

2021 Texas NAELA Summer Conference

August 4, 2021 • Live Webcast

Wednesday Afternoon, Aug. 4, 2021

Presiding Officer:

John R. McNair, J. McNair Dallas Law P.C. - Dallas, TX

12:20 pm	<p>Virtual Exhibit Hall Opens</p> <p>Please take time to visit our sponsors and exhibitors in the virtual exhibit hall. You have the opportunity to meet with sponsors and exhibitors in our Zoom room to hear about their products and services and also possibly win some great prizes.</p>
12:50 pm	<p>Welcoming Remarks</p>
1:00 pm 1.00 hr	<p>Elder Law Forms</p> <p>While it is relatively easy to find basic estate planning, probate, guardianship and Medicaid application forms, creating a library of forms for unusual situations takes years to cultivate. Presented here is a collection of forms to assist the elder law attorney and client.</p> <p>Benecia Flores, Petrosewicz Law Firm, P.C. - Richmond, TX</p>
2:00 pm	<p>15-Minute Break</p>
2:15 pm 0.50 hr	<p>Dismantling Estate Plans in Probate Litigation</p> <p>When things go bad in Probate even the perfect iron-clad estate plans are at risk. Focus on case studies and worst case scenarios of contested probate and guardianship matters where estate plans are busted, dismantled and tossed aside. Educate planners on the practical aspects of implementing an estate plan when fiduciaries and beneficiaries go rogue and how to issue spot to avoid their plan from being dismantled in litigation.</p> <p>Erin W. Peirce, Leu & Peirce, PLLC - Plano, TX</p>
2:45 pm	<p>15-Minute Break</p>
3:00 pm 1.00 hr	<p>Using Medicaid Compliant Annuities In Your Practice</p> <p>Join national Medicaid Compliant Annuity expert Dale Krause, J.D., LL.M. as he breaks down how Medicaid Compliant Annuities can help senior clients in your practice. Discuss how the spend-down tool works for crisis Medicaid planning, the requirements of the annuity, and two detailed case studies showing the annuity in action.</p> <p>Dale M. Krause J.D., LL.M, Krause Financial Services - De Pere, WI</p>
4:00 pm	<p>15-Minute Break</p>

4:15 pm
0.50 hr

Diversity, Equity & Inclusion in the Practice of Law

Understanding DEI and bias is integral to every law practice. Join us for an honest, informative presentation on these key topics.

Tissa Hami, Korsi Consulting - Weston, MA

4:45 pm

Adjourn to Annual Meeting and Social Hour

Join TX NAELA for their virtual Annual Meeting and Social Hour. The meeting will be held in Zoom and you will receive more information by email.