up to 4.00 hours of Guardianship credit.
- Discuss the Medicaid Estate Recovery Program (MERP), its rules, requirements, and exemptions, and hear practical guidance for practitioners facing MERP claims.
- Get answers to your frequently—and sometimes infrequently—asked questions at the popular *Ask the Experts* panel.
- Earn up to 3.00 hours of legal ethics credit.
- Join conference faculty and fellow colleagues at the **Moody Gardens Aquarium for Thursday Evening's Networking Buffet and Reception** sponsored by Frost Wealth Advisors.

ACCREDITATION

CPE CREDIT

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.learningmarket.org

Earn up to 18.00 credits in Specialized Knowledge and Applications.

Delivery Method: Group-Live

Program Level: Overview

Advance Preparation: None

Prerequisites: None

To comply with NASBA Standards, the Registry sponsor is required to maintain records of participation, dates and locations of programs, and number of CPE credits earned by participants. Attendance sign-in sheets will be available at the registration desk, and attendees claiming CPE credit must sign in to verify attendance for each segment. You will need your CPA license number to sign in. A CPE Certificate of Completion will be issued at the conclusion of the conference.

CFP CREDIT

Certified Financial Planner credit (CFP) expected.

GCB CREDIT

TX Guardianship Certification Board (GCB) expected.

REGISTRATION FORM

ERT19/ER19

Register:
www.utcle.org/conferences/ERT19
www.utcle.org/conferences/ER19

Mail:
The University of Texas School of Law
ATTN: CLE
PO Box 7759
Austin, TX 78713-7759

Fax:
512.475.6876

Questions?
512.475.6700

If you would like to request accommodations under the ADA, please contact Customer Service at 512.475.6700 or service@utcle.org at least 10 days prior to the conference.

PLEASE PRINT CLEARLY

Bar Card# _____ TX Other State: _____ N/A

Name [Mr. / Ms.] _____

Firm _____

Address _____

City _____ State _____ Zip _____

Telephone _____ Fax _____

Registrant's Email (required) _____ Assistant's Email (optional) _____

Invoices, confirmations, and receipts are emailed to these addresses.

REGISTRATION—Select from ONE of the columns below

Texas NAELA members who attend UT Law's Estate Planning and Elder Law Conference may attend the TX NAELA Summer Conference at no charge!
(use far right column)

WEDNESDAY ONLY

TX NAELA SUMMER CONFERENCE ONLY
(Open to TX NAELA Members ONLY)
Includes Wednesday Luncheon and Dinner

Individual registration by July 24 \$225
 Individual registration after July 24 \$250

Select One Concurrent Track

Medicaid Planning Workshop Track (limit 24)
 General Session Track

Wednesday Luncheon RSVP

Wednesday Evening Dinner

Registrant RSVP
 Add Non-Registrant Guest \$75

Printed course materials available through July 24
Conference registration includes Electronic Materials

Printed Course Binder \$27.06 (\$25*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

Registration Subtotal \$ _____

THURSDAY AND FRIDAY ONLY

UT LAW'S ESTATE PLANNING, GUARDIANSHIP AND ELDER LAW CONFERENCE
Includes Thursday Lunch Presentation, Evening Reception, and Friday Lunch Presentation

Individual registration by July 24 \$595
 Individual registration after July 24 \$645

Thursday Aquarium Reception RSVP
 Purchase Guest Reception Tickets (limit 5) . . . \$30 x _____

Purchase Guest Meal Passes (limit 5) \$50 x _____

Printed Course Binder – Available Through July 24
Note: Conference registration includes Electronic Course Binder Download (PDF) in Your Briefcase.

Printed Course Binder \$37.89 (\$35*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

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 Wednesday Luncheon and Dinner, Thursday Lunch Presentation and Evening Reception, and Friday Lunch Presentation

Individual registration by July 24 \$595
 Individual registration after July 24 \$645

Select One NAELA Conference Concurrent Track

Medicaid Planning Workshop Track (limit 24)
 General Session Track

Wednesday Luncheon RSVP

Wednesday Dinner RSVP
 Purchase Dinner Guest Ticket \$75 x _____

Thursday Aquarium Reception RSVP
 Purchase Guest Reception Tickets (limit 5) . . . \$30 x _____

Purchase Guest Meal Passes (limit 5) \$50 x _____

Printed Course Binder – Available Through July 24
Note conference registration includes Electronic Course Binder Download (PDF) in Your Briefcase.

Wednesday Conference \$27.06 (\$25*)
 Thursday and Friday Conference \$37.89 (\$35*)
*Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

Registration Subtotal \$ _____

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

Estate Planning, Guardianship and Elder Law Conference ONLY

eConference – For Texas MCLE Credit
Includes Electronic Course Binder Download (PDF) and program video/audio. Available 4-6 weeks after live event. Hours may vary depending on actual event runtime.

Individual eConference \$545

Post-Course Binder – For Research and Self-Study
Comprehensive binder with papers and slides, available for delivery 4-6 weeks after live event.

Electronic Post-Course Download (PDF) \$243.56 (\$225*)
* Tax-exempt rate for, e.g., government employees and nonprofits. Include a Tax-Exempt Certificate with order.

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

Annual eLibrary Subscription – For Research and Self-Study
Extensive resources including audio, video, papers, and slides from UT Law CLE programs.

eLibrary 12 Month Subscription \$319.34 (\$295*)
* 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

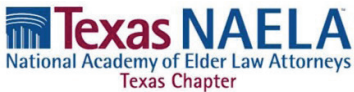
METHOD OF PAYMENT

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

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July 31, August 1–2, 2019 ■ Moody Gardens ■ Galveston, Texas

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GALVESTON

July 31, August 1–2, 2019

CONFERENCE LOCATION



Moody Gardens Hotel
Seven Hope Boulevard
Galveston, Texas
888.388.8484

Special Room Rate: \$199
through July 8
(subject to availability)

Parking:
Complimentary self-parking

KEY DATES

July 24, 2019

Last day to order a printed binder

July 24, 2019

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

July 26, 2019

Last day for full refund cancellation

July 29, 2019

Last day for partial refund cancellation
\$50 processing fee applied

July 31, 2019, 1:15 p.m.

TX NAELA Summer Conference Begins
*Open to Members ONLY

August 1, 2019 8:20 a.m.

UT Elder Law Conference Begins

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